Side By Side Guide for Managing Primary Contact

Somos Portal to Somos Hub

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About This Guide

This guide compares the Manage Resp Org Primary Contact workflow in the Somos Portal (portal.somos.com) to the Somos Hub (hub.somos.com).



BEFORE YOU BEGIN

To manage your Resp Org's Primary Contact, you must have Company Admin role in your User Profile within the Somos Hub to proceed with these steps. Please reach out to your Company Admin for assistance.



DISCLAIMER

Images in this document are intended to be used as a guide for educational purposes only and they may differ slightly between environments.

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In this guide, you'll learn how to:

01 Log in to the Somos Hub — Page 4

02 Manage Primary Contact — Page 6

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Log in to the Somos Hub

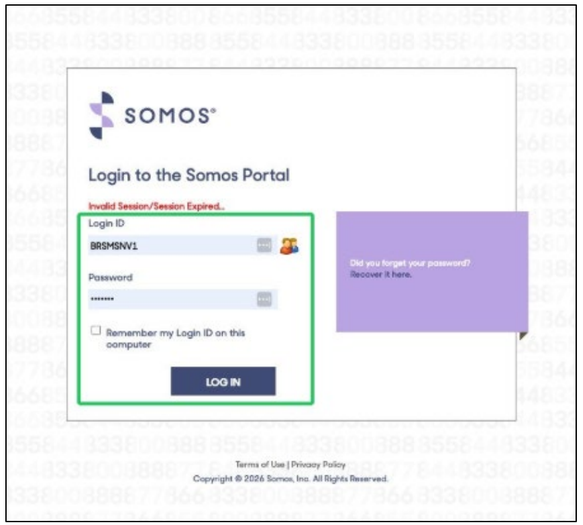
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Log In

SOMOS PORTAL

portal.somos.com

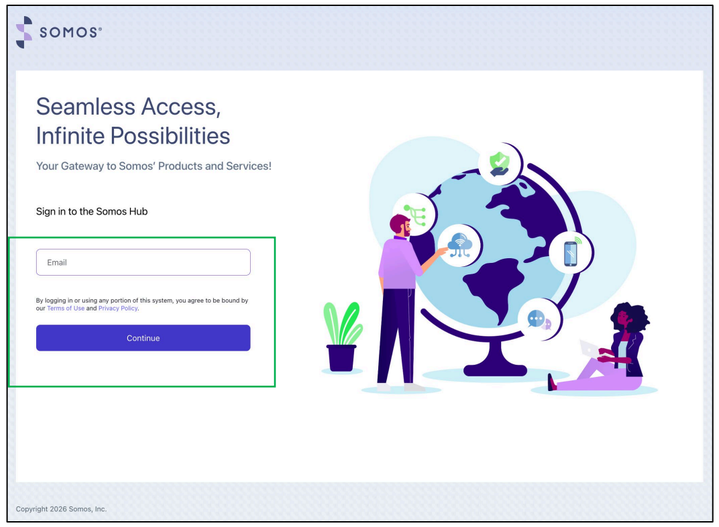
1. Visit portal.somos.com to log in
2. Enter your Login ID and Password
3. Click the LOG IN button



SOMOS HUB

hub.somos.com

1. Visit hub.somos.com to log in
2. Enter your Email Address and Password
3. Click the Continue button



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Manage Primary Contact

You must have User Management role in your User Profile within the Somos Hub to proceed with these steps. Please reach out to your Company Admin for assistance.

Users in a Pending status have been sent an invitation email and will be required to sign into the Somos Hub.

Users in an Active status have signed in at least once into the Somos Hub.

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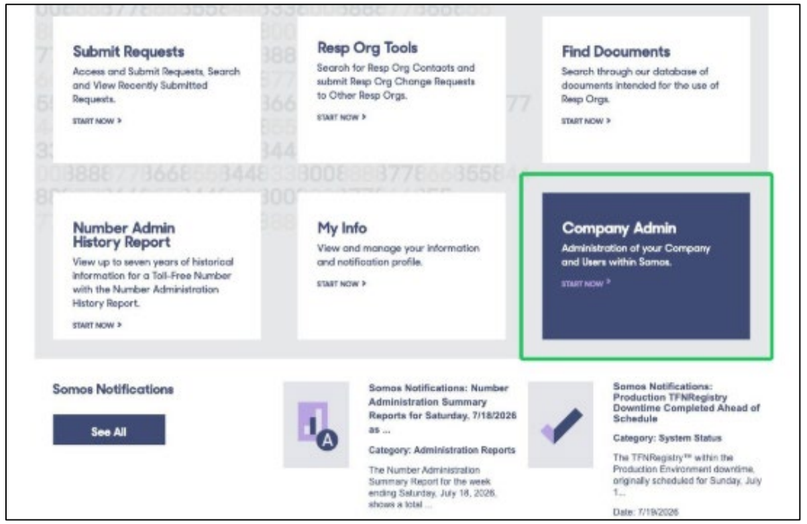
STEP 1

Accessing Contacts

SOMOS PORTAL

portal.somos.com

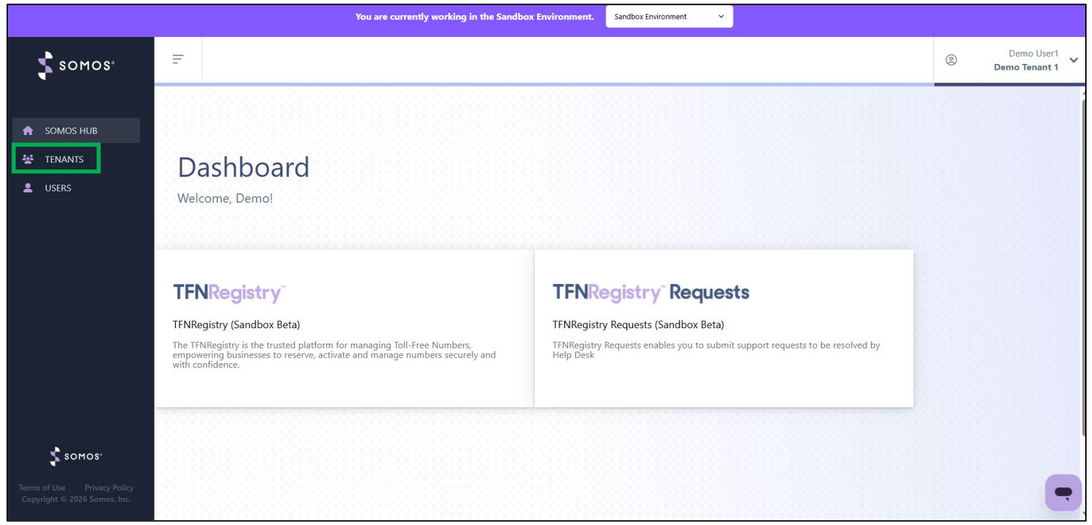
1. Home page
2. Click Company Admin



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1. Dashboard page
2. Click TENANTS



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STEP 2

Accessing Primary Contact

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NOTE The user's Login ID must be created before modifying a Resp Org Contact for an existing Resp Org ID

1. If you need to add a Login ID for a Resp Org Change Contact, review steps 2 - 4 above under the Add Resp Org Change Contact section

2. If you know the user's Login ID, proceed with the remaining steps

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No equivalent step in the Somos Hub.
Please proceed to next page.

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STEP 3

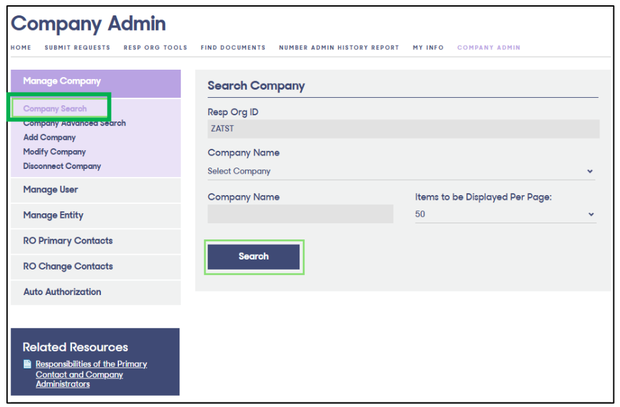
Accessing Primary Contact Continued

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NOTE If you know the Resp Org ID you want to edit, you can skip this step

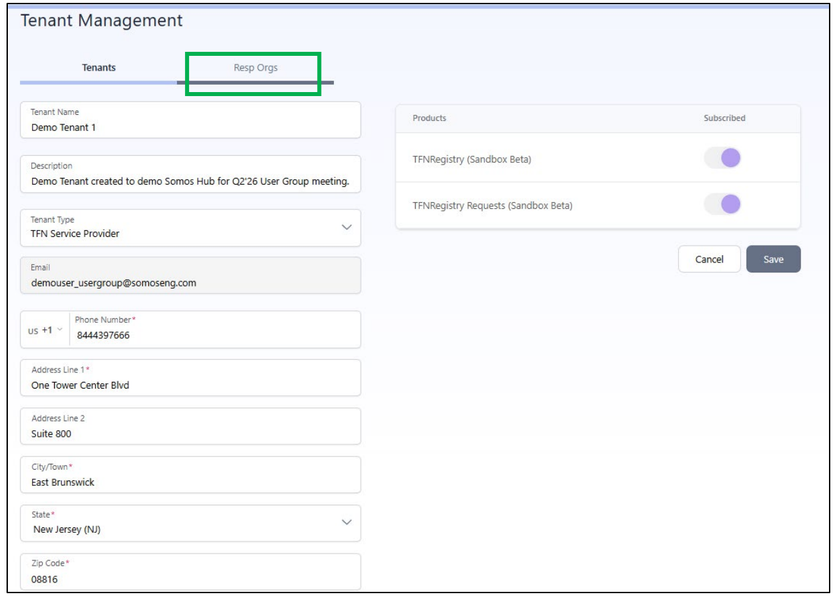
1. Click Manage Company
2. Click Company Search or Company Advanced Search
3. Enter information and click Search button



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1. Tenant Management page
2. Click Resp Orgs tab



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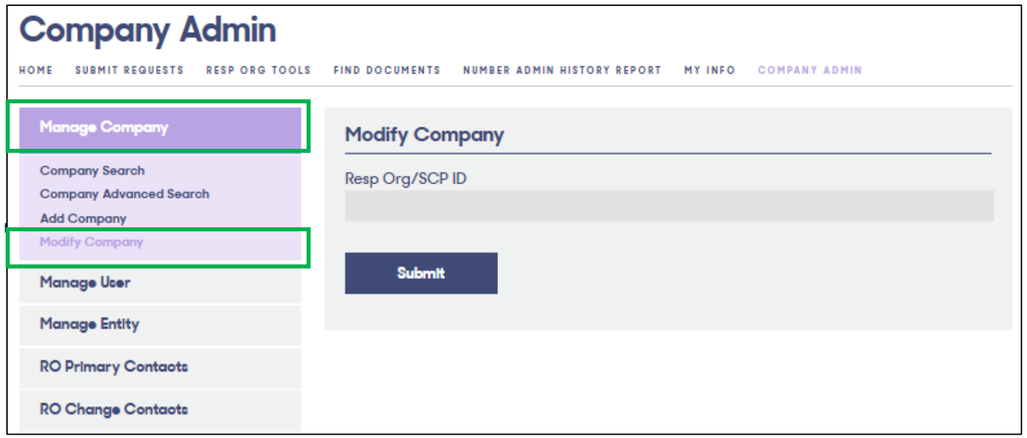
STEP 4

Retrieving Primary Contact

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1. Click Manage Company and then click Modify Company
2. Enter the desired Resp Org ID
3. Click Submit



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1. Tenant Management page, Resp Orgs tab
2. Click Manage Contacts button



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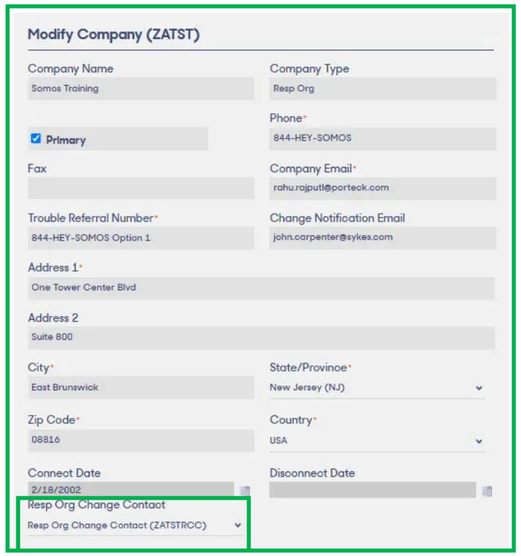
STEP 5

Edit Primary Contact

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1. Modify all required fields as needed
2. Click the user in the Resp Org Change Contact drop down
3. Scroll down and click Submit button



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1. Resp Org Contacts page
2. Click Edit icon for the Primary Contact



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STEP 6

Submit Update

Request to update a contact will be submitted to the Somos Help Desk for processing.

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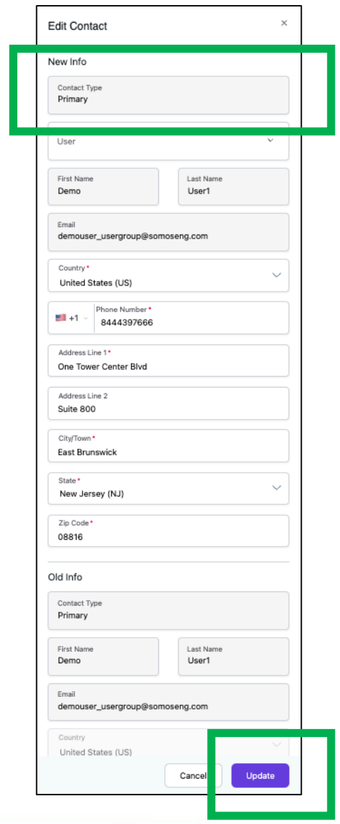
portal.somos.com

No equivalent step in the Somos Portal

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1. On the Edit Contact page
2. In User, select new user to be the Primary Contact
3. Click Update button



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Key Terms

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Key Terms

SOMOS PORTAL	SOMOS HUB	DEFINITION
Resp Org	Resp Org	A Responsible Organization (Resp Org) associated with TFNRegistry services and the Tenant.
Role	Role	A named set of permissions for Somos Hub or a subscribed product.
Resp Org ID	Scope	The Resp Org ID(s) on whose behalf a TFNRegistry related role may act.
Company	Tenant	Your Resp Org's account with Somos, including shared product subscriptions and organization data.
Company	Home Tenant	The Tenant to which your user account belongs.
Company	Current Tenant	The Tenant whose data you are currently viewing and managing which may be another Resp Org if Acting As permissions have been established.

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