MBI ADMINISTRATION

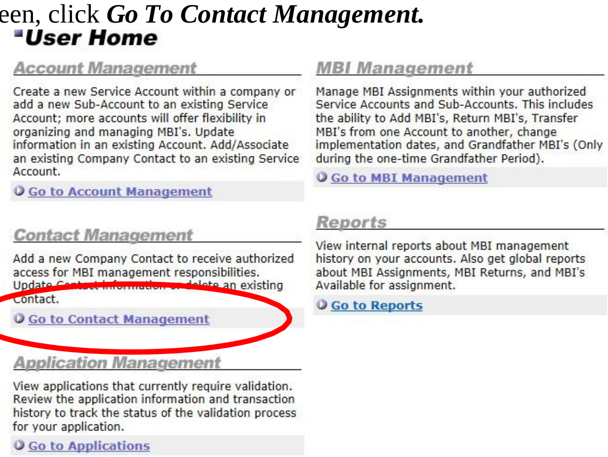
Add/Manage Users

Contact information is used by the MBI Administrators to communicate with Contacts and respond to applications. Contact Management and Account Management are used to manage contact information and the related permissions.

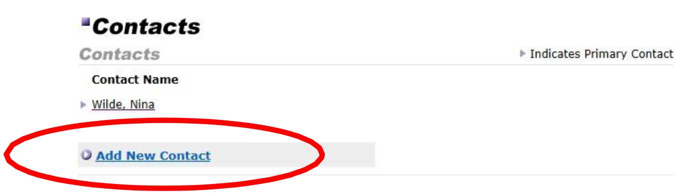
- Add Contact - Only Administrators and Primary Contacts have authority to add contacts from an account. Use the Add Contact to add the user to the ***Mail Distribution list***.
  - The ***Mail Distribution list*** is used to communicate system maintenance and other website related information such as the Quarterly Report and pricing updates.
- Delete Contact - Only Administrators and Primary Contacts have authority to delete contacts from an account.
- Update Contact - All authorized Contacts within a company have authority to update their contact information within that company.
- Assign/Change Primary Contact – The Primary Contact is responsible for managing the account and contact information.

Add Contact

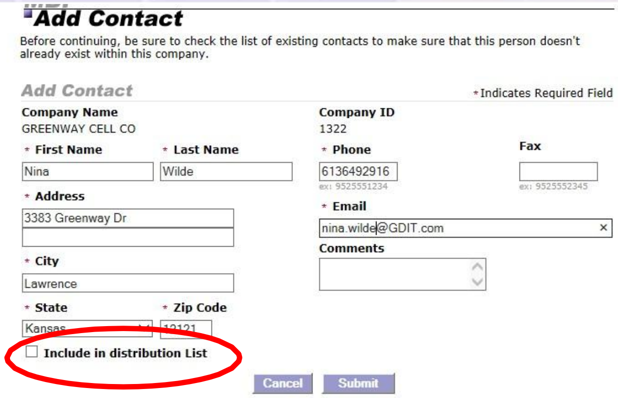
1. From the ***User Home*** screen, click ***Go To Contact Management.***



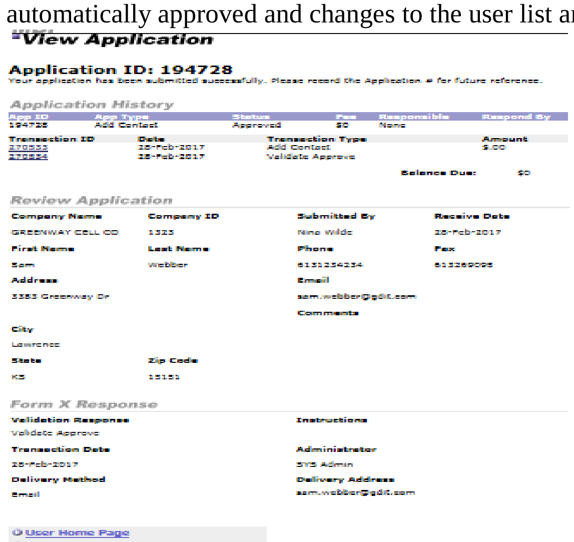
2. Click on the ***Add New Contact.***



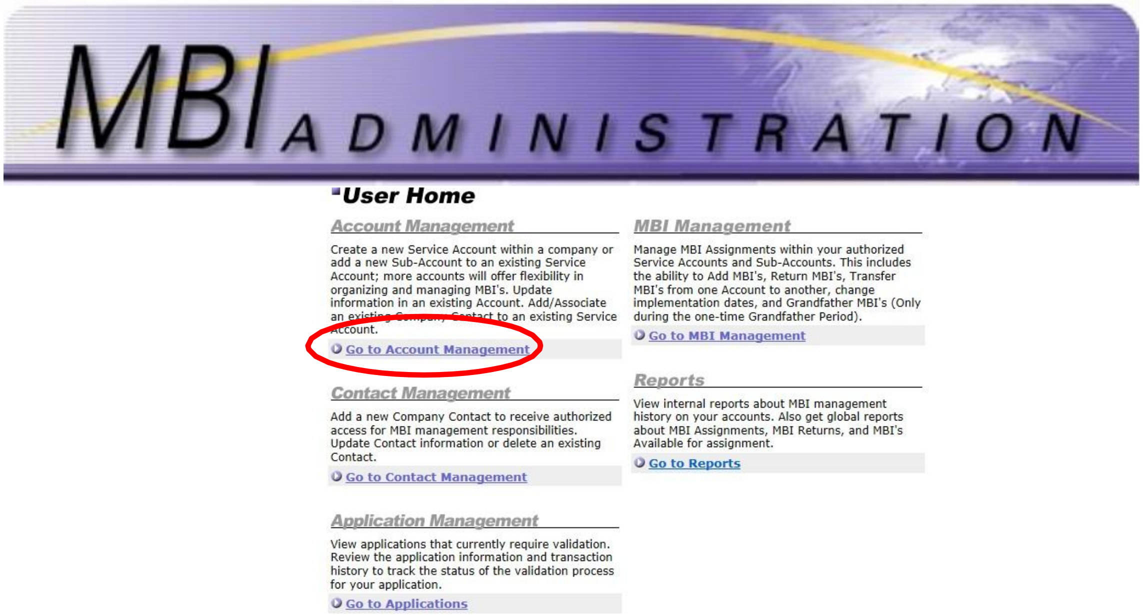
3. Enter the *required information.



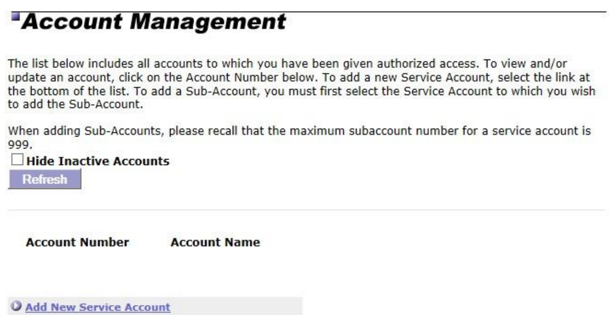
4. Enter additional comments in the *Comments* box.
5. To add the user to the Mail Distribution list (to receive quarterly updates, system maintenance notices, and other website related updates) click on the *Include in Distribution List* check box.
6. Review all information. Click ***Submit***. The system will not allow an application to be submitted with required data elements missing. A warning will appear at the top of the application if errors are detected or if required information is missing. Correct any errors and resubmit the application.
7. The application will be automatically approved and changes to the user list are effective immediately.



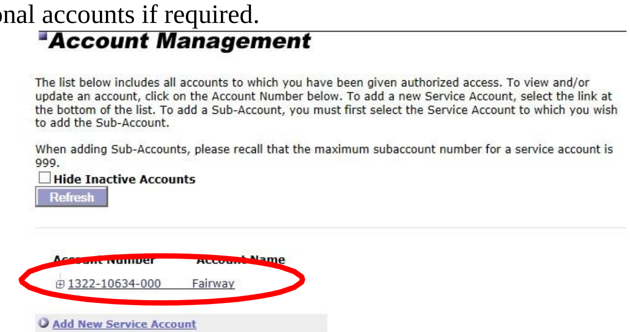
8. Click ***Home***. Click ***Go to Account Management***.



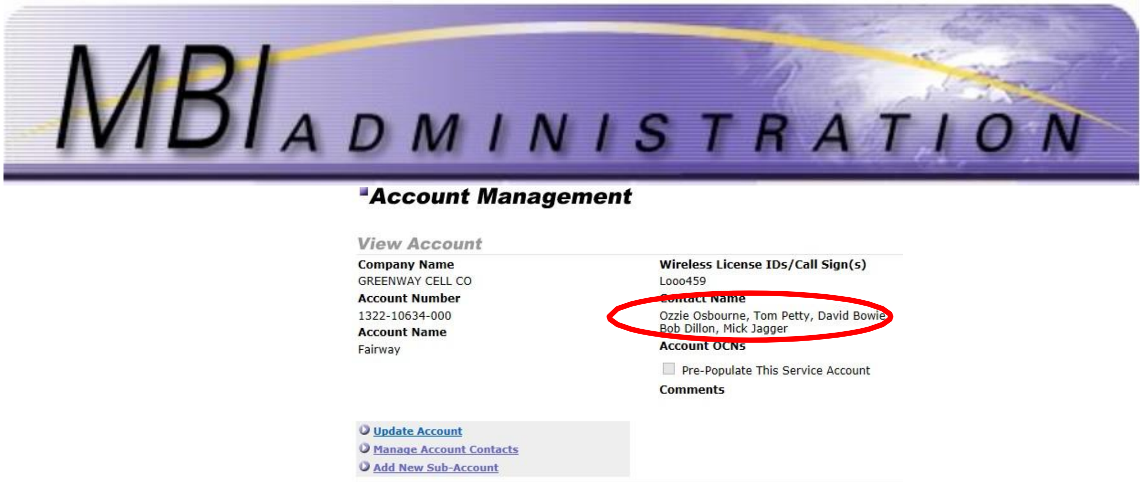
9. Uncheck the *Hide Inactive Accounts* box if this is a new account or an existing account with no MBIs. Click ***Refresh.***



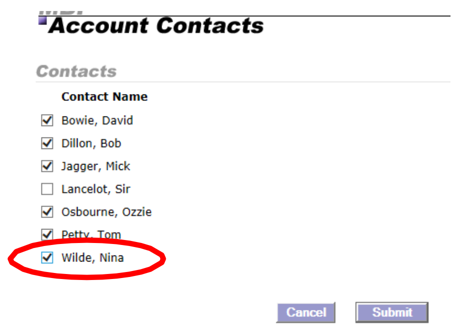
10. Click on the account where you want to associate the new contact. Repeat this step to associate the new contact with additional accounts if required.



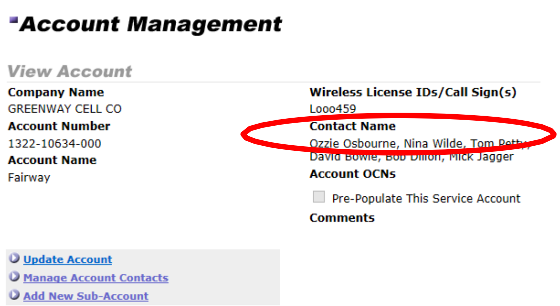
11. A list of contacts associated with that account appears on the right side of the screen. Click ***Manage Account Contacts.***



12. Click to check the box beside the new contact's name. Click ***Submit***.

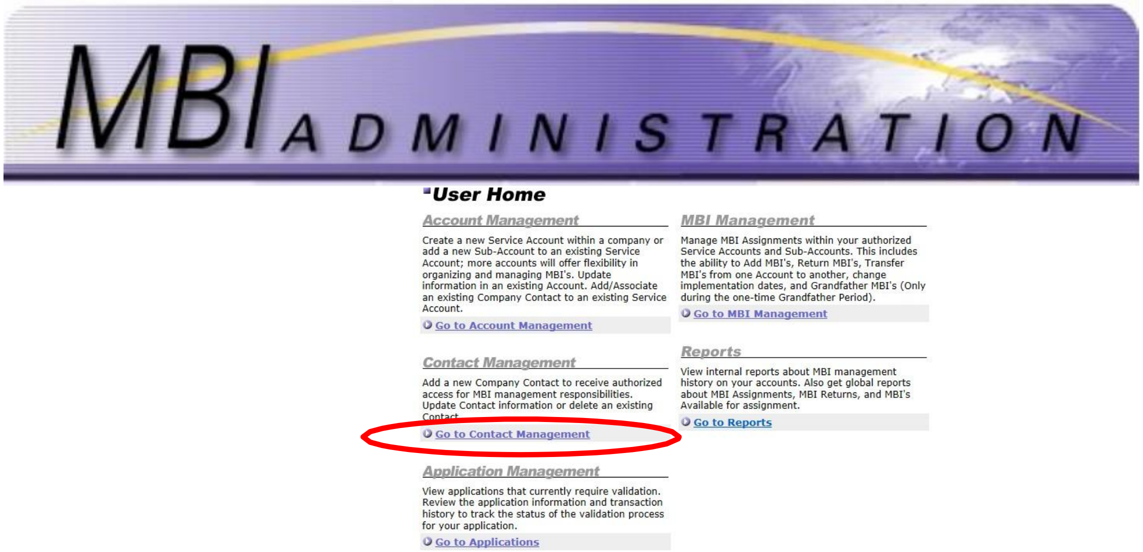


13. The new contact's name will appear in the Contact name field

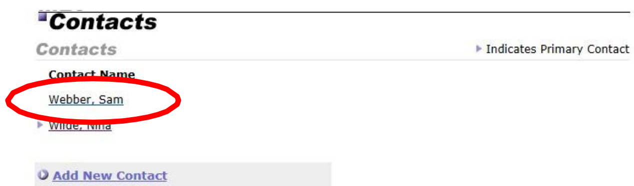


Delete Contact

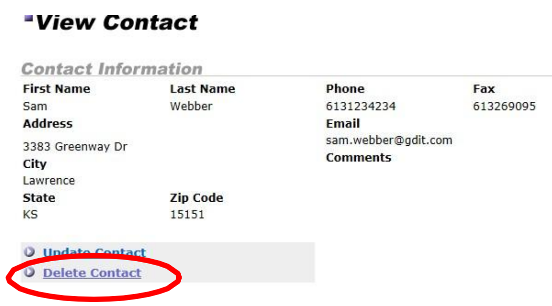
1. From the ***User Home*** screen, click ***Go To Contact Management***



2. Click on the contact name to be updated**.**



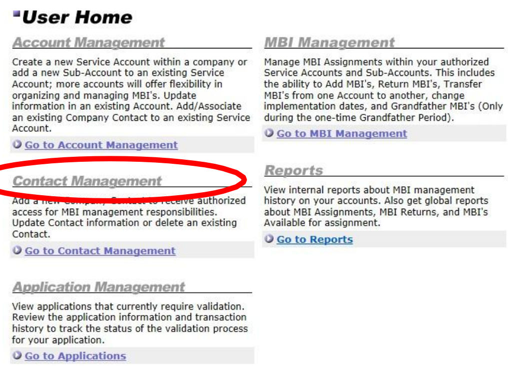
3. Click ***Delete Contact***. User will be redirected to the *Application History* page.



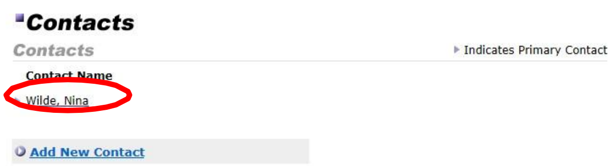
4. The application is processed automatically. The user is removed from the account.

Update Contact

1. From the ***User Home*** screen, click ***Go To Contact Management***.



2. Click on the <u>Contact</u> from the list.



3. Click on ***Update Contact***.

4. Update information by clicking in the field to be updated.

5. Enter Comments. This section is optional and can contain a maximum of 250 characters, including spaces. Use it to record notes to the Administrator specific to your application.

6. Click ***Submit***. The system will not allow an application to be submitted with required data elements missing. A warning will appear at the top of the application if errors are detected or if required information is missing. Correct any errors and resubmit the application.

7. The application is forwarded to the administrator for validation. Once the application is validated, the Administrator will respond with a Form X to the email listed for the Contact on the Service Account. Response time is within 5 days.

Application History

App ID	App Type	Status	Fee	Responsible	Respond By
194724	Change Contact Info	Pending	$0	Administrator	06-Mar-2017

Transaction ID	Date	Transaction Type	Amount
270524	28-Feb-2017	Change Contact Information	

Balance Due: $0

Review Application

Company Name	Company ID	Submitted By	Receive Date
GREENWAY CELL CO	1323	Nina Wilde	28-Feb-2017
First Name	**Last Name**	**Phone**	**Fax**
Nina	Wilde	6132910953	613269095
Address		**Email**	
3833 Greenway Dr		saubrey@nrtco.net	
		Comments	
City			
Lawrence			
State	**Zip Code**		
KS	12121		

User Home Page

Assign/Change Primary User

A Primary User is the point of contact for each account and is able to change both account and contact information. The Primary User is assigned or changed by the Administrator at the written request of the current primary contact or by written request of an authorized company representative.

Requests can be emailed to MBIAdmin@solusur.com Ensure that your contact information is included as the Administrator will contact you for verification.

If the new Primary Contact is also a new contact, include the required information in the request.

Required Information:
Company Number:
Account Name:
First Name:
Last Name:
Address:
City:
State:
Zip Code:
Include in Distribution List: Y/N
Telephone:
Email:

Optional Information:
Fax: (Optional)
Comments