



Additional Contacts – Add, Edit, Delete

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



Purpose

This document is intended to explain how to edit customer information in a customer profile in IWDS 2.0. The customer information section of the customer profile should be maintained with current and up to date information for the customer.



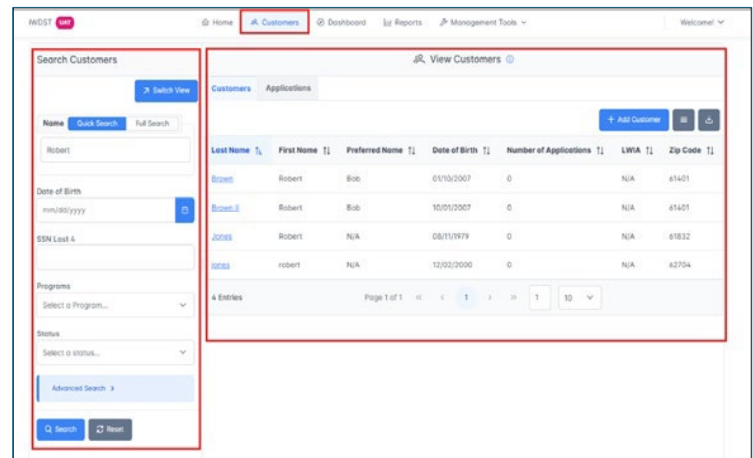
Audience

This document is designed to guide both trainers and end users through the process of editing current customer information in the IWDS 2.0 system.



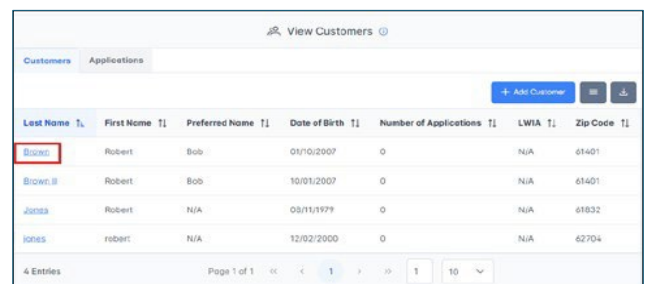
Navigate to Customers

- Log into IWDS 2.0. ([Link](#))
- Select **Customers**.
- The View Customers Page is displayed.
- The View Customers page is a two-panel page with the **Search Filter** on the left and the **List View** on the right.



View/Edit Customers Information

- Select the Customer you want to **edit to access the Customer Profile**.
- The customer profile page will appear



IWDS 2.0 Site



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Add/Edit/Delete Additional Contacts

- The Customer Profile page will appear, scroll down to **Additional Contacts**
- On the right side of the screen, click the **Add Contact** button.
- After clicking the **Add Contact** button, you can make the needed changes or additions to the Additional Contacts.
- To Edit an Existing Contact, click on the Contact Name > **Edit**.
- Once finished with adding or editing the customer information, you can click **Save** at the bottom of the page.

Name	Relationship	Phone Number	Phone Type	Email
Elin Waldorf	Other (Please Specify)	(314) 655-8041	N/A	N/A
Bartholomew Bass	Parent	(314) 655-7465 x...	N/A	barbass@fakemail.com

Add Additional Contact

First Name*

Last Name*

Phone*

Phone Receives Text Messages*

Email

Relationship*

Address Line 1

Address Line 2

City

State

Zip Code

Comments

Edit Additional Contact

First Name*

Last Name*

Phone*

Phone Receives Text Messages*

Email

Relationship*

Address Line 1

Address Line 2

City

State

Zip Code

Comments





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Delete Additional Contacts

- To **Delete** an Existing Contact, Select Customer > Edit > **Delete**.
- Deleting a Contact will require a Reason for Deletion.

Edit Additional Contact

First Name* Cheryl Last Name* Adams

Phone* (999) 888-4777 Phone Receives Text Messages* No

Email Relationship* Partner

Address Line 1 Address Line 2

City State Select an option... Zip Code

Comments

Save X Cancel Delete

Delete Additional Contact

Are you sure you want to delete this Additional Contact?

Reason for Deletion*

Delete X Cancel Save X Cancel Delete

The Illinois workNet Center System, an American Job Center, is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment by calling TTY (800) 526-0844 or 711. This workforce product was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration.

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