SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

Create and Update Customer Contacts

This guide covers how to create and update customer contact information.

Steps to complete:

- Option 1: Create a Customer Contact
- Option 2: Update Customer Contact Information

Option 1: Create a Customer Contact

1. Navigate to the *Contact Information* page using one of the options below. You are able to access the page from the Billing or Accounts Receivable modules.

   - From the Billing Module:

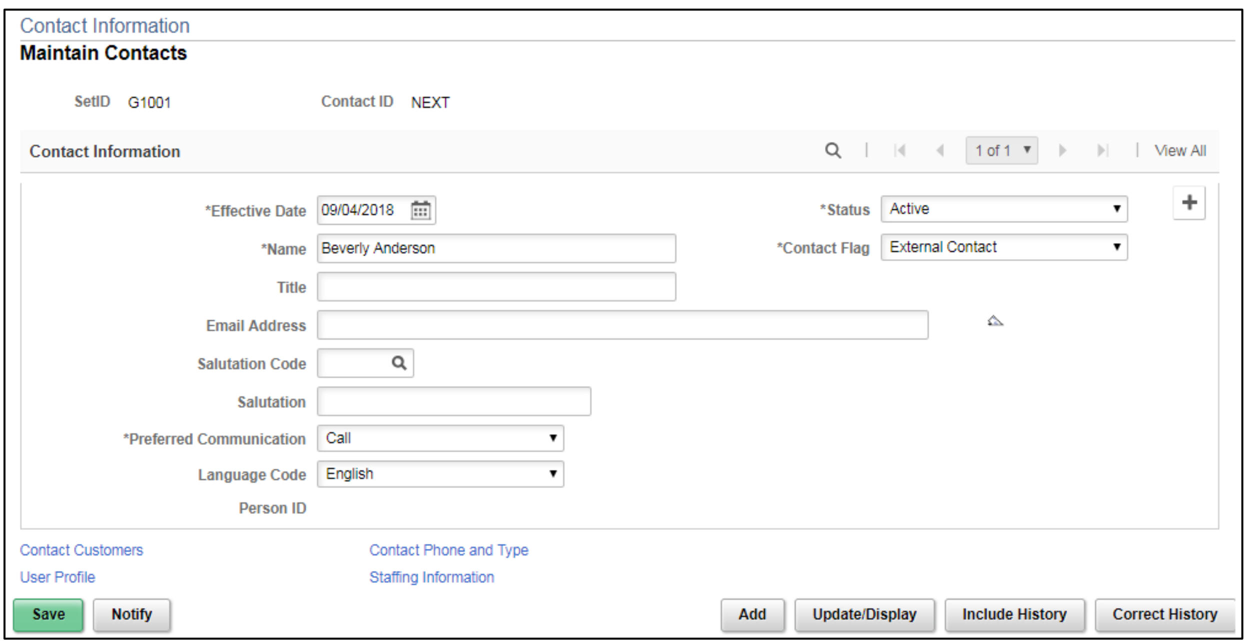
Navigation Options	Navigation Path
Navigation Collection	Accounting, Billing, Customer Contact, Contact Information.
WorkCenter	Accounting, Billing, Billing WorkCenter, left-menu, Links section, Customer & Contact Information, Contact Information.

   - From the Accounts Receivable Module:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Accounts Receivable, Customer Interactions, Contact Information.
WorkCenter	Accounting, Accounts Receivable, Receivables WorkCenter, left-menu, Links section, Customer & Contacts, Contact Information.

2. At the *Contact Info* page, click on the **Add a New Value** tab.
3. **DO NOT** accept the default *SetID (“*SHARE*”)*. Enter the *SetID* field (usually the same as your *Business Unit*) or click on the **Lookup** icon and select a *SetID*. You will only be able to use contacts with your *SetID*.
4. Accept the default “NEXT” for the *Contact ID* and SWIFT will automatically assign the next number available after you save the contact record. You can also enter your own.

5. Click on the **Add** button. The *Contact* page displays.

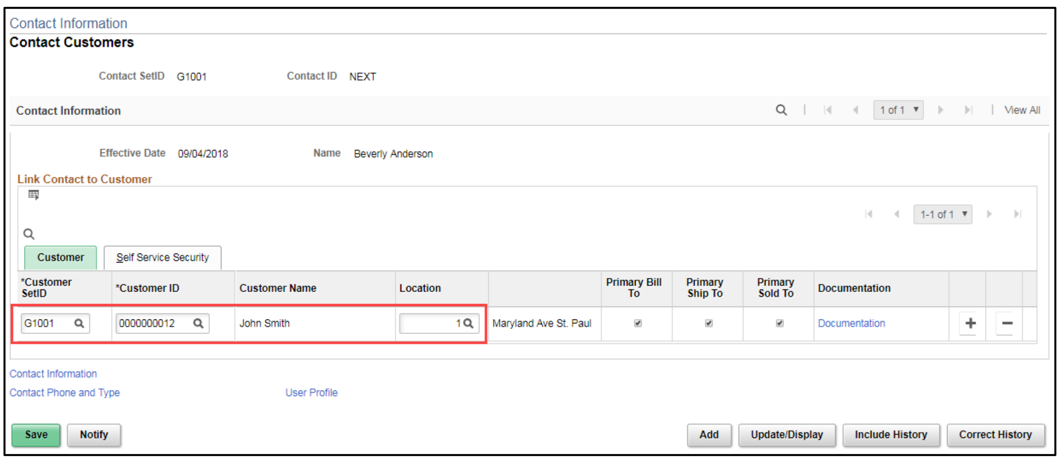


6. Complete the *Contact* page as described below.

Field Name	Field Description
***Effective Date**	The Effective Date indicates the date that the contact can be used.
***Status**	Accept the default “Active”. Other options are “Inactive” and “Template.” You would change the status to “Inactive” to close or deactivate a contact.

Field Name	Field Description
***Name**	Enter the name of the contact.
***Contact Flag**	Select the Contact Flag. Options include: External Contact, Internal Corporate Contact.
Title	Optionally, enter the Title of the Contact.
Email ID	Optionally, enter the email address of the contact.
Salutation Code	Optionally, select a Salutation Code, such as “Mr.” or “Ms.”
***Preferred Communication**	Select the Preferred Communication. Options include: Call, Email & Print, Email Only, Fax, Standard Mail.
Language Code	Accept the default “English” or select a different option from the drop-down menu.

7. Click on the **Contact Customer** link at the bottom-right of page to relate the contact to the customer and provide additional information.

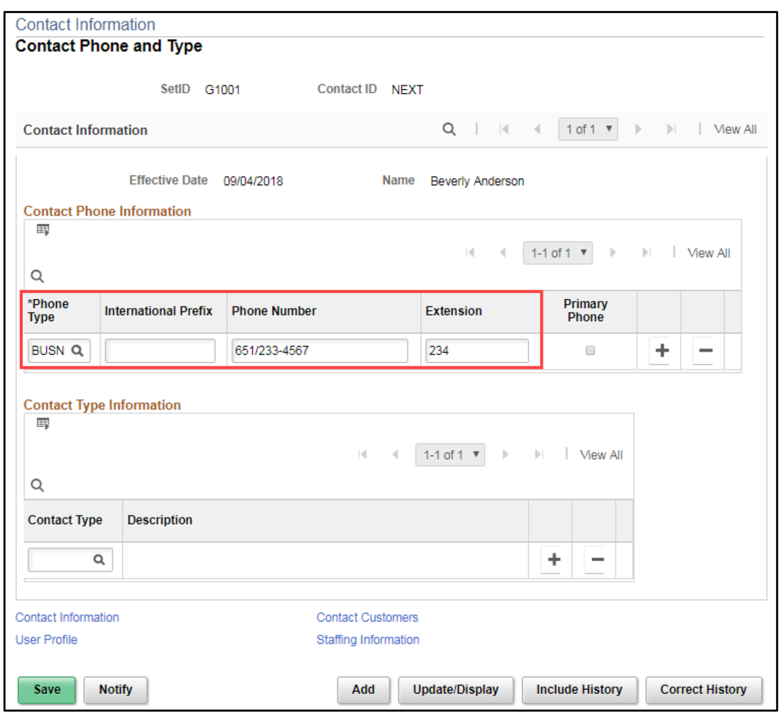


Field Name	Field Description
***Customer SetID**	Accept the default *Customer SetID*. The *Customer SetID* is a unique identifier that represents a default set of rules, or attributes for each agency.
***Customer ID**	Enter the related *Customer ID* for the Contact or click on the **Lookup** icon and select the *Customer ID*.
Customer Name (display only)	After selecting the *Customer ID*, the *Customer Name* is automatically populated.
Location	Enter the related *Location* for the Contact or click on the **Lookup** icon and select the *Location*.
Credit Card	Minnesota does not use this link.
Documentation Link	This feature is used to setup automatic emailing of invoices. Contact the SWIFT Helpdesk for more information.

Field Name	Field Description
Primary Bill To	After selecting the *Location*, the *Primary Bill To* field will be automatically populated from the Customer record.
Primary Ship To	After selecting the *Location*, the *Primary Ship To* field will be automatically populated from the Customer record.
Primary Sold To	After selecting the *Location*, the *Primary Sold To* field will be automatically populated from the Customer record.

8. Click on the **Contact Phone and Type** link at the bottom-right of the page and enter phone information.

Field Name	Field Description
***Phone Type**	Click on the **Lookup** icon and select the *Phone Type*. Some of the Options include: Business Phone, Cellular Phone, and Home Phone.
International Prefix	Optionally, enter the International Prefix
Phone Number	Enter the phone number.
Extension	Optionally, enter the Extension number.
Primary Phone	Click on the Primary Phone checkbox to indicate that this is the primary number where the contact can be reached.
Contact Type (agency defined)	Click on the **Lookup** icon and select a Contact Type. These may or may not be setup for your agency.



Option 2: Update Customer Contact Information

To make changes to customer contact information, begin by navigating to the *Contact Info* page.

1. Navigate to the *Contact Information* page for the contact using one of the options below. You are able to access the page from the Billing or Accounts Receivable modules.

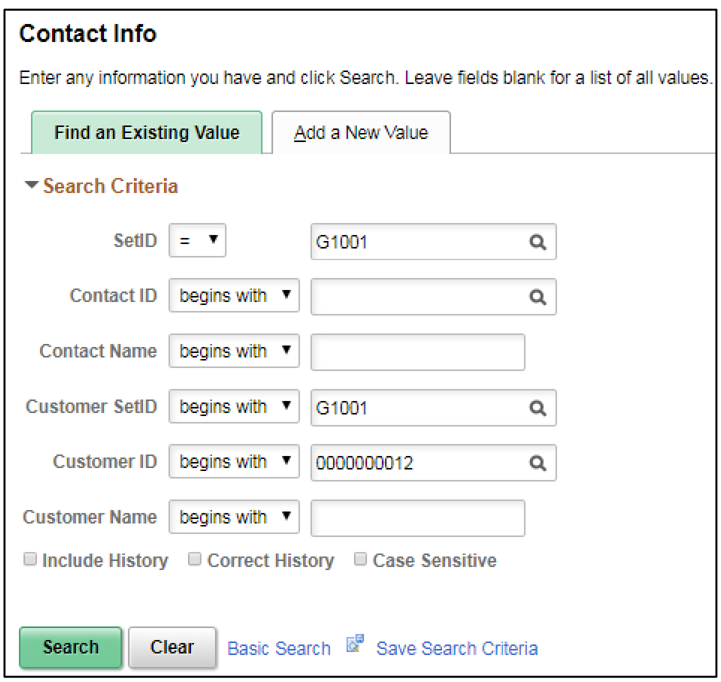
   - From the Billing Module:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Billing, Customer Contact, Contact Information.
WorkCenter	Accounting, Billing, Billing WorkCenter, left-menu, Links section, Customer & Contact Information, Contact Information.

   - From the Accounts Receivable Module:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Accounts Receivable, Customer Interactions, Contact Information.
WorkCenter	Accounting, Accounts Receivable, Receivables WorkCenter, left-menu, Links section, Customer & Contacts, Contact Information.

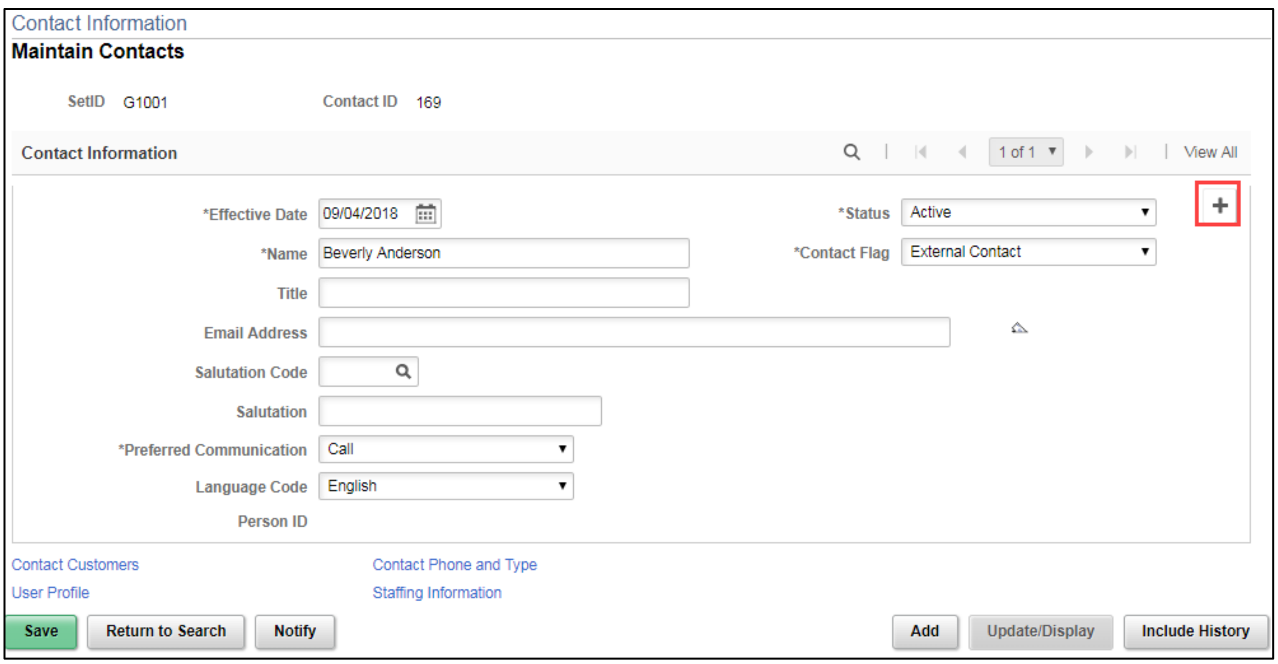
2. At the *Contact Info* page, enter search criteria. Search criteria options are described below.



Field Name	Field Description
SetID	Accept the default SetID or click on the Lookup button and select a different SetID.

Field Name	Field Description
Contact ID	Enter the Contact ID or click on the Lookup button and select a Contact ID.
Contact Name	Enter the Contact Name.
Customer SetID	Accept the default Customer SetID or click on the Lookup button and select a different Customer SetID.
Customer ID	Enter the Customer ID or click on the Lookup button and select a Customer ID.
Customer Name	Enter a Customer Name.

3. Click on the **Search** button.
4. If multiple Contacts display in the **Search Results** section, click on the entry for the Contact that you want to update.
5. At the *Contact Information* page, click on the **Add New Row** icon (plus sign) to add a new contact record. The new row is created.



6. Use the arrow key (>) to ensure you are on the new record.
7. The *Effective Date* for the new row has defaulted to the current date. Accept this date or select a different date.
8. Update the Contact information as you would normally. Refer to the instructions in Option 1 of this guide for detailed instructions.