

Add/Edit Contact (Accounts) - Additional Contact Option for Invoice & Past Due Notifications (17099) [New Feature]

Last Modified on 08/12/2024 2:23 pm EDT

Edit Contact has been updated to include the option to allow a non-billing contact to receive invoice and past-due notifications. For this, the following requirements must be met:

- This field only displays IF 'None' is selected for the Billing Contact field **AND** the contact link type is Account-level (Customer Portal Access tab - Accounts check box is selected).
- For the 'Receive Invoice Notifications' option to work, the primary billing contact on the account must have their delivery option set to email. This setting ensures that additional non-billing contacts can also receive invoice notifications via email.

EDIT CONTACT

Details | Customer Portal Access | Tags | Activity History

TITLE	<input type="text"/>
NAME	<input type="text" value="Aliena"/>
EMAIL	<input type="text" value="Contact@fakeEmail.com"/>
EMAIL 2	<input type="text"/>
PHONE 1	<input type="text" value="(999) 999-9999"/> <input type="text"/>
PHONE 2	<input type="text" value="(999) 999-9999"/> <input type="text"/>
PHONE 3	<input type="text" value="(999) 999-9999"/> <input type="text"/>
PHONE 4	<input type="text" value="(999) 999-9999"/> <input type="text"/>
NOTE	<input type="text"/>
RECEIVE SERVICE NOTIFICATIONS	<input type="text" value="Yes"/>
SERVICE NOTIFICATION METHOD	<input type="text" value="Email"/>
REQUEST NOTIFICATION METHOD	<input type="text" value="None"/>
BILLING CONTACT	<input type="text" value="None"/>
RECEIVE INVOICE NOTIFICATIONS	<input type="text" value="Yes"/> (Notifications are only sent for accounts with invoice delivery set to email)
RECEIVE PASTDUE NOTIFICATION	<input type="text" value="No"/>
MOBILE OPT OUT?	<input type="checkbox"/>
ENABLE PORTAL ACCESS	<input checked="" type="checkbox"/>
PORTAL USER	Portal UserId 16746, Last Login Jul 1, 2024 10:09 am