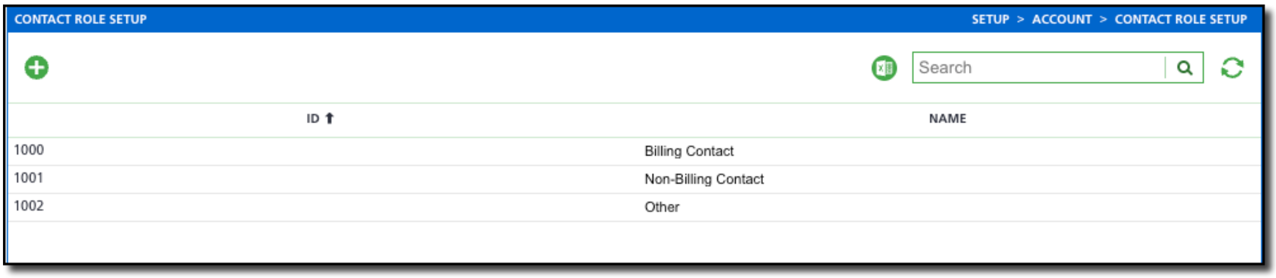
Contact Role Setup

Last Modified on 05/20/2026 10:52 am 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.

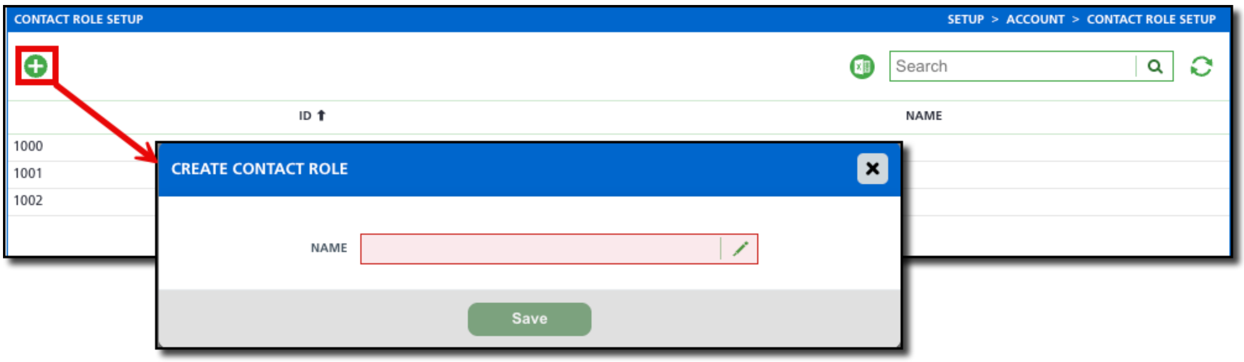


Field Descriptions

Fields	Descriptions
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

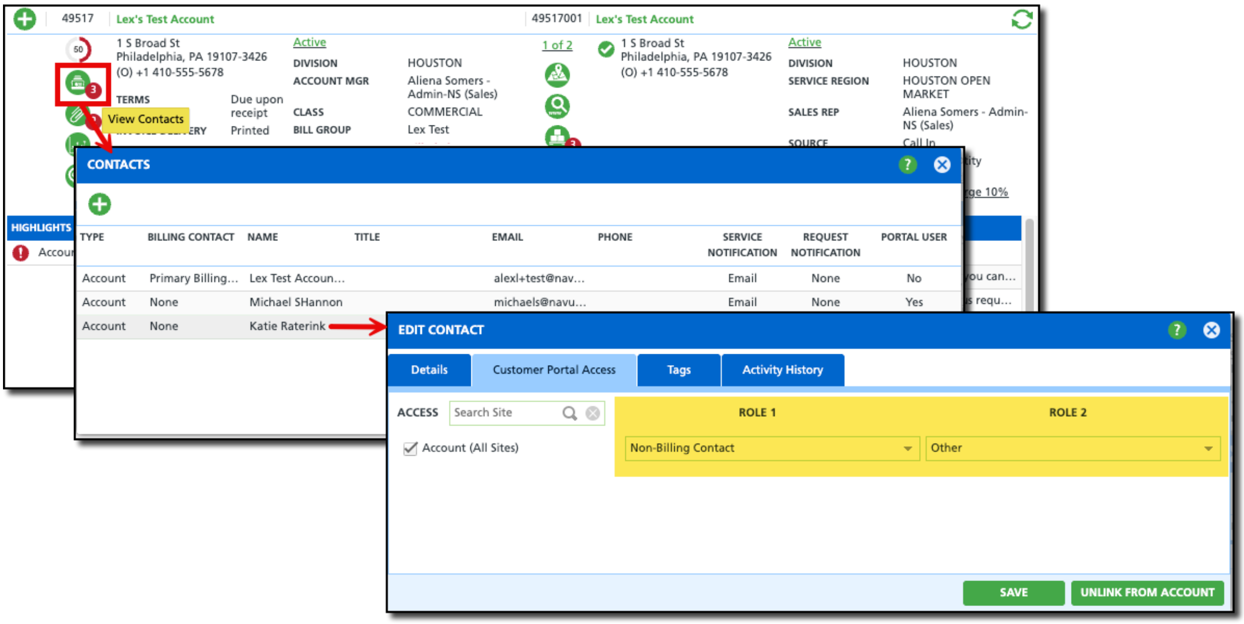
1. Click the **green +** icon to open the *Create Contact Role* tool.
2. Enter a unique, longer **Name** for the Term.
3. Click **Save** when finished.

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 visible in Contacts. The Database Query Tool can be used to pull contacts based on the assigned Contact Role(s).
Each contact may be assigned up to 2 roles.



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

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