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.

System Contact Roles

Examples of common contact roles that are found in most systems can be viewed in the chart below along with their general intention. The roles may be used by your organization in accordance with your definition of the contact roles.

Note Some of the contact roles can be tied to functionality in WebCenter. For more information: WebCenter Contact Roles.

Contact Role	General Intention	Additional Functionality
-	employees on the Order and is the	Typical approver of WebCenter timecards.
Hiring Mgr		Can be set as an approver of WebCenter Timecards.
HR Coordinator	This role may be the individual who may have created the original	N/A
Invoice Email Contact	In addition to being set as an invoice recipient on the customer record, they also receive emails for invoices involving this Order.	N/A

Order Request Creator	This may be the individual who requested the order initially.	Can be set as individual who can create WebCenter Orders.
Order Request Email contact	This may be the point of contact for updates on the Order.	N/A
Order Request T1-3 Approvers	This may be the individual(s) responsible for approving Orders in or outside of WebCenter.	This may be set as individual(s) responsible for approving orders created in WebCenter.
Reports To	This may be the individual that the employee reports directly to on an order.	N/A
Time Card Alt 1-2	This may be the individual(s) responsible for approving timecards in or out of WebCenter.	This may be the individual(s) responsible for approving timecards in or out of WebCenter.
External Timeclock Approver	For use only with the Timerack integration.	N/A

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

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4. Select a contact

apply changes		assigne	ed contac	t roles		×
Only this customer	-	Overwri	Last Name	First Name	Role	4
contact			Erickson	Marshall	Supervisor	
Erickson, Marshall	٠		Fletcherson	Veronica	Hiring Mgr	
Last Name First Name			Floodwater	James	HR Coordinator	
Erickson Marshall						
Fletcherson Veronica						
Floodwater James						
Myman Philip						
InvoiceEmail Contact						
Order Request Creator +						
Order Request Email Contact						

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

🥢 customer contacts		⊘ ×
apply changes	assigned contact roles	×
Only this customer	No Records Found	
contact		
Smith, Mia		
available roles		
Hiring Mgr +		
HR Coordinator +		
InvoiceEmail Contact +		
Order Request Creator +		
Order Request Email Contact +		
•		💾 Save

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.

h	customer contacts
	apply changes
	Only this customer
	Update
	Only this customer
	This customer and its orders
	This customer and its departments
	All departments and orders

- **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

assigne	ed contac	t roles		×
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.

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tasks		Chef Line Cooks for kitchen		•	contacts			/ 🛛 🖽 🗄
search					Name	Description 🔺 0	Office Phone	Email
					Smith, Mia	Hiring Mgr (234)123-4560	mia.smith@ininn.x
employee								
customer	Dress Code			0				
order	Safety Notes							-

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

		@ ×
🖽 order contacts		
Contact 🕂	assigned contact roles	×
Smith, Mia	No Records Found	
contact roles		
Hiring Mgr +		
HR Coordinator +		
InvoiceEmail Contact +		
Order Request Creator +		
Order Request Email Contact +		
Order Request T1 Approver +		
u		
0 🛦		B Save

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

conta	ots	Email	/ 🗠 📾 🗄
•	Description	Office Phone	Email
Shelby	Hiring Mgr	7894561230	shelby
eddy	Supervisor	123-123-4560	teddy
4	_		

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.

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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.

Note This template is customizable. Check out How to Set up and Utilize Email Templates in Enterprise for more information.

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