Contact Types Screen

Admin - Configuration · https://learn.logisense.com/docs/609026057/

Last verified with: 10.8.6.0

Account Contact Types are configured in Setup / Users & Accounts / Accounts / Contact Types

Overview

Contact types define the kinds of contacts that can be stored on accounts, such as billing, service, administrative, technical, shipping, or other contact records. Each contact type can also include one or more contact points that describe what information should be captured for that type of contact, such as email addresses, phone numbers, or addresses.

Contact types can affect important account behavior. For example, billing contacts can be used for invoice delivery, and service contacts can provide address details that support tax determination. Because of that, contact-type setup should be reviewed carefully before it is used broadly across accounts.

The Billing contact is required by default when creating an account. If you wish to make the Billing contact optional select it on this screen and uncheck the ‘Required’ field.

Prerequisites

Contact types can be configured immediately. There are no prerequisite configuration steps.

Contact Types Panel

The Contact Types panel on the left lists the configured contact types. Select a contact type to view or edit its details in the panel on the right.

Actions

Icon	Description
	Deletes the selected contact type if not in use
	Adds a new contact type

Edit Contact Type Panel

The Edit Contact Type panel displays the details for the selected contact type.

Fields

- **Name**: Identifies the contact type.
- **Contact Type**: Defines the system contact-type classification, such as Billing, Service, Administrative, Technical, Shipping, or Other. Most system-defined contact types can only be used once, while **Other** can be used for additional custom contact types.
- **Description**: Stores an optional internal description for the contact type.
- **Required**: Determines whether the contact type must be completed when creating a new account.
- **Show on New Account**: Determines whether the contact type is displayed during new account creation.
- **Show on Overview**: Determines whether this contact type is displayed on the Account Overview screen.

When **Required** is enabled, **Show on New Account** is also enforced so the contact type is available during account creation.

Contact Points Tab

The **Contact Points** tab is used to define the individual pieces of contact information that can be stored for the selected contact type.

Each contact point describes a specific data element, such as an email address, phone number, or physical address.

Contact Points List

The list can display details such as:

- **Name**: The label of the contact point.
- **Data Type**: The type of value stored by the contact point.
- **Allow Multiple**: Indicates whether multiple values of this contact point can be stored.
- **Required**: Indicates whether the contact point must be completed.
- **Show on New Account**: Indicates whether the contact point appears during new account creation.

Guides

Adding Contact Types

1. In the **Contact Types** panel, click **Add**.
2. Enter the **Name**.
3. Select the **Contact Type**.
4. Enter a **Description**, if needed.
5. Set **Required**, **Show on New Account**, and **Show on Overview** as needed.
6. Open the **Contact Points** tab to add the contact points that should be stored for the contact type.
7. Click **Save**.

Editing Contact Types

1. In the **Contact Types** panel, select the contact type you want to update.
2. Update the contact type details as needed.
3. Open the **Contact Points** tab to add, edit, or remove contact points.
4. Click **Save**.

Deleting Contact Types

1. In the **Contact Types** panel, select the contact type you want to delete.
2. Click **Delete**.
3. In the confirmation dialog, click **Yes**.