

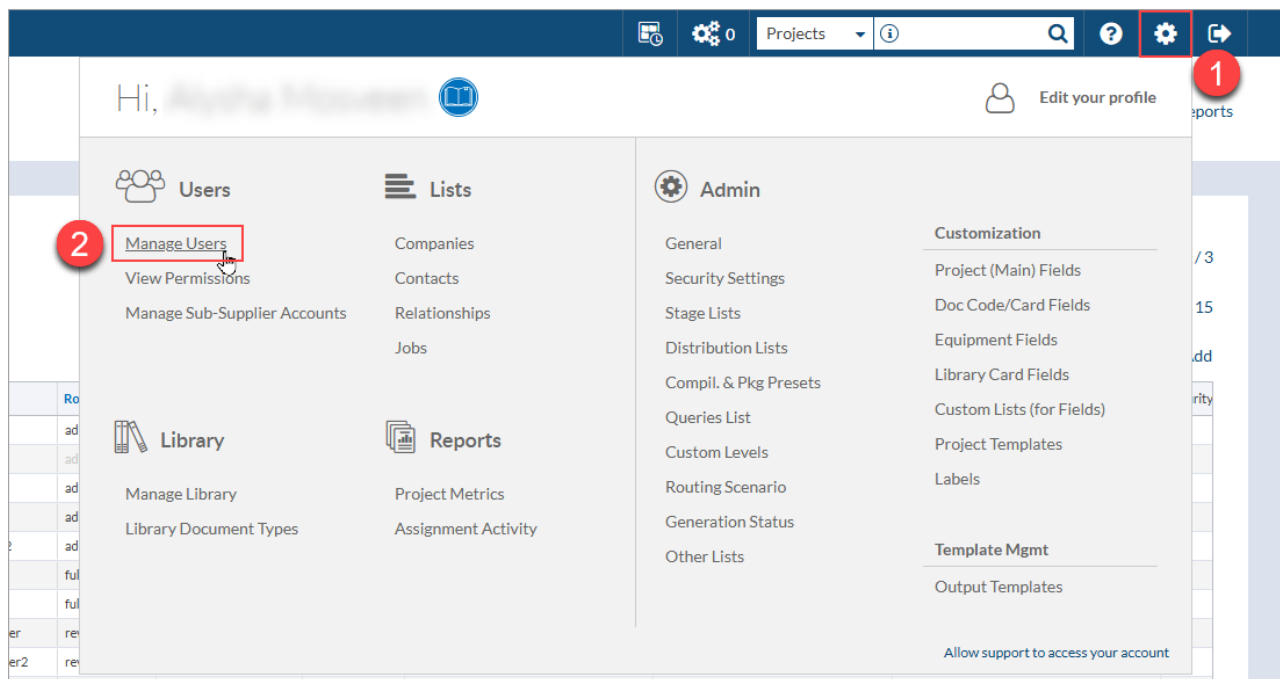
Set Commercial Contact

04/10/2025 6:09 am MDT

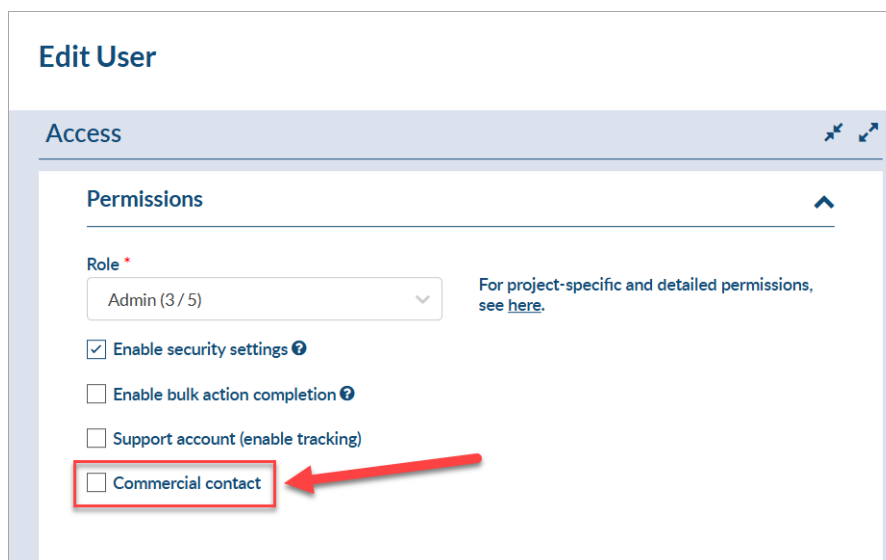
The user responsible for the contract-related activities (e.g., adding additional user licenses, contract renewals, etc.) should be set as a commercial contact. Flagging a user as the commercial contact allows the DocBoss team to accept and action billing-related requests from them.

Set commercial contact

To set a user as the commercial contact, navigate to **System Menu > Users > Manage Users**.



Select the appropriate user from the list. From the edit screen, open the "Permissions" section and check the "Commercial contact" check-box.



Once the box has been checked, press the save button (bottom right).

