



The contact & user database is setup with custom data fields divided into sections. Add users to manage catalogs or the site and add contacts to be associated with a catalog record.

## Contact & User Administration



### Setup

Setup contact & user administration by adding custom fields to hold data. Fields can be text, lookup, select, date, numbers or text areas. The database can be displayed in sections to better organize the fields.



### Add and Manage

Site administrators can add new contacts & users and manage existing ones. Contacts and users are added individually or uploaded in bulk. Contacts & users can also be added from catalog administration.



### Welcome Emails

When a user is added to the portal, the administrator has the option of having the portal automatically deliver a welcome email. These emails contain a link that sends the user directly to the site so they can set their password and login. Welcome emails are customized in the message library.



### Notes and Tasks

Attach a note to the user record. Create a task and set a reminder date, then send that note to another administrator on the site. Notes are created by the site if data is changed in the record.