Creating a Team Member's Related Company and Contact Record

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This guide explains how to create a company and contact record for a specific team member. It is intended for system administrators.

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 desired 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, aACE automatically links it 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's detail view, click Human Resources tab > Edit > Company field > 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 a 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 Record Access Restricted, located in the Finance & Accounting tab. This prevents the team member companies from displaying when other users access the Companies module. For example, this flag could help prevent sales staff from seeing the home addresses of other team members.

You can change which users can see team member company records using these methods:

- Clear the Record Access Restricted flag on a company record
- Move the user(s) into a User Group (https://aace6.knowledgeowl.com/help/controlling-access-to-aace-modules-with-user-groups) that has access privileges (Main Menu > System Admin > User Groups > Access Privileges section > Companies > Can View Restricted Companies

Contact Records for Team Members

Team member information is typically recorded on the team member record. But a contact record 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 set up a contact record for a team member is via the Team Members module:

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

When you create the contact record this way, aACE automatically links it 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's detail view, 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: At the Team Members module list view, locate the team members who should have a contact record.

Then click Actions > Create Related Contact for Team Members in List.

Team Member Contact Without Team Member Company

An organization may want team members to be listed in the Contacts module, but *not* have team member-specific records in the Companies module. You can set this up 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 multiple team members to set up this way, you can streamline the process. First, manually assign the general company to all the needed team members. Then create a batch of contact records (see above).