

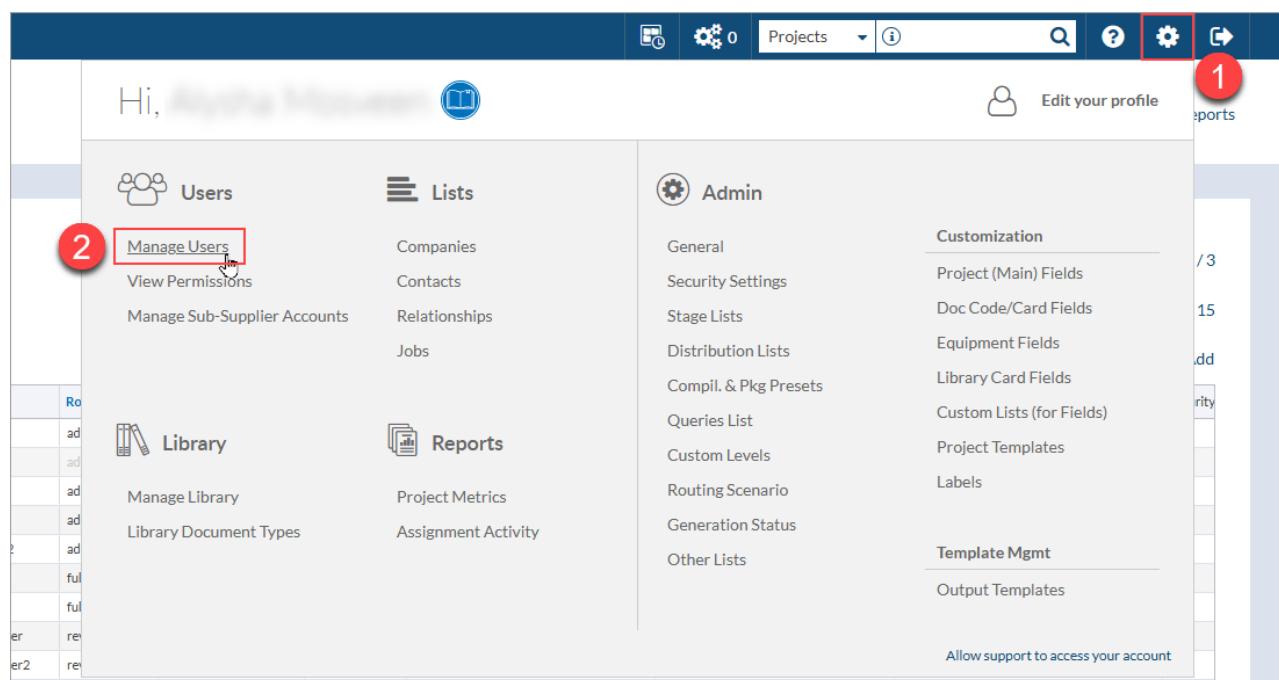
# Set Commercial Contact

02/04/2026 9:55 am MST

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

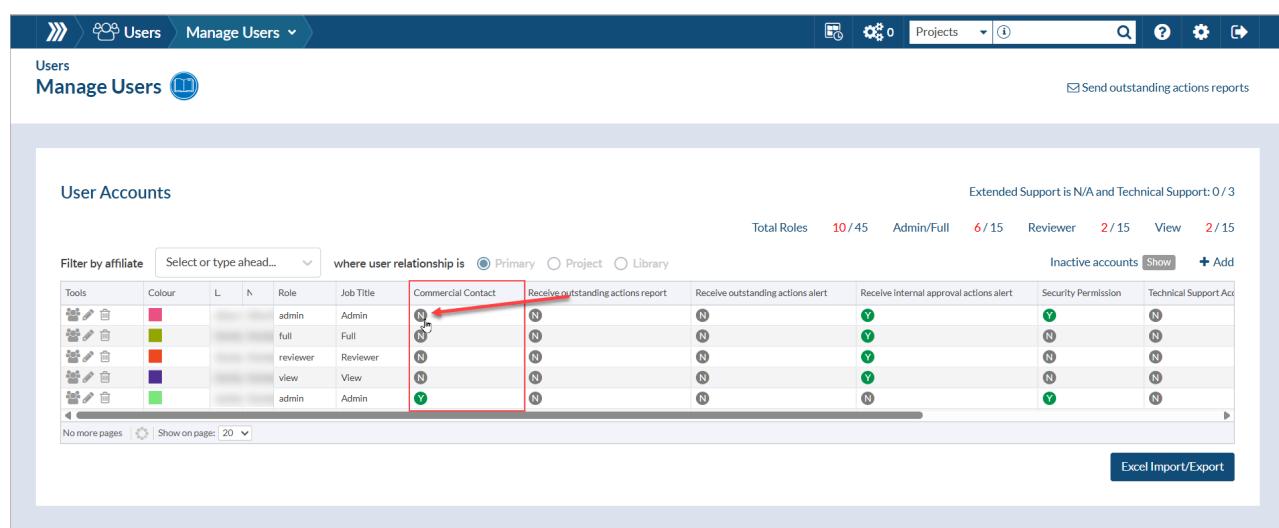
## Set commercial contact

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



The screenshot shows the DocBoss system menu. At the top right, there is a gear icon with a red circle containing the number '1'. Below the gear icon is a 'Edit your profile' link. In the center-left, there is a 'Manage Users' link with a red circle containing the number '2' over it. The 'Manage Users' link is highlighted with a red box. The rest of the menu items are visible but not highlighted.

From the User Accounts grid, scroll to the "Commercial Contact" column and click the "N" symbol for the user being set as the commercial contact. Because only one user can be designated as the commercial contact, a prompt will appear to confirm the change from one user to another.



The screenshot shows the 'User Accounts' grid. The 'Commercial Contact' column is highlighted with a red box and an arrow pointing to the 'N' symbol in the first row. The 'N' symbol is also highlighted with a red box. The grid includes columns for Tools, Colour, L, N, Role, Job Title, Commercial Contact, and several alert and permission columns. At the bottom of the grid, there is a 'No more pages' link and a 'Show on page' dropdown set to 20. A 'Send outstanding actions reports' link is also visible.

 Note: Setting the commercial contact can only be completed by an admin user with **security permissions** (see article: [Enable Security Permission for a User](#))