

Create Contacts & User Access

SSO Release 7.7.0

Creating New Contacts

CLIENT	EMPLOYEE	GENERIC	PROVIDER
Default employee form The built-in add-new-employee form.			
Custom forms			
BCBA Test		Used 0 time(s)	
CRCH-3457 Contact Form Validate label for email and additional email		Used 1 time(s)	
New Hire		Used 31 time(s)	
Rockstar BCBA Employee Form Form completed by future Rockstar Therapy Services' BCBA.		Used 2 time(s)	
Rockstar Manager Employee Form A form for potential Rockstar Managers.		Used 0 time(s)	
Rockstar RBT Employee Form Form completed by future Rockstar Therapy Services' RBT.		Used 1 time(s)	

- Users are able to create contacts using a default form or a custom form.
- When a new contact is created with a default form, the contact gets access to the application with the email address added when completing the form as the username. Please note that the new user has to be informed of the username and advised to go through the Password Reset/First Time User workflow to set a password.
 - If the default form is completed without an email address, the contact will not be given automatic access.

Custom Contact Forms

The screenshot shows the 'Rockstar Therapy Services' interface. At the top, there is a navigation bar with the company name and a star icon. Below it, a breadcrumb trail shows 'Contact Forms' and 'Edit'. The main content area is titled 'EMAIL' and contains the following elements:

- A header with tabs: 'DETAILS', 'AUTOMATION & FILES', 'FIELDS', and 'EMAIL'.
- Instructional text: 'Use these settings to personalize the email that is sent to newly created accounts. Leave blank if you would like the default CentralReach message.'
- A checkbox labeled 'Send Welcome Email' with the text 'Check this box if you would like a welcome email sent that includes login information.' This checkbox is highlighted with a red rectangular box.
- A 'Subject' input field with the placeholder text 'Subject'.
- A 'Body' text area with the placeholder text 'Body'.
- Two buttons at the bottom: 'Save Form' (in red) and 'Delete Form' (in grey).

- Creating contacts using a custom contact form, allows the contacts to be created and given access depending on the organization's requirements.
- Enabling Send Welcome Email on the contact form will automatically give the users access to the application and an email is sent to the new user to set their password.
- If the custom form does not have Send Welcome Email enabled, the contacts created with the form will not get automatic access to the application and will need to follow the same workflow as the default contact form (where "convert to user" is clicked and the new user is notified manually).

Give Contacts Access

The screenshot shows a CRM interface for a contact named Oscar Green. The contact is identified as an employee and is currently active. The 'Basics' tab is selected, displaying various fields for contact information. A 'Convert to User' button is visible next to the 'Contact Type' field.

Contact Information:

- Employee ID: 1351011
- Gender: Add gender
- Company: Add company
- Primary Email: emailtest@gmail.com
- Web: Add website

Basics Form Fields:

- Contact Type: Contact | [Convert to User](#)
- Status: Active | [Make In-active](#) Termination Date:
- Type: Employee | [Make Generic](#)
- Title:
- First Name: Oscar
- MI: Middle Initial
- Last Name: Green
- Primary Email: emailtest@gmail.com
- Additional E-mail:
- Marital Status: Choose marital status...
- Gender: Choose gender...
- DOB: 10 11 2000
- Contact First Name:
- Contact Last Name:

You can give contacts created with a custom form without Send Welcome Email enabled, by going to the contact's Basic Profile and clicking on "Convert to User".

Remove Access

The screenshot shows a user profile for Oscar Green. The left sidebar contains contact details: Employee ID (1351011), Gender (Add gender), Company (Add company), Primary Email (emailtest@gmail.com), Web (Add website), and additional contact information. The main content area is divided into several sections: Timesheets This Week (no timesheets available), Messages Recently (no messages), Appointments Upcoming (no appointments), Productivity (line chart showing worked, avail, sched, and worked % over time), Files Added Recently (no files added), Learning Trees (no learning trees), Notes & Forms, and Document Manager. The top navigation bar includes a 'Remove Access' button, which is highlighted in red in the original image.

When a contact has access, you can remove the user's ability to access your CentralReach instance by clicking "Remove Access" from the contact's Basic Profile.