

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:

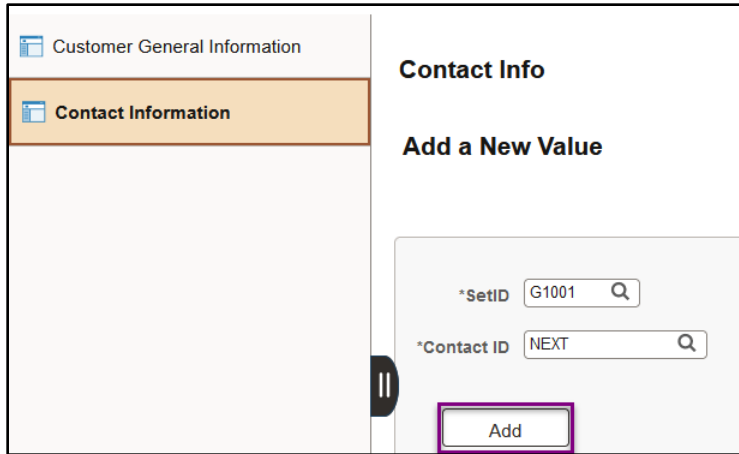
Navigation Options	Navigation Path
Navigation Collection	Accounting, Billing, Customer Contact, Contact Information.
WorkCenter	Accounting, Billing, Billing WorkCenter, left menu, Links section, Customer & Contact Information, Contact Information.

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.

Contact Information
Maintain Contacts

SetID G1001 Contact ID NEXT

Contact Information Q | < < 1 of 1 > > | View All

*Effective Date

*Name

Title

Email Address

Salutation Code

Salutation

*Preferred Communication

Language Code

Person ID

*Status

*Contact Flag

[Contact Customers](#) [Contact Phone and Type](#)

[User Profile](#) [Staffing 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.

Contact Information
Contact Customers

Contact SetID G1001 Contact ID NEXT

Contact Information

Effective Date 07/01/2023 Name Accounts Payable

Link Contact to Customer

Customer Self Service Security

*Customer SetID	*Customer ID	Customer Name	Location	Credit Cards	Documentation	Primary Bill To	Primary Ship To	Primary Sold To	Staffing Hot List
G1001	0000000001	Hennepin County Research, Planning & Dev		Credit Cards	Documentation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Contact Information

Contact Phone and Type User Profile

Save Notify Add Update/Display Include History

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.

Contact Information

Contact Phone and Type

SetID G1001 Contact ID NEXT

Contact Information

Effective Date 07/01/2023 Name Accounts Payable

Contact Phone Information

*Phone Type	International Prefix	Phone Number	Extension	Primary Phone
CELL		999/999-9999		<input checked="" type="checkbox"/>

Contact Type Information

Save Notify Add Update/Display Include History

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.

The screenshot shows the 'Find an Existing Value' search interface. On the left, there is a sidebar with 'Customer General Information' and 'Contact Information'. The main area is titled 'Find an Existing Value' and contains a 'Search Criteria' section. Below this, there is a 'Recent Searches' section with a dropdown menu. The search criteria section includes several fields: 'SetID' (set to 'G1001'), 'Contact ID' (set to 'begins with'), 'Contact Name' (set to 'begins with Accounts'), 'Customer SetID' (set to 'begins with'), 'Customer ID' (set to 'begins with'), and 'Customer Name' (set to 'begins with'). At the bottom of the search criteria section, there are checkboxes for 'Case Sensitive' and 'Include History', and a 'Search' button highlighted with a red box.

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

The screenshot shows the 'Search Results' table. The table has 7 columns: SetID, Contact ID, Contact Name, Customer SetID, Customer ID, Customer Name, and an action column. The first row shows SetID 'G1001', Contact ID '1', Contact Name 'Accounts Payable', Customer SetID 'G1001', Customer ID 'R9P0100001', and Customer Name 'WATER & SOIL RESOURCES BOARD'. The second row shows SetID 'G1001', Contact ID '10', Contact Name 'Accounts Payable', Customer SetID 'G1001', Customer ID 'G380100001', and Customer Name 'INVESTMENT BOARD'. The table is titled '100 rows - SetID "G1001" Contact Name "Accounts"' and has a 'View All' link.

SetID	Contact ID	Contact Name	Customer SetID	Customer ID	Customer Name	
G1001	1	Accounts Payable	G1001	R9P0100001	WATER & SOIL RESOURCES BOARD	>
G1001	10	Accounts Payable	G1001	G380100001	INVESTMENT BOARD	>

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

Contact Information
Maintain Contacts

SetID G1001 Contact ID 1

Contact Information

*Effective Date 08/28/2018
*Name Accounts Payable
Title
Email Address Swift.Testing@state.mn.us
Salutation Code
Salutation
*Preferred Communication Email & Print
Language Code English
Person ID

*Status Active
*Contact Flag External Contact

+

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.

Contact Information
Maintain Contacts

SetID G1001 Contact ID 16

Contact Information

*Effective Date 09/01/2013
*Name Accounts Payable
Title
Email Address Swift.Testing@state.mn.us
Salutation Code
Salutation
*Preferred Communication Email only
Language Code English
Person ID

*Status Active
*Contact Flag External Contact

+

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History