



COMMERCIAL ADVANTAGE

Modify Contacts Quick Reference Guide

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Member FDIC



Modify Contacts

When converting existing recipients to Commercial Advantage, duplicate recipients may be created. This is primarily because the data transfer of required fields in Commercial Advantage and the previous online banking platform may not carry over one-for-one. The same Contact may have converted both as a Business and as an Individual.

Why is Contact Maintenance Important?

Modifying the Contact list to remove duplicates is highly recommended and can be completed over time.

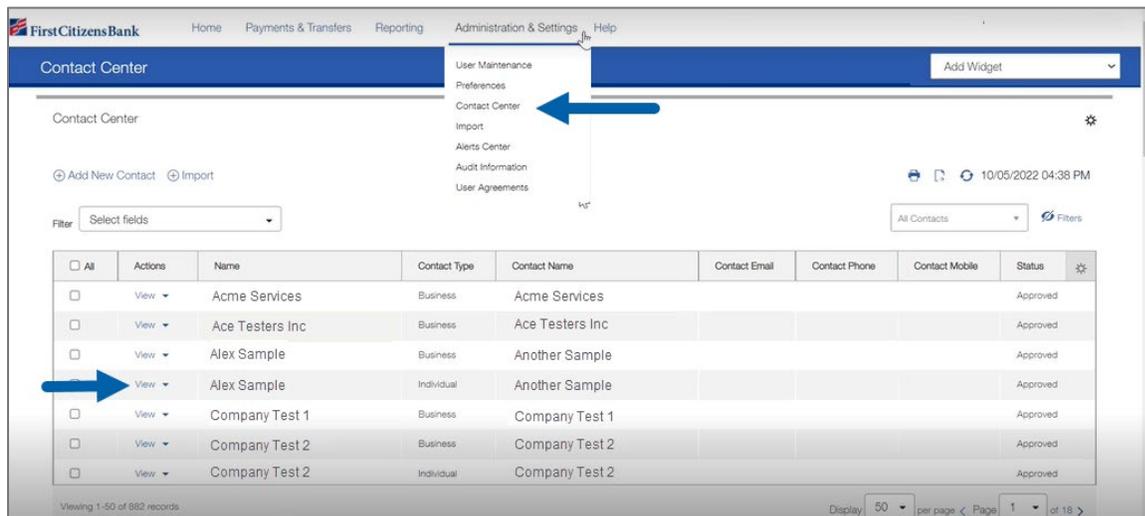
When processing Consumer Payments and Collections in Commercial Advantage, only the Individual Contacts will appear in the Beneficiary name list.

However, when processing Corporate Vendor Payments in Commercial Advantage, an Individual who has also been added to Contact Center as a Business Contact may be listed in the Beneficiary name list, creating the potential of selecting an Individual recipient for a Corporate Vendor Payment.

Differences Between a Business and Individual Contact

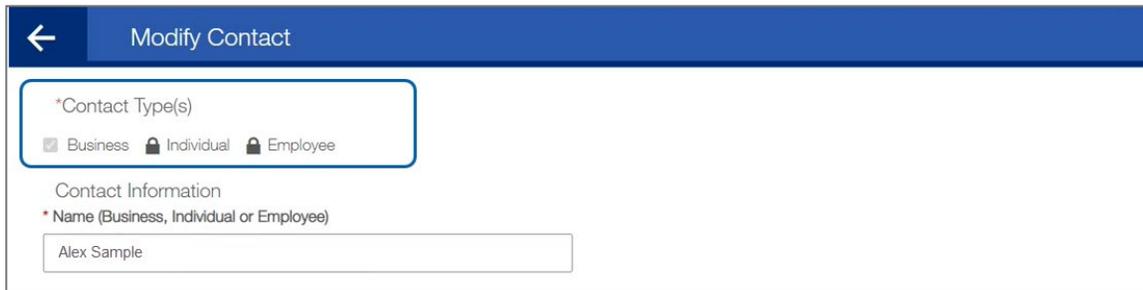
To open the Contact Center from the **Home** page, select **Administration & Settings**. Then select **Contact Center**.

Locate a Contact and select **View**.



Business Contact Type

The **Contact Type** is identified at the top of the screen. In this example, **Business** is checked, and both Individual and Employee are locked out.



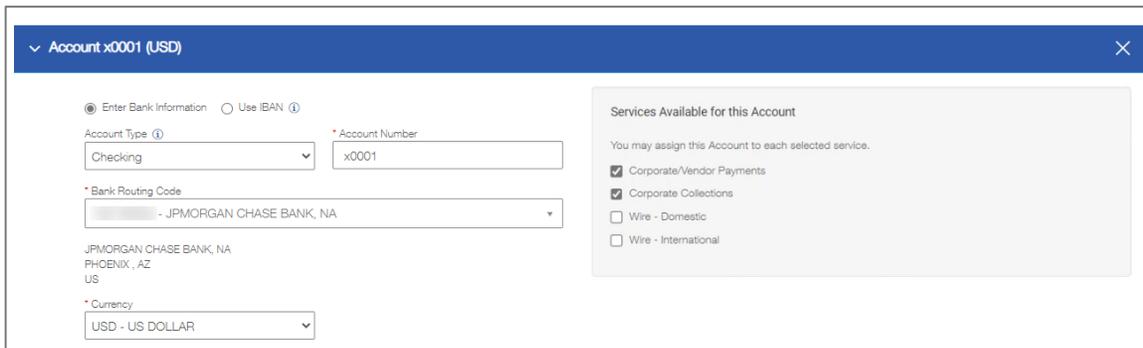
The screenshot shows a 'Modify Contact' form. At the top, there is a blue header with a back arrow and the text 'Modify Contact'. Below the header, there is a section titled '*Contact Type(s)' with three radio button options: 'Business' (checked), 'Individual' (locked), and 'Employee' (locked). Below this, there is a section titled 'Contact Information' with a label '*Name (Business, Individual or Employee)' and a text input field containing 'Alex Sample'.

Continue to scroll down to the **Account xXXXX (USD)** section. Click on the action arrow to open and view.

The **Services Available** for a Business Contact may include Corporate Vendor Payments, Corporate Collections and Wires, both Domestic and/or International, if applicable.

Verify the appropriate Services Available are selected for the surviving Contact.

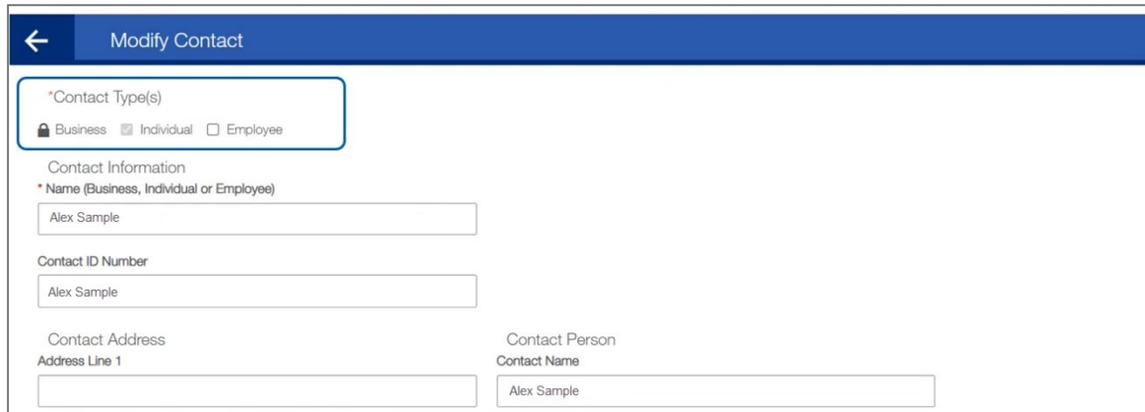
Note: List of **Services Available** depends on the types of services subscribed to by the Company. Not all available services may be listed.



The screenshot shows a 'Account x0001 (USD)' form. At the top, there is a blue header with a dropdown arrow and the text 'Account x0001 (USD)'. Below the header, there are two radio button options: 'Enter Bank Information' (selected) and 'Use IBAN'. Below these, there are fields for 'Account Type' (set to 'Checking'), 'Account Number' (set to 'x0001'), and 'Bank Routing Code' (set to 'JPMORGAN CHASE BANK, NA'). Below the routing code, there is a text block: 'JPMORGAN CHASE BANK, NA', 'PHOENIX, AZ', 'US'. Below this, there is a 'Currency' dropdown set to 'USD - US DOLLAR'. To the right of the form, there is a section titled 'Services Available for this Account' with the text 'You may assign this Account to each selected service.' and three checkboxes: 'Corporate/Vendor Payments' (checked), 'Corporate Collections' (checked), 'Wire - Domestic' (unchecked), and 'Wire - International' (unchecked).

Individual Contact Type

When an **Individual Contact** type is selected, the Business option is locked out. The **Employee** check box is open to select if this person is both an Individual and an Employee.



← Modify Contact

*Contact Type(s)
 Business Individual Employee

Contact Information
* Name (Business, Individual or Employee)
Alex Sample

Contact ID Number
Alex Sample

Contact Address
Address Line 1

Contact Person
Contact Name
Alex Sample

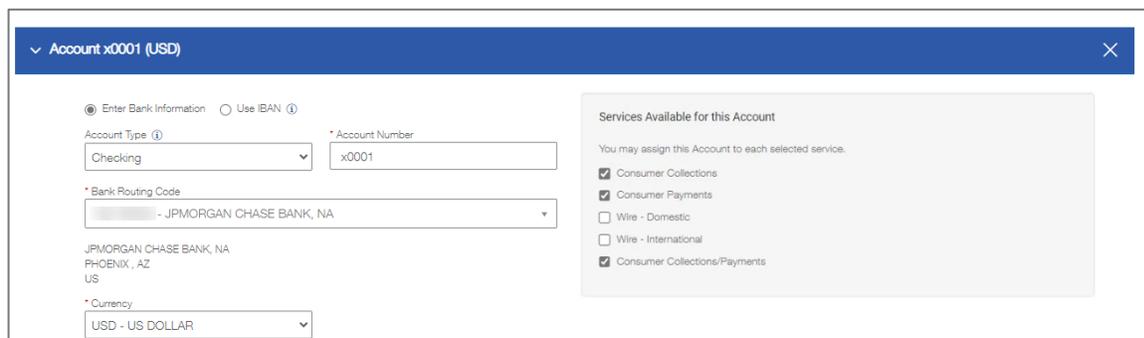
Continue to scroll down to the **Account xxxxx (USD)** section. Click on action arrow to open and view.

The **Services Available** for an Individual Contact may include Consumer Collections, Consumer Payments, Consumer Collections/Payments, Payroll and Wires, both Domestic and International, if applicable.

Verify the appropriate Services Available are selected for the surviving Contact.

Notes:

- Payroll is only listed when the Contact Type selected is both Individual and Employee.
- With converted data, it is likely any Domestic and International Wire Services were assigned to the Business Contact type. If the intention is to delete the Business Contact and retain the Individual Contact, you will need to update the Individual Contact with Domestic and/or International Wire Services as needed.



Account x0001 (USD)

Enter Bank Information Use IBAN ⓘ

Account Type ⓘ
Checking

Account Number
x0001

Bank Routing Code
- JPMORGAN CHASE BANK, NA

JPMORGAN CHASE BANK, NA
PHOENIX, AZ
US

Currency
USD - US DOLLAR

Services Available for this Account

You may assign this Account to each selected service.

- Consumer Collections
- Consumer Payments
- Wire - Domestic
- Wire - International
- Consumer Collections/Payments

Modify a Contact

In Commercial Advantage, the existing Contact can be easily modified.

1. From the **Home** page, select **Contact Center**.
2. Click on the column heading to sort by **Name** to identify any duplicates. When reviewing for duplicates, look for identical/similar names with a Contact Type of Business and Individual.
3. From the Action column, select **View**. Verify each Contact and identify the correct Contact type – Business or Individual. Verify the appropriate **Services Available** are selected for the surviving Contact.

Note: With converted data, it is likely any Domestic and International Wire Services were assigned to the Business Contact Type. If the intention is to delete the Business Contact and retain the Individual Contact, update the Individual Contact with Domestic and International Wire Services as needed.

4. Once the surviving Contact is identified, select **Modify** from the Actions menu, if applicable.

The screenshot shows the First Citizens Bank Contact Center interface. The top navigation bar includes 'Home', 'Payments & Transfers', 'Reporting', 'Administration & Settings', and 'Help'. The 'Administration & Settings' menu is open, showing options like 'User Maintenance', 'Preferences', 'Contact Center', 'Import', 'Alerts Center', 'Audit Information', and 'User Agreements'. The 'Contact Center' option is highlighted with a blue arrow. Below the menu, there's a 'Filter' dropdown and a table of contacts. The table has columns for 'All', 'Actions', 'Name', 'Contact Type', 'Contact Name', 'Contact Email', 'Contact Phone', 'Contact Mobile', and 'Status'. The 'View' action for the contact 'Alex Sample' is highlighted with a blue arrow. A dropdown menu for 'View' is open, showing 'Modify' and 'Delete' options.

All	Actions	Name	Contact Type	Contact Name	Contact Email	Contact Phone	Contact Mobile	Status
<input type="checkbox"/>	View	Acme Services	Business	Acme Services				Approved
<input type="checkbox"/>	View	Ace Testers Inc	Business	Ace Testers Inc				Approved
<input type="checkbox"/>	View	Alex Sample	Business	Another Sample				Approved
<input type="checkbox"/>	View	Alex Sample	Individual	Another Sample				Approved
<input type="checkbox"/>	View	est 1	Business	Company Test 1				Approved
<input type="checkbox"/>	View	Company Test 2	Business	Company Test 2				Approved
<input type="checkbox"/>	View	Company Test 2	Individual	Company Test 2				Approved

5. Scroll down and click on the **Add Payment Account Information** to access the **Account View**.

The screenshot shows the 'Modify Contact' form in the First Citizens Bank system. The form has a blue header with a back arrow and the text 'Modify Contact'. Below the header, there are several sections: '*Contact Type(s)' with checkboxes for 'Business', 'Individual', and 'Employee'; 'Contact Information' with a required field for 'Name (Business, Individual or Employee)' containing 'Alex Sample'; 'Contact ID Number' with an empty text field; and 'Contact Address' with a 'Contact Person' field. A blue arrow points to the 'Add Payment Account Information' button. At the bottom, there are 'Save Contact' and 'Cancel' buttons.

- Click the action arrow to open the **Account xXXXX** view. Make the needed adjustments and select **Save Contact**. A confirmation message will display, and the user is returned to the Contact Center.

All	Actions	Name	Contact Type	Contact Name	Contact Email	Contact Phone	Contact Mobile	Status
<input type="checkbox"/>	View	Alex Sample	Individual, Employee					Approved

- If the modified Contact is used within a Template, a system message will display, along with a list of templates. The impacted templates will be placed in a 'Needs Repair' status and require maintenance and re-approval. For information on how to repair a Template, see the [Modify a Template with a Needs Repair Status \(firstcitizens.com\)](https://www.firstcitizens.com/quick-reference-guide/modify-a-template-with-a-needs-repair-status) Quick Reference Guide.

Make a note of the Templates and Payments needing repair. Click on **Continue** to return to the Contact Center.

Changes to this Contact will impact Payments and Templates

This contact is used in the following payment(s) that have not been released. Modify the payment after this contact is approved to update the payment details.

ID	Beneficiary	Payment Type	Value Date	Last Update Date/Time	Status
6119	Alex Sample	Payroll	10/19/2022	10/17/2022 13:44:19	Entered

When this contact is approved, the following templates will be updated with the changes, which will need to be re-approved after the update.

Template Code	Template Description	Beneficiary	Payment Type	Last Update Date/Time	Status
RepairTest	Modify Contact Test	Alex Sample	Payroll	10/17/2022 13:45:58	Approved
Payroll	Expense Reimbursement	Alex Sample	Consumer Payments	09/21/2021 11:21:07	Approved

Do you want to continue with these changes?

Continue Cancel

Note: Other Contact error messages may display and require adjustments prior to saving the modified Contact. For example:



Delete a Contact

Once the surviving contact is identified and maintained, if applicable, the duplicate contact can be removed.

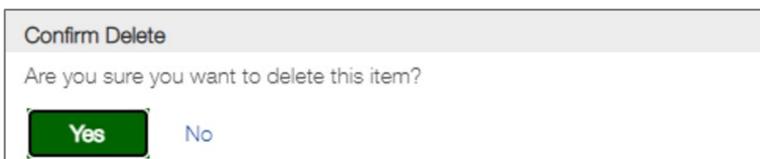
1. From the **Home** page, select **Contact Center**.
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3. From the Action column, select **View**. Verify each Contact and identify the correct Contact – Business or Individual.

Note: With converted data, it is likely any Domestic and International Wire Services were assigned to the Business Contact Type. If the intention is to delete the Business Contact and retain the Individual Contact, modify the Individual Contact with Domestic Wires and International Wires Services as needed.

4. Once the duplicate Contact is identified, select **Delete** from the **Actions** menu.

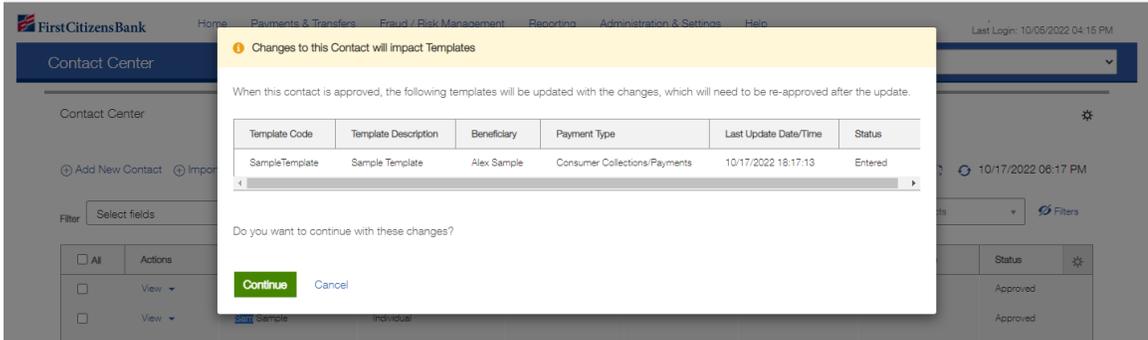
<input type="checkbox"/> All	Actions	Name	Contact Type	Contact Name	Contact Email	Contact Phone	Contact Mobile	Status
<input type="checkbox"/>	View	Alex Sample	Individual					Approved
<input type="checkbox"/>	View		Individual, Employee					Approved
<input type="checkbox"/>	View		Individual					Approved
<input type="checkbox"/>	View	Test Business	Business					Approved
<input type="checkbox"/>	View	Test Company	Business	Test Name				Approved
<input type="checkbox"/>	View	Test Three contact	Individual	Test Three				Approved

5. A confirmation message will display. Click on **Yes** to delete.

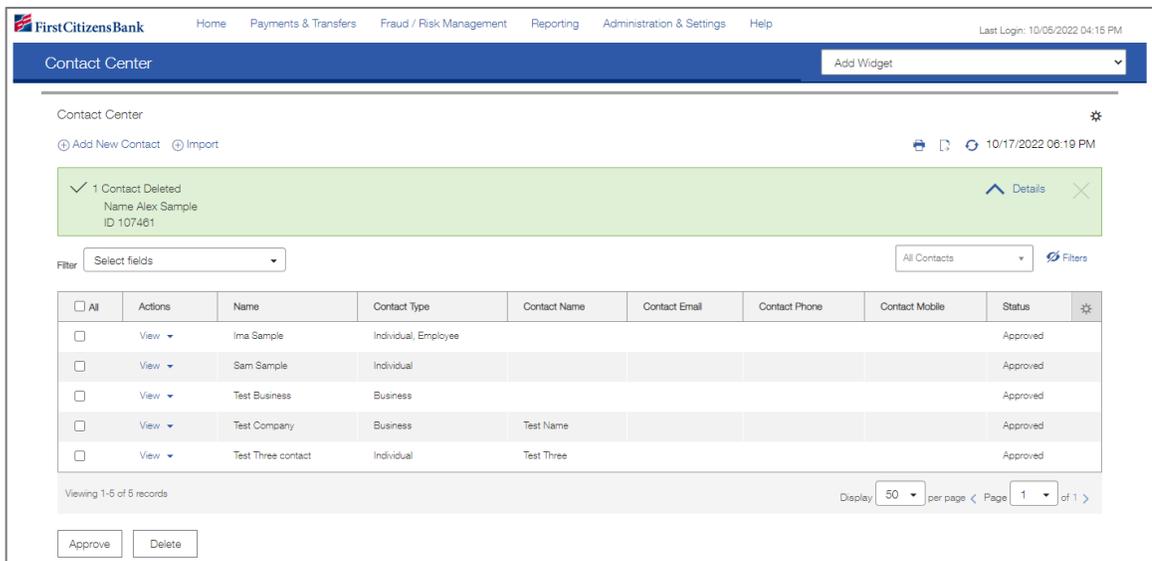


- If the deleted Contact is used within a Template, a system message will display, along with a list of Templates. The impacted Templates will be placed in a 'Needs Repair' status and require maintenance and re-approval. For information on how to repair a Template, see the [Modify a Template with a Needs Repair Status \(firstcitizens.com\)](https://www.firstcitizens.com/quick-reference-guide/modify-a-template-with-a-needs-repair-status) Quick Reference Guide.

When applicable, make a note of the Templates and Payments needing repair.



- A confirmation message will display, and the Contact is deleted.



Questions?

We're here to help. Contact Customer Support with questions at 866-322-4249 (866-FCB-4BIZ). Our team is happy to assist you. For more information visit our [Commercial Advantage Learning Center](#).