

## Horizon Support Portal

### Updating Existing Contacts

★ **NOTE:** Only individuals designated by Horizon as *Contact Admin* will have this functionality available. However, all contacts can edit their own information once logged into the portal. This includes changing passwords.

#### TO ACCESS THE HORIZON SUPPORT PORTAL:

1. In **Version 11 programs**, select **Help > Horizon Support Portal** in the upper right corner.  
In **Version 16 programs**, select **Support > Horizon Support Portal** in the upper right corner.  
Or, click the link below:  
<https://support.horizon-is.com/scripts/texcel/customerwise/clogin.dll>
2. Log in by entering your email address.
3. Next, enter your password.
  - ▶ **NOTE:** Unless you have changed your password, the default is *horizon*. We highly recommend changing your password from the default after entering the portal.

#### TO ACCESS CONTACTS:

1. Click on the tab labeled **Customer** at the top of the screen. This will bring you to a list of all current staff contacts.
  - ▶ **NOTE:** This list can be collapsed by clicking the small grey arrow on the right. ▲
2. From this list, select the contact you wish to edit by clicking on their name.
  - ▶ **NOTE:** The Contact icons indicate the current status of that staff member.
    - (1) **GREEN** = Contact Admin / Primary Contact
    - (2) **BLUE** = Active Contact
    - (3) **RED** = Inactive Contact

#### Contact Info

1. From this area, you can edit:
  - ▶ First Name
  - ▶ Last Name
  - ▶ Title – (Select 1 option from drop-down menu.)
  - ▶ Company
  - ▶ Address
  - ▶ Mobile
  - ▶ Fax
  - ▶ Phone 1
  - ▶ Phone 2
    - › **NOTE:** We recommend using the Phone 2 field to enter any additional numbers or notes for contacting the staff member.  
*Example: Tuesday and Thursday call 814-123-4567*
2. You can either scroll to the very bottom of the page or click the grey arrow to collapse the menu. ▲

## For Customers

1. From this area, you can edit:
  - ▶ Contact Status – **Active / Inactive**
  - ▶ Access Type – This should default to **Standard**.
    - › **NOTE:** Contact Horizon at 814-535-7810 if this individual needs to be designated as *Contact Admin* or *Primary Contact*.

## Login Info

1. From this area, you can edit:
  - ▶ Email Address
  - ▶ Password

## SAVE:

1. When finished, click Submit at the very top right of the screen.
2. Click Refresh in your browser or right click on the page and select Reload.
3. Select the **Customer** tab and view the newly created staff member.