Managing Organization Contact and Address Information

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Update Medical Director

**Important:** Review the drop down menu labeled I'm making purchases for to ensure you are making the purchase on behalf of the correct organization or party.

Update contact details

1. Click *Update* next to the current medical director.

2. Edit *Email* (required), *Phone* and/or *Fax*.

3. Click *Save and Submit*.

**TIP:** The radio button defaults to Update contact details (email, phone, fax).

**TIP:** The phone and fax country code will default based on the physical address of the organization.

**TIP:** Click *Cancel* at any time and changes will not be saved.
Once you Save and Submit, a confirmation message will be displayed.

4. Click Continue.

Select another contact in my organization

1. Click Update next to the current medical director.
2. Use the radio button to **Select another contact in my organization**.

3. **Select** the radio button for the new medical director.

   ![Image of contact selection](image)

   **TIP:** All people who currently have a relationship with the organization will be listed.

   **Important:** The selected medical director’s current contact details are displayed and can be edited.

4. Enter required fields and any additional contact information.

5. Click **Save and Submit**.

   ![Image of contact details](image)

   **TIP:** See Update contact details for additional information.

   **TIP:** Click **Cancel** at any time and changes will not be saved.
6. Click Continue.

Add a new contact to my organization

1. Click Update next to the current medical director.
2. Use the radio button to **Select another contact in my organization**.

3. Click the link to **Add New Contact**.
4. Enter required fields and any additional contact information.

5. Click Save and Submit.

Once you Save and Submit, a confirmation message will be displayed.

6. Click Continue.
Update Ordering Contact

**Important:** Review the drop down menu labeled *I'm making purchases for* to ensure you are making the purchase on behalf of the correct organization or party.

**Update contact details**

1. Click **Update** next to the current ordering contact.

2. Edit **email** (required), **phone** and/or **fax**.

3. Click **Save and Submit**.

**TIP:** The radio button defaults to Update contact details (email, phone, fax).

**TIP:** The phone and fax country code will default based on the physical address of the organization.

**TIP:** Click **Cancel** at any time and changes will not be saved.
Once you **Save and Submit**, a confirmation message will be displayed.

4. Click **Continue**.

**Select another contact in my organization**

1. Click **Update** next to the current ordering contact.
2. Use the radio button to Select another contact in my organization.

3. Select the radio button for the new ordering contact.

   **Important**: The selected ordering contact’s current contact details are displayed and can be edited.

4. Enter required fields and any additional contact information.

5. Click Save and Submit.

   **TIP**: All people who currently have a relationship with the organization will be listed.

   **TIP**: See Update contact details for additional information.

   **TIP**: Click Cancel at any time and changes will not be saved.
Once you **Save and Submit**, a confirmation message will be displayed.

6. Click **Continue**.

**Select a Generic Contact**
A generic contact is used when you want the attention to be directed to a department or role rather than a specific contact name.

1. Click **Update** next to the current ordering contact.
2. Use the radio button to **Select another contact in my organization**.

3. Use the radio button to **Select** a generic contact (existing or new).

**TIP:** The Generic Contacts section is listed under the organization contacts.
4. Enter required fields and any additional contact information.

5. Click Save and Submit.

**Important:** If your organization has an existing generic contact and you choose an existing generic contact, the existing contact details are displayed and cannot be edited.

Once you Save and Submit, a confirmation message will be displayed.

6. Click Continue.
Add a new contact to my organization

1. Click **Update** next to the current ordering contact.

2. Use the radio button to **Select another contact in my organization**.

3. Click the link to **Add New Contact**.
4. Enter required fields and any additional contact information.

5. Click **Save and Submit**.

TIP: Click **Cancel** at any time and changes will not be saved.

Once you **Save and Submit**, a confirmation message will be displayed.

6. Click **Continue**.
No Ordering Contact

1. Click Update next to the current ordering contact.

2. Select the radio button No Ordering Contact.

3. Click Save and Submit.

Once you Save and Submit, a confirmation message will be displayed.

4. Click Continue.
Update Proctor Contacts

Important: Review the drop down menu labeled I'm making purchases for to ensure you are making the purchase on behalf of the correct organization or party.

Select another contact in my organization

1. Navigate to the Shipping page of the checkout process.

2. Click Update/Add next to the proctor contact(s).

TIP: See the Ordering help document for how to checkout.

TIP: The proctor contacts will only be visible when there is a PAP PT program in the shopping cart.
3. Use the radio button to **Select another contact in my organization**.

**TIP**: All people who currently have a relationship with the organization will be listed.
Important: The selected proctor contact’s current contact details are displayed and can be edited.

4. Enter required fields and any additional contact information.

5. Check the Box to agree to the CAP Proficiency Testing Proctor terms.

6. Click Save and Submit.

Add a new contact to my organization
1. Navigate to the Shipping page of the checkout process.

2. Click Update/Add next to the proctor contacts.

TIP: See the Ordering help document for how to checkout.

TIP: The proctor contacts will only be visible when there is a PAP PT program in the shopping cart.
3. Use the radio button to **Select another contact in my organization**.

4. Click the link to **Add New Contact**.
5. Enter required fields and any additional contact information.

6. **Check the Box** to agree to the CAP Proficiency Testing Proctor terms.

7. Click **Save and Submit**.

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**TIP**: Click **Go Back To All Contacts** to access the previous page.

**TIP**: If you know the CAP Personal ID for the new proctor contact, enter it in the CAP Personal ID# box and click **Find**. The new contact’s detail information is displayed. Click **Reset** to remove CAP Personal ID#.

**TIP**: Click **Cancel** at any time and changes will not be saved.
Remove Existing Proctor

1. Navigate to the Shipping page of the checkout process.

2. Click **Remove** next to the proctor contacts.

3. **Select** the contact(s) you want to remove.

4. Click **Remove**.

**TIP:** See the Ordering help document for how to checkout.

**TIP:** The proctor contacts will only be visible when there is a PAP PT program in the shopping cart.

**TIP:** If the laboratory is an active PAP PT customer, at least 1 proctor is required.

**TIP:** Click **Cancel** at any time and changes will not be saved.

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Update Ship to Contact

**Important:** Review the drop down menu labeled *I’m making purchases for* to ensure you are making the purchase on behalf of the correct organization or party.

**Update contact details**

1. Navigate to the Shipping page of the checkout process.

2. Click **Update** next to the current Ship to Contact.
3. Edit email (required), phone and/or fax.

4. Click Save and Submit.

**TIP:** The radio button defaults to Update contact details (email, phone, fax).

**TIP:** The phone and fax country code will default based on the physical address of the organization.

**TIP:** Click Cancel at any time and changes will not be saved.

Once you Save and Submit, a confirmation message will be displayed confirming the change for future shipments.

5. Click Continue.
Select another contact in my organization

1. Navigate to the Shipping page of the checkout process.

2. Click **Update** next to the current Ship to Contact.

3. Use the radio button to **Select another contact in my organization**.

4. **Select** the radio button for the new Ship to Contact.

**TIP**: See the Ordering help document for how to checkout.

**TIP**: All people who currently have a relationship with the organization will be listed.
5. Enter required fields and any additional contact information.

6. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed noting it will be changed for all future shipments.

7. Click **Continue**.
Select a Generic Contact
A generic contact is used when you want the attention to be directed to a department or role rather than a specific contact name.

1. Navigate to the Shipping page of the checkout process.

2. Click Update next to the current Ship To contact.

TIP: See the Ordering help document for how to checkout.
3. Use the radio button to **Select another contact in my organization**.

4. Use the radio button to **Select** a generic contact (existing or new).

5. Enter required fields and any additional contact information.

6. Click **Save and Submit**.

**TIP:** The Generic Contacts section is listed under the organization contacts.

**TIP:** See Update contact details for additional information.
Important: If your organization has an existing generic contact and you choose an existing generic contact, the existing contact details are displayed and cannot be edited.

Once you Save and Submit, a confirmation message will be displayed noting it will be changed for all future shipments.

7. Click Continue.

Add a new contact to my organization

1. Navigate to the Shipping page of the checkout process.

2. Click Update next to the current Ship to Contact.
3. Use the radio button to **Select another contact in my organization**.

4. Click the link to **Add New Contact**.
5. Enter required fields and any additional contact information.

6. Click **Save and Submit**.

   **TIP**: Click **Go Back To All Contacts** to access the previous page.

   **TIP**: If you know the CAP Personal ID for the new ship to contact, enter it in the CAP Personal ID# box and click **Find**. The new contact's detail information is displayed. Click **Reset** to remove CAP Personal ID#.

   **TIP**: Click **Cancel** at any time and changes will not be saved.

Once you **Save and Submit**, a confirmation message will be displayed noting it will be changed for all future shipments.

7. Click **Continue**.
Update Ship to Address

**Important:** Review the drop down menu labeled *I'm making purchases for* to ensure you are making the purchase on behalf of the correct organization or party.

**Select another address in my organization**

1. Navigate to the Shipping page of the checkout process.

2. Click **Update** next to the current Ship to Address.

**TIP:** See the Ordering help document for how to checkout.
3. **Select** the radio button for the new Ship to Address.

4. **Click** **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed noting it will be changed for all future shipments.

5. **Click** **Continue**.
Add a new address to my organization

1. Navigate to the Shipping page of the checkout process.

2. Click Update next to the current Ship to Address.

3. Click the link to Add New Address.
4. Enter required fields and any additional address information.

5. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed noting it will be changed for all future shipments.

6. Click **Continue**.
Update Bill To Customer

**Important:** Review the drop down menu labeled *I’m making purchases for* to ensure you are making the purchase on behalf of the correct organization or party.

Select another billing account

1. Navigate to the Billing page of the checkout process.

2. Click **Update** next to Bill To Customer.

**TIP:** You can only update the **Bill To Customer** to another billing account with an existing relationship to the organization.
3. Enter search criteria for the new Bill To Customer.

4. Click **Go**.

5. **Select** the radio button for the new Bill To Customer.

6. Click **Select**.

**TIP:** If you enter no search criteria and click **Go**, all accounts with an existing relationship to the organization will be displayed.

**TIP:** Click **Back to billing page** to return to the Billing page.
Update Bill To Contact

Important: Review the drop down menu labeled I’m making purchases for to ensure you are making the purchase on behalf of the correct organization or party.

Update contact details

1. Navigate to the Billing page of the checkout process.

2. Click Update next to the current Bill To Contact.

TIP: See the Ordering help document for how to checkout.
3. Edit **email** (required), **phone** and/or **fax**.

4. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed confirming the change is pending CAP’s review.

5. Click **Continue**.

**TIP**: The phone and fax country code will default based on the physical address of the organization.

**TIP**: The radio button defaults to Update contact details (Email, Phone, Fax).

**TIP**: Click **Cancel** at any time and changes will not be saved.
6. The Billing page will display the current Bill To Contact and the Bill To Contact change pending CAP’s review.
Select another contact in my organization

1. Navigate to the Billing page of the checkout process.

2. Click Update next to the current Bill To Contact.

TIP: See the Ordering help document for how to checkout.
3. Use the radio button to **Select another contact in my organization**.

4. **Select** the radio button for the new Bill to Contact.

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**TIP:** All people who currently have a relationship with the organization will be listed.
5. Enter required fields and any additional contact information.

6. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed confirming the change is pending CAP’s review.

7. Click **Continue**.
8. The Billing page will display the current Bill To Contact and the Bill To Contact change pending CAP’s review.
Select a Generic Contact

A generic contact is used when you want the attention to be directed to a department or role rather than a specific contact name.

1. Navigate to the Billing page of the checkout process.

2. Click Update next to the current Bill To Contact.
3. Use the radio button to Select another contact in my organization.

4. Use the radio button to Select a Generic Contact (existing or new).

5. Enter required fields and any additional contact information.

6. Click Save and Submit.

TIP: The Generic Contacts section is listed under the organization contacts.

TIP: See Update contact details for additional information.
Once you Save and Submit, a confirmation message will be displayed confirming the change is pending CAP’s review.

7. Click Continue.

8. The Billing page will display the current Bill To Contact and the Bill To Contact change pending CAP’s review.
Add a new contact to my organization

1. Navigate to the Billing page of the checkout process.

2. Click **Update** next to the current Bill To Contact.
3. Use the radio button to **Select another contact in my organization**.

4. Click the link to **Add Contact**.
5. Enter required fields and any additional contact information.

6. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed confirming the change is pending CAP’s review.

7. Click **Continue**.

**TIP:** Click **Back to all contacts** to access the previous page.

**TIP:** If you know the CAP Personal ID for the new bill to contact, enter it in the **CAP Personal ID#** box and click **Find**. The new contact’s detail information is displayed. Click **Reset** to remove CAP Personal ID#.

**TIP:** Click **Cancel** at any time and changes will not be saved.
8. The Billing page will display the current Bill To Contact and Bill To Contact change pending CAP’s review.
Update Bill To Address

Important: Review the drop down menu labeled I'm making purchases for to ensure you are making the purchase on behalf of the correct organization or party.

Select another address in my organization

1. Navigate to the Billing page of the checkout process.

2. Click Update next to the current Bill To Address.
3. **Select** the radio button for the new Bill To Address.

4. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed confirming the change is pending CAP’s review.

5. Click **Continue**.
6. The Billing page will display the current Bill To Address and Bill To Address change pending CAP’s review.
Add a new address to my organization

1. Navigate to the Billing page of the checkout process.

2. Click Update next to the current Bill To Address.
3. Click the link to **Add Address**.
4. Enter required fields and any additional address information.

5. Click **Save and Submit**.

Once you **Save and Submit**, a confirmation message will be displayed confirming the change is pending CAP’s review.

6. Click **Continue**.
7. The Billing page will display the current Bill To Address and Bill To Address change pending CAP’s review.