SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

February 29, 2024

Create and Update Customer Contacts

This guide demonstrates first how to create a customer contact, and second, how to update a customer contact.

Step 1. Navigate to Contact Information

Whether you want to create a customer contact or update a contact, you can navigate to the Contact Information page from either the Billing or Accounts Receivable modules.

From the Billing Module:

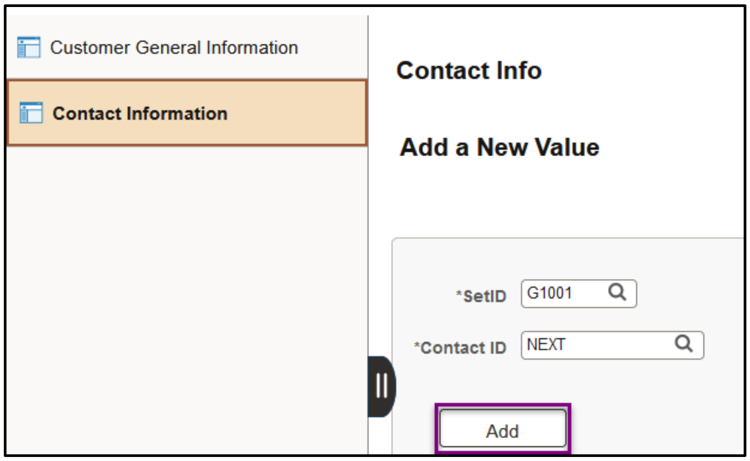
Navigation Options	Navigation Path
Navigation Collection	Accounting, Billing, Customer Contact, Contact Information.
WorkCenter	Accounting, Billing, Billing WorkCenter, left menu, Links section, Customer & Contact Information, Contact Information.

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.

Step 2A. Create a Customer Contact

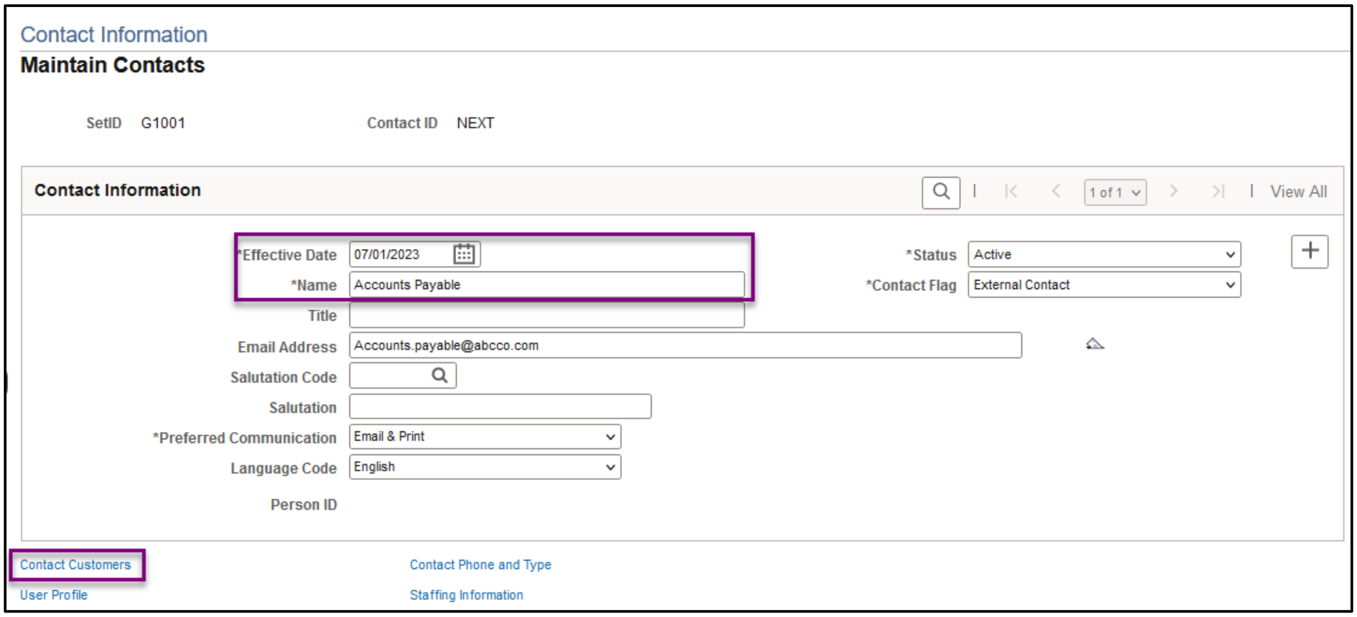
1. At the Contact Info page, select the **Add a New Value** button.
2. Do not accept the default of “SHARE” in the SetID. Enter your SetID, usually the same as your Business Unit or select the **Lookup** icon and select the SetID.
3. Accept the default “NEXT” for the Contact ID. SWIFT will automatically assign the next number available after you save the contact record. You can also enter your own.
4. Select the **Add** button.



5. The Contact page displays. 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. You cannot invoice a contact prior to their effective date.
***Status**	Accept the default “Active”. Other options are “Inactive” and “Template.” You would change the status to “Inactive” to close or deactivate a contact.
***Name**	Enter a name, either a person or unit.
***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. If you want SWIFT to automatically email invoices, this must be entered.
Salutation Code	Optionally, use the Lookup glass icon to select a Salutation Code.
***Preferred Communication**	Select the Preferred Communication. Options include Call, Email & Print, Email Only, Fax, Standard Mail. An email option must be selected if you want SWIFT to automatically email invoices.
Language Code	Accept the default “English” or select a different option from the drop-down menu.

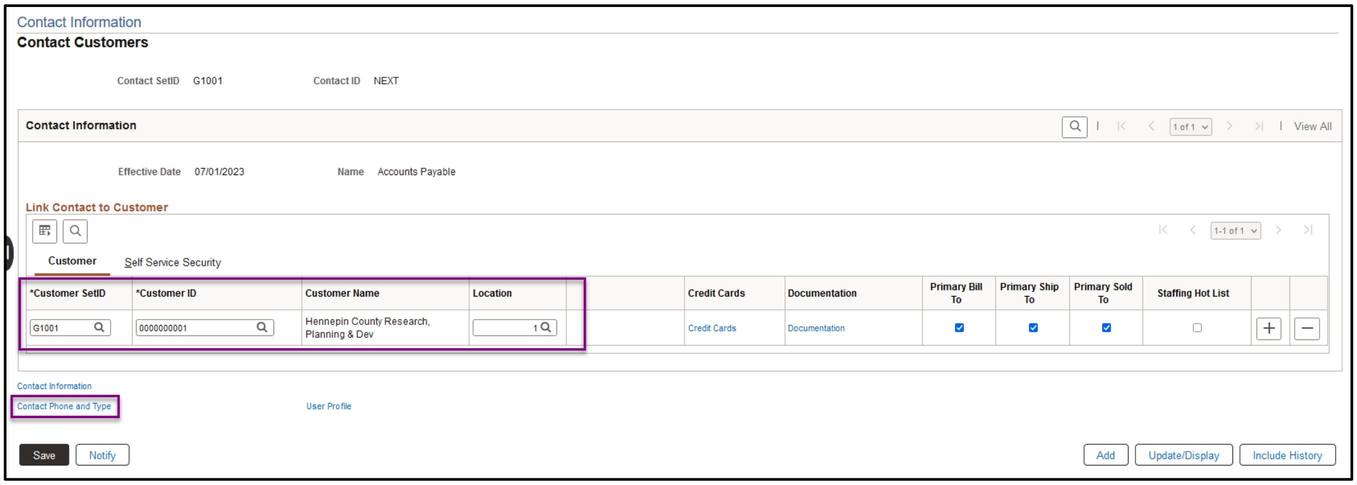
6. Select the **Contact Customer** link to relate the contact to the customer and provide additional information.



7. The Contact Customer page displays for the Contact Information. Enter additional information as described below.

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 select 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 select 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.
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.

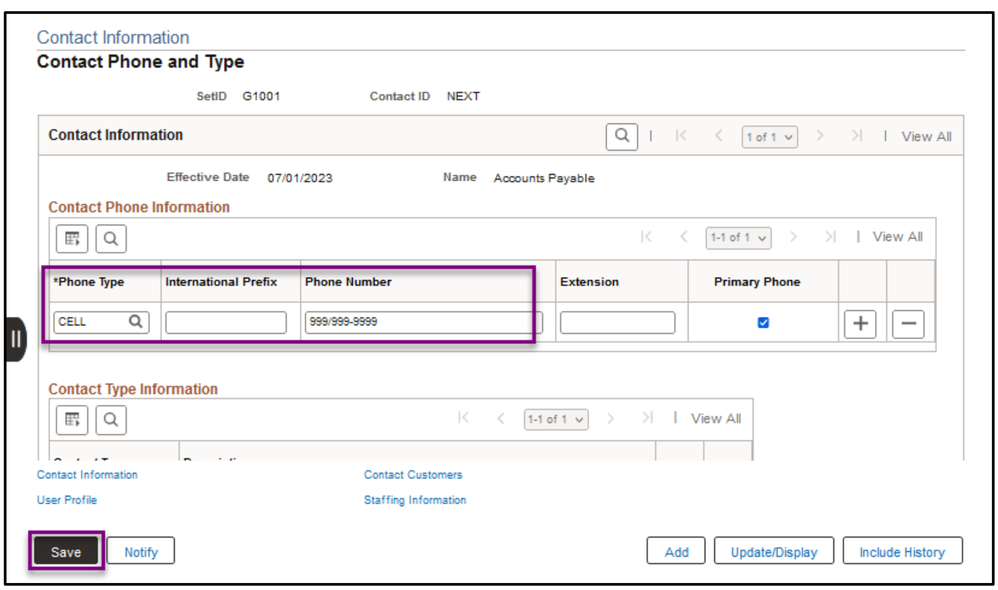
8. Select the **Contact Phone and Type** link.



9. Enter information for the contact as described below.

Field Name	Field Description
***Phone Type**	Select 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	Select the Primary Phone checkbox to indicate that this is the primary number where the contact can be reached.
Contact Type (Agency defined)	Select the **Lookup** icon and select a Contact Type. These may or may not be setup for your agency.

10. Select the **Save** button.

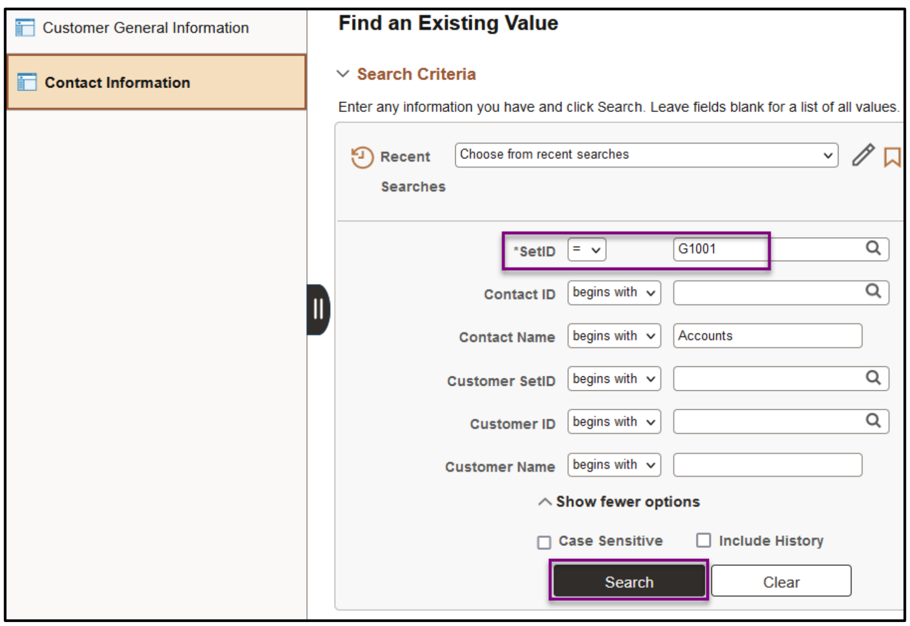


Step 2B. Update a Customer Contact

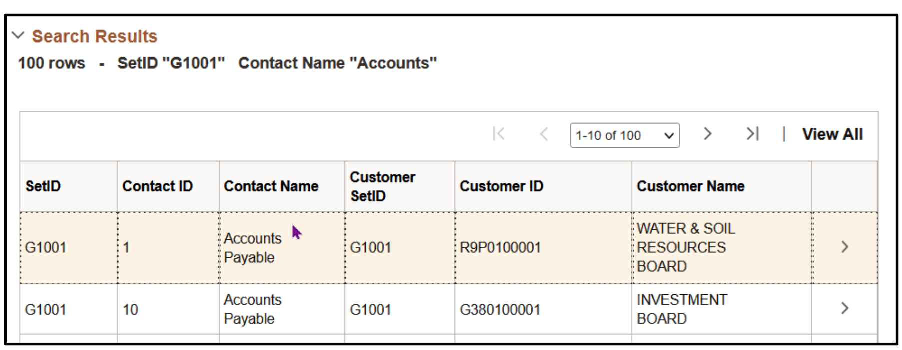
1. From the Find an Existing Value page for Contact Info, enter search criteria as described below.

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

2. Select the **Search** button.



3. Select the contact you want to update from the Search Results.



4. The Maintain Contacts page displays for Contact Information. Select the **Add New Row** icon (plus sign) to add a new contact record.

5. Select the **Arrow** icon to ensure you are on the new record.
6. The Effective Date for the new row has defaulted to the current date. Accept this date or select a different date.
7. Update the Contact information as you would normally. Refer to the instructions to Create a Customer Contact of this guide for detailed instructions.
8. Select the **Save** button when finished entering information.