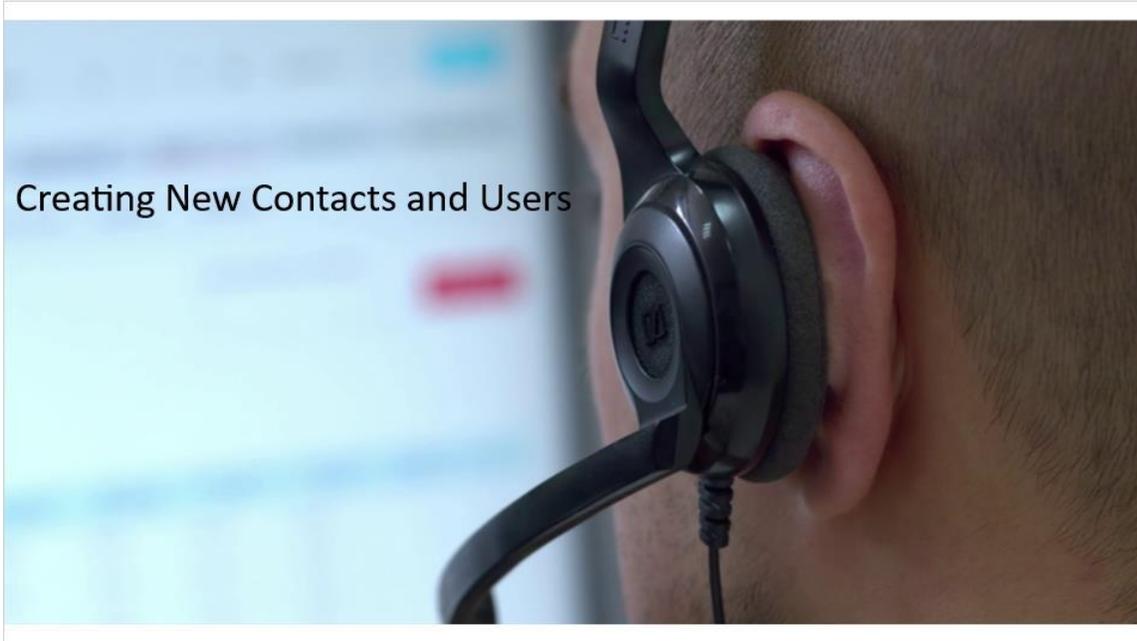
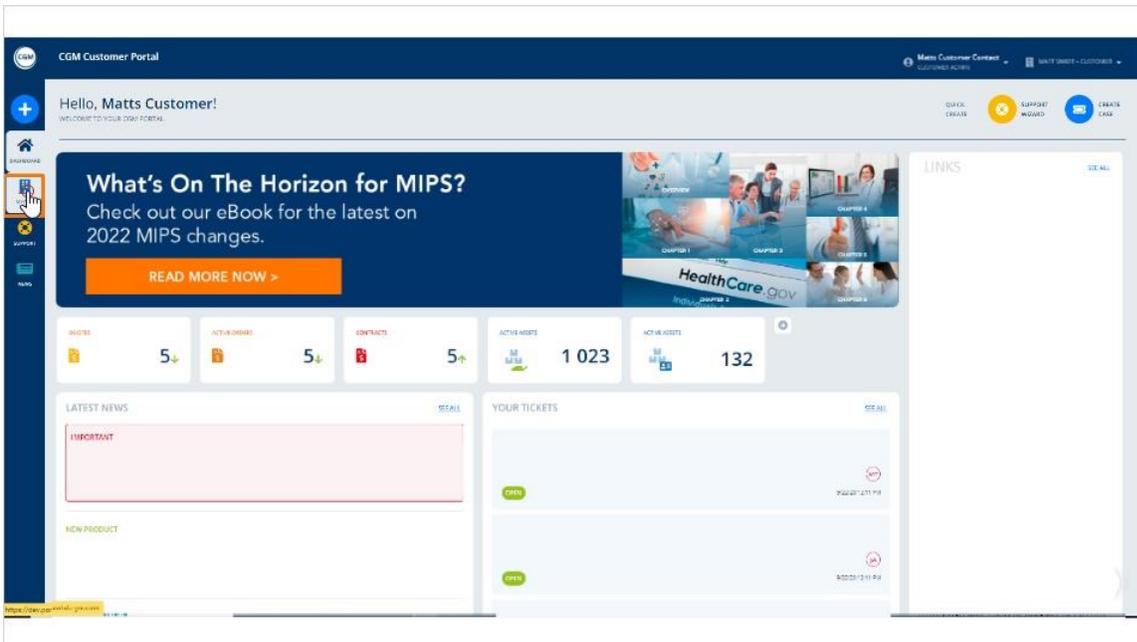


Creating New Contacts and Users

1.1 Creating New Contacts and Users



1.2 My Org

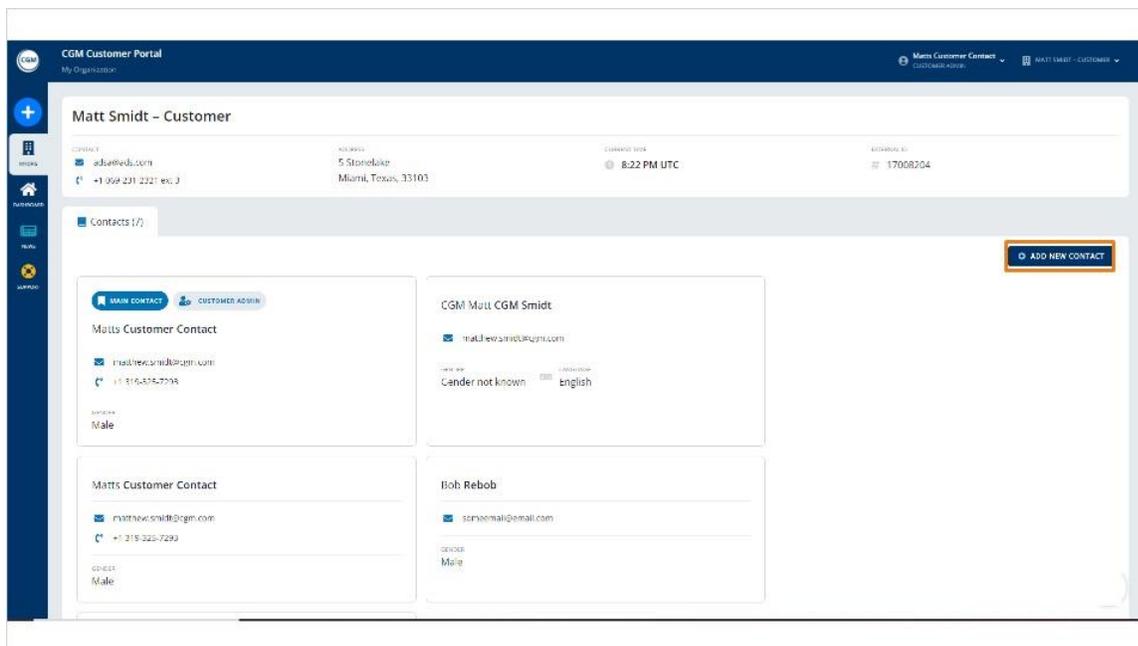


Creating New Contacts and Users

Notes:

When logged in as an admin for your organization, new contacts and users can be created for your organization. To view migrated users and create new users, go to the My Org tab in the navigation panel on the left side of the window.

1.3 View Linked Contacts



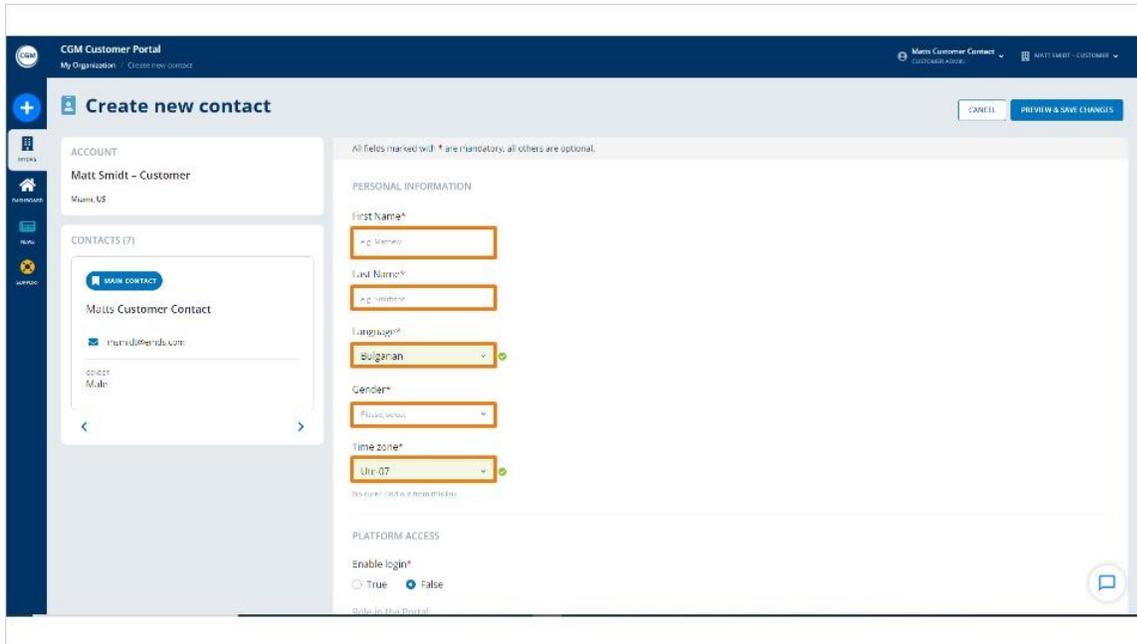
Notes:

Contacts for your facility designated as Customer Community Admin Users, Customer Community Users or Customer Community End Users in the previous support center migrated to the CGM Portal and can be viewed here.

If a support center user did not migrate or if there are new support center users needed, select the Add New User button on the right side of the window.

Creating New Contacts and Users

1.4 Personal Information



CGM Customer Portal
My Organization | Create new contact

Matts Customer Contact
CUSTOMER PORTAL

MATT SMIDT - CUSTOMER

Create new contact [CANCEL] [PREVIEW & SAVE CHANGES]

ACCOUNT
Matt Smidt - Customer
Miami, US

CONTACTS (7)
MAIN CONTACT
Matts Customer Contact
matt.smidt@compu.com
Gender: Male

All fields marked with * are mandatory, all others are optional.

PERSONAL INFORMATION

First Name*
Last Name*
Language*
Gender*
Time zone*

PLATFORM ACCESS

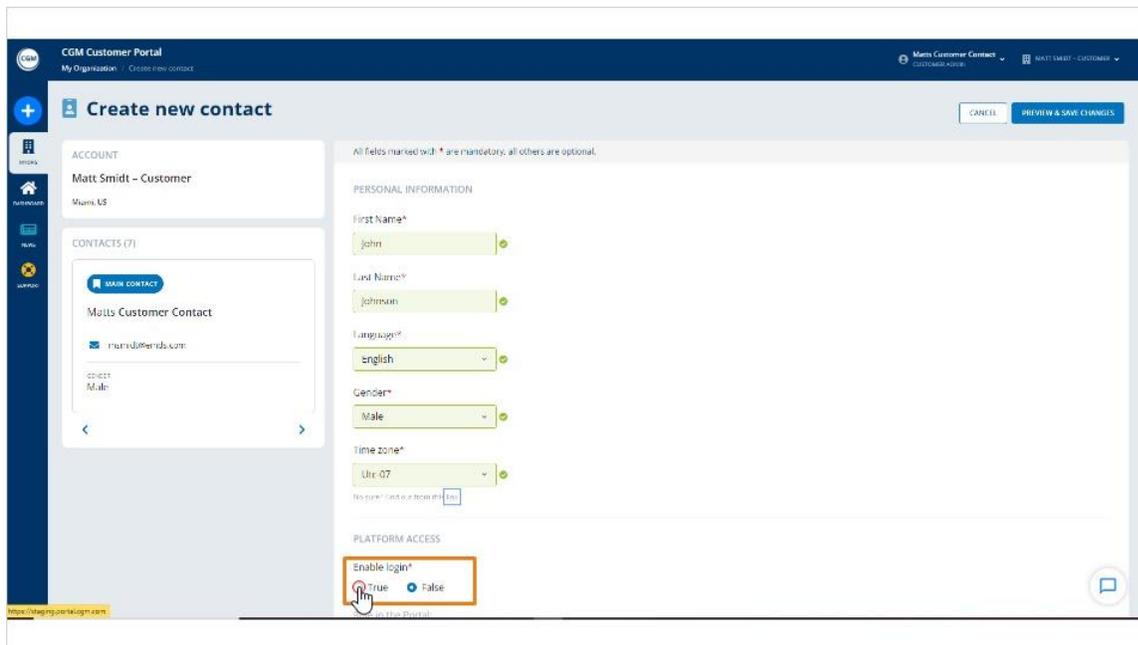
Enable login*
 True False

Notes:

Enter the first name, last name, preferred language, gender, and user time zone. All fields marked with a red asterisk are required fields.

Creating New Contacts and Users

1.5 Enable Login



The screenshot shows the 'Create new contact' form in the CGM Customer Portal. The form is divided into several sections:

- ACCOUNT:** Matt Smidt - Customer, Miami, US.
- CONTACTS (7):** A list of existing contacts, with 'Matt's Customer Contact' selected.
- PERSONAL INFORMATION:** Fields for First Name (John), Last Name (Johnson), Language (english), Gender (Male), and Time zone (Uhr: 07).
- PLATFORM ACCESS:** A section with a radio button for 'Enable login*' set to 'True'.

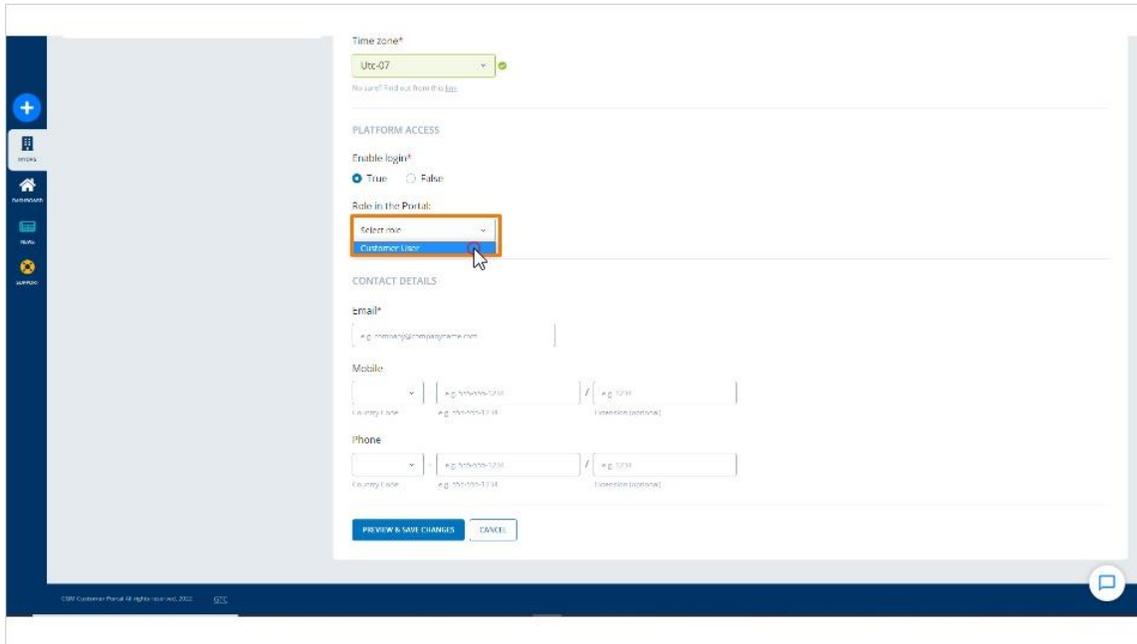
The 'Enable login*' field is highlighted with a red box, and a mouse cursor is pointing at the 'True' radio button. The 'True' radio button is selected, while the 'False' radio button is unselected.

Notes:

If this user should receive an email inviting them to be a support center user, in the Enable Login field, select True.

Creating New Contacts and Users

1.6 Role



The screenshot shows a web form for creating a new contact and user. The form is divided into several sections:

- Time zone***: A dropdown menu showing "Utc-07".
- PLATFORM ACCESS**:
 - Enable login***: Radio buttons for "True" (selected) and "False".
 - Role in the Portal:**: A dropdown menu with "Select role" and "Customer User" (highlighted by a red box and a mouse cursor).
- CONTACT DETAILS**:
 - email***: A text input field with a placeholder "e.g. john.doe@compugroup.com".
 - Mobile:** A section with a dropdown menu, a text input field with a placeholder "e.g. 555-555-1234", and a text input field with a placeholder "e.g. 1234".
 - Country Code:** A dropdown menu with a placeholder "e.g. 1414141-1234" and a text input field with a placeholder "(extension (optional))".
 - Phone:** A section with a dropdown menu, a text input field with a placeholder "e.g. 555-555-1234", and a text input field with a placeholder "e.g. 1234".
 - Country Code:** A dropdown menu with a placeholder "e.g. 123456-789" and a text input field with a placeholder "(extension (optional))".

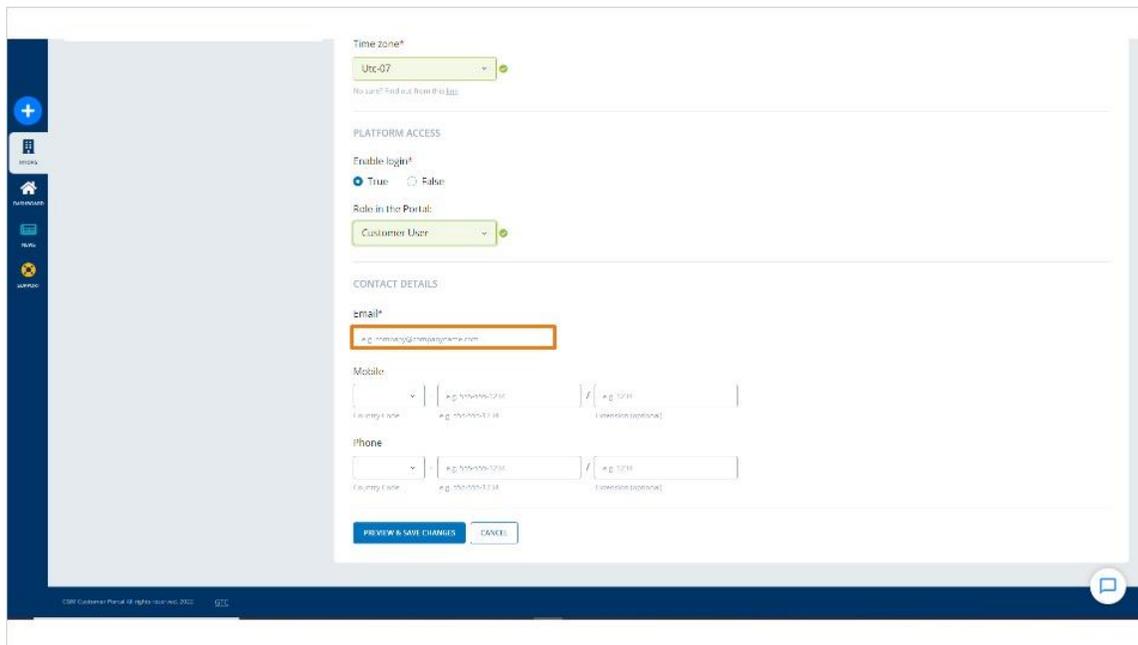
At the bottom of the form, there are two buttons: "PREVIEW & SAVE CHANGES" and "CANCEL".

Notes:

Select the role "Customer Use" from the list displayed In the Role in the Portal field,

Creating New Contacts and Users

1.7 Email



The screenshot shows a user creation form with the following sections:

- Time zone***: A dropdown menu with "Utc-07" selected.
- PLATFORM ACCESS**:
 - Enable login***: Radio buttons for "True" (selected) and "False".
 - Role in the Portal:**: A dropdown menu with "Customer User" selected.
- CONTACT DETAILS**:
 - email***: A text input field with a placeholder "e.g. john.doe@compuGroupMedical.com" and a red border, indicating it is the current step.
 - Mobile:** A form with a dropdown for country code, a text input for the number (placeholder "e.g. 555-555-1234"), and a text input for extension (placeholder "e.g. 1234").
 - Phone:** A form with a dropdown for country code, a text input for the number (placeholder "e.g. 555-555-1234"), and a text input for extension (placeholder "e.g. 1234").

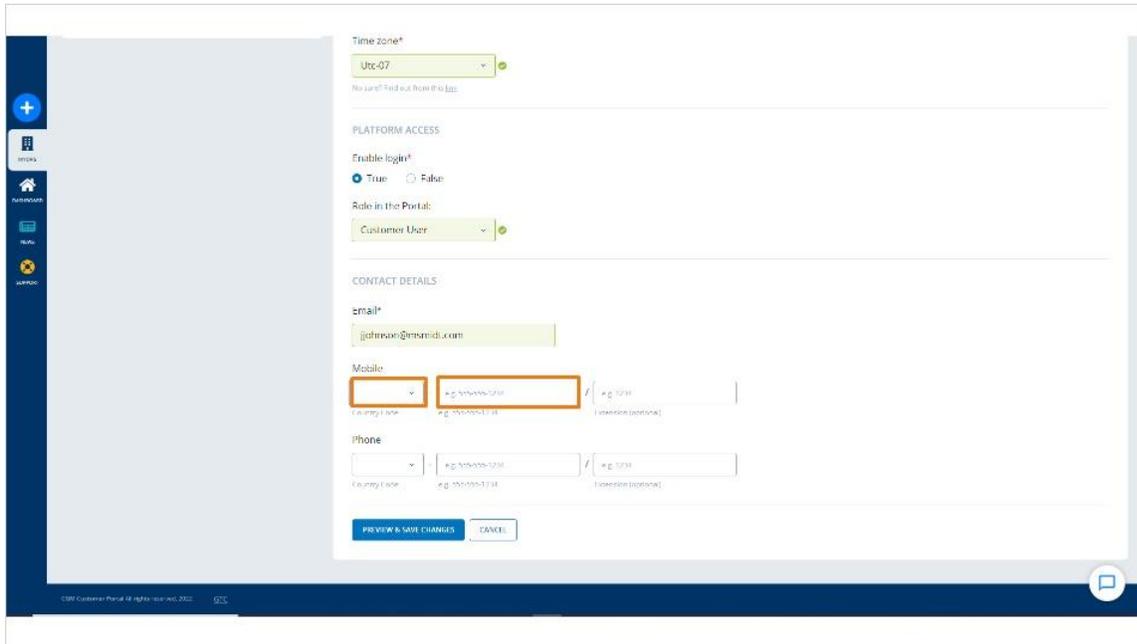
At the bottom of the form are two buttons: "PREVIEW & SAVE CHANGES" and "CANCEL".

Notes:

Enter the user's email address.

Creating New Contacts and Users

1.8 Mobile



The screenshot shows a user creation form with the following sections:

- Time zone***: A dropdown menu set to "Utc-07".
- PLATFORM ACCESS**:
 - Enable login***: Radio buttons for "True" (selected) and "False".
 - Role in the Portal:** A dropdown menu set to "Customer User".
- CONTACT DETAILS**:
 - email***: A text input field containing "jchrispe@cmrmed.com".
 - Mobile**: A dropdown menu, a text input field containing "1 555-555-1234", and a text input field containing "1234".
 - Phone**: A dropdown menu, a text input field containing "1 555-555-1234", and a text input field containing "1234".

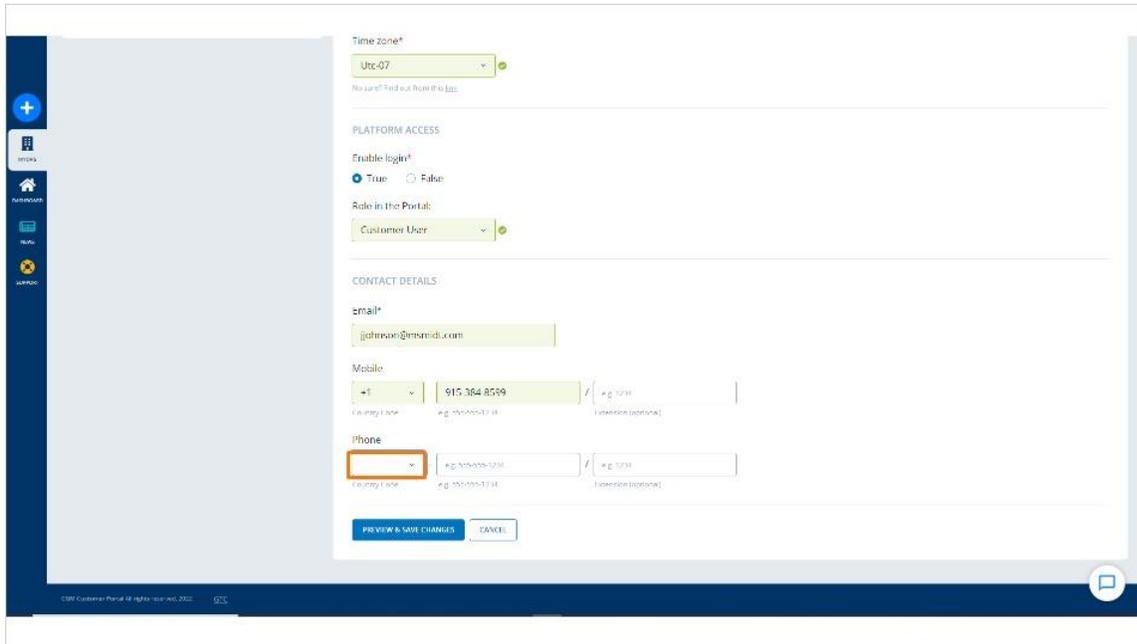
At the bottom of the form are two buttons: "PREVIEW & SAVE CHANGES" and "CANCEL".

Notes:

Enter the user's mobile phone number if available beginning with the Country Code. If the user is in the US, enter the number 1 and tab to enter the area code and 7 digit mobile number.

Creating New Contacts and Users

1.9 Country Code



The screenshot shows a user creation form with the following fields and options:

- Time zone***: A dropdown menu set to "Utc-07".
- PLATFORM ACCESS**:
 - Enable login***: Radio buttons for "True" (selected) and "False".
 - Role in the Portal:** A dropdown menu set to "Customer User".
- CONTACT DETAILS**:
 - email***: A text input field containing "jchristian@msnrcd.com".
 - Mobile:** A dropdown menu set to "+1", a text input field containing "915 384 8599", and a text input field for extension (empty).
 - Phone:** A dropdown menu (highlighted with a red box), a text input field for country code (empty), and a text input field for extension (empty).

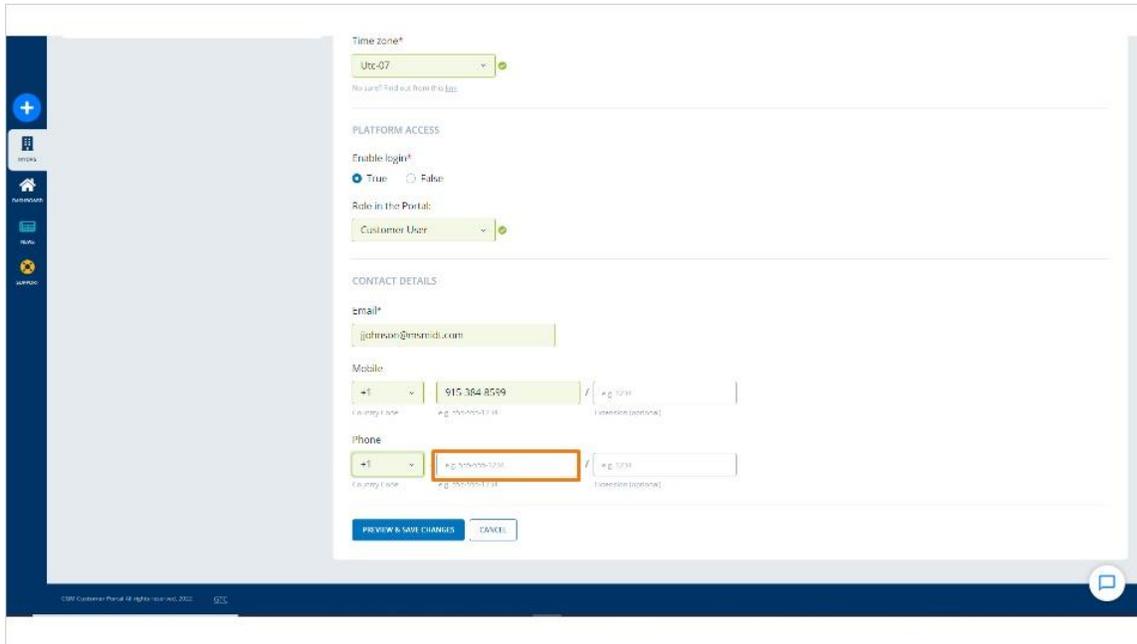
At the bottom of the form are two buttons: "PREVIEW & SAVE CHANGES" and "CANCEL".

Notes:

Next, enter the user's telephone number beginning with the Country Code.

Creating New Contacts and Users

1.10 Telephone



The screenshot shows a user creation form with the following sections:

- Time zone***: A dropdown menu set to 'Utc-07'.
- PLATFORM ACCESS**:
 - Enable login***: Radio buttons for 'True' (selected) and 'False'.
 - Role in the Portal:** A dropdown menu set to 'Customer User'.
- CONTACT DETAILS**:
 - email***: A text input field containing 'jchristian@msnrcd.com'.
 - Mobile**: A dropdown menu set to '+1', a text input field containing '915.364.8599', and a text input field for extension (empty).
 - Phone**: A dropdown menu set to '+1', a text input field containing '915.364.8599' (highlighted with an orange box), and a text input field for extension (empty).

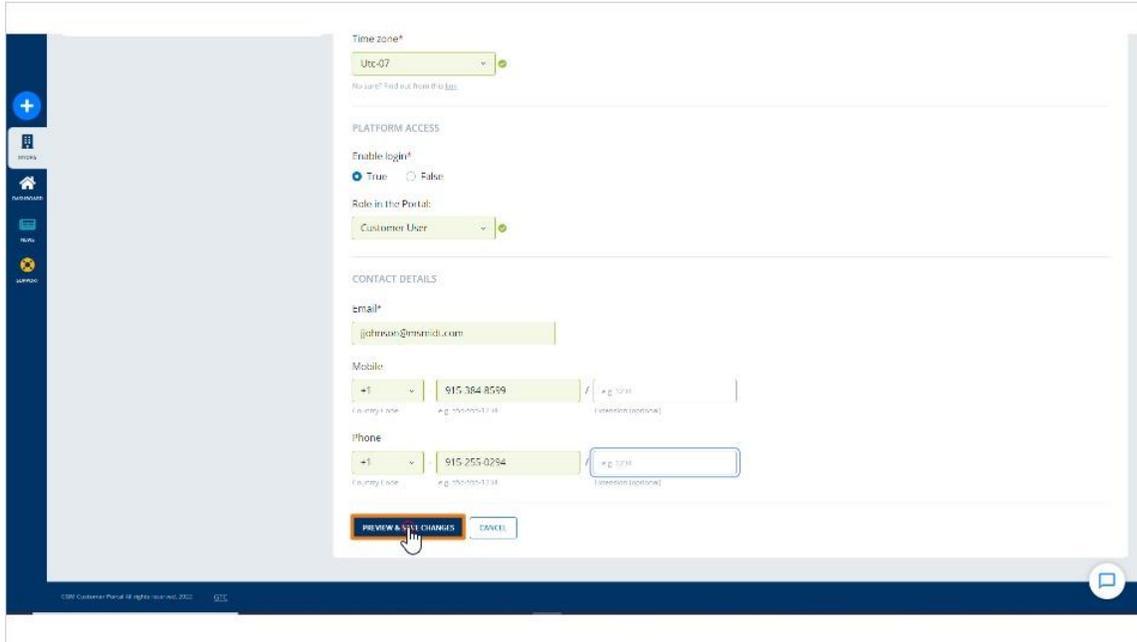
At the bottom of the form are two buttons: 'PREVIEW & SAVE CHANGES' and 'CANCEL'.

Notes:

Then tab to enter the area code and 7 digit telephone number.

Creating New Contacts and Users

1.11 Preview & Save Changes



The screenshot displays a web form for creating a new contact and user. The form is organized into several sections:

- Time zone***: A dropdown menu set to "Utc-07".
- PLATFORM ACCESS**:
 - Enable login***: Radio buttons for "True" (selected) and "False".
 - Role in the Portal:**: A dropdown menu set to "Customer User".
- CONTACT DETAILS**:
 - email***: A text input field containing "jchrispe@msnrcd.com".
 - Mobile**: A field with a country code dropdown (+1), a number input (915.384.8599), and a text input for extension (e.g. 1011).
 - Phone**: A field with a country code dropdown (+1), a number input (915.257.0294), and a text input for extension (e.g. 1234).

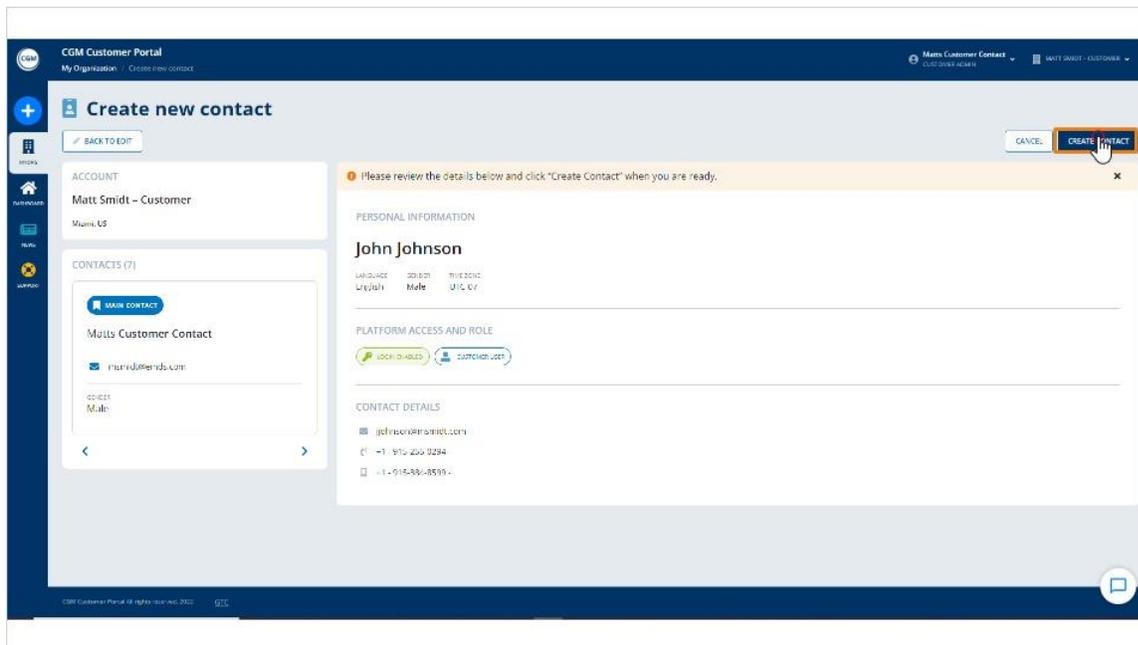
At the bottom of the form, there are two buttons: "PREVIEW & SAVE CHANGES" (highlighted with a mouse cursor) and "CANCEL".

Notes:

Select Preview & Save Changes.

Creating New Contacts and Users

1.12 Create Contact

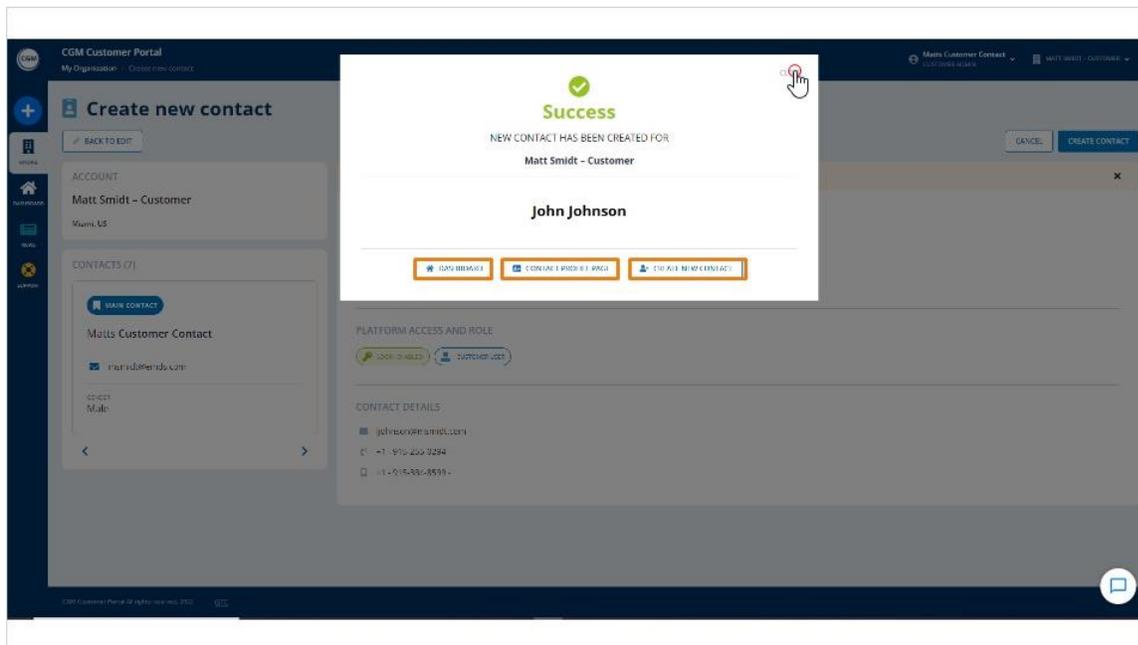


Notes:

If the information entered is correct, select Create Contact at the top right of the window.

Creating New Contacts and Users

1.13 Success



Notes:

When you see this message, your new contact has been successfully created. From here, you can use the buttons at the bottom of the window to go to the Dashboard, go to the Contact Profile Page or Create Another New Contact. To return to My Org, select the Close button!

Creating New Contacts and Users

1.14 More Resources

More Resources

We have created a library of short videos and documents to assist you in learning how to perform all of the tasks you need to do in the new CGM Support Portal. More content will be added as new features are made available so check back using the links in your Dashboard!

[Access CGM Customer Support Portal here!](#)

A close-up photograph of a smartphone screen displaying a red YouTube play button icon on a grey background.

Notes:

We have created a library of short videos and documents to assist you in learning how to perform all of the tasks you need to do in the new CGM Support Portal. More content will be added as new features are made available so check back using the links in your Dashboard!

[Click here to access more CGM Portal videos and documents!](#)