First Citizens Bank

COMMERCIAL ADVANTAGE

Modify Contacts Quick Reference Guide

Published 11/01/2022

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.

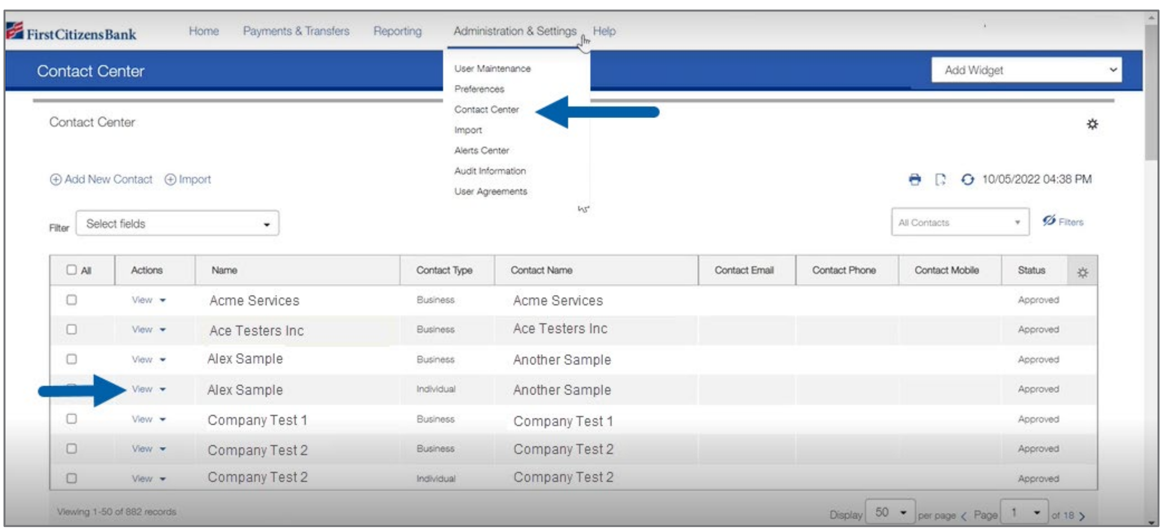
When processing Consumer Payments and Collections in Commercial Advantage, only the Individual Contacts will appear in the Beneficiary name list.

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

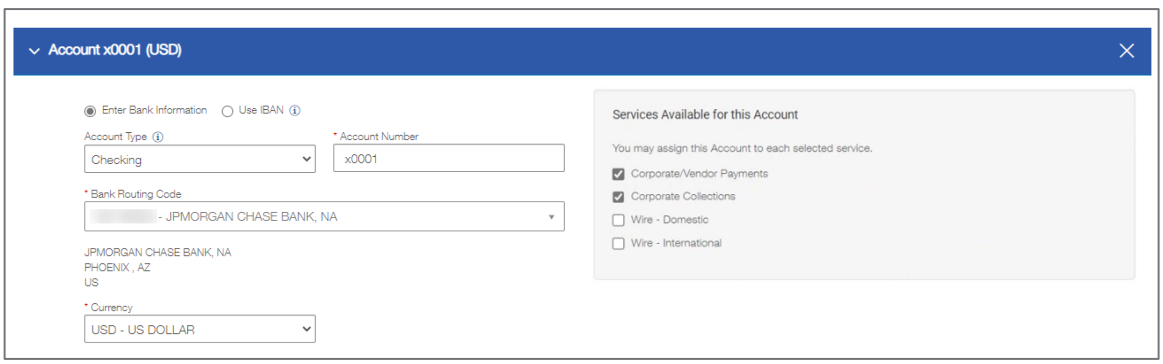
The **Contact Type** is identified at the top of the screen. In this example, **Business** is checked, and both Individual and Employee are locked out.

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.

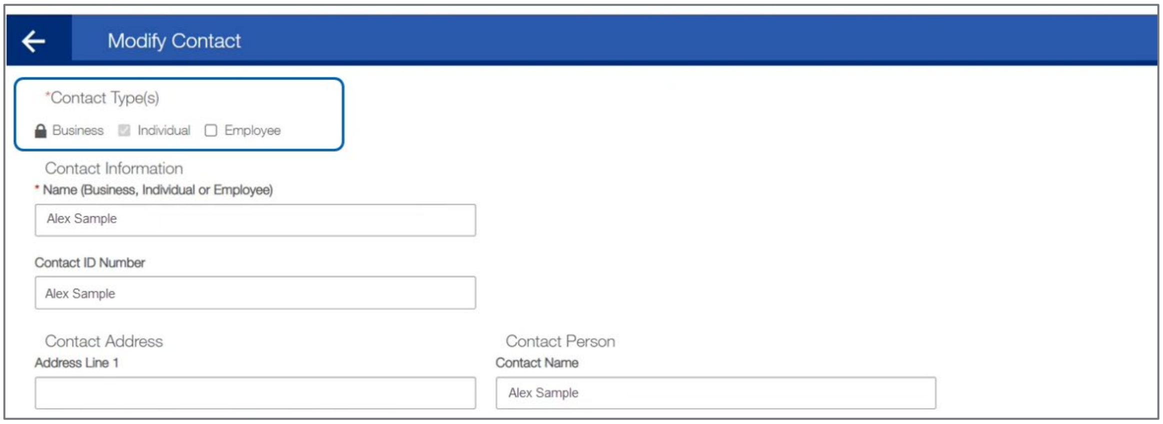
Verify the appropriate Services Available are selected for the surviving Contact.

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



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.



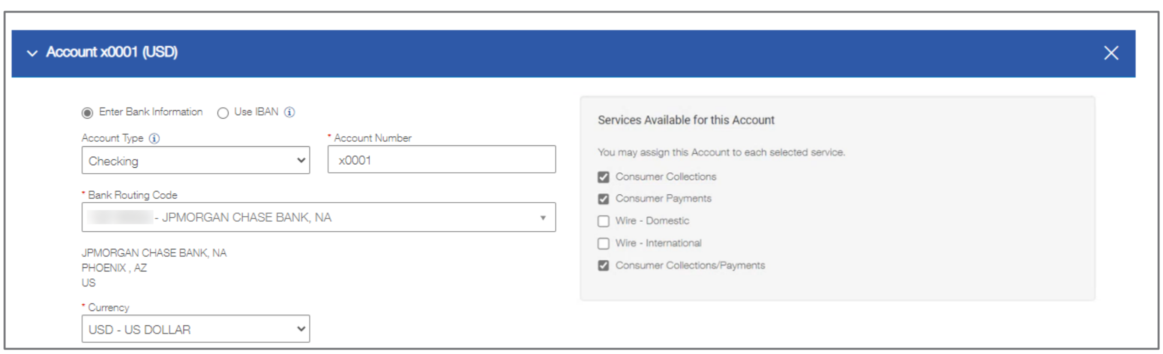
Continue to scroll down to the **Account xXXXX (USD)** section. Click on action arrow to open and view.

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.



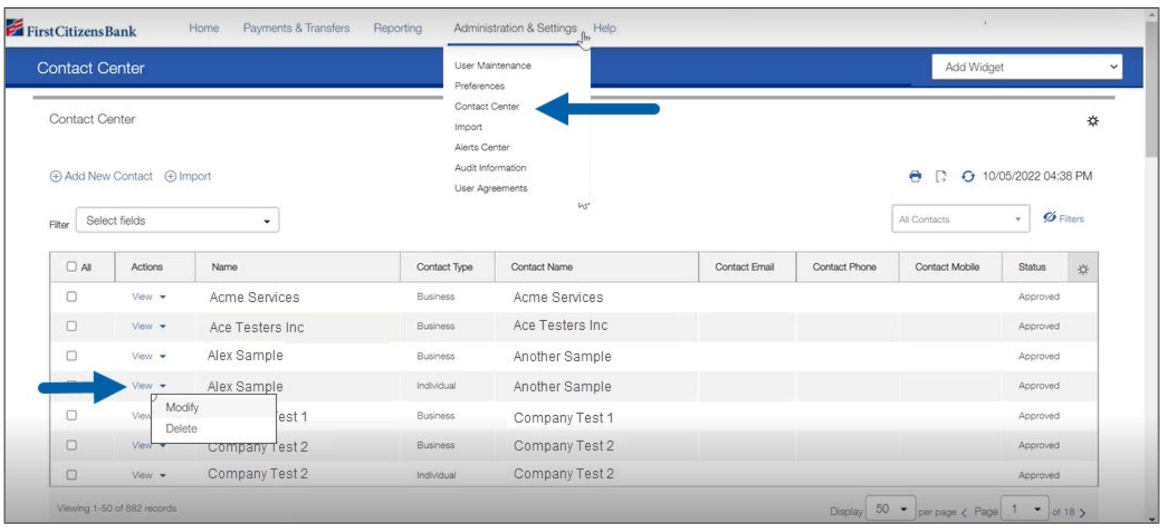
Modify a Contact

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

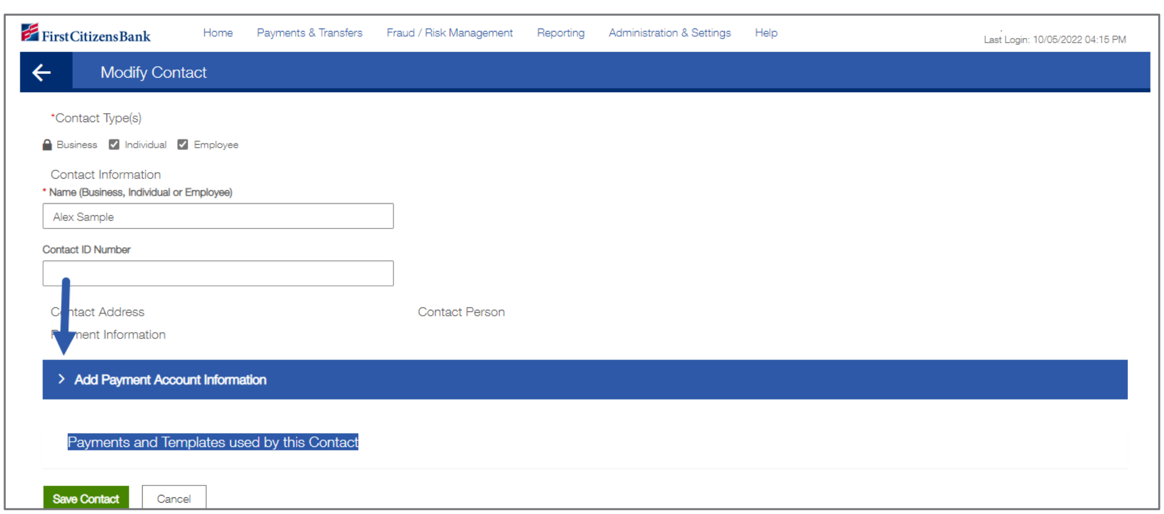
1. From the **Home** page, select **Contact Center**.
2. Click on the column heading to sort by **Name** to identify any duplicates. When reviewing for duplicates, look for identical/similar names with a Contact Type of Business and Individual.
3. From the Action column, select **View**. Verify each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

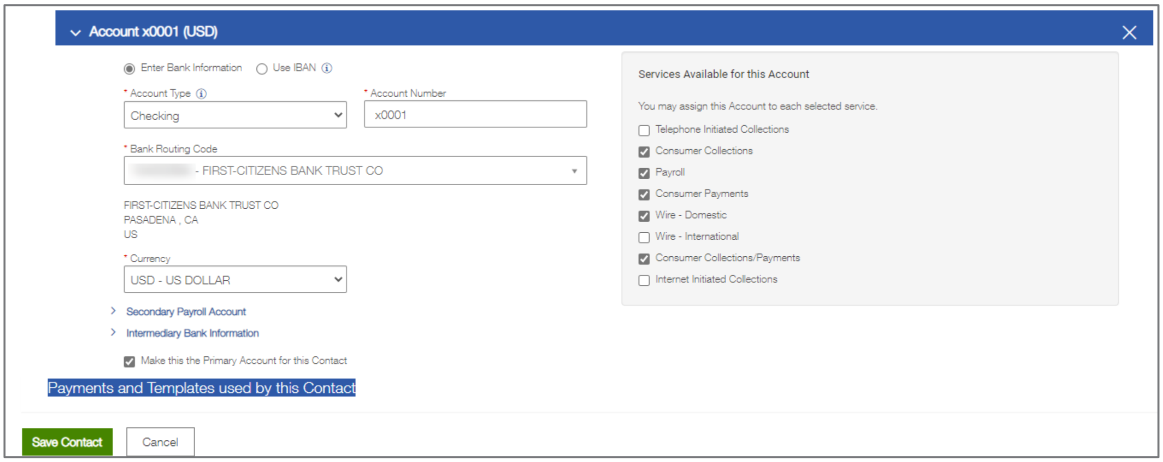
4. Once the surviving Contact is identified, select **Modify** from the Actions menu, if applicable.

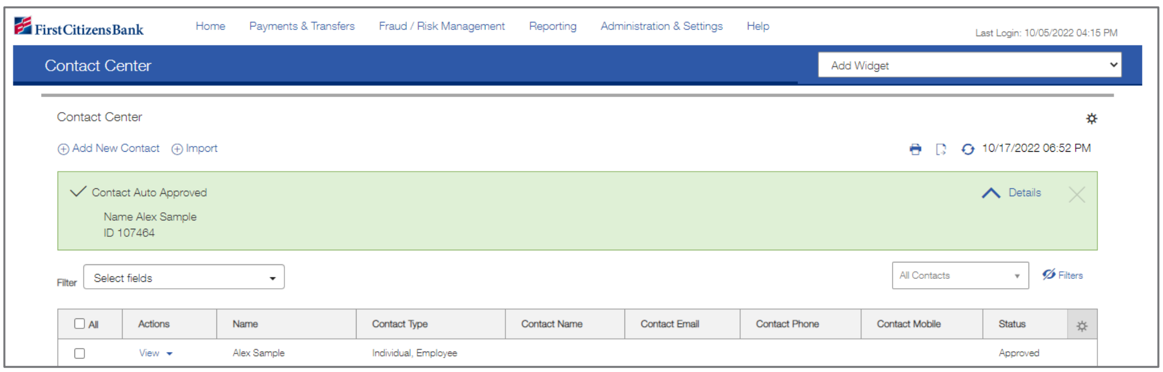


5. Scroll down and click on the **Add Payment Account Information** to access the **Account View**.



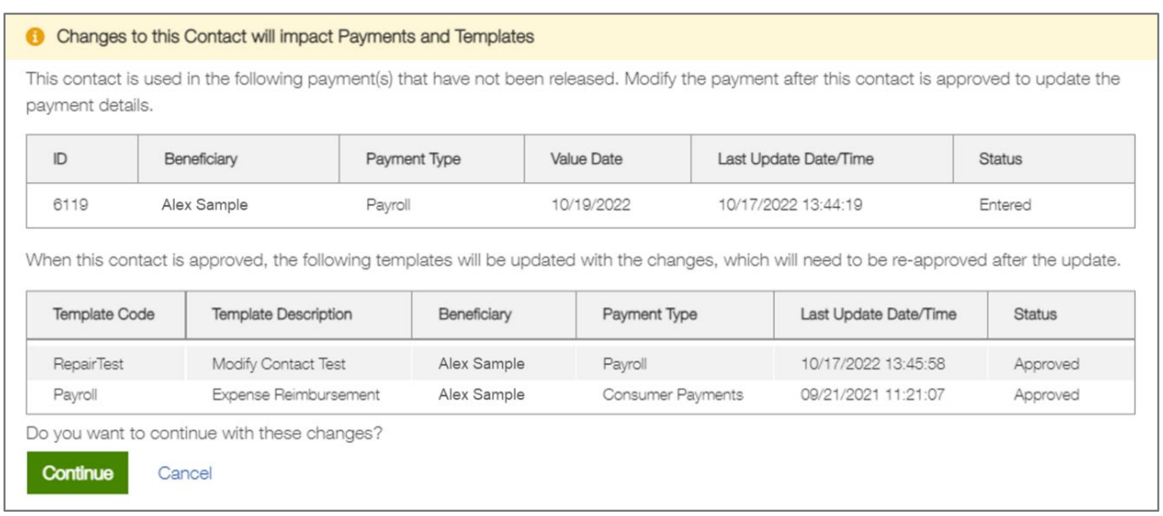
6. Click the action arrow to open the **Account xXXXX** view. Make the needed adjustments and select **Save Contact**. A confirmation message will display, and the user is returned to the Contact Center.



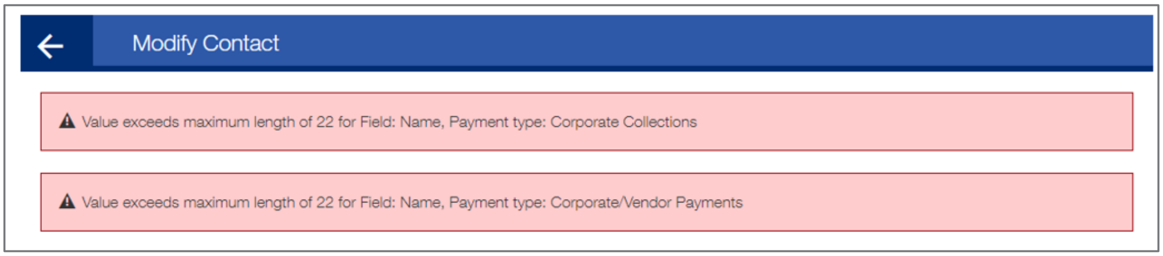


7. If the modified Contact is used within a Template, a system message will display, along with a list of templates. The impacted templates will be placed in a 'Needs Repair' status and require maintenance and re-approval. For information on how to repair a Template, see the Modify a Template with a Needs Repair Status (firstcitizens.com) Quick Reference Guide.

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



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



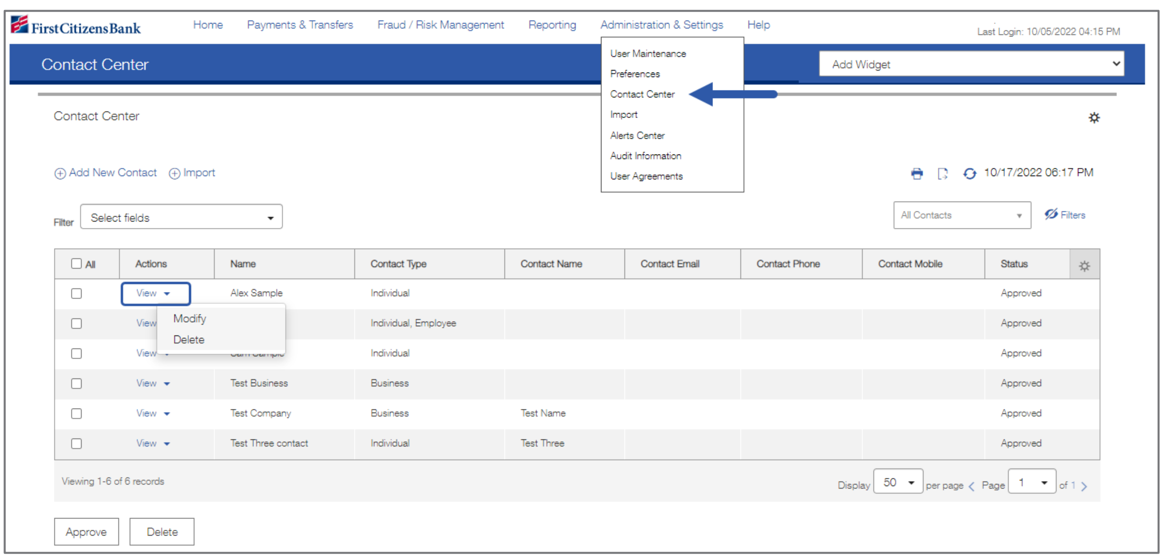
Delete a Contact

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

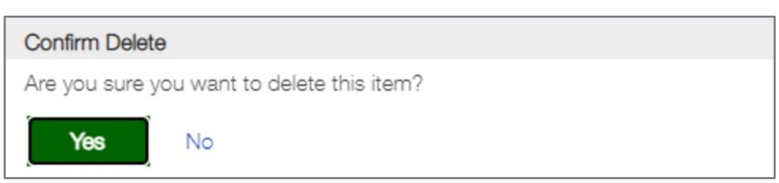
1. From the **Home** page, select **Contact Center**.
2. Click on the column heading to sort by **Name** to identify any duplicates. When reviewing for duplicates, look for identical/similar names with a Contact Type of Business and Individual.
3. From the Action column, select **View**. Verify each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

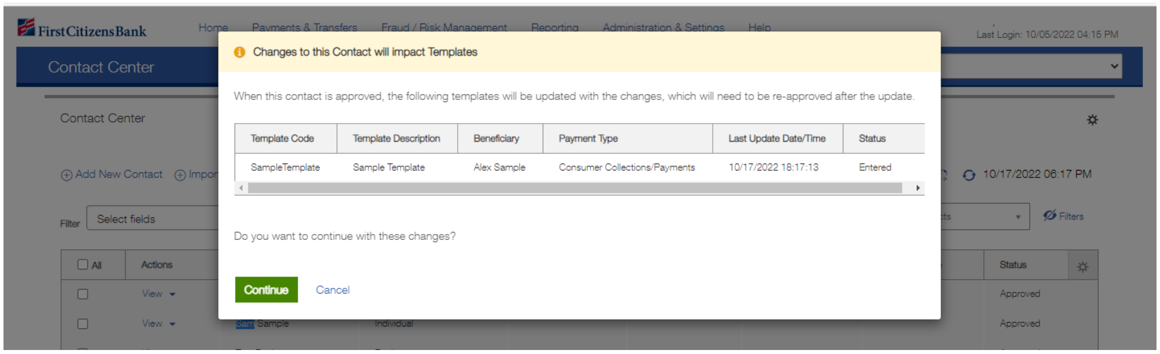


5. A confirmation message will display. Click on **Yes** to delete.

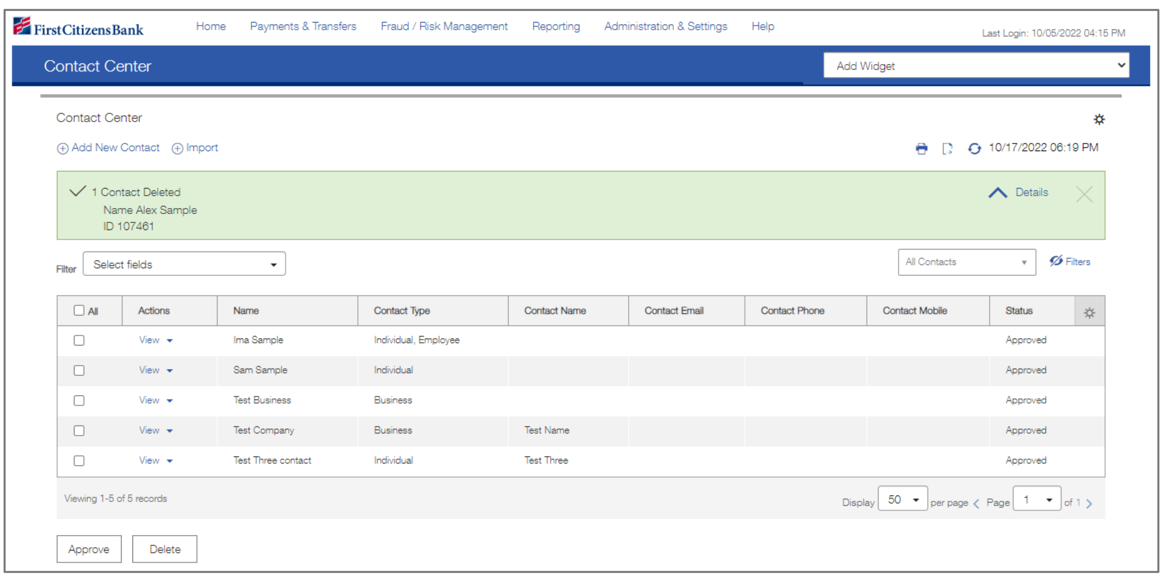


6. If the deleted Contact is used within a Template, a system message will display, along with a list of Templates. The impacted Templates will be placed in a 'Needs Repair' status and require maintenance and re-approval. For information on how to repair a Template, see the [Modify a Template with a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

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



8. 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]().