

Primary Contact(s)

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Primary Contact(s)

In the Contegix portal, each company can have 1 or many designated primary contact(s) for the company. Initially, there will be 1 primary contact and it will be the person we work with throughout the sales process. As time progresses, you may wish to change the original primary contact or add additional ones.

Modify Primary Contact

1. Select Edit on the Client Profile Address & Contact Information section.
2. Edit the Name, Phone, and Email to reflect the desired Primary Contact
3. Select Save

Add/Remove Additional Primary Contacts

1. See [Create and Add, Edit, and Deactivate Users](#)Deactivate User sections respectively.