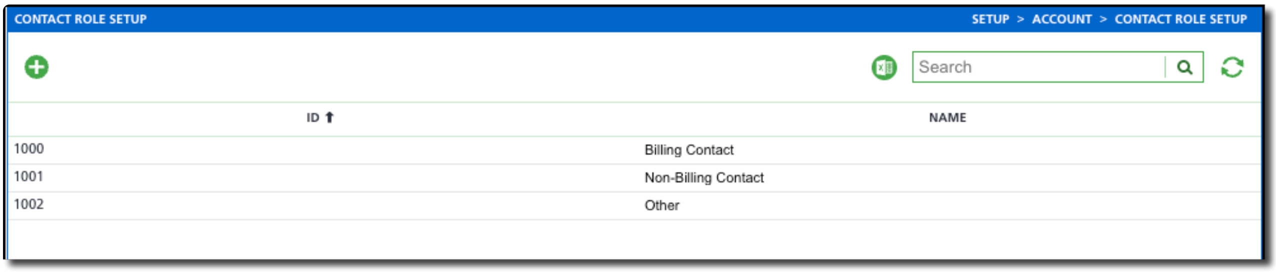
Contact Role (Setup / Account) - New Setup Screen (21117) [New Feature]

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.



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**