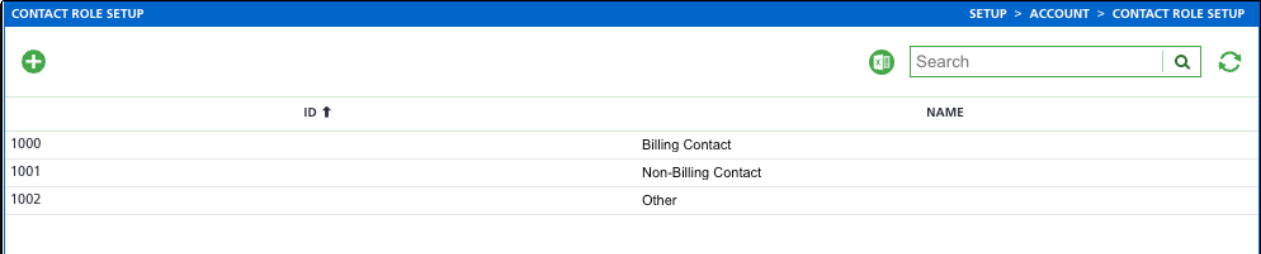


Contact Role (Setup / Account) - New Setup Screen (21117) [New Feature]

Last Modified on 05/20/2026 12:44 pm PDT

A new **Contact Role Setup** screen has been added to *Setup > Account*. This screen will allow companies to define contact roles and manage contacts using the Contact Role. As part of this new functionality, the **Add/Edit Contact** screen has been configured to pull values for the Role 1 and Role 2 drop-downs from the Contact Roles defined via this setup.



The screenshot shows the 'CONTACT ROLE SETUP' interface. At the top, there is a blue header with the title 'CONTACT ROLE SETUP' and a breadcrumb trail 'SETUP > ACCOUNT > CONTACT ROLE SETUP'. Below the header, there is a search bar with a magnifying glass icon and a refresh icon. The main content area contains a table with two columns: 'ID' (with an upward arrow) and 'NAME'. The table lists three contact roles: 1000 (Billing Contact), 1001 (Non-Billing Contact), and 1002 (Other).

ID ↑	NAME
1000	Billing Contact
1001	Non-Billing Contact
1002	Other

Pathway: Setup > Account > Contact Role

In addition, the following fields have been added to the *Contact Information* and the *Contact Information New* entities in the **Database Query** tool. Use these fields to filter Contacts based on Contact Roles defined.

- **Contact Role 1 Name**
- **Contact Role 2 Name**
- **Contact Role 1 ID**
- **Contact Role 2 ID**