

Enterprise - Using Contact Roles with Orders

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What is a Contact Role?

Contact roles take company contacts and assign them a role such as 'Hiring Manager' or 'HR Coordinator' to make it easier to know who to contact for what kind of information. From the customer record, a contact role can be defaulted onto an order for easy access to their contact information. This is especially helpful when an employee is going to be late or absent.

Enterprise allows you to add contact roles to Customers, Departments, and Orders. The contact role information is found on the Details page for each of these record types.

How to Assign a Contact Role Default for Customer Orders

Note To assign a contact role, you must first have your contacts for a company added under the contacts section. For more information on contact records, check out [How to Add a Contact to a Customer vs. How to Add a Contact Role](#).

1. Navigate to the Customer Record
2. Select Details
3. Under Contact Roles, select the Pencil Icon

Veridian Dynamics (Primary)
5430 Principal Drive
Des Moines, IA 50305
(515) 555-2258
ID: 4294999770

customer information

Customer Name: Veridian Dynamics
Department: Primary
Customer ID: 4294999770
Parent ID: [Search]

contact information

Street: 5430 Principal Drive
Street 2: Suite 505
City: Des Moines
State: IA Zip: 50305-____
Country: United States of America
Website: www.verdiandynamics.com

customer status

Status: A Active
Activation Date: 5/2/2014
Date Created: 5/2/2014 9:43:00 AM

billing address

Attention To: Veronica Palmer
Street: 5430 Principal Drive
Street 2: Suite 505
City: Des Moines
State: IA Zip: 50305-____
Country: United States of America

sales tax

No Records Found

default worksite

Work Site: Primary
5430 Principal Drive
Suite 505
Des Moines, IA 50305

contact roles

First Name	Last Name	Contact Type
Marshall	Erickson	Supervisor
Veronica	Fletcher	Hiring Mgr
James	Floodwater	HR Coordinator

4. Select a contact

customer contacts

apply changes

Only this customer

contact

Erickson, Marshall

Last Name	First Name
Erickson	Marshall
Fletcher	Veronica
Floodwater	James
Myman	Philip

InvoiceEmail Contact +

Order Request Creator +

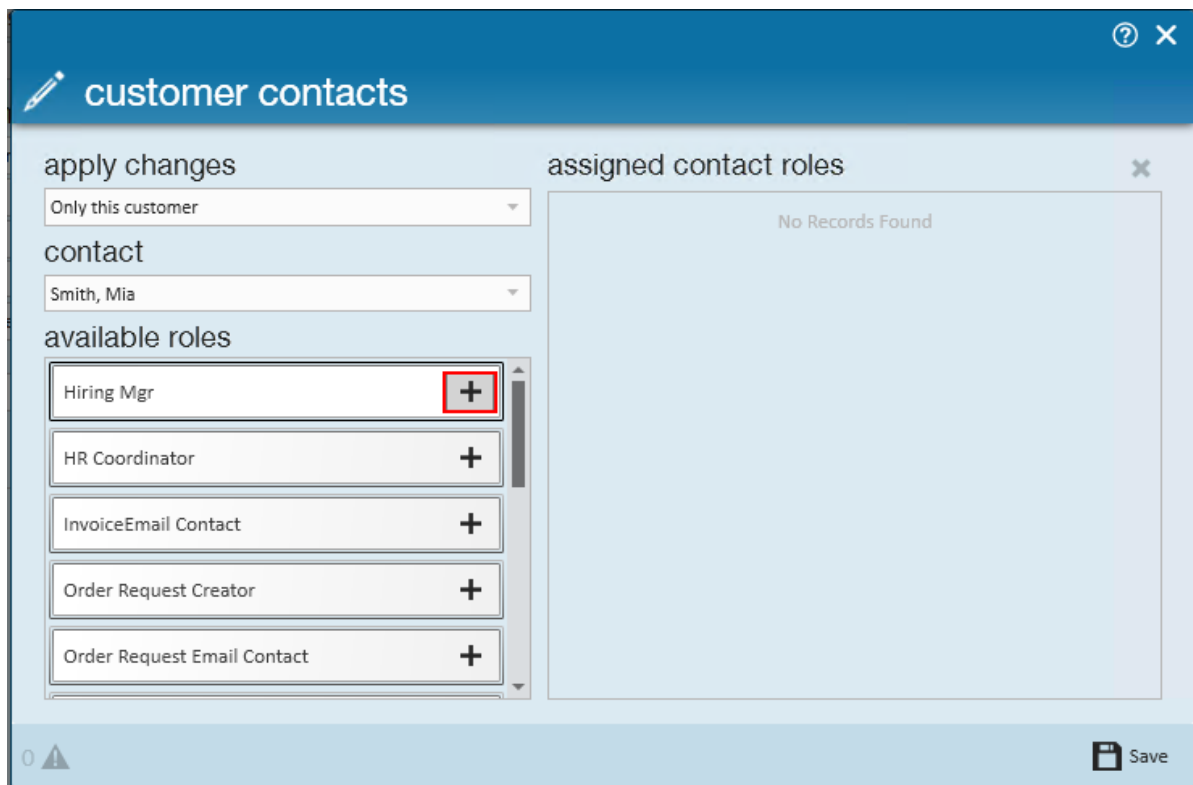
Order Request Email Contact +

assigned contact roles

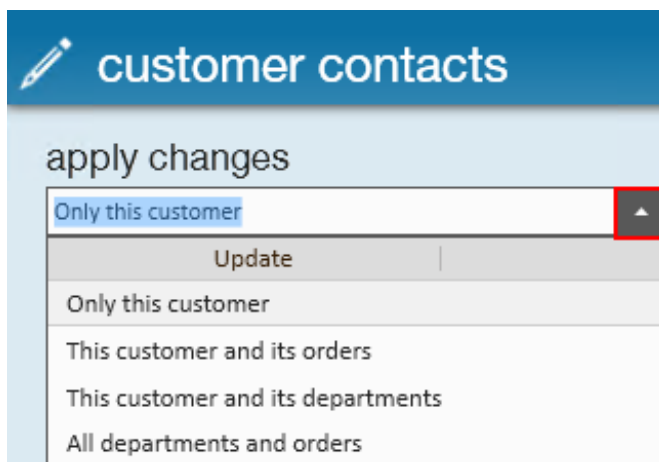
Overwri...	Last Name	First Name	Role
	Erickson	Marshall	Supervisor
	Fletcher	Veronica	Hiring Mgr
	Floodwater	James	HR Coordinator

Save

5. Find the available role and click the + to assign the contact role



6. To apply Contact roles to all Departments, Orders, or both: Under apply changes section, use the drop down to change which level the contact role will default to.



- **Only the Customer:** the changes will only apply to this Customer. It will not carry down into the orders and Assignments.
- **This Customer and its Orders:** the changes will apply to the Customer Record and the Orders that have been created and future Orders that will be created.
- **This Customer and its Departments:** the changes will apply only to the Customer Record and the Customers Departments that have been created and anything that is created in the future as far as Departments for that

Customer. The Contact Roles will not carry through onto the Orders.

- **All Departments and Orders:** means that these changes will apply to all Departments and Orders both previously created and any future Orders or Departments that may be added to this particular Customer Record.

7. Click save to finish

To Remove a Contact Role Default

Navigate to the customer record details page and click the pencil icon next to Contact Roles.

Select the contact role you wish to remove under assigned contact roles and click the X icon in the upper right



Overwri...	Last Name	First Name	Role
	Smith	Mia	Hiring Mgr

Click save to save your changes.

To Add a Contact Role to a Specific Order

If you want a contact role for just a specific order, you can add and edit contact roles for that order without changing the defaults for other orders.

Navigate to the order details screen. Contacts is a section on the right side of the page. Click the pencil icon to edit the contacts.

Independence Inn, Primary
 Chef
 0 of 3 positions filled
 Customer ID: 4295013537
 Order ID: 4295088951

customer information
 Customer ID: 4295013537
 Worker Comp: MN 8810
 Alt Order ID:
 Directions:
 Work Site: Primary
 123 Independence Lane
 Excelsior, MN 55331
 Burden: Burden 3%

job information
 Required: 3
 Assigned: 0
 Order Type: TF Temp To Full-Time
 Job Title: Chef
 Description: Line Cooks for kitchen

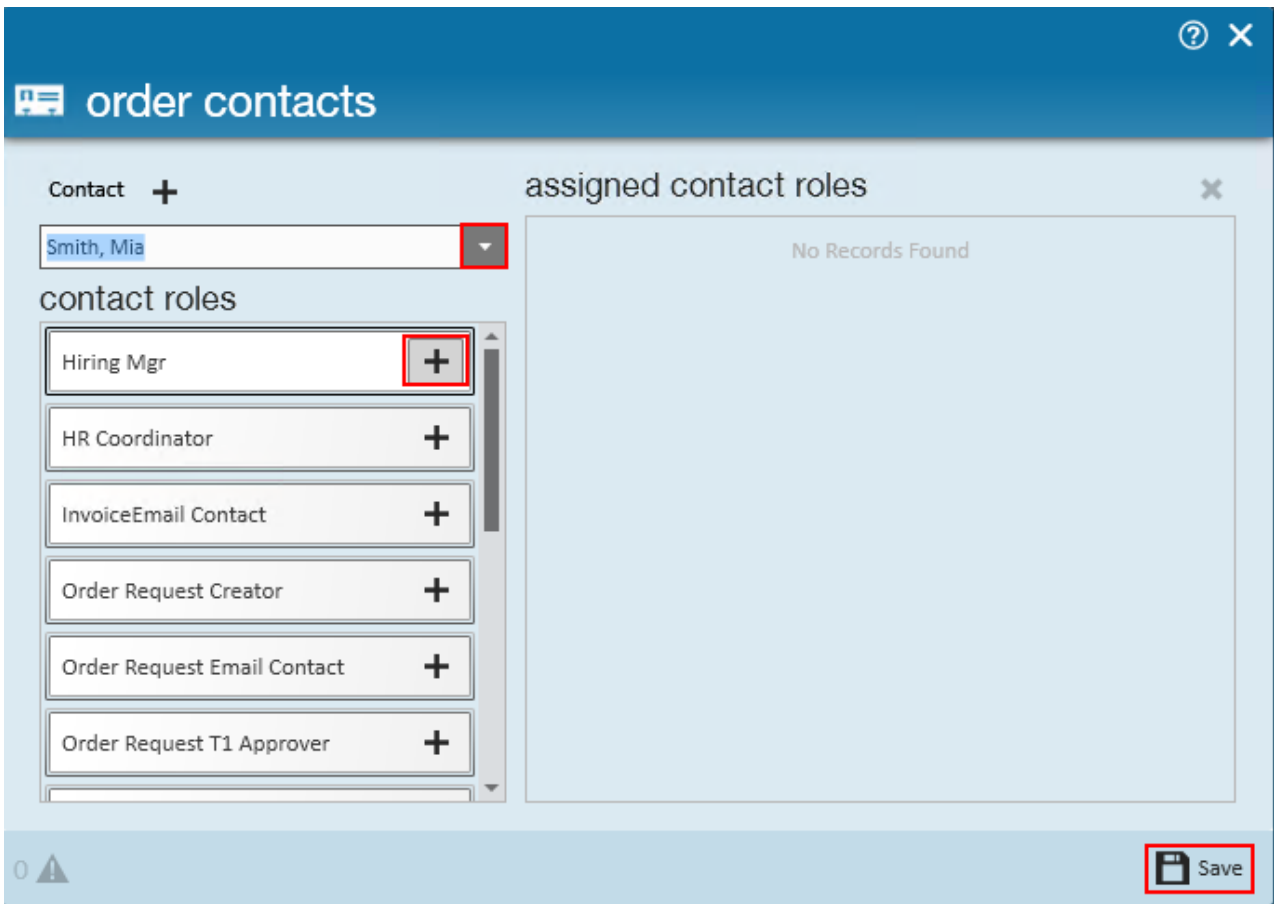
financial details
 Multiplier: 1.2
 Bill Rate: \$18.51
 Unit Bill Rate: \$0.00
 OT Factor: 1.5000
 Overtime Bill: \$27.77
 Doubletime Bill: \$0.00
 Overtime Plan: PlanSTD
 Desired GM %:
 Pay Periods: 52
 Pay Rate: \$15.00
 Unit Pay Rate: \$0.00
 Other Agency Pay: \$0.00
 Overtime Pay: \$22.50
 Doubletime Pay: \$37.02
 GP Percent: 9.29%
 GP Estimate: \$0.00

contacts

Name	Description	Office Phone	Email
Smith, Mia	Hiring Mgr	(234)123-4560	mia.smith@inn.x...

A new window will pop open titled Order Contacts

Here you can select a contact from the drop down or click the plus sign to add a new contact. Then find the contact role you wish to assign and click the plus sign next to it. The contact will then appear in the assigned contact roles section

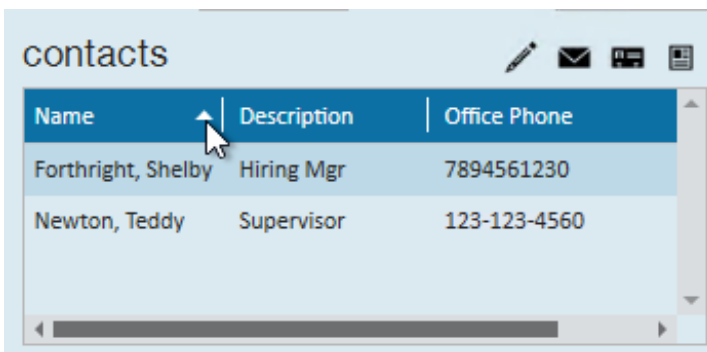


Click save to save your changes.

Additional Actions with Contacts on an Order

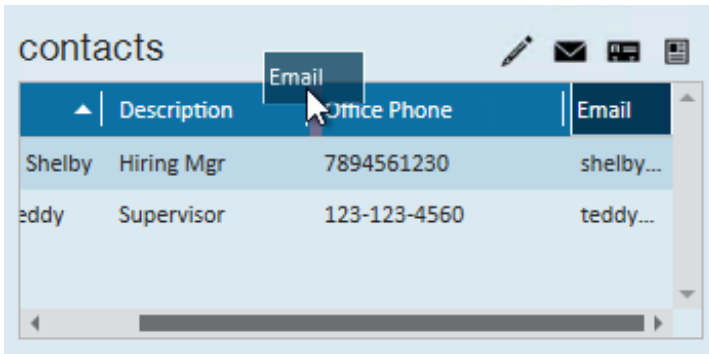
Once you have assigned one or more contacts with a role on an order, you will have additional actions available.

Organizing Contacts

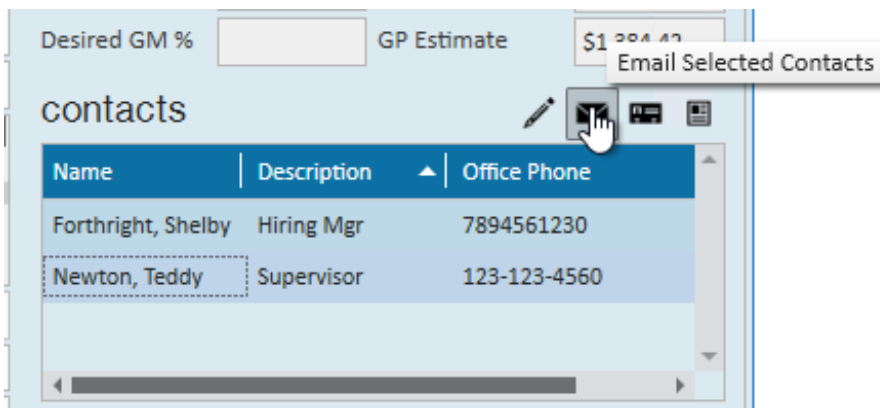


- You can sort your contacts by clicking on any of the columns of information under contacts

- Right click on the column headers to add or remove a column
- Drag and drop to rearrange columns



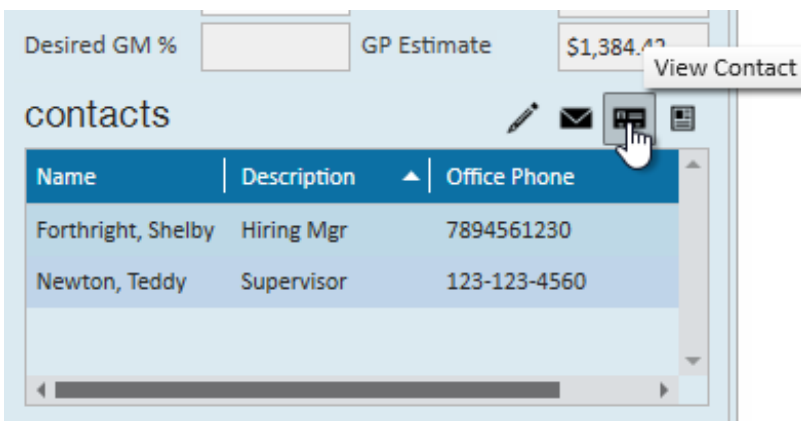
Email Selected Contacts



This option allows you to email one or more contacts if you are utilizing email in Enterprise. Use the CTRL or SHIFT keys on your keyboard to select more than one contact before clicking on the "email selected contacts" option.

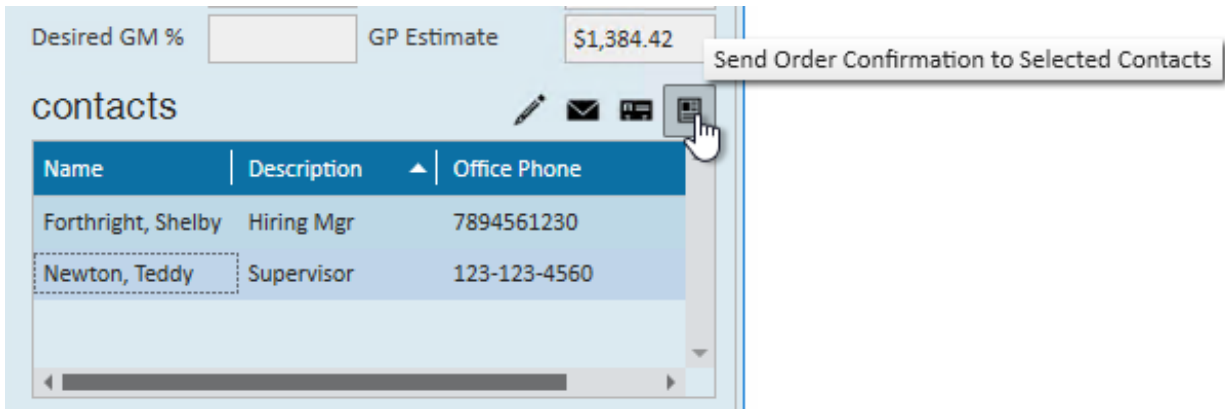
To learn more about setting up and using your email in Enterprise, check out [Enterprise Email Overview](#).

View Contact

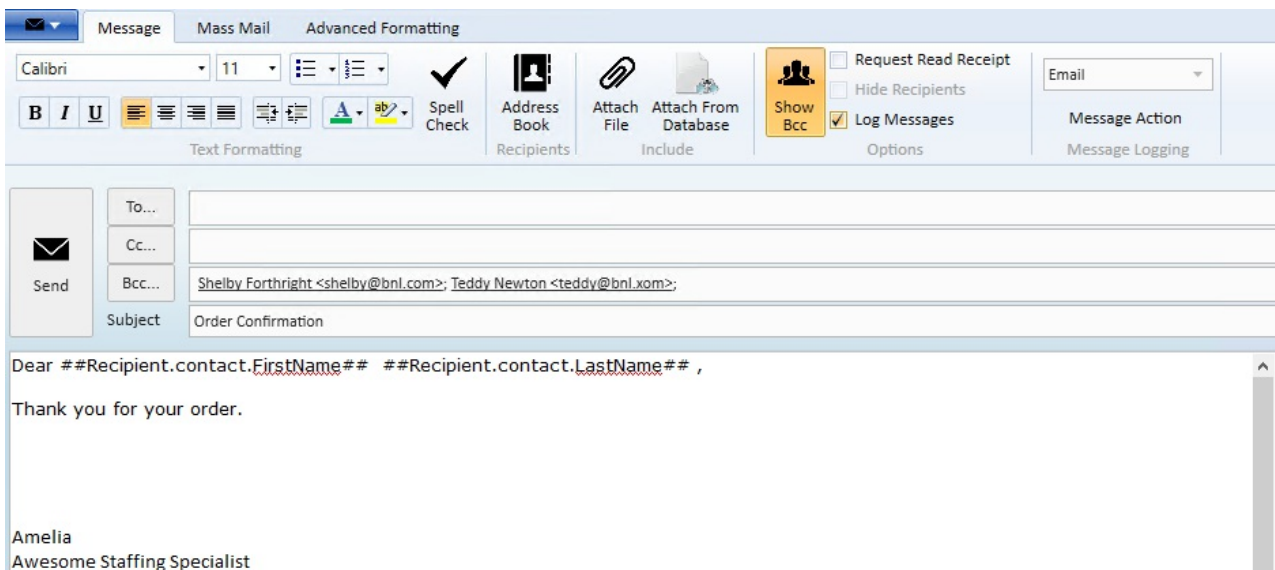


This jump button will bring you directly to the selected contact's record in Enterprise to view more details, log a message, etc.

Send Order Confirmation to Selected Contacts



This option will allow you to select one or more contacts to email order confirmation information to. You will need to have your email set up in Enterprise and the contacts will need to have an email on file to select this option.



An email window will open up, ready to send to your contacts with the Order Confirmation template already entered. You can enter any additional information to personalize this email before clicking send. Once the email is sent, a message will also be logged on the contacts' records in Enterprise.

This template is customizable. Check out [How to Set up and Utilize Email Templates in Enterprise](#) for more information.

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