Managing Contacts & Default Contacts

Keep the right people on every company record — and let Horizon address tenders, documents and notices to them automatically

Deep Space Horizon · Company Directory, Client Directory & Project Team · September 2026

1. What are default contacts?

Every company in your Directory — subcontractors, suppliers and clients — carries a list of **contacts**: the real people you deal with at that company. Any contact can be flagged as a **default contact** for one or more areas of Horizon. When Horizon needs to send something to that company and nobody has been picked by hand, it addresses the people flagged for that area.

Default type	Horizon uses it for
Tender	Tender package invitations and RFQs sent to the company
Delivery	Delivery-stage communications on live projects
Accounts	Claims, payment schedules and other accounts correspondence
Documents	Generated & sent documents and transmittals
Notices	Contractual notices
General	The company's everyday go-to person — the fallback when no specific default is set

It's a pool, not a single slot. Several contacts can be default for the same area — for example the estimator *and* the general manager can both be Tender defaults, and both will receive tender invitations. One contact can also hold several flags.

Per workspace. Default flags are your workspace's own settings. They never change the company's record for anyone else on Deep Space.

2. Where you'll see them

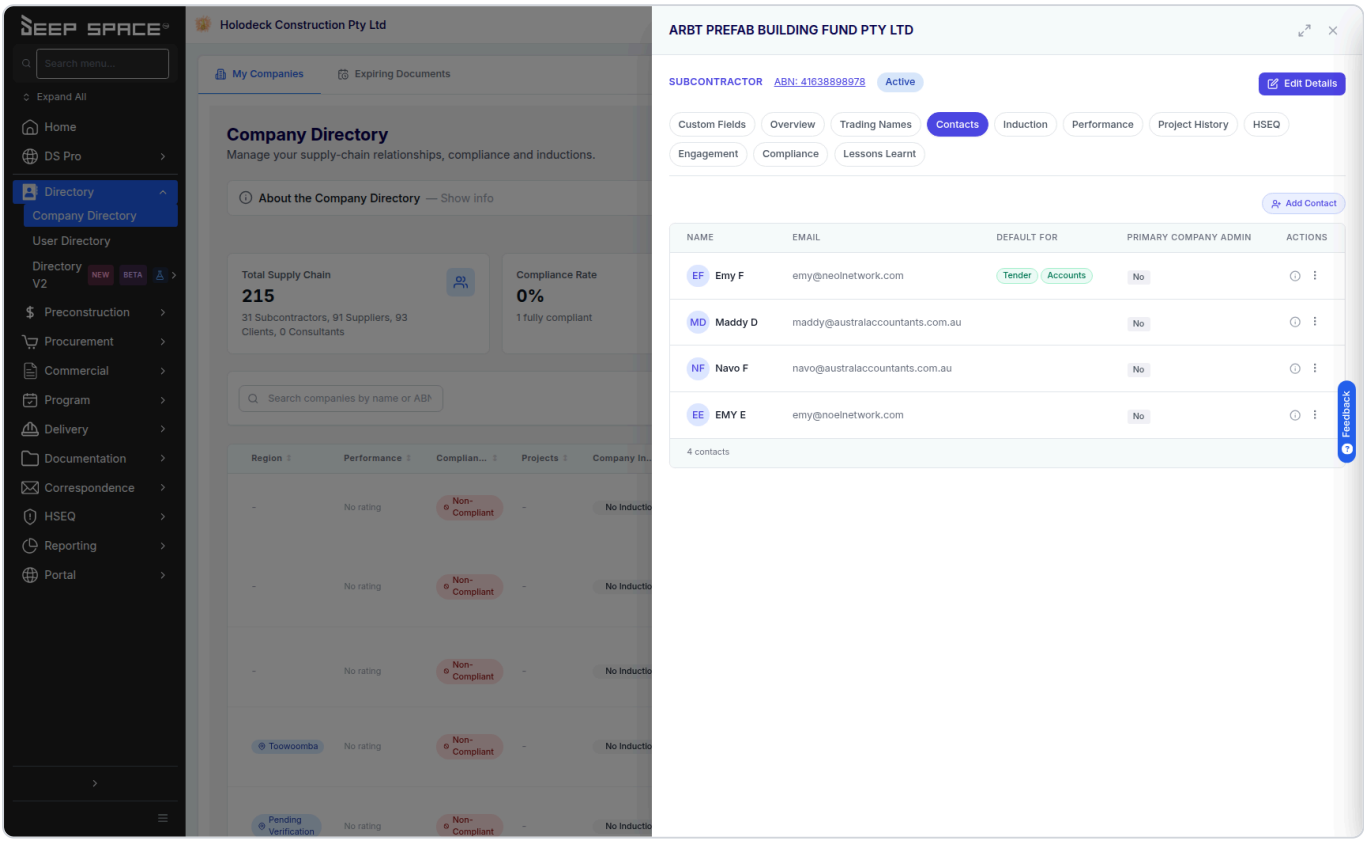
Default flags appear as green pills in a **Default For** column (or beside the contact's name) on every contact list:

- **Company Directory → a company → Contacts tab** — subcontractors and suppliers
- **Client Directory → a client → Contacts tab** — client-side contacts
- **Company Directory → Contacts view** — everyone at your connected companies, grouped by company
- **Project Settings → Team** — the project's supply-chain contact tables

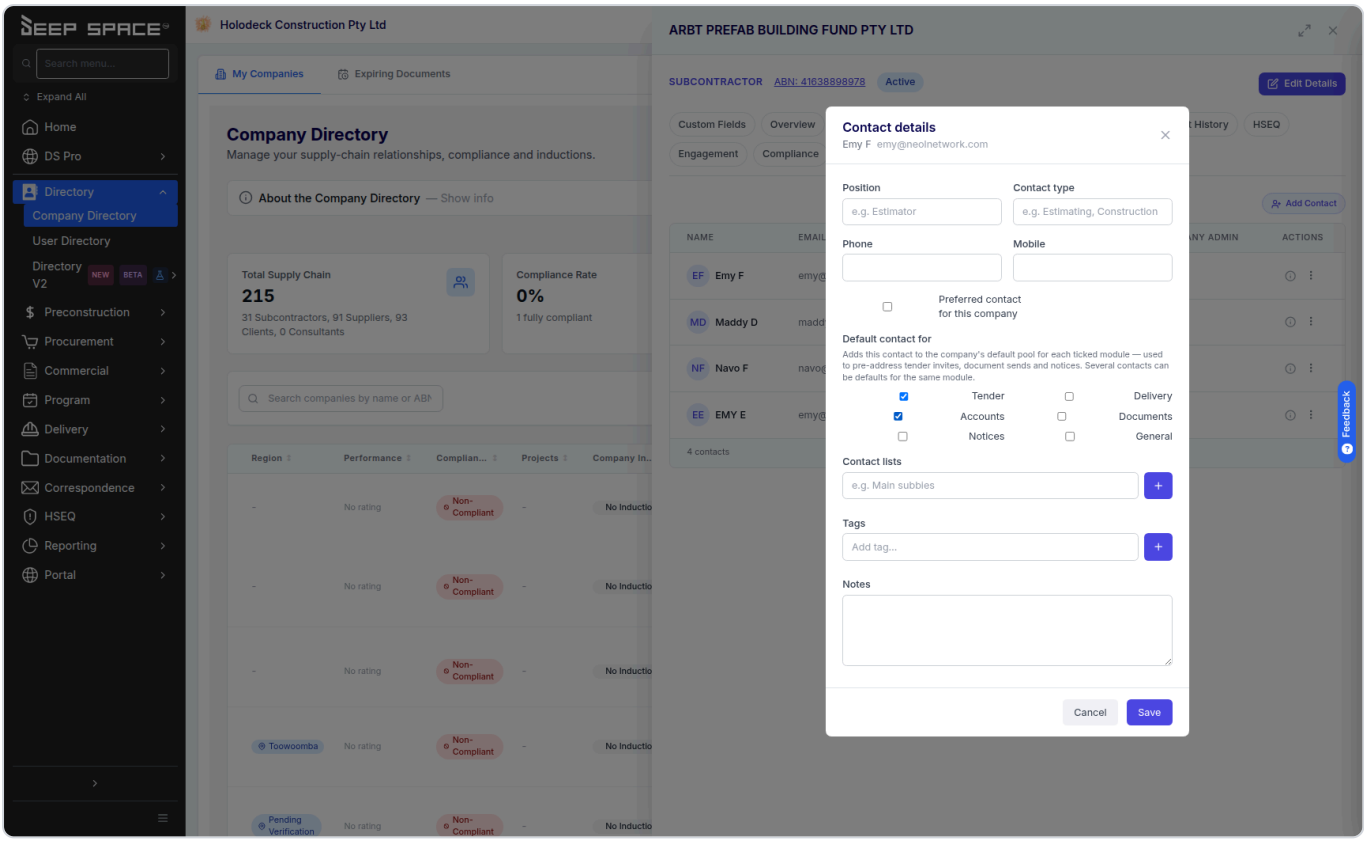
The pills are read-only on the tables. To change them, open the contact's details with the **(i)** button.

3. Setting a default contact (subcontractors & suppliers)

1. Open **Directory** → **Company Directory** and open the company (View company data).
2. Go to the **Contacts** tab. Each contact row shows its current **Default For** pills.
3. Click the **(i)** button on the contact, then **Edit**.
4. Under **Default contact for**, tick each area this person should be the default for — Tender, Delivery, Accounts, Documents, Notices, General — and **Save**.



The company Contacts tab — the Default For column shows each contact's flags.

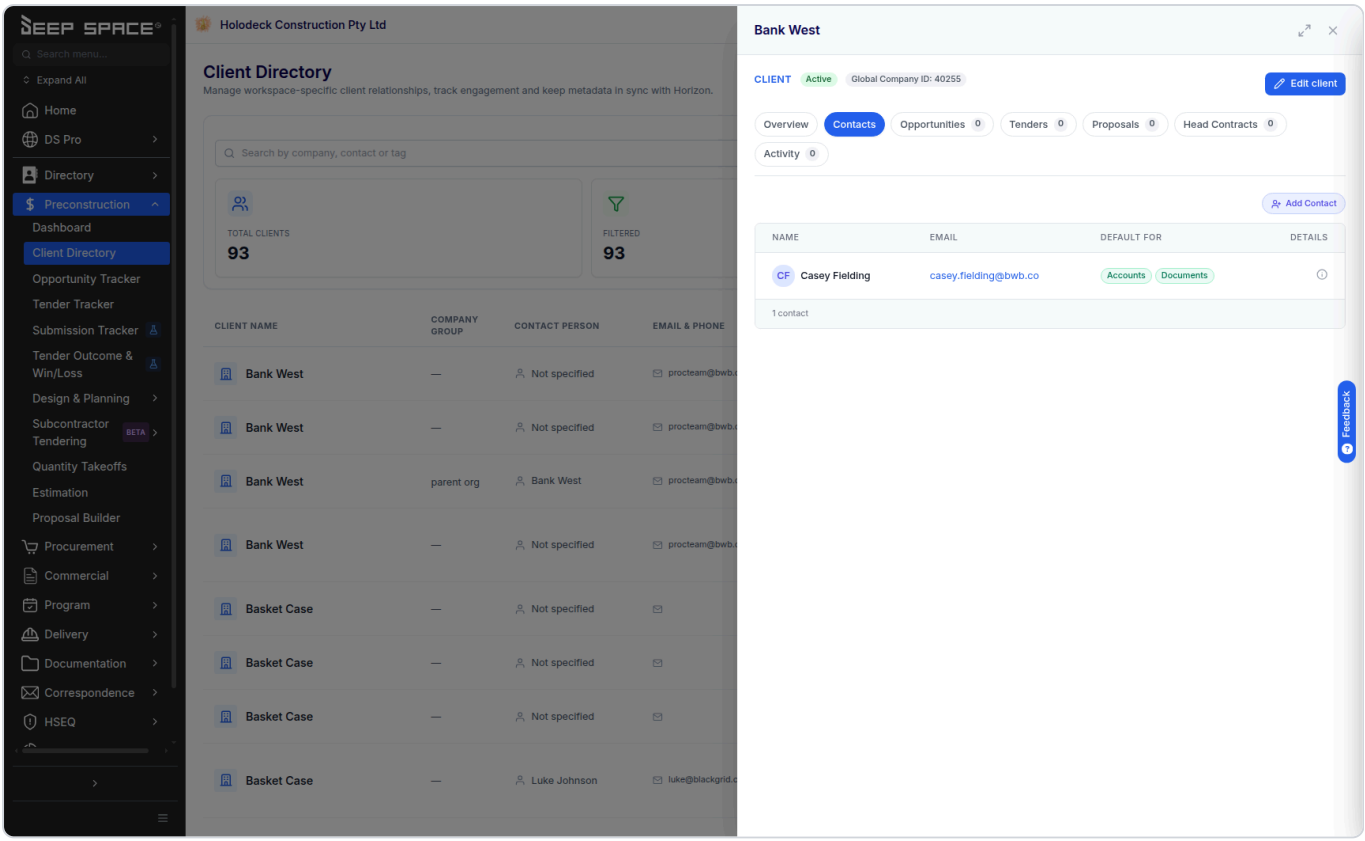


The contact details card — tick the areas this contact is the default for.

> **Tip:** the same card also holds the contact's position, phone numbers, contact lists, tags and notes — keep it current and every module benefits.

4. Client contacts

Clients work exactly the same way. Open **Directory** → **Client Directory**, open the client, and use its **Contacts** tab. Flag the person who should receive documents or accounts correspondence for that client.

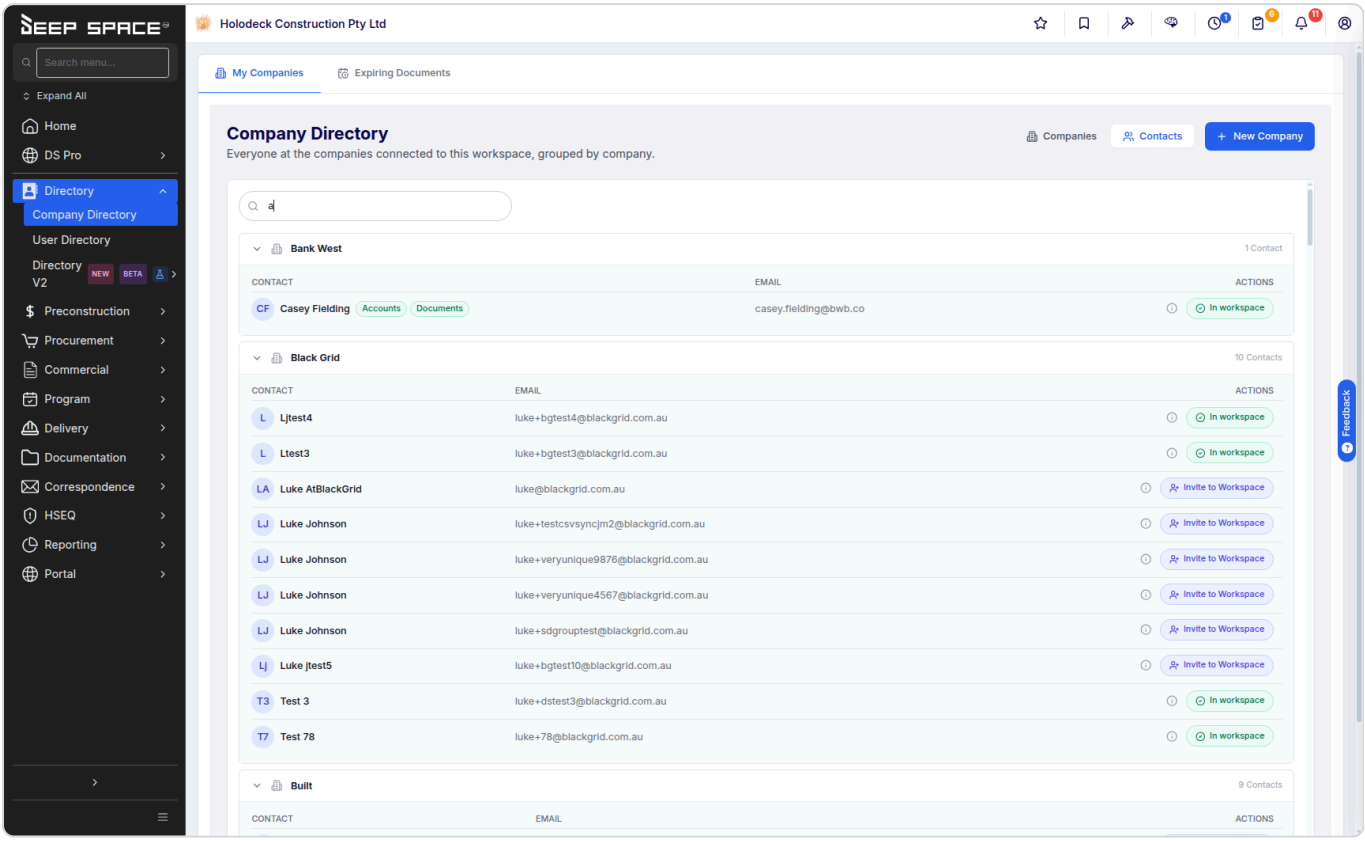


Client Directory → Contacts — the same pills and (i) card as the subcontractor side.

No Contacts tab on a client? A workspace-only client has no directory link to store contacts against. Link the client to its Company Directory record first, then the Contacts tab lights up.

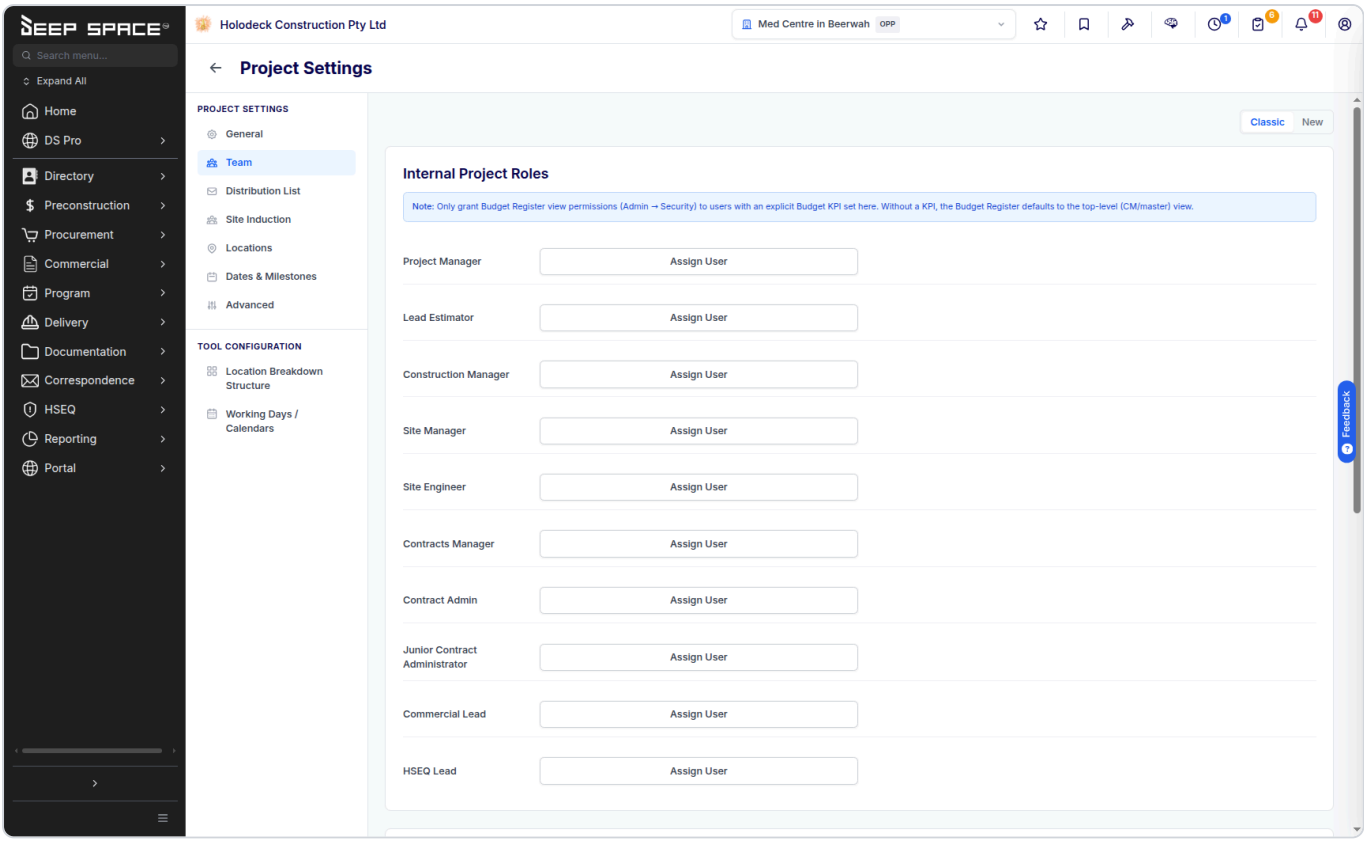
5. The Contacts view and Project Team

The **Company Directory → Contacts** tab lists everyone at your connected companies, grouped by company — default pills show right next to each name, so you can audit coverage at a glance. Use the search to check a single company or person.



Company Directory → Contacts — expand a company to see everyone and their default flags.

On a project, **Project Settings → Team** shows the same people in the project's supply-chain tables, with the (i) button opening the same contact card — so the details you keep in the Directory follow the company onto every project.



Project Settings → Team — company contact tables with the same (i) contact card.

6. How tender invitations pick their recipients

When you publish a tender package to a directory company, Horizon works down this list and stops at the first step that finds someone:

1. **The contact you nominated on the invite** — picking a person by hand always wins.
2. **The company's Tender defaults** (or, if none, its General defaults) — everyone flagged receives the invitation.
3. **The company's directory main contact email.**
4. **Every verified member of the company** — the last resort, so an invitation is never silently dropped. The invite screens warn you with an amber chip before this happens.

> **Seeing "⚠ all members" on an invite?** That company has no nominated person, no Tender/General default and no main contact on file. Set a default contact on its Contacts tab and the warning goes away for every future tender.

7. Notes

- Default flags never remove anyone's access — they only steer *addressing*. Company portal administration is a separate permission.
- Flags update live: save the contact card and the pills refresh immediately.

- Contacts don't need a Horizon login to be defaults — flag anyone on the company's contact list.
