

REBEL SOFTWARE · RebelPSA

One Contact, Multiple Companies

A technician guide and customer service Q&A for handling a person linked to more than one company.

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1. About This Guide

This guide covers how RebelPSA handles a person who is associated with more than one company — a common real-world situation for consultants, contractors, board members, and people who work across a parent company and its subsidiaries. It's written to double as both a technician reference and a Q&A resource your customer service team can use when a customer asks a question about how their contact relationships work.

Important. *A few concepts in this area have very similar names but are genuinely different features. Section 3 exists specifically to prevent that confusion — read it before relying on this guide for a customer-facing answer.*

2. The Core Concept

In RebelPSA, a Contact (a person) and a Company (an organization) are linked through a relationship record — not a single fixed field. That means the same person can be linked to more than one company at the same time, each link carrying its own role and its own primary/VIP flags, independent of any other company that same person is linked to.

This shows up in two mirrored places, since the relationship can be managed from either side:

- From the Contact's own record, under a Relationships tab, showing every company that contact is linked to
- From the Company's own record, showing every contact linked to that company

There's exactly one link record per contact–company pair — you can't link the same two records together twice. Trying to re-add an already-linked pair is silently ignored rather than creating a duplicate or throwing an error.

3. Two Things That Sound Alike But Aren't

RebelPSA has separate concepts that all use similar-sounding labels. Confusing them is an easy mistake, and it's exactly the kind of thing a customer might ask about in a way that sounds like it's the same topic when it isn't.

Contact–Company Role vs. Company Relationship Role

	Contact–Company Role	Company Relationship Role
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What it classifies	The person's job at that specific company	The company itself
Seeded values	Decision Maker, Technical Contact, Billing, Executive, Former Employee	Customer, Vendor, Prospect, Lead, Partner
How many at once	One role per contact–company link	A company can carry several relationship roles simultaneously
Where it's managed	Contact/Company Relationships screens	Company's own Identity panel, as chips
Admin configuration	Separate admin settings page for roles	A separate admin settings page for company relationship roles

Tip. If someone asks "what role is this person" — that's Contact–Company Role. If someone asks "is this company a customer or a vendor" — that's Company Relationship Role. They are stored in entirely separate tables and configured on entirely separate admin pages.

4. Linking a Contact to a Company

You can create the link from either side, and both paths lead to the same underlying record.

From the Contact's Record

- Open the contact and go to the Relationships tab.
- Choose Add Company.
- Search for and select the company.
- Optionally choose a Role from the list (Decision Maker, Technical Contact, Billing, Executive, Former Employee, or a custom role your organization has added).
- Optionally mark this as the contact's primary company.

Tip. VIP status is not offered on this screen. If a contact needs to be marked VIP for a specific company, that's set from the company side (see below).

From the Company's Record

- Open the company and go to its linked contacts section.
- Choose Link Existing (to connect an already-existing contact) or Add Contact (to create a brand-new contact already linked to this company).
- Search for and select the contact (if linking existing).
- Optionally choose a Role and mark as primary.

The company-side screen additionally shows a VIP column, and its edit-relationship option includes a specific "VIP for this company" toggle.

Other Ways a Link Gets Created

- The new-contact wizard can link one company when a contact is first created.
- A bulk "assign company" action can link a company across many selected contacts at once.
- The mobile app has its own company picker screen for linking on the go.

5. Primary Company: What It Actually Means

Important. *This is the single most important nuance in this whole feature: "primary company" is not a strictly enforced, always-exactly-one rule. Treat the explanation below as authoritative rather than assuming it behaves like a simple database constraint.*

The Primary flag is used in two different directions, and each direction only cleans up its own side:

- **Setting a primary from the Contact side** — "this is this contact's home company" — clears primary status on that same contact's other company links, so exactly one comes out primary for that contact.
- **Setting a primary from the Company side** — "this is this company's primary contact" — clears primary status on that same company's other linked contacts, so exactly one comes out primary for that company.

However, simply creating a new link and marking it primary at the moment of creation does not go through either cleanup step — so it is possible for a contact to end up with more than one company marked primary if that happens twice in a row. This is an edge case, not the normal day-to-day experience, but it's worth knowing if something looks inconsistent.

What marking a company as primary impacts:

- The company name shown on the contact's summary and in most contact list/search views
- Contact-level reports
- Which company's activity feeds a contact's help-desk metrics
- Portal invitations — which company a new portal user gets connected to

- Ticket creation -- as a fallback when nothing else determines the company (see Section 7)
- Inbound email resolution -- as one step in a longer fallback chain (see Section 7)

Tip. *If no company is marked primary at all, most of these simply fall back to whichever company link happens to come first or show blank rather than erroring.*

6. VIP: What It Does (and Doesn't) Do Today

A contact can be flagged VIP specifically in the context of one company — this is set from the company side, alongside the role and primary settings for that link.

Important. *Today, this flag is informational and display-only. It shows as a badge on the company's contact list, but it does not currently drive health scoring, alerting, dashboards, filtering, or any automatic ticket flag. It is a separate thing entirely from a ticket's own VIP flag — marking a contact VIP for a company does not automatically mark their tickets as VIP tickets.*

If a customer or colleague asks whether VIP status "does anything" beyond showing a badge, the honest answer today is: not yet.

7. Which Company Does a New Ticket Belong To?

This is the question most likely to come up in practice, and the answer depends entirely on how the ticket was created.

A Technician Creates the Ticket

- If the contact only has one company, it's selected automatically.
- If the contact has two or more companies, the technician sees a company picker and must choose — it does not silently default to the primary company.
- If a company is explicitly specified at creation (by whatever means), that explicit choice always wins over any automatic resolution.

An Email Creates the Ticket

Inbound email resolves the company through a fallback chain, through the order below:

- A company whose email domain matches the sender's domain.
- Among the contact's linked companies, whichever one's domain matches.
- The contact's primary company.
- If none of the above resolve, the ticket is treated as ambiguous — depending on your mailbox settings, it either goes to a system "Unassigned" company or is created without a company at all.

The Customer Creates the Ticket via the Portal

A portal ticket doesn't carry an explicit company on creation — it resolves the same way a technician-side fallback would: primary company first, otherwise the first linked company found.

Important. *A portal user is tied to exactly one company when they log in, but that specific company is not automatically forced onto a ticket they create. If a portal contact's primary company differs from the company their portal account is tied to, their ticket could resolve to a different company than the one they're logged into the portal as. This is an edge case worth flagging to a supervisor if you notice it happening.*

8. Not the Same Thing: Parent/Child Companies

RebelPSA separately supports Related, Parent, and Child relationships directly between two companies — for example, a holding company and its subsidiaries. This lives on the Company record's own "Related companies" section and has nothing to do with a person belonging to multiple companies.

Tip. *If a customer asks about "linking companies together," clarify whether they mean two organizations being related to each other (Parent/Child company relationships) or a specific person working across two organizations (the subject of this guide) — these are unrelated features that happen to get asked about in similar language.*

9. Merging Contacts: What Happens to Their Companies

When two duplicate Contact records are merged into one, their company associations are combined as follows:

- Any company linked to the duplicate (source) contact but not already linked to the surviving (target) contact is copied over, carrying the same role — always added as non-primary, regardless of whether it was primary on the source.
- VIP status is not carried over on a merge — a copied link always starts as not-VIP, even if it was VIP on the source contact.
- If both contacts were already linked to the same company, the surviving contact's existing role, primary, and VIP values win outright — there's no side-by-side comparison or manual review step for that conflict.

Tip. *If VIP status or primary-company accuracy matters for a specific relationship, it's worth double-checking those settings manually after merging two contacts who shared a company — the merge process doesn't flag or preserve them automatically.*

10. Ending a Relationship

Removing a contact–company link is a hard delete of that relationship record — there's no start/end date field and no soft-close that preserves the link in an "inactive" state automatically. Once removed, that specific connection is gone (though the contact and company records themselves are unaffected).

The one built-in way to preserve some memory of an ended relationship is the seeded Former Employee role — if you want a record that someone used to work at a company, set their role to Former Employee instead of removing the link outright. That's a manual choice, not something that happens automatically when someone's employment ends.

Tip. Removing a company from the Contact side logs an unlink event to that contact's activity timeline. Removing a contact from the Company side does not currently log an equivalent timeline entry.

11. Limits & Practical Considerations

There is no hard limit on how many companies a single contact can be linked to, or how many contacts a single company can have. In practice, both the contact's company list and the company's contact list load as a complete list rather than a paginated one, so an unusually large number of relationships could make that specific grid slower to work with — but there's no built-in cap that would block you from adding another link.

12. Customer Service Q&A

The questions below are phrased the way a customer or a colleague might ask them, with a direct answer for each.

“Can the same person be linked to more than one of our companies?”

Yes. A contact can be linked to as many companies as needed, and each link is independent with its own role and primary/VIP status.

“Why did my ticket end up under the wrong company?”

This depends on how the ticket was created. If a technician created it and the contact has multiple companies, they should have been prompted to pick one and you may need to double-check which one was chosen. If it came in by email, it will resolve by domain match first, then by the contact's primary company. If it came from the portal, it resolves to the contact's primary company by default. If the "wrong" company keeps happening, check which company is marked primary for that contact.

“Can I see all my companies in one view in the Customer Portal?”

Not currently. A portal login is tied to exactly one company at a time — there's no switcher between multiple companies in the portal. Someone who genuinely needs visibility into two companies' portal data

today would need a separate portal invitation for each one.

“What does the VIP flag actually change?”

Today, it's a visible badge on the company's contact list and nothing more — it doesn't currently affect ticket priority, alerting, or reporting.

“Someone left a company we work with — how do we update that?”

A technician can either remove the link entirely, or, if it's useful to keep a record that the person used to be associated with that company, change their role to Former Employee instead of deleting the relationship.

“Is there a limit to how many companies someone can be linked to?”

No hard limit exists today.

“We merged two duplicate contacts — will we lose any company relationships?”

No relationships are lost, but it's worth a manual check afterward: any VIP status is reset to off upon a merge, and if both contacts shared a company, the surviving contact's existing settings for that company are what's kept, without a prompt to compare the two.

13. Common Technician Workflows

Adding a consultant who works across two of your clients

- Open the contact (or create them if new) and go to Relationships.
- Add the first company with an appropriate role, and mark it primary if it's their main affiliation.
- Add the second company the same way, leaving it non-primary unless it should replace the first as primary.

Double-checking why a contact's ticket keeps landing on an unexpected company

- Open the contact's Relationships tab and check which company is currently marked primary.
- If the ticket came in by email, check whether the sending domain matches a different company than the one you expected.
- Correct the primary flag if that's the actual source of the mismatch, rather than assuming it's a bug.

Marking someone VIP for a specific company

- Open that company's record and find the contact in its linked contacts list.
- Edit the relationship and toggle VIP for this company.
- Remember this is a display flag only — it won't change ticket handling on its own.

14. Quick Reference & Glossary

Term	Meaning
Contact–Company Link	The relationship record connecting one contact to one company; exactly one per pair.
Contact–Company Role	What job the person does at that specific company (Decision Maker, Technical Contact, Billing, Executive, Former Employee, or a custom role).
Company Relationship Role	A separate concept classifying the company itself (Customer, Vendor, Prospect, Lead, Partner) — not the same as Contact–Company Role.
Contact Category	A fixed classification on the Contact record itself (Lead, Prospect, Vendor, Partner, Customer) — shares label names with Company Relationship Role but is a different field.
Primary Company	The one company link marked as a contact's (or a company's) main relationship — not strictly enforced as unique in every situation.
VIP (for this company)	A display-only badge on a specific contact–company link, with no functional effect elsewhere today.
Parent/Child Company	A separate company-to-company relationship (holding company and subsidiaries), unrelated to a person belonging to multiple companies.
Former Employee	A seeded Contact–Company Role used to preserve a record of an ended relationship instead of deleting the link.