

Contacts

Overview

Contacts in CE One Source are **WordPress user accounts** on the subsite (residents, building admins, staff, subcontractors). The **All Contacts** area lists these users; staff use it to register new people, open a contact profile, and manage related records (units, relationships, pets, vehicles, addresses, preferences, and more depending on enabled features and roles).

Access is role- and capability-based (for example `client_admin` and module flags). Some sites use a **Plan Warrantee** variant of the contacts UI.

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How to Create

A directory of important contacts, including staff, departments, and external service providers. This can help guests and staff quickly find and communicate with the right people.

Please find attached the video for the **Contacts/Accounts**.

- **All Contacts** - Here you can view all user logins for contacts, displaying full names, email addresses, status, date of birth and contact type added. You also have the option to view or edit a contact's profile by selecting the three-dot icon under **"Actions."**

A **"New Contact"** button is also available for adding new contacts to the system. By clicking this button, users can input the necessary information to register and manage additional contacts.

It can also be categorized based on **Residents, Resources, Staff, and Building Admin.**

The screenshot shows the Pacific Vista Intranet Dashboard. The left sidebar contains a navigation menu with 'Contacts' highlighted. The main content area is titled 'ALL CONTACTS' and features a search bar, a filter dropdown set to 'All', and a '+ New Contact' button. Below the header, there are tabs for 'Residents', 'Resources', 'Staff', and 'Building Admin', with 'Residents' selected. A table displays a list of contacts with the following columns: USER LOGIN, FIRST NAME, LAST NAME, EMAIL, DATE OF BIRTH, CONTACT TYPE, and ACTIONS. The table contains 10 rows of contact data.

USER LOGIN	FIRST NAME	LAST NAME	EMAIL	DATE OF BIRTH	CONTACT TYPE	ACTIONS
mykatakawara	Myka	Toguchi	associate@parklanealamoana.com	March 22, 1968	Residents	
olivia.black	Olivia	Black	Olivia.Black@ceonesource.com	March 05, 2015	Owner	
james.black	James	Black	James.Black@ceonesource.com	March 01, 2011	Owner	
sophia.black	Sophia	Black	Sophia.Black@ceonesource.com	August 15, 2017	Owner	
jeff.black	Jeff	Black	Jeff.Black@ceonesource.com	December 27, 2013	Owner	
jennifer.black	Jennifer	Black	Jennifer.Black@ceonesource.com	July 19, 1997	Owner	
william.black	William	Black	William.Black@ceonesource.com	December 4, 1998	Owner	
emma.red	Emma	Red	Emma.Red@ceonesource.com	March 04, 2015	Owner	
liam.red	Liam	Red	Liam.Red@ceonesource.com	January 07, 2014	Owner	
bella.red	Bella	Red	Bella.Red@ceonesource.com	November 13, 2012	Owner	

After completing all required details, click **"Register."**

New Contact

USERNAME*

EMAIL ADDRESS*

FIRST NAME*

LAST NAME*

ROLE

Resident User

Register

How to Update

1. From **All Contacts**, locate the person (search, filters, or pagination as provided).
2. Open their **profile / edit** contact view.
3. Update core user fields (name, email, role-related settings) and any linked sections (units, relationships, pets, vehicles, preferences, resources for subcontractors, etc.) using the tabs or modals your site exposes.

Changes are saved through the theme's edit-contact handlers and AJAX endpoints where applicable; always use Save / submit actions shown on the form.

Basic field information (New Contact modal)

Field label (UI)	Purpose
Username	Login identifier; must be unique.
First Name	Given name (required).
Last Name	Family name (required).
Email Address	Primary or alternate contact email depending on site rules.
Role	Resident User, Building Admin, Subcontractor, Staff User.

After creation, **unit assignment**, **owner vs resident**, and other data live on **Units** and profile subsections—not on this minimal registration form alone.