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How can we help?

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Contacts Overview

🕒 Jun 7, 2022 · Knowledge

PERMISSIONS

Account Owners have full access to manage both Contacts and Users.

Administrators have full access to manage Contacts, and may be given separate [permission \(/s/article/User-Roles-And-Permissions\)](#) to **Manage Users & Roles**.

Regular Users may be granted access via **Role** to **Create, Edit, View** and/or **Archive/Delete** Contacts, but cannot manage Users.

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Contacts are people your organization does business with or employs. Contacts aren't able to log in to Fleetio, but can be given that access (enable them as users). This distinction helps keep your information secure because you don't have to give everyone access to your Fleetio data. You also don't have to manage a contact's permissions.

This article covers adding and managing contacts, adding renewal reminders such as certification renewals, and how to access reports to get the most of your contact data.

IMPORTANT: Contacts and **Users** serve separate functions in Fleetio. Need a refresher? Check out the [Contacts vs. Users Explained \(/s/article/Contacts-VS-Users-Explained\)](/s/article/Contacts-VS-Users-Explained) article. **Vendors** are also separate in Fleetio. Vendors should be used for companies you wish to associate with Service Entries, Fuel Entries, Work Orders and Parts. Learn more in the [Vendor Overview \(/s/article/Vendor-Overview\)](/s/article/Vendor-Overview) article.

Contact Classifications

There are three contact classifications in Fleetio: **Operators**, **Technicians**, and **Employees**. A contact can be just one or all three; it's up to you.

- Operator - the contact can be assigned to vehicles and equipment.
- Technician - the contact can be tied to labor entries on Work Orders. Work Orders and technician classifications are only available for [Fleetio Advanced Plans \(https://www.fleetio.com/manage/pricing\)](https://www.fleetio.com/manage/pricing).
- Employee - the contact is identified as an employee of your organization. This is not required to enable user access, but can help with searching and filtering.

NOTE: In most circumstances, a Contact can only be assigned to a Vehicle if the Contact has Operator contact classification. An exception to this requirement exists in the case of an assignment which is done via inspection workflow. Since this is an automated process on Fleetio Go, we **OVERRIDE** the requirement; a contact may be assigned to a vehicle via inspection workflow even if they are not an operator.

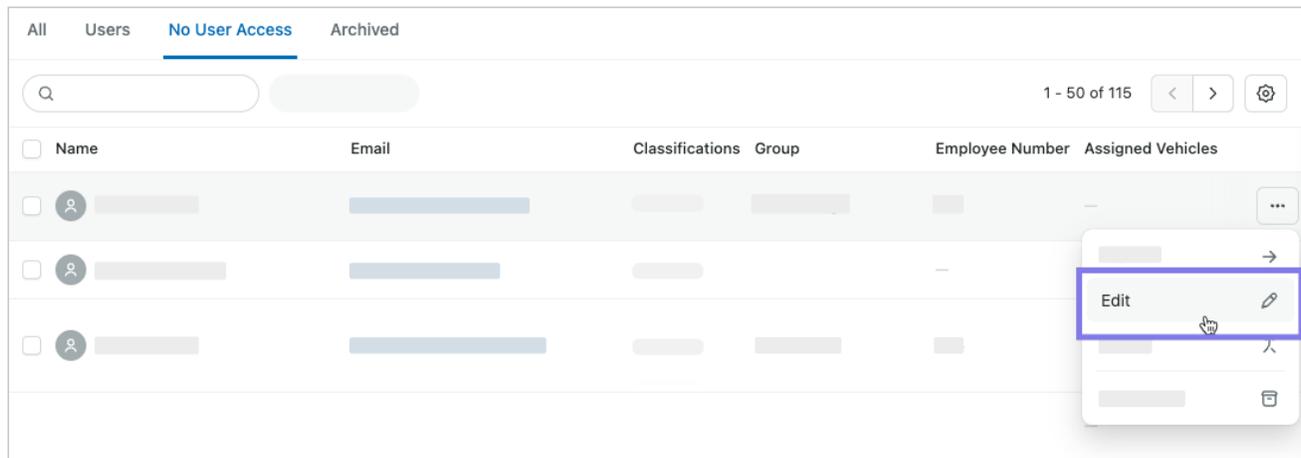
Contacts at a Glance

View contact information in the Contact List and Contact Details.

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Contacts List

The Contacts list separates users (contacts with user access) and contacts. Here, you can filter and search based on user status (whether they're active, an account invite has been sent, and more), type, role, and more. Contacts are organized in rows, and you can select several or all contacts to get actions such as updating classifications and groups. You can also edit a single contact by selecting the  menu for any row and selecting **Edit**.

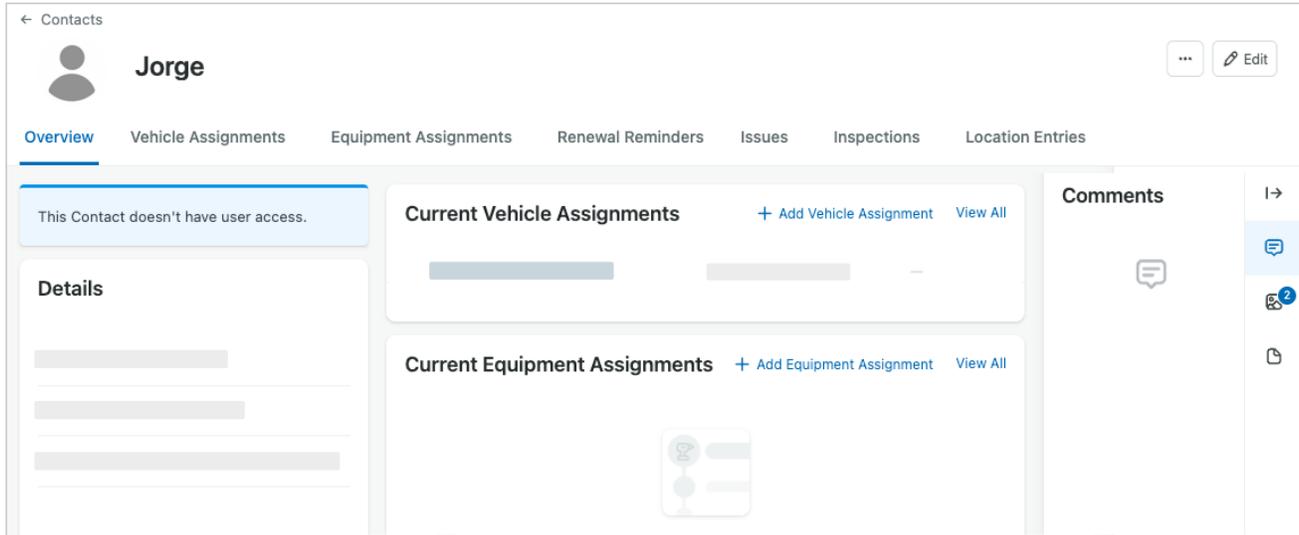


NOTE: Contacts can be given user access from the Contacts List by selecting the checkboxes for the applicable users, then selecting the Actions drop-down menu and Enable User Access. Contacts must have a valid email address.

Contact Details

The Contact Details screen is the main view for a contact. The Overview shows any active asset, Work Order (if applicable), and Issue assignments, as well as quick links to add an assignment. View any past assignments or records tied to the contact by utilizing the tabs near the top of the screen. Finally, expand the photos, comments, and documents panel to start a conversation with a contact or add photos of

contracts and agreements.



Manage Contacts

To add a contact, select **Contacts** from the left sidebar menu, then either:

- Select **+ Add Contact** to add a single contact.
- Select the **More Actions** menu on the top right of the screen to import contacts from a spreadsheet.

There is an option to add multiple contacts in Fleetio, however contacts added this way will have user access.

Add an Individual Contact

The only required field for a new Contact is a **First Name**. However, it's best to fill out as much detail as possible.

- **Basic Information** - Name, Group, Email (for Notifications), and Type (Operator, Technician, and/or Employee). Upload a Photo.
- **User Management** - Choose if you want the contact to be a user and be able to log in to Fleetio, or have no access.
- **Contact Information** - Phone number and address information.
- **Personal Information** - Job Title, Date of Birth, Employee Number (this needs to be unique for each contact), and Start/Leave Dates. This section also includes operator details, such as a license number, and a technician hourly rate.
- **Custom Fields** - This section only displays if [Custom Fields \(/s/article/Custom-Fields-Overview\)](/s/article/Custom-Fields-Overview) have been defined for the Contact Record type.
- **SAML** - Links a contact with a given [SAML ID \(/s/article/Single-Sign-On-SSO-SAML-Authentication\)](/s/article/Single-Sign-On-SSO-SAML-Authentication).

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Import Contacts

You can import your contacts instead of manually adding them in Fleetio. Check how to format your spreadsheet data with the [Data Import Overview \(/s/article/Data-Import-Overview\)](/s/article/Data-Import-Overview) and [Contacts Import Guide \(/s/article/Contact-Import-Guide\)](/s/article/Contact-Import-Guide) articles.

Archive or Delete Contacts

If you no longer want a contact to appear as active in Fleetio, you can archive them. Archived contacts are still viewable internally and can be restored. Deleting a contact removes their details from your account. You can only delete contacts that do not have any records associated with them, such as a Work Order.

TIP: Learn more in the [Archive, Restore or Delete Contacts \(/s/article/Archive-Restore-Or-Delete-Contacts\)](/s/article/Archive-Restore-Or-Delete-Contacts) article.

Contact Renewal Reminders and Types

Use **Contact Renewal Reminders** for important dates related to a contact such as certification expirations, license renewals, and inspection deadlines. Contact Renewal Types can be customized in **Account Settings**.

TIP: Learn more in the [Contact Renewal Types \(/s/article/Contact-Renewal-Types\)](/s/article/Contact-Renewal-Types) and [Contact Renewal Reminders \(/s/article/Contact-Renewal-Reminders\)](/s/article/Contact-Renewal-Reminders) articles.

Contacts Reports

There are two reports available for contacts: the Contact List report and Contact Renewal Reminders report.

The main difference between these reports and the contacts and renewal reminders lists is after applying filters, you can save a report and have it sent on a schedule to Fleetio users so they don't have to manually keep up with any data.

Select **Reports** from the left sidebar menu to access available reports. Click the desired **Report** title and apply any filters to refine your data.

Reports / Contacts Report Export CSV Print

Filters 2 filters applied Clear all 1-4 of 4 < >

Name ▲	Group	Email	Employee Number	Job Title	Start Date	Leave Date	Date of Birth	Operator?	License Number	License Class	License Stat...
Aaron Lawson	Baltimore	Aaron.Lawson.VP@fleetio.com	#533		03/14/2013	10/13/2014	04/27/1986	No	3QJSR05ZGZ76XQ	Class A	NE
Adam Price	Baltimore	Adam.Price@fleetio.com	#217	Staff Scientist	12/10/2008		01/17/1962	Yes	G8U8POQ9WQZKHOQ	Class C	AZ

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[Contacts, Users, and Vendors](#)

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Related Articles

[Archive, Restore or Delete Contacts \(/s/article/Archive-Restore-Or-Delete-Contacts\)](/s/article/Archive-Restore-Or-Delete-Contacts)

[Contacts vs. Users Explained \(/s/article/Contacts-VS-Users-Explained\)](/s/article/Contacts-VS-Users-Explained)

[Contact Renewal Reminders \(/s/article/Contact-Renewal-Reminders\)](/s/article/Contact-Renewal-Reminders)

[Issues Overview \(/s/article/Issues-Overview\)](/s/article/Issues-Overview)

[Contacts in Fleetio Go \(/s/article/Contacts-In-Fleetio-Go\)](/s/article/Contacts-In-Fleetio-Go)

[Merge Contacts \(/s/article/Merge-Contacts\)](/s/article/Merge-Contacts)

[Vehicle Assignment Overview \(/s/article/Vehicle-Assignment-Overview\)](/s/article/Vehicle-Assignment-Overview)

[Service Reminders Overview \(/s/article/Service-Reminders-Overview\)](/s/article/Service-Reminders-Overview)

[Enable User Access for Contacts \(/s/article/Enable-User-Access-For-Contacts\)](/s/article/Enable-User-Access-For-Contacts)

[Work Order Overview \(/s/article/Work-Order-Overview\)](/s/article/Work-Order-Overview)

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Still need help?

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