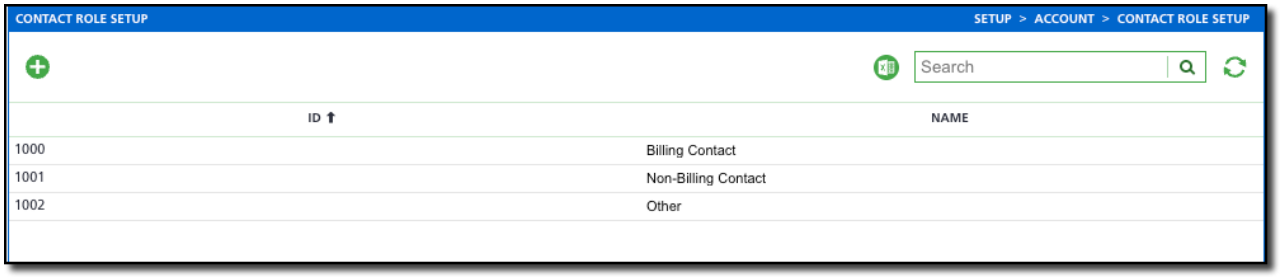
Contact Role Setup

Last Modified on 10/09/2026 12:57 pm PDT

Pathway: *Setup > Account > Contact Role*

Contact Role Setup allows users to create different contact roles providing the ability to filter contacts by certain role types.

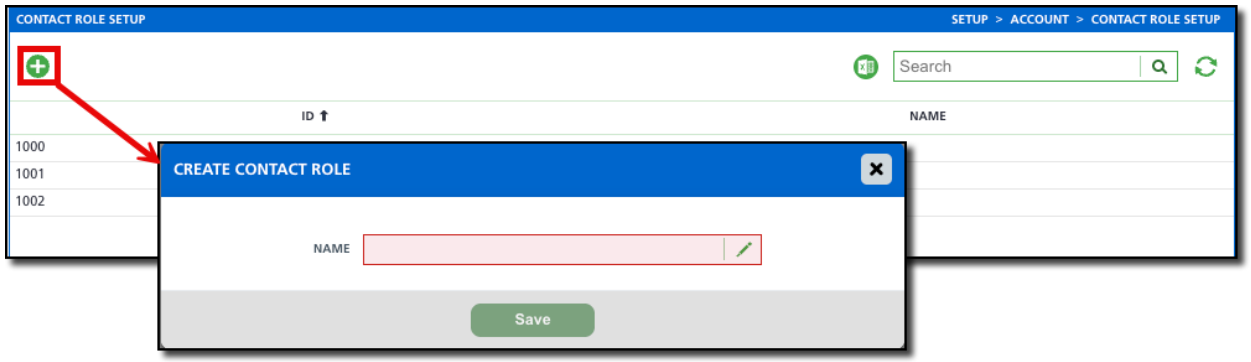


Field Descriptions

Field	Description
ID	A unique ID assigned to the Contact Role.
Name *Required*	The name of the Contact Role to be used as a way to categorized contacts.

Add/Edit a Contact Role

To add or edit a Contact Role, use the following steps. Once created, it will be available to assign to a contact.



To Add

1. Click the **green +** icon to open the *Create Contact Role* tool.
2. Enter a **Name** for the Contact Role.
3. Click **Save** when finished.

To Edit

Click the **Name** field on the *Contact Role Setup* screen to modify it. Changes save automatically.

Application of Contact Role

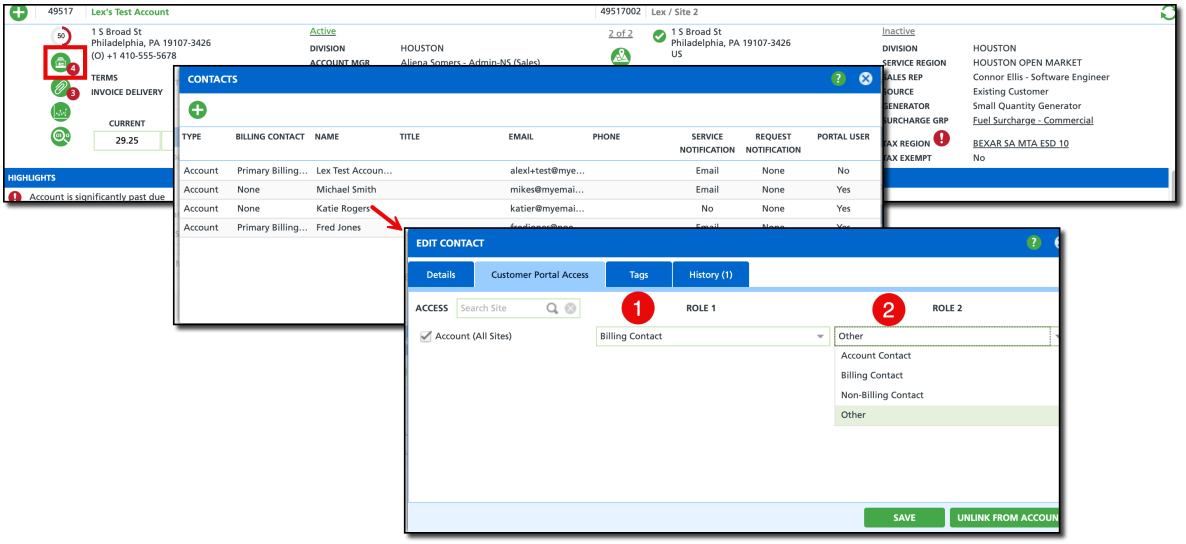
Contact Roles are accessible via in the Contacts list and can be used when sendingBulk Emails. For reporting, the

Database Query Tool can also be used to pull contacts as shown below.

Role Assignment

Pathway: *Account > View Contacts > Contact row [double click]*

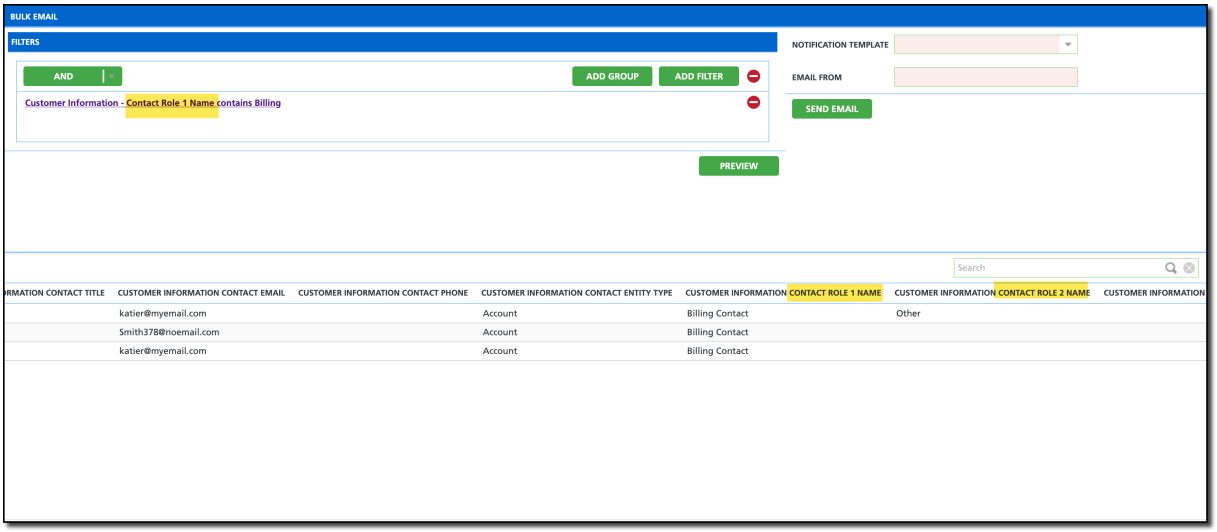
Each contact may be assigned up to 2 roles as shown here:



Bulk Email Application

Pathway: *Database > Send Bulk Emails*

When sending bulk emails, contact roles can be used to fine-tune your email list by using the Customer Information entity and filtering on Contact Role fields. Review the Send Bulk Emails documentation to learn more about using the Bulk Email feature.



Permission

The following permissions are required to view, add and edit contact roles.

Permission ID	Permission Name
22	Setup \ Account

Database Query Mapping

Use the Database Query Tool to find all contacts assigned to a specific contact role
Database > Database Query

Use the Entities and Display Fields below to query contacts based on a role.

Entity	Display Field	To Find (examples)
Contact Information new	**Contact Role 1 Name** **Contact Role 2 Name**	All contacts where Contact Role 1 Name equals Billing
Contact Information	**Contact Role 1 Name** **Contact Role 2 Name**	Same as above but with more account and site information that the contact is assigned to.

Related Articles

Add and Edit Contacts
Database Query
Send Bulk Emails