Contacts & Roles

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Overview

Contacts

On signing up for your first Mithi product or subscription, a Mithi Customer Account with the Primary role gets created for your organization, accessible from myaccount2.mithi.com.

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

Primary Contact

This is the owner of the account.

When a partner raises an order on Mithi on behalf of the customer, then the primary contact is an email id or a group id on the partner's domain. If the customer has placed a direct order on Mithi, then the primary Contact is an email id or group id on the Customer's domain

Billing Contact

This is the contact which manages the commercial engagement with Mithi.

When a partner raises an order on Mithi on behalf of the customer, then the Billing Contact is an email id or a group id on the partner's domain. If the customer has placed a direct order on Mithi, then the Billing Contact is an email id or group id on the Customer's domain

Support Contact

This role should be used by partners/in house teams who are managing the internal support desk for the Mithi products.

Technical Contact

This role is used by the Mithi product domain administrators. This is usually the customer team which provisions users etc.

Unassigned Contacts

Contacts without any role can log in to the Customer Account application and view the notifications, access self help documentation or the payment gateway.

The following table gives a summary of the applications accessible under each role.

Application	Primary	Billing	Support	Tech	Unassigned
Notifications	✔	✔	✔	✔	✔
Contact Manager	✔	✖	✖	✖	✖
Order Book	✔	✔	✖	✖	✖
Payment Record	✖	✔	✖	✖	✖
License Extension	✖	✔	✖	✖	✖
Dashboards	✔	✔	✔	✔	✖
Help desk	✖	✖	✔	✖	✖
Bill desk	✖	✔	✖	✖	✖
Documentation	✔	✔	✔	✔	✔
Payment Gateway	✖	✔	✖	✖	✔

Managing Contacts

1. Login to your Mithi account using the Primary Contact email id.
2. From the options on the **Application switch** on the left, click on **Contacts**.
3. All the current contacts of your organization and their roles will be listed.
4. To add a new Contact, click on the **Add Contact** button.
5. In the **Add Contact** pop-up, give the display name and the email id of the new contact.
6. Select the **Send Verification Email** checkbox.
7. Click on the **Add Contact** button.
8. The newly added contact is displayed in the list.
9. To re-send the verification email to the contact, click on the **Verify** button next to the email id.

10. A confirmation mail is sent to the email id. The recipient has to click on **Verify your Email** link to proceed.
11. On verification, refresh the Manage Contacts page. If the email id is verified, the Verify button gets replaced with a **Verified Contact** sign. Verified contacts can access the Customer Account application.
12. To delete a contact, click on the **Delete** button next to the email id. Contacts with the Primary role cannot be deleted. For other contacts with the Technical or Billing roles, the system will ask you for a confirmation before deleting the contact.

Managing Roles

1. Login to your Mithi account using the Primary Contact email id.
2. From the options on the **Application switch** on the left, click on **Contacts**.
3. Click on **Manage Contacts** button on the top right corner.
4. **Update the Primary, Billing, Support, and Technical Contacts** by selecting appropriate email id for each role.
5. Click on the **Assign** button.

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