CDOL Tip of the Week. April 24, 2014 Primary Contacts and Setting the Primary Contact Flag for an Assignment

When looking at an organization summary page in CDOL with the Position section expanded, sometimes one assignment will display with a parenthetical statement: (Primary Contact)
This statement indicates that the individual in that assignment is considered the contact "Point" for this organization and that decisions and communications for that organization might run through that individual's overview, even if that individual may not be the first contact someone attempting to communicate with the organization will reach.

When an assignment in an organization is specified as the "primary contact" a few different things happen:

- That active assignment's contact information (if populated) is automatically expanded when the Position section of CDOL is expanded on the organization summary page, and will be visible to all those who have rights to view that organization and assignment information
- If an email address is entered for the individual in an active primary contact assignment, any IROP (Internal Record of Purchase) for the organization will be sent to that email address automatically
- Any mail or shipments sent to the primary contact will use that individual's addresses as shown in CDOL
- If the individual showing as primary contact is released, or released and replaced, and CDOL doesn't require that an active primary contact be in place for that organization to exist (some organizations require an active primary contact, such as a ward requires an active bishop, etc.), then the indicator or "flag" for primary contact does not automatically switch to the replacement or stop indicating if no replacement is specified, but rather the flag stays on the last primary contact until the flag is manually set to a replacement. That means that the released individual's email address, mailing address, phone numbers, etc., will still be showing as the primary contact default information, unless the information is removed from the individuals historical assignment, or a replacement primary contact is specified. ***This can understandably cause some significant issues***

How to Set the Primary Contact Flag

Users with certain edit rights will see and be able to change the "fill" of a five-point star found in the Edit Organization, Assignments tab to the left of listed assignments under the "Primary" column for position types that can potentially be a primary contact. Primary contact is an exclusive assignment so if the star is filled in with a gold color, then that individual is the primary contact. If the star is just an outline, then that individual could be the primary contact, but filling the star by clicking in the middle of the outline will remove the primary contact flag from the previous primary contact. If the user can only see the filled star, or sees no stars then either listed assignments are not potential primary contact position types and an appropriate position type would need to be added, or the user does not have sufficient rights to change the primary contact and the flag would need to be set by someone who has rights.

A position type must be set up in CDOL Admin to be a possible primary contact. In non-ecclesiastical organizations possible primary contact position types might include: president, commissioner, managing

director, director, manager, supervisor, etc. In ecclesiastical organizations primary contact positions might include: president, bishop, 1st counselor, 2nd counselor, etc.