Operations - Active Contact Verification Instructions and Template

01/22/2024 1:24 pm EST

In Salesforce Using the drop down Select Reports

If the reports option does not show on your list of options Select Edit in the Edit Service Console select Add More Items

Select the + beside Reports on the list of items, select select

Once in the Reports select Public Reports.

Select Active Contact Report Created by Tammy Narowski.

Select Edit (Upper Right Corner)

Select the Filters Tab on the report

> **Tip:** It easiest to copy the account name from the account screen prior to entering the report filters.

Select Account Name Filter and Paste the account name into the Account Name field.

Select Apply

Select in the upper right corner.

> **TIP:** If an account name has a comma or period in the name the complete name will need to be placed in quotation marks “Company Name, Inc.” in the Account name field. This is one of the biggest reasons that reports will come back with no details.

Once you have the correct data in your report select the drop-down option beside the button.

Select Export

Select Formatted Report – this will download the report with all the contacts that can be sent as is to customers to verify their contacts. If the customer is wanting to verify both active and portal contacts on the same document, please follow the following instructions.

Step 1: Open the report and select Enable Editing

Step 2: Delete Rows 1 through 11

Step 3: Delete Columns A, C, and I

Step 4: Delete Rows the last three rows of the table in the above example it would be rows 10, 11 and 12.

Step 5: Open the Active Contact Verification Template. Active Contact Verification - Template.xlsx

Step 6: Copy Information into the Active Contacts Verification – Template

Note: Columns G and H are drop down selection to it is easy for the customer to select Active (yes or no) and Portal Access (No, User, or Manager). Both Columns have descriptions in them as to what the options mean.

Step 7: Select File, Save As and in the Name change “Template” to the account name in the above example the document name would be Active Contact Verification - Xenoge Technologies.xlsx.

This new spreadsheet can be sent to the customer to complete. They can add users at the bottom of the existing list if they need to add additional contacts.

Step 8: When customer returns the document update the contacts in accordance with the document and then upload the completed form to the Files on the account level.

To upload a file to an Account select the Files Quick Link on the account.

Select the button at the upper right corner of the page. Select the file to upload and select the Upload Files button.