

Adding A New Contact to your Company's Citrix Account



What's in this Guide?

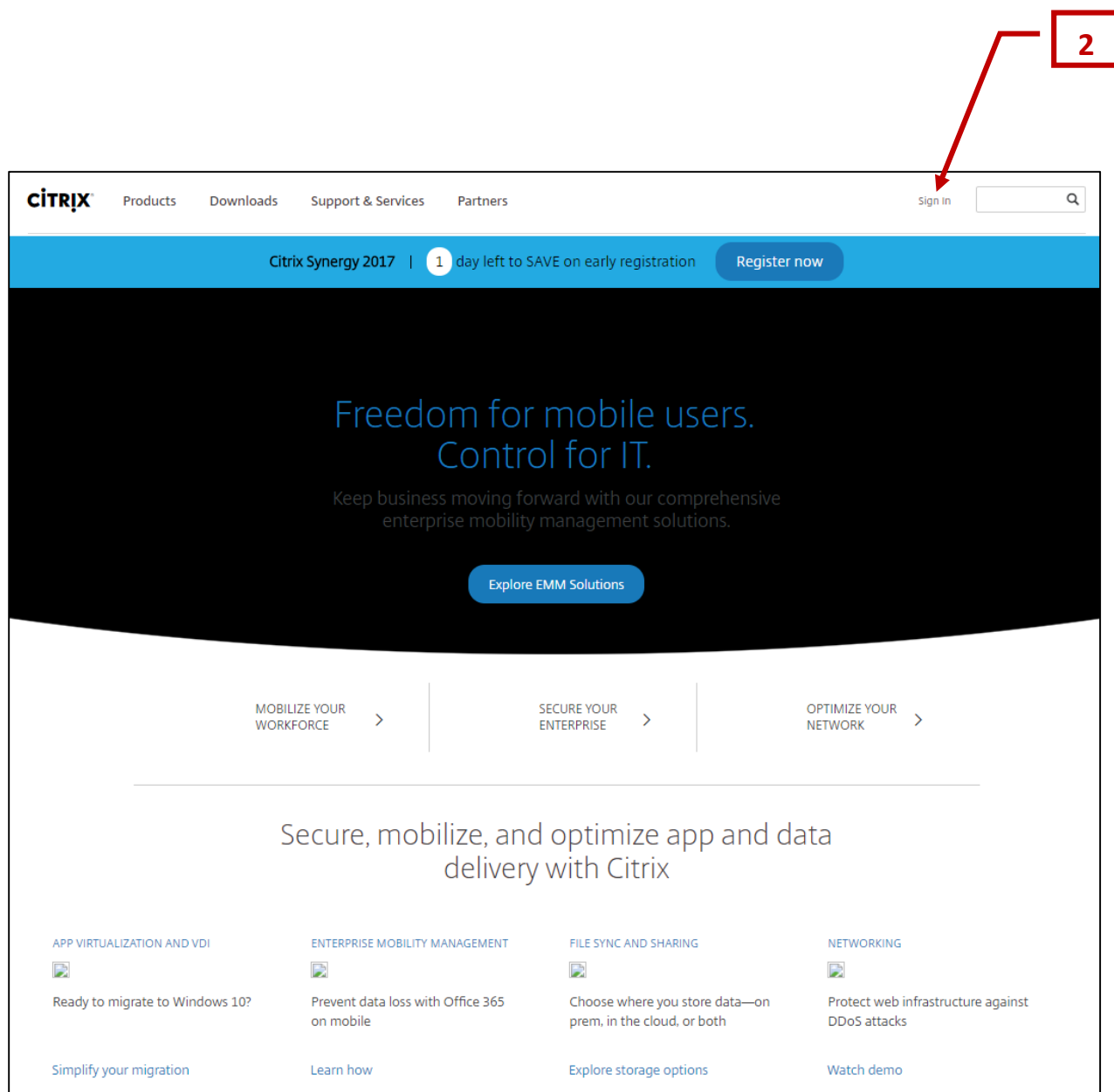
This guide provides step-by-step instructions for an individual to add a new contact to its organization's account on Citrix.com.

The steps below are for an individual who has an existing Citrix account. See the guide titled **Creating a Citrix Account** for instructions on how to create your Citrix account. An authorized Citrix Partner can add a new contact to your organization's account for you. For additional assistance with either establishing a Citrix account or adding a new contact, please contact an authorized Citrix Partner. Locate a partner at www.Citrix.com/Partners/Locator.

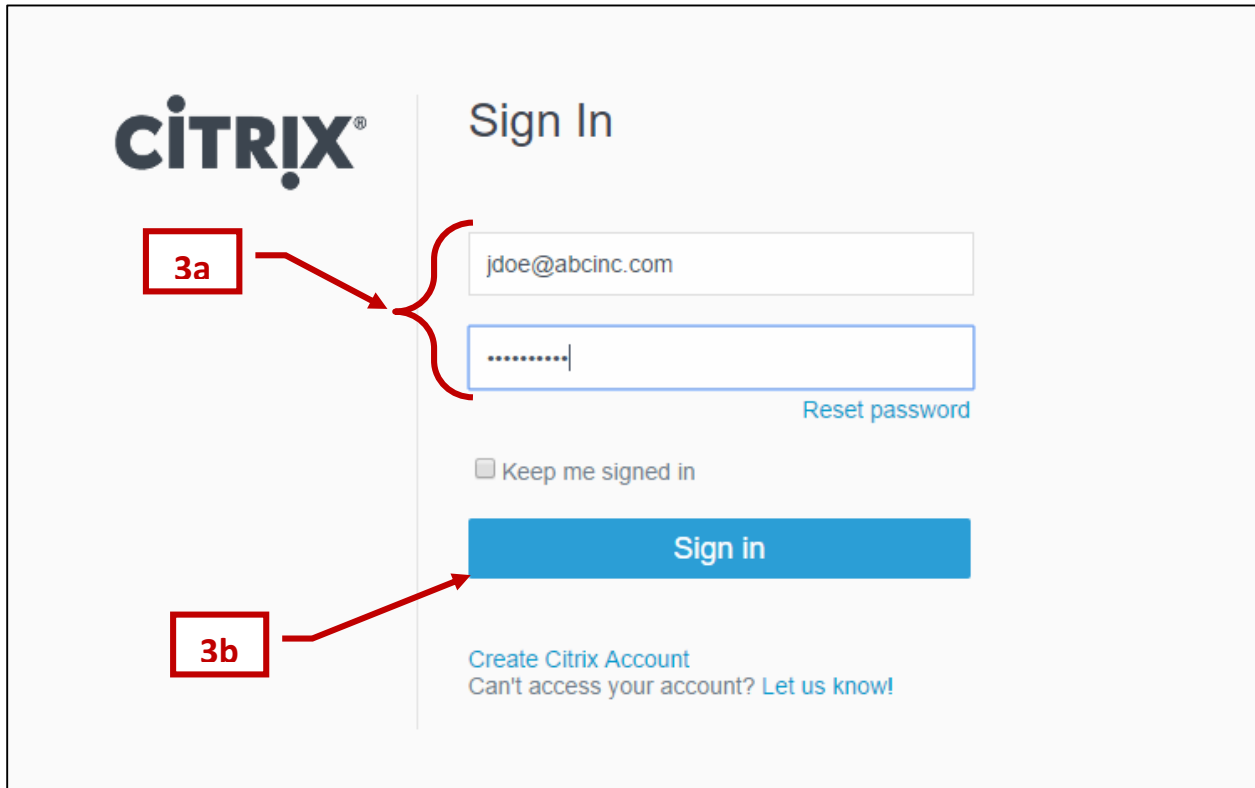
Why add a new Contact?

Adding a new contact to your organization's account is one of the easiest methods of extending your Citrix discount and benefits across your organization while increasing the opportunities for other departments and affiliates to increase your discount and benefits.

1. Go to www.Citrix.com.
2. Click **Sign In**.



3. To sign into Citrix.com:
 - a. Enter your User name and Password.
 - b. Click **Sign In**.



The image shows a screenshot of the Citrix Sign In page. The Citrix logo is on the left. The page title is "Sign In". There are two input fields: the first contains "jdoe@abcinc.com" and the second contains ".....". A red box labeled "3a" has an arrow pointing to both input fields. Below the password field is a "Reset password" link. There is a checkbox labeled "Keep me signed in". A blue "Sign in" button is present. A red box labeled "3b" has an arrow pointing to the "Sign in" button. Below the button are links for "Create Citrix Account" and "Can't access your account? Let us know!".

4. Click **Company Information and Contacts**.

The screenshot shows the Citrix user dashboard. At the top, there is a navigation bar with the Citrix logo and links for Products, Downloads, Support & Services, and Partners. A search bar and a 'Sign Out' link are also present. Below this is a blue 'Dashboard' header. On the left is a vertical menu with various options. A red box with the number '4' is placed over the 'Company Information and Contacts' menu item, with a red arrow pointing to it. The main content area shows a 'Profile Summary' for Robert Smith, a green status bar indicating everything is up to date, and three promotional cards for Lifecycle Management, Synergy 2017 registration, and Citrix Summit '17. At the bottom, there is a list of links for support cases and a 'View the Step-by-Step Renewal Guide' link with an accompanying image.

Navigation Bar: Products Downloads Support & Services Partners Sign Out [Search]

Dashboard Header: Dashboard

Left Menu: My Account, Update My Profile, **Company Information and Contacts**, Administer Company User Access, All Licensing Tools, Appliance Evaluation Agreement (AEA), Invoices, Licensing Program Registration, My Certification Manager, Previews/Betas - License Retrieval, Renew and Manage Maintenance Programs, Upgrade My Products, View Executed Agreements, View Non-Disclosure Agreement, Company Information and Contacts (New), Update My Profile (New)

Profile Summary: Profile Summary | edit profile
Robert Smith • ABC Ltd.
User ID: xxxyyzzz (ID: 51343334)

Status Bar: Everything is up to date! No actions required.

Promotional Cards:
- **citrix Lifecycle Management:** Simplify deployment and on-going management of Citrix workloads. Try now
- **Synergy 2017 registration is open—save \$700 before December 31.** Register now
- **citrix Summit '17:** Harness the power of cloud and win: find out how at Summit 2017. Preview Keynotes

Support Links:
• Create/View Support Cases (test) [↗](#)
• Create/View Support Cases (preprod) [↗](#)
• Create/View Support Cases (staging) [↗](#)
• Downloads [↗](#)
• Support Forums [↗](#)

Renewal Guide: View the Step-by-Step Renewal Guide [↗](#)

5. Click the **Add Contact** tab.

The screenshot shows the Citrix portal interface. At the top, there is a navigation bar with the Citrix logo and links for Products, Downloads, Support & Services, and Partners. A search bar and a Sign Out button are also present. Below this is a blue header for 'Company Information and Contacts'. On the left, a sidebar menu lists various user management and licensing tools. The main content area has a sub-header with tabs: 'Update/Edit Contacts', 'Add Contact', 'Remove Contact', 'Name & Phone', and 'Addresses'. The 'Add Contact' tab is selected and highlighted. Below the tabs, there is a section titled 'Update an Existing Contact' with a 'PREPROD' label. A message asks the user to select a contact to update. There are two radio buttons: 'Current Contact(s)' (selected) and 'Former Contact(s)'. Below this is a table with the following data:

Contact Name	Phone	Status	Email Address
<input type="checkbox"/> Sarah Green	44-1753-278200	Current	sgreen@abcltd.com
<input type="checkbox"/> Robert Smith	44-1753-276200	Current	rsmith@abcltd.com

Below the table is a 'Continue' button with a dropdown arrow.

- To identify your new contact, add information in all required fields indicated by an asterisk (*).
- When all information has been entered, click **Continue**.

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CITRIX Products Downloads Support & Services Partners Sign Out

Company Information and Contacts

Update/Edit Contacts Add Contact Remove Contact Name & Phone Addresses

Add a New Contact^{PREPROD}

To add a new contact to your company, Please enter the following information and then click on Continue.
*Required information is followed by an asterisk.

Contact Data

Job Level: Assistant
Department: Executive Office / Administration
Is Restricted:
First Name: Kevin
Last Name: * Brovn
Address: * 29 Eastbourne Terrace Floor 16
Country: * United Kingdom
State or Province: London
City: * London
ZIP/Postal Code: * W2 6LE
Email Address: * kbrown@abcitd.com
Email Format Preference: HTML
Preferred Language: * English (US)
Phone country Code: 44
Phone: 1753 276200
(Area code) (Phone number)
Fax Country Code:
Fax:

Citrix provides periodic product information. Please check all boxes that indicate how you would like to receive this information:
It is OK for Citrix to call me. Yes No
It is OK for Citrix to mail me. Yes No
It is OK for Citrix to email me. Yes No
It is OK for Citrix to contact me for customer surveys. Yes No
 Please do not send me any Citrix promotional information.

Continue

8. When the screen displays the message below, you have finished adding a new contact.
9. You can perform another function by pointing to and clicking the desired link.
10. If you are finished click Sign Out to log out of your account.

The screenshot shows the Citrix 'Company Information and Contacts' page. The page title is 'Company Information and Contacts'. The navigation bar includes 'Products', 'Downloads', 'Support & Services', and 'Partners'. A 'Sign out' link is visible in the top right corner. The main content area is titled 'Add a New Contact' and displays a success message: 'Contact with login has been added to your company. The new contact has been emailed with the login information.' Below the message is a form for adding a new contact, with fields for Job Level, Department, Is Restricted, First Name, Last Name, Address, Country, State/Province, City, ZIP/Postal Code, Email Address, Email Format Preference, Preferred Language, Phone Country Code, Phone, Fax Country Code, and Fax. A 'Continue' button is at the bottom of the form. A sidebar on the left contains various navigation links, including 'My Account', 'Update My Profile', 'Company Information and Contacts', 'Administer Company User Access', 'All Licensing Tools', 'Appliance Evaluation Agreement (AEA)', 'Invoices', 'Licensing Program Registration', 'My Certification Manager', 'Previews/Betas - License Retrieval', 'Renew and Manage Maintenance Programs', 'Upgrade My Products', 'View Executed Agreements', 'View Non-Disclosure Agreement', 'Company Information and Contacts (New)', and 'Update My Profile (New)'. Red boxes and arrows highlight the success message (8), the 'Sign out' link (10), and the 'Continue' button (9).

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Contact with login has been added to your company. The new contact has been emailed with the login information.

Continue