

Contact & Role Management

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Overview

Contacts

On signing up for your first Mithi product or subscription, a Mithi Customer Account gets created for your organization, accessible from www.mithi.com.

Each customer can have up to 5 contacts who can access the account.

Primary Contact

The Primary Contact for an organization is the email id used to sign up for the first product.

The Primary Contact manages the remaining contacts.

If you login to the Customer Accounts application using the credentials of the Primary Contact, you can do the following:

- [Update your password or display name](https://docs.mithi.com/home/how-to-update-mithi-contact-profile) (<https://docs.mithi.com/home/how-to-update-mithi-contact-profile>)
- [Add or delete other contacts](https://docs.mithi.com/home/how-to-manage-contacts-and-roles-in-mithi-account) (<https://docs.mithi.com/home/how-to-manage-contacts-and-roles-in-mithi-account>)
- [Assign or remove the primary, tech, and billing roles from existing contacts](https://docs.mithi.com/home/how-to-manage-contacts-and-roles-in-mithi-account) (<https://docs.mithi.com/home/how-to-manage-contacts-and-roles-in-mithi-account>)
- [Access the payment portal](https://docs.mithi.com/home/how-to-access-and-use-mithi-payment-gateway) (<https://docs.mithi.com/home/how-to-access-and-use-mithi-payment-gateway>)
- [Access Mithi Documentation](https://docs.mithi.com/home/how-to-access-the-documentation-from-mithi-account) (<https://docs.mithi.com/home/how-to-access-the-documentation-from-mithi-account>)

Billing Contact

The Billing Contact role is assigned to a single contact. A contact with the Billing Contact Role can do the following from the Customer Account application:

- [Update password or display name](https://docs.mithi.com/home/how-to-update-mithi-contact-profile) (<https://docs.mithi.com/home/how-to-update-mithi-contact-profile>)

- [Access the Bill Desk](https://docs.mithi.com/home/how-to-access-mithi-bill-desk) (https://docs.mithi.com/home/how-to-access-mithi-bill-desk)
- [Access the payment gateway](https://docs.mithi.com/home/how-to-access-and-use-mithi-payment-gateway) (https://docs.mithi.com/home/how-to-access-and-use-mithi-payment-gateway)
- Access the [License Extension](https://docs.mithi.com/home/how-to-request-for-a-license-extension) (https://docs.mithi.com/home/how-to-request-for-a-license-extension) app
- Access the [Record Payment](https://docs.mithi.com/home/how-to-record-the-payment-you-made) (https://docs.mithi.com/home/how-to-record-the-payment-you-made) app
- [Access Mithi Documentation](https://docs.mithi.com/home/how-to-access-the-documentation-from-mithi-account) (https://docs.mithi.com/home/how-to-access-the-documentation-from-mithi-account)

Technical Contact

The Technical Contact role is assigned to a single contact within the organization. Contact with the Technical Contact Role can do the following from the Customer Account application:

- [Update password or display name](https://docs.mithi.com/home/how-to-update-mithi-contact-profile) (https://docs.mithi.com/home/how-to-update-mithi-contact-profile)
- [Access the Help Desk](https://docs.mithi.com/home/how-to-access-mithi-help-desk) (https://docs.mithi.com/home/how-to-access-mithi-help-desk)
- [Access the payment gateway](https://docs.mithi.com/home/how-to-access-and-use-mithi-payment-gateway) (https://docs.mithi.com/home/how-to-access-and-use-mithi-payment-gateway)
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Other Contacts

Contacts without any role can log in to the Customer Account application and do the following:

- [Update password or display name](https://docs.mithi.com/home/how-to-update-mithi-contact-profile) (https://docs.mithi.com/home/how-to-update-mithi-contact-profile)
- [Access the payment gateway](https://docs.mithi.com/home/how-to-access-and-use-mithi-payment-gateway) (https://docs.mithi.com/home/how-to-access-and-use-mithi-payment-gateway)
- [Access Mithi Documentation](https://docs.mithi.com/home/how-to-access-the-documentation-from-mithi-account) (https://docs.mithi.com/home/how-to-access-the-documentation-from-mithi-account)



Managing Contacts

1. [Login to your Mithi account](https://docs.mithi.com/home/how-to-login-to-mithi-account) (https://docs.mithi.com/home/how-to-login-to-mithi-account) using the Primary Contact email id.
2. From the options on the **Application switch** on the left, click on **Manage Contacts**.
3. Your contact details are on the top of the list.
4. Other contacts added are listed below.
5. To add a new Contact, click on the **Add Contact** button.

6. In the **Add Contact Details** pop-up, give the display name and the email id of the new contact.
7. Click on the **Add Contact** button.
8. The newly added contact is displayed in the list.
9. To verify the contact, click on the **Verify** button next to the email id.
10. A pop-up box appears asking you to confirm that you want to send a verification mail to the email id.
11. Click on **Yes**.
12. A confirmation mail is sent to the email id. The recipient has to click on **Verify your Email** link to proceed.
13. On verification, refresh the Manage Contacts page. If the email id is verified, the Verify button gets replaced with a **Verified User** sign. Verified users can access the Customer Account application.
14. To delete a contact, click on the **Delete** button next to the email id. **Note:** Primary Contacts and Contacts with Billing or Tech roles cannot be deleted.

Managing Roles

1. [Login to your Mithi account](https://docs.mithi.com/home/how-to-login-to-mithi-account) (<https://docs.mithi.com/home/how-to-login-to-mithi-account>) using the Primary Contact email id.
2. From the options on the **Application switch** on the left, click on **Manage Roles**.
3. To change the **Primary Contact** for your organization, select a contact from the drop-down list under **Primary Contact** and click on **Update Primary Contact**.
4. To assign the **Tech Contact role** to a contact, select a contact from the dropdown list under **Tech Contact** and click on **Update Tech Contact**.
5. On successful updates, access to the **Helpdesk is immediately transferred to the newly selected contact**.
6. To assign the **Billing Role** to a contact, select a contact from the dropdown list under **Billing Contact** and click on **Update Billing Contact**.

Note: Only verified contacts appear in the drop-down list.