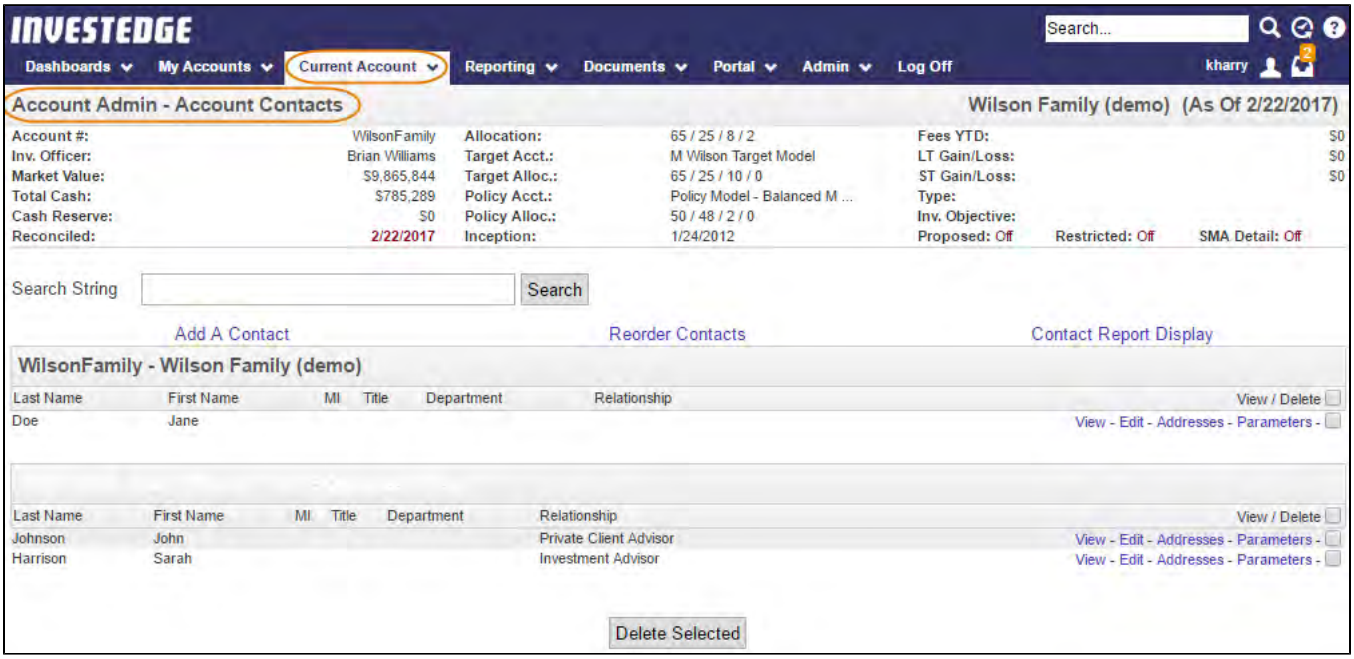
Account Admin > Account Contacts

The **Account Contacts** screen allows you to:

- Add **Contacts** to an **Account** (and view, edit, change addresses and change parameters)
- Order **Contacts**
- Include or exclude **Contacts** from **Reports**

> When viewing **Consolidated Accounts,** the screen lists contacts directly associated with the **Consolidated Account** first, then groups the **Contacts** associated to the **Sub-accounts** by **Sub-account.**

> You need to be assigned the **Accounts - Account Relationship Mgmt** user right to use this screen. Contact your administrator for further information.



Searching for a Contact

By default, the **Contacts** list is initially populated with the first 20 **Contacts** sorted by the last name. The list can be sorted in ascending or descending order by

clicking any of the column headings.

The search function enables the user to narrow the list or search for one specific **Contact**.

1. Enter all or part of a **Contact's Name**, **Title**, or **Department.**
2. Click the **Search** button.

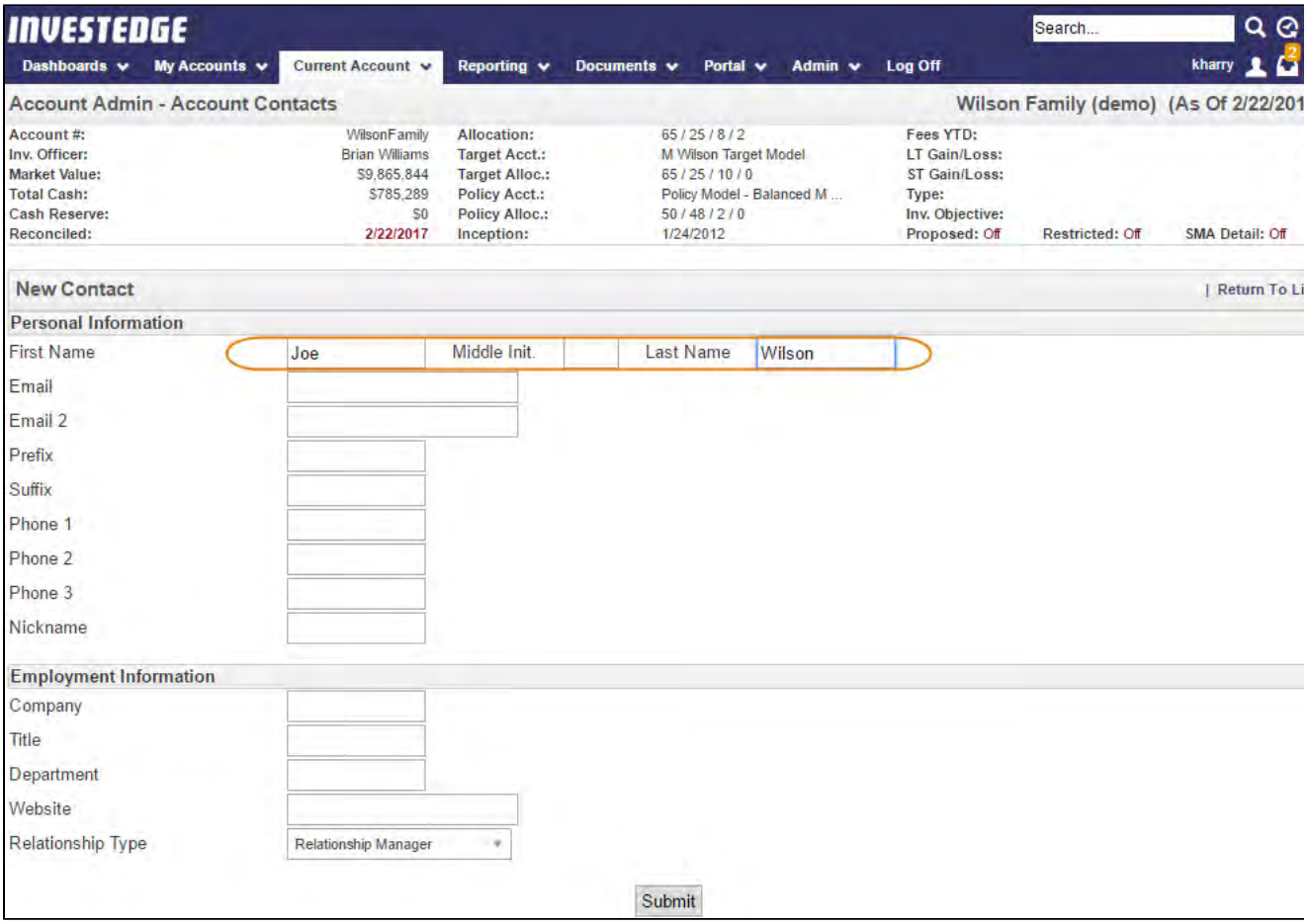
Adding a Contact

When adding a **Contact,** the **First** and **Last Name** are required fields. All personal and employment information is saved for that **Contact** as it relates to

the **Account** only. Click the **Submit** button after entering all of the contact's details. When adding a new **Contact,** the new **Contact** is placed last in the

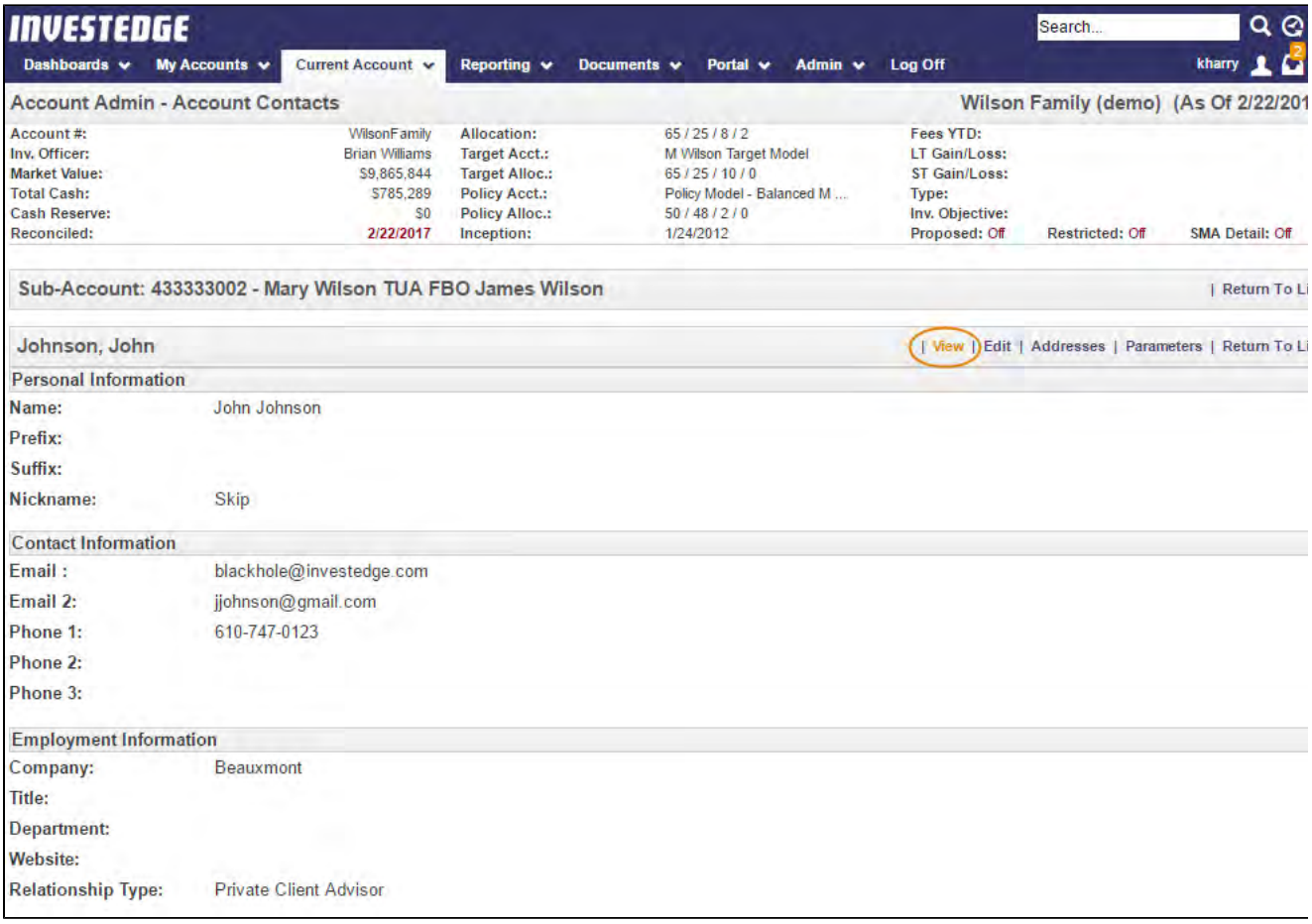
Report ordering and is excluded from displaying on **Reports.**

> **Relationship Types** have to be configured for your site. Please contact client services for further information.



Viewing Contact Details

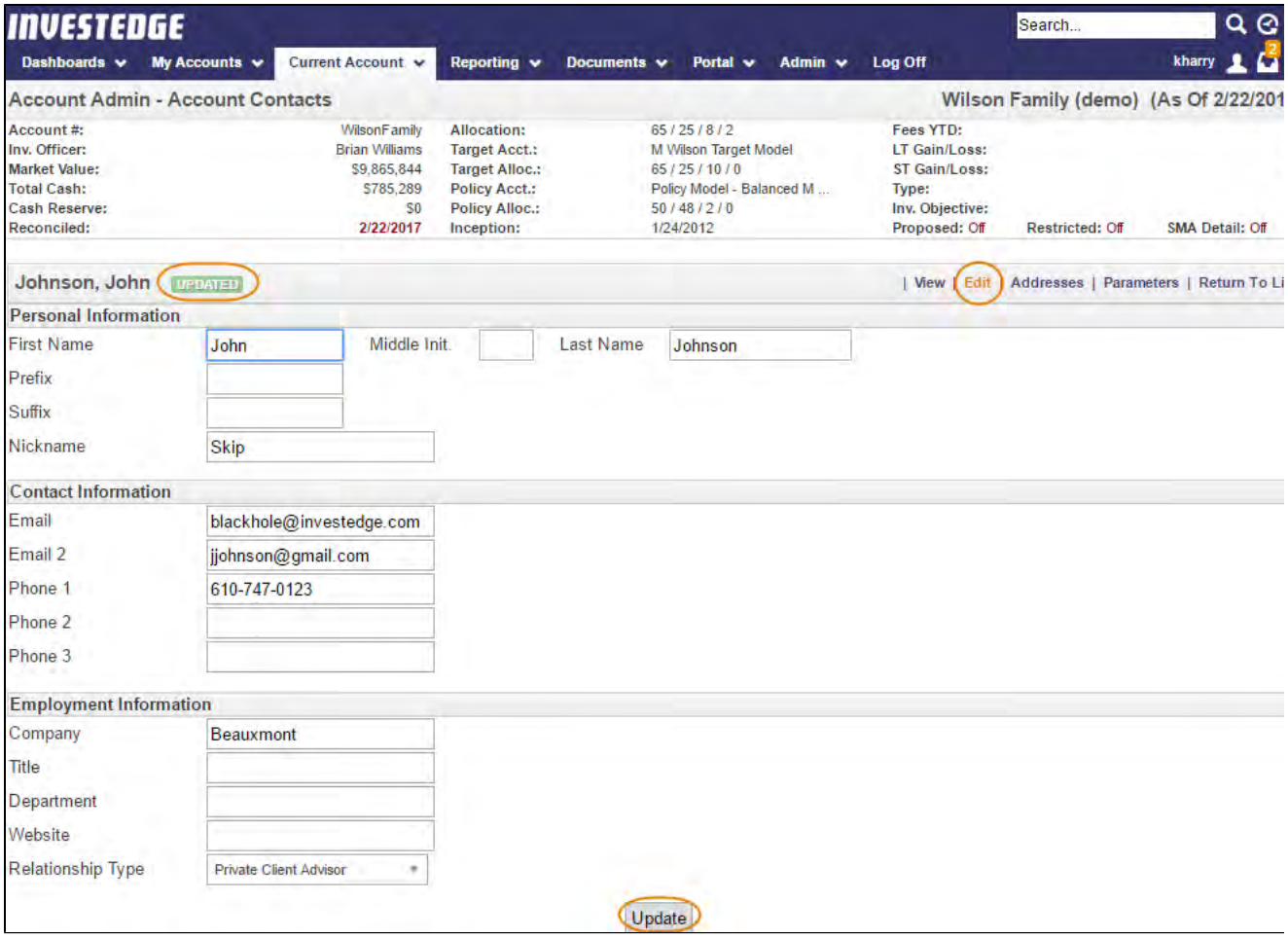
You can click the **View** link for any **Contact** to view the contact's details. This is a read-only screen.



Editing Contact Details

Click the **Edit** link for any **Contact** to update the details. This screen is the same screen you see when creating a **Contact.**

Update the necessary details and click the **Update** button.



Deleting a Contact

To delete a **Contact,** select the **Delete** checkbox to the right of the **Contact** and click the **Delete Selected** button.

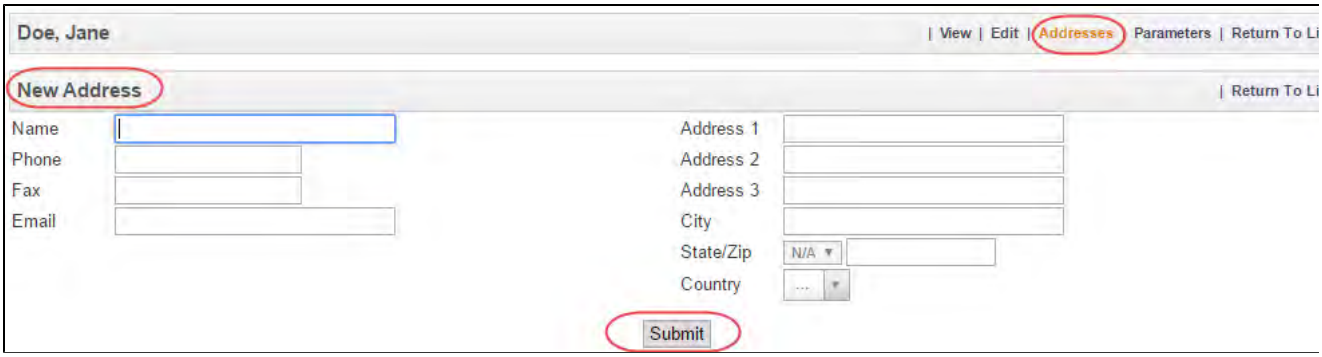
Adding an Address to a Contact

The **Addresses** screen enables you to add or edit the selected **Contact's** addresses and other contact information.

Adding an Address

Click the **Add An Address** link to be directed to the **New Address** screen. **Name** is a required field. Click the **Submit** button to save the **Address.**

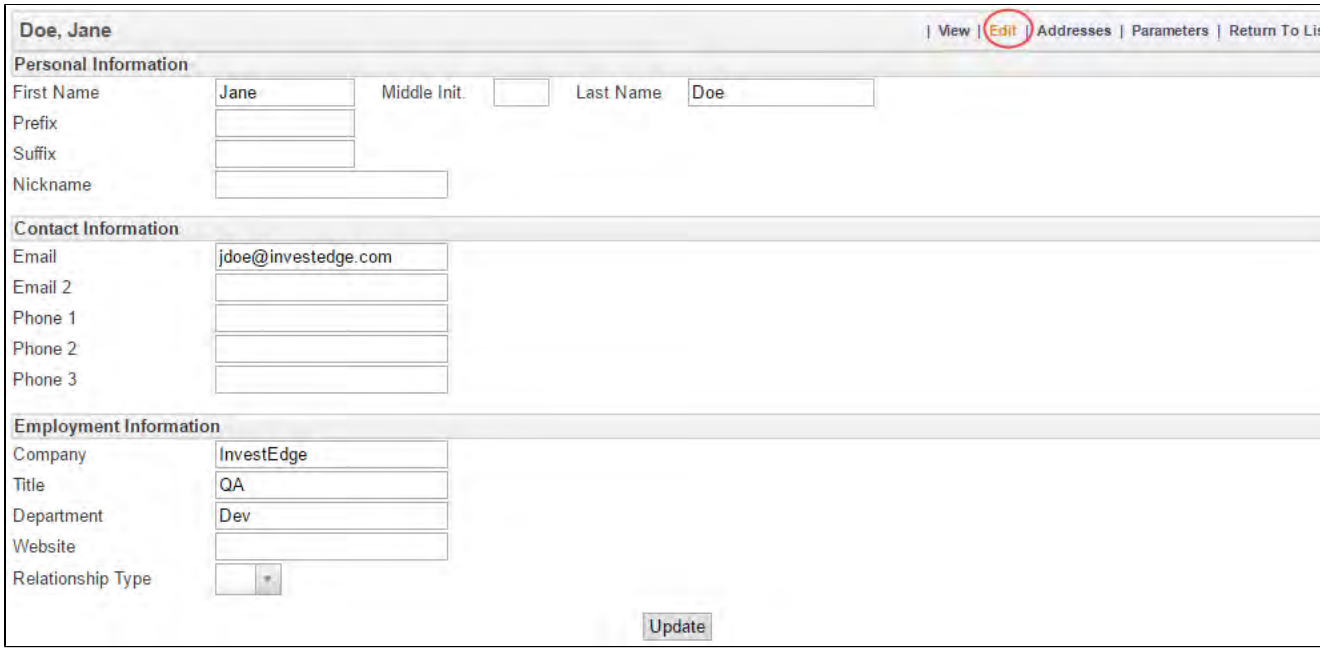
All **Address** information will be saved with this **Address** to this **Contact** as it relates only to this **Account.**



Editing an Address

You can edit any field for an **Address** by clicking the **Edit** link. Click the **Submit** button to save your changes.

When you update a **Contact Address,** any corresponding information in **Statement Events** is also updated.



Reordering Addresses

If there are multiple **Addresses** associated with a **Contact,** you can click the **Reorder Addresses** to reorder the **Addresses.** Drag and drop the **Addresses** to the desired order. Click the **Submit** button

Deleting an Address

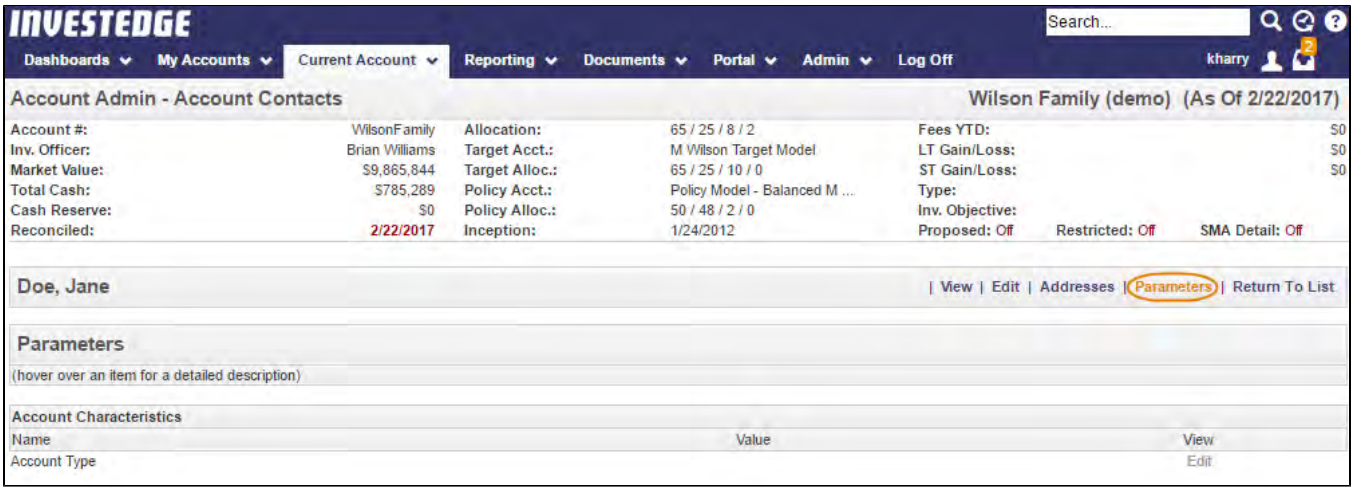
To delete an **Address,** select the **Delete** checkbox to the right of the **Contact** and click the **Delete Selected** button.

Viewing Contact Parameters

Click the **Parameters** link for a **Contact** to view any **Parameters** that are associated with the **Contact. Parameters** are a way to group together **Accounts** by

account characteristics. **Parameters** are created, edited and assigned to different locations within the user interface on

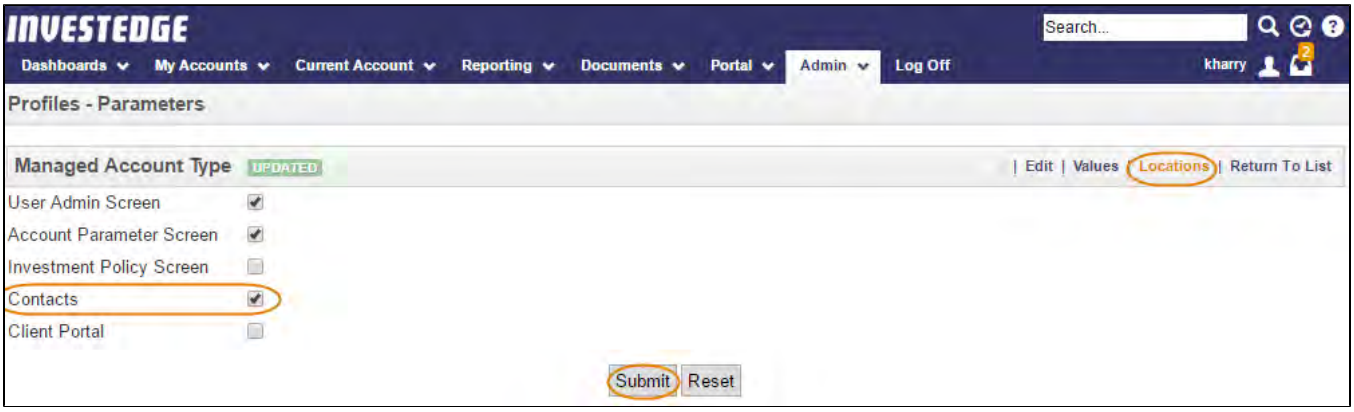
the **Admin**>**Profiles> Parameters**>**Location** screen.



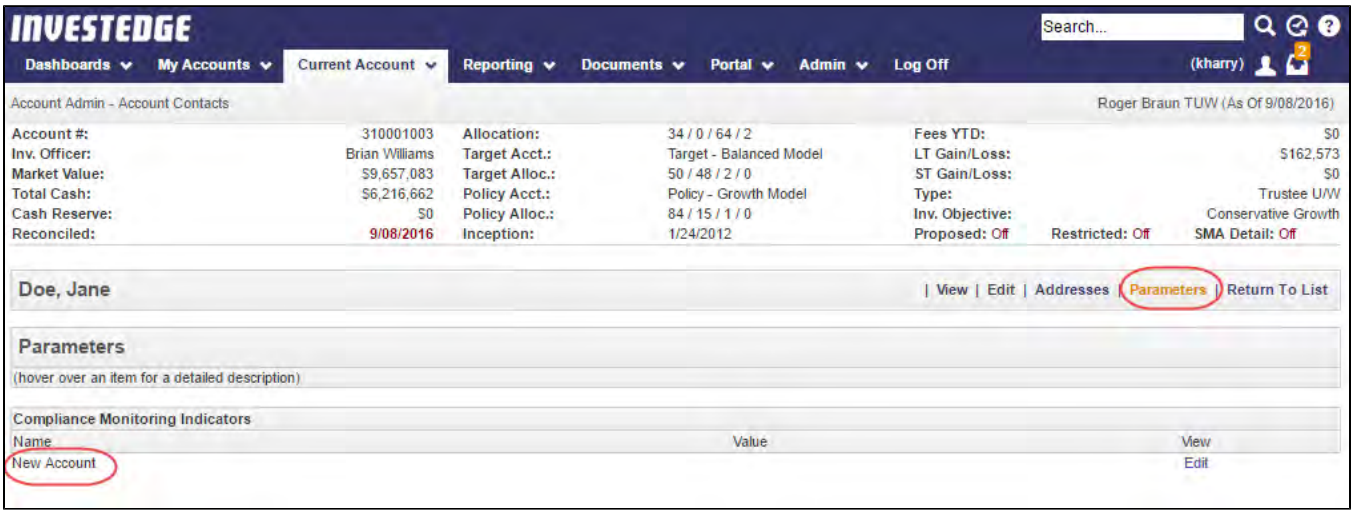
Adding New Parameters to be displayed on the Account Contacts Screen

To add a new **Parameter** that will be displayed on the **Account Contacts** screen:

1. Navigate to the **Admin>Profiles>Parameters** screen
2. Click the **Locations** link for the **Parameter**
3. Select the **Contacts** check box
4. Click the **Submit** button.



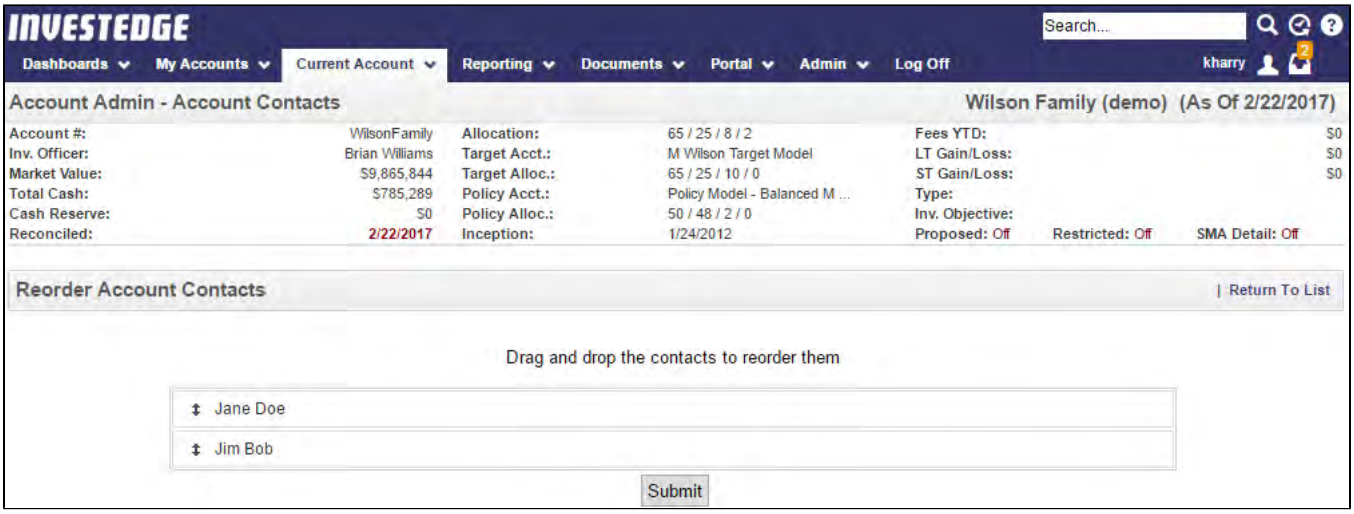
The **Parameter** is available on the **Account Contacts** screen.



Reordering Contacts

To reorder **Contacts:**

1. Click the **Reorder Contacts** link
2. Drag and drop the list of **Contacts** to the desired order
3. Click the **Submit** button



Displaying Contacts on Reports

You can choose which **Account Contacts** will be displayed on **Reports** that include **Accounts Contacts.**

1. Click the **Contact Report Display** link
2. Select the **Display** checkbox for any **Contact** you want to be displayed on **Reports**
3. Click the **Update Report Display** button

> Please contact client services to discuss opportunities for using **Contacts** in reporting.