Creating a Team Member's Related Company and Contact Record

Last Modified on 09/28/2021 1:06 pm EDT

This guide explains how to assign a company and contact record to a specific team member. It is intended for advanced users.

aACE does *not* require that all users have a company or contact record. However, some functionality for team members can be improved by creating company and contact records specific to your staff.

Note: To quickly locate contact information, you can click the Co-Workers icon ( ) on the Main Menu. This module displays a list of the active team member records, providing their primary phone number and an email link.

Company Records for Team Members

Team members who will receive expense reimbursements or commissions *must* be linked to a company record. This company record must be unique to the team member (as opposed to a general company record for your organization).

If the needed company record does *not* already exist, you can create and link a new record:

1. Navigate from **Main Menu** > **Internal** > **Team Members**.
2. Locate the team member.
3. Click **Actions** > **Create Related Company**.
4. At the confirmation dialog, click **OK**.

When you create the team member's company record this way, it is automatically linked to the team member record. Changes to the team member record will automatically sync to the related company record.

If the needed company record *already exists* for the team member, you can manually link it to the team member record: At the team member record, click Human Resources tab > Edit > Company field, and select the desired company.

Creating a Batch of Company Records

You can create company records for multiple team members at one time: From the Team

Member module list view, locate the team members who should be linked to the same company record. Click Actions > Create Related Company for Team Members in List.

Restricted Access to Company Records

A team member's company record is initially flagged as Restricted Access (Customer Details tab). This prevents the company from displaying when team members in certain user groups use the Companies module. For example, this flag could be used to prevent sales staff from seeing the home addresses of other team members.

To change which users can see a team member's company record, you can use one of these methods:

- Clear the Restricted Access flag on that company record
- Move the user(s) into a User Group (http://aace5.knowledgeowl.com/help/controlling-access-to-aace-modules-with-user-groups) that has Access Privileges > Companies > No Restricted Access Constraint

Contact Records for Team Members

Team member information is typically recorded on the team member record. On a contact record, you can capture additional details (often related to sales and marketing).

You can create new contact records directly from the Contacts module. However, the easiest way to link a contact record to a team member record is via the Team Members module:

1. Navigate from **Main Menu** > **Internal** > **Team Members**.
2. Locate the team member.
3. Click **Actions** > **Create Related Contact**.
4. At the confirmation dialog, click **OK**.

When you create the contact record this way, it is automatically linked to the team member record.

If a contact record already exists for the team member, you can manually link it to the team member record: At the team member record, click Human Resources tab > Edit > Contact field, and select the desired contact.

Creating a Batch of Contact Records

You can create contact records for multiple team members at one time: From the Team Member module list view, locate the team members who should have a contact record. Click

Actions > Create Related Contact for Team Members in List.

Team Member Contact Without Team Member Company

Some organizations may want team members to be listed in the Contacts module, but *not* have team member-specific records in the Company module. You can accomplish this using a general company record:

1. Navigate from **Main Menu** > **Internal** > **Team Members**.
2. Locate the desired team member and display the **Human Resources** tab.
3. Click **Edit**, then click the **Company** field.
4. Select the general company record associated with the team member's office, then click **Save**.
5. Run the process in the section above to create a contact record.
   Note: If there are a number of team members to set up this way, you can streamline the process by first assigning the company to all the needed team members, then creating the contact records as a batch.