

Setting a Billing Contact

17 Steps [View most recent version](#) 

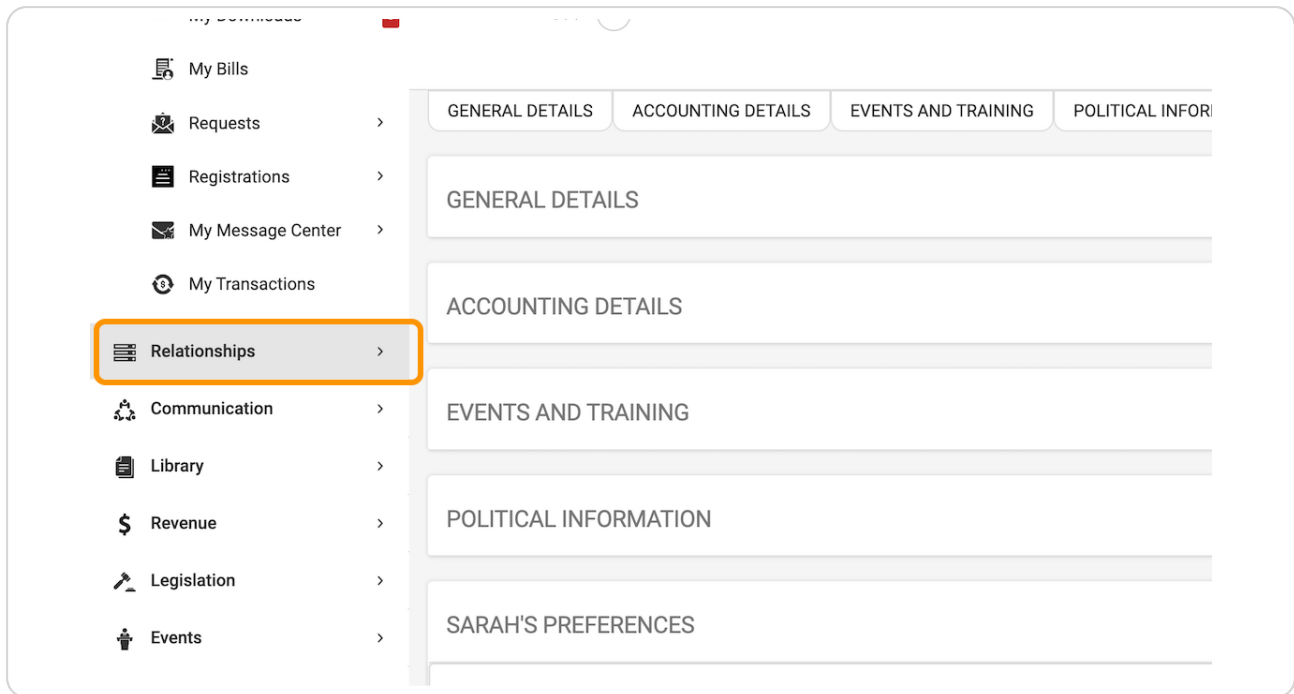
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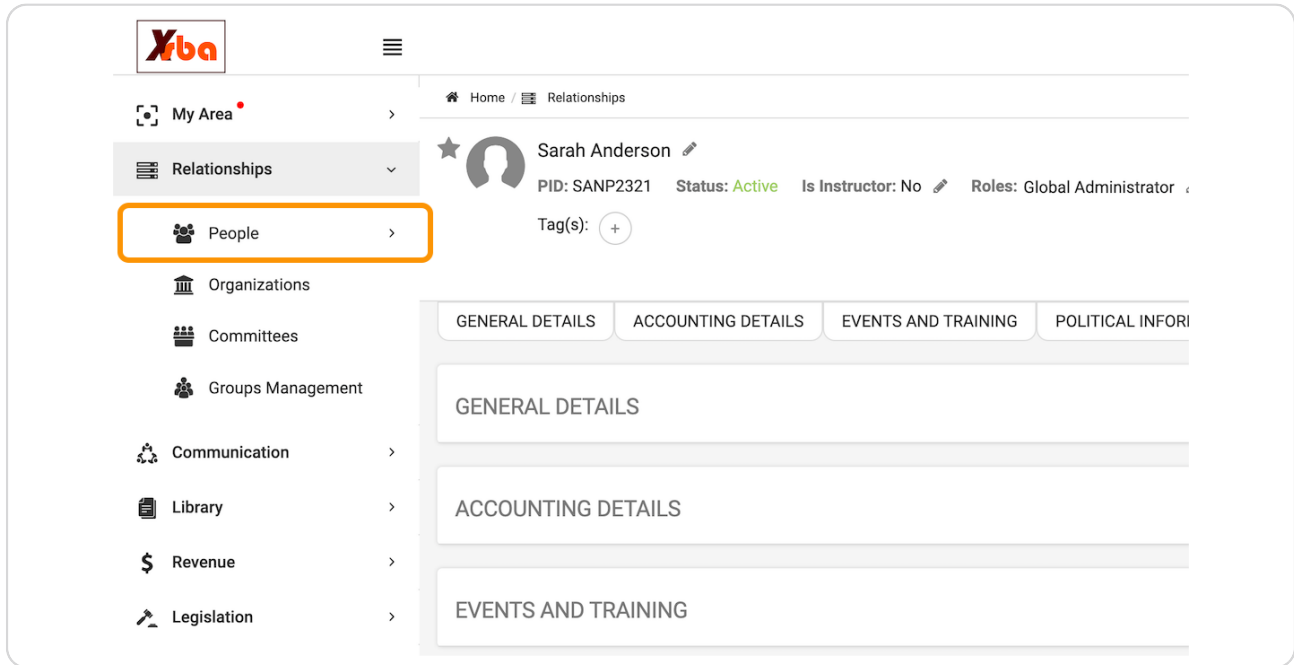
STEP 1

Click on Relationships



STEP 2

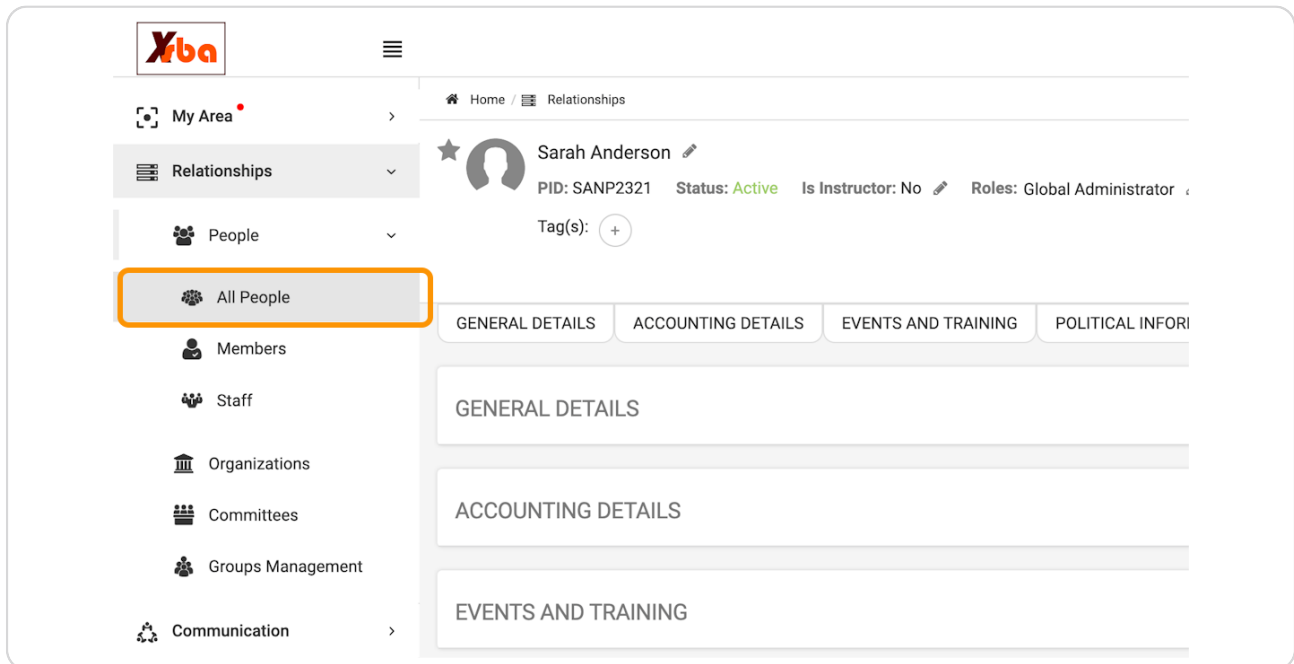
Click on People



The screenshot shows the Xiba Relationships page. The left sidebar contains a menu with the following items: My Area, Relationships, People (highlighted with an orange box), Organizations, Committees, Groups Management, Communication, Library, Revenue, and Legislation. The main content area displays the profile of Sarah Anderson, with details including PID: SANP2321, Status: Active, Is Instructor: No, and Roles: Global Administrator. Below the profile, there are tabs for GENERAL DETAILS, ACCOUNTING DETAILS, EVENTS AND TRAINING, and POLITICAL INFORMATION. The 'People' menu item is highlighted with an orange box.

STEP 3

Click on All People



The screenshot shows the Xiba Relationships page. The left sidebar contains a menu with the following items: My Area, Relationships, People, All People (highlighted with an orange box), Members, Staff, Organizations, Committees, Groups Management, and Communication. The main content area displays the profile of Sarah Anderson, with details including PID: SANP2321, Status: Active, Is Instructor: No, and Roles: Global Administrator. Below the profile, there are tabs for GENERAL DETAILS, ACCOUNTING DETAILS, EVENTS AND TRAINING, and POLITICAL INFORMATION. The 'All People' menu item is highlighted with an orange box.

STEP 4

Click on the person you wish to add as Billing contact

The screenshot shows a user selection interface. On the left, there is a sidebar with categories: People, Members, Organizations, Institutes, and Case Management. The main area displays a list of users with search bars at the top. The user 'Sarah Anderson' is highlighted with an orange box. The list includes the following entries:

Name	Email Address
Crescerance Admin	admin@crescerance.com
Andy Administrator	joviset383@revutap.com
Alex Administrator-XSBA	alexadminxsba@yopmail.com
Sarah Anderson	sarahanderson@yopmail.com
elainetester benes	elainetesterbenes@yopmail.com
Bob Billing	bobbilling@yopmail.com
Rhonda Billing	rhondabilling@yopmail.com
bill	bill@vopmail.com

STEP 5

Click on Edit

The screenshot shows an edit form for a billing contact. The form is mostly blank, with a few horizontal lines and a vertical line on the right side. A small orange box highlights a field on the right side of the form.

STEP 6

Click on Search School (School staff) or District (District staff)(s)




Country

Certification Number *

0

School or District *

School (School staff) or District (District staff) *


 XSBA
Department:
Position: Board Secretary Current  

[Add Position](#)

Personal demographics

STEP 7

Search the organization you will assign her to be a Billing contact




Tag(s): 

0

School or District *

School (School staff) or District (District staff) *

[Search School \(School staff\) or District \(District staff\)\(s\)](#)

 XSBA
Department:
Position: Board Secretary Current  


[Add Position](#)

Personal demographics

Sex

Select

Search School (School staff) or District (District staff)(s)

cambridge 

Cambridge District School District

Need to add a new organization in your Relationships database? [Click Here](#)

Date of Birth

Select Date

STEP 8

Check on the Organization

The screenshot shows a web interface for adding a position. At the top, there is a search bar labeled "School or District *". Below it, a dropdown menu is open, showing "Search School (School staff) or District (District staff) *" and a search input field containing "cambridge". A search result "Cambridge District School District" is listed with a checked checkbox. On the left, there are two organization cards. The first card is for "XSBA" with a "Primary" tag, showing "Department:" and "Position: Board Secretary" with a "Current" status and an edit icon. Below it is an "Add Position" button. The second card is for "Cambridge District School District" with a "Me" tag and an "Add Position" button.

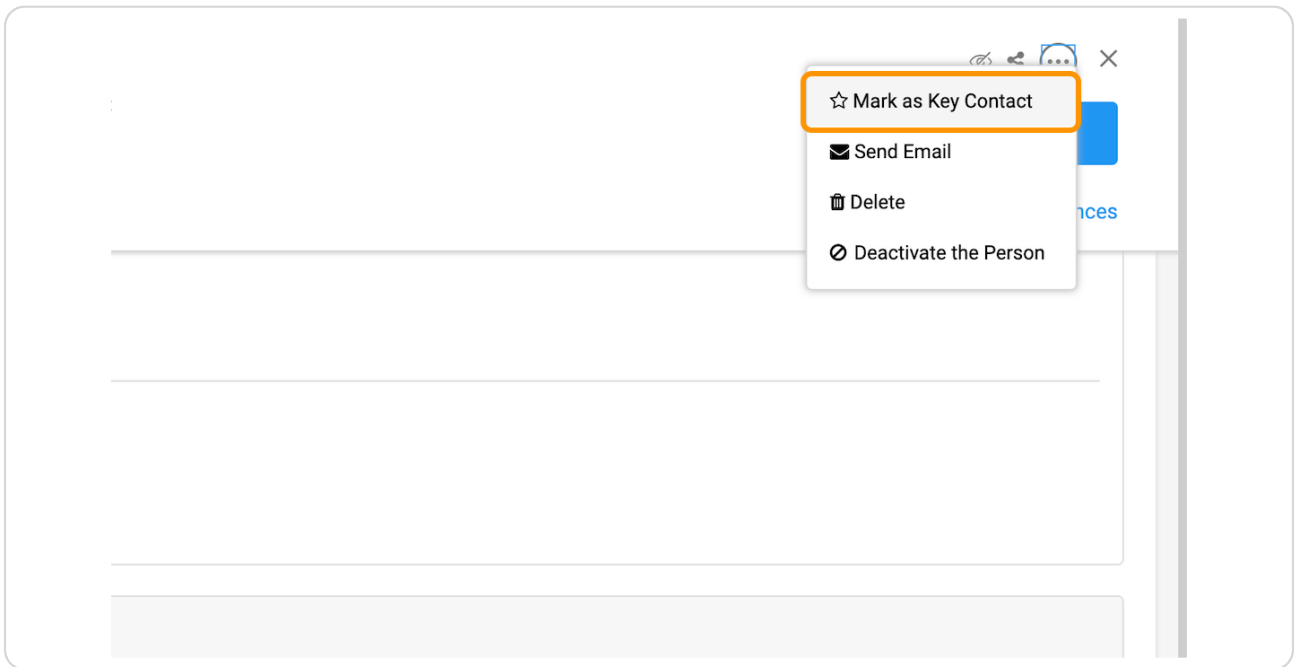
STEP 9

Click on the option button

The screenshot shows a user interface with a blue button labeled "Invite User" and a link labeled "Sarah's Preferences". The button has a house icon and a plus sign. The link is in blue text. The background is a light gray color.

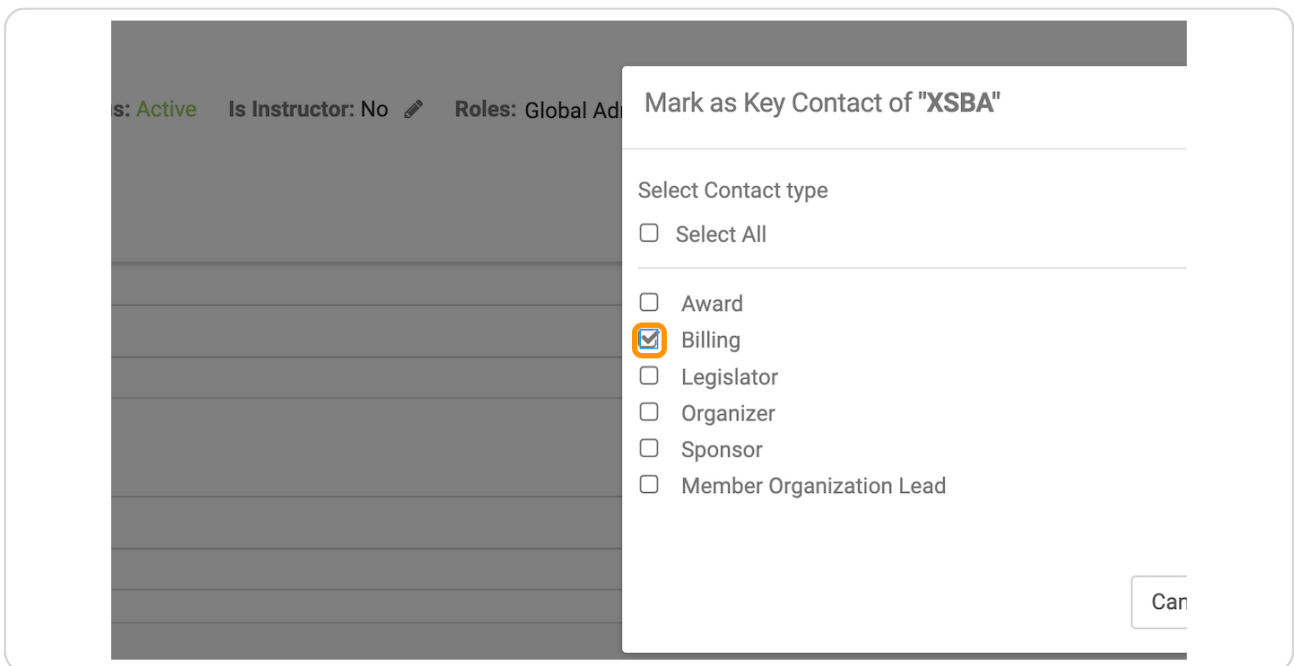
STEP 10

Click on Mark as Key Contact



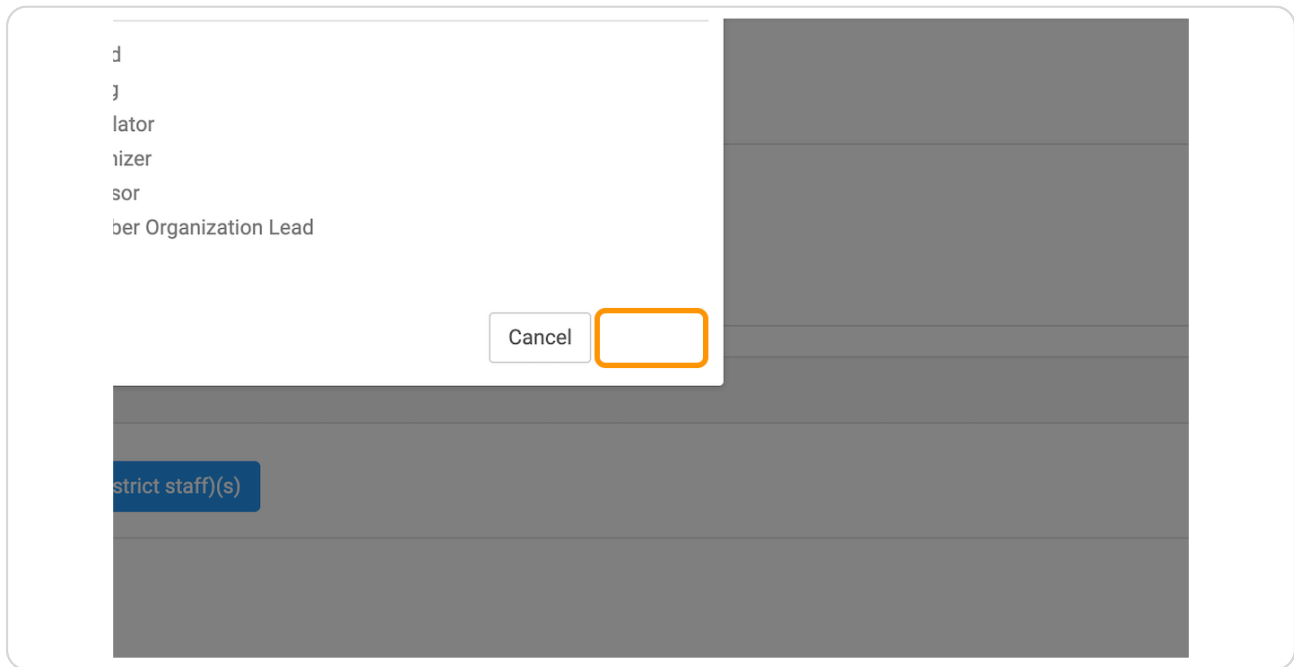
STEP 11

Check on Billing



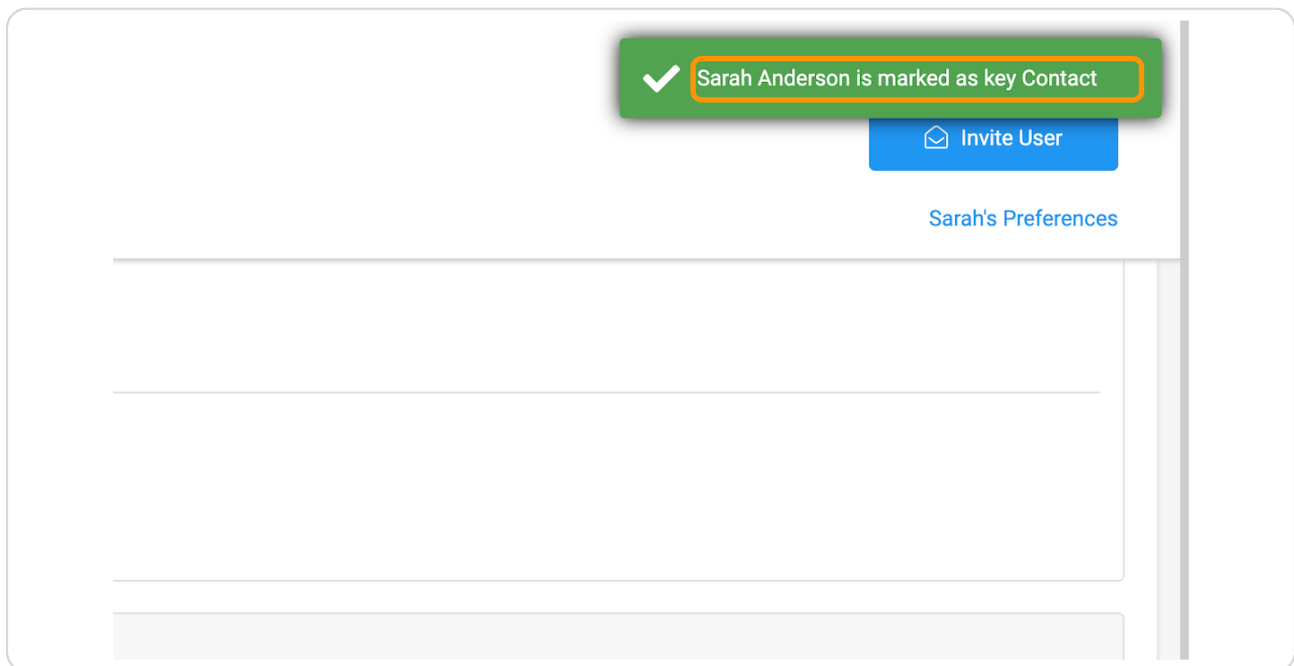
STEP 12

Click on OK



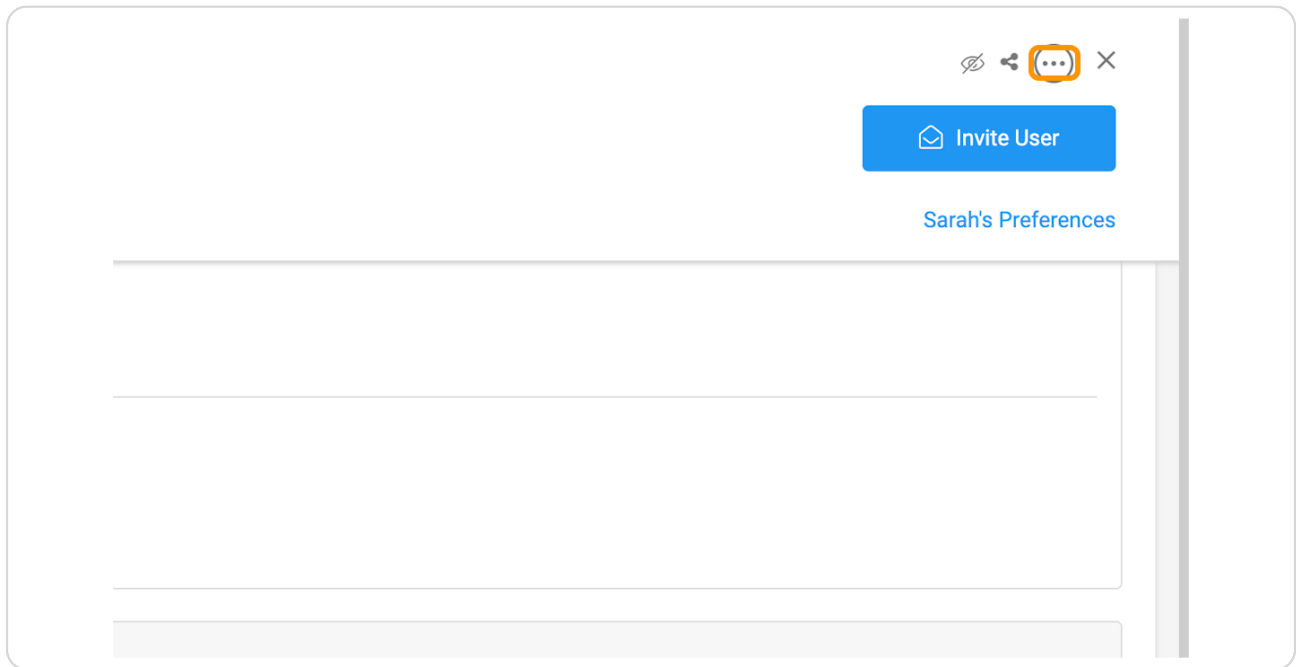
STEP 13

A prompt will appear advising the update



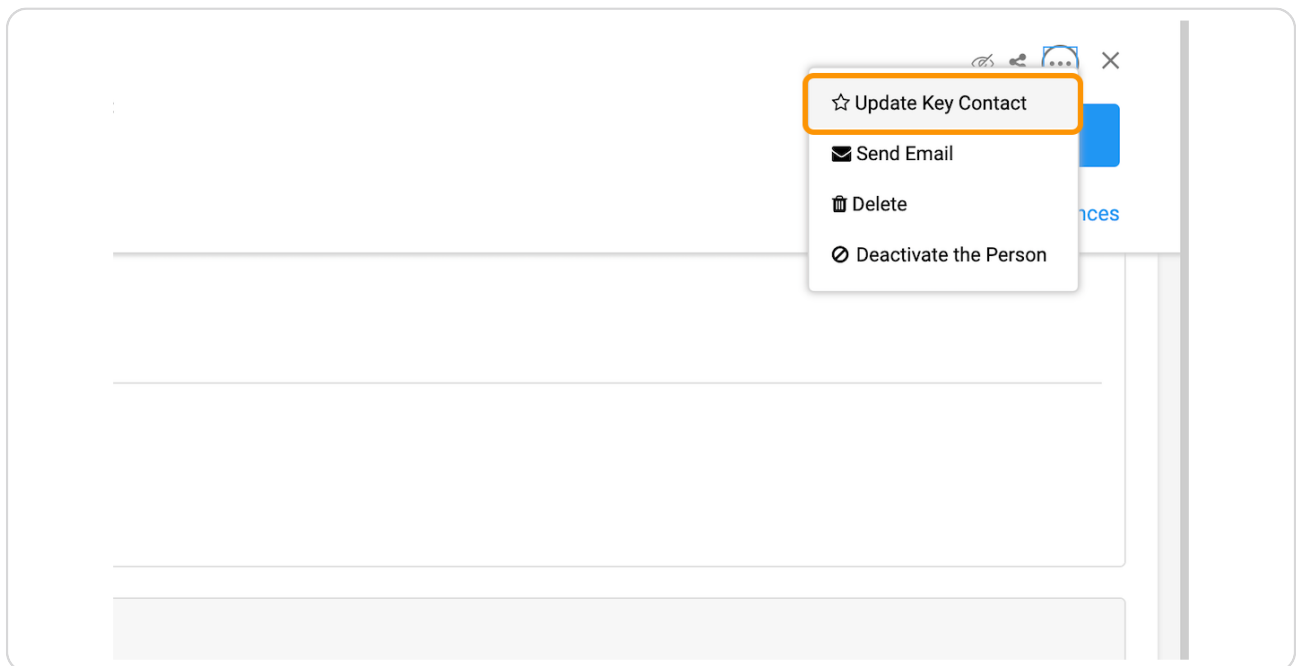
STEP 14

Click on dropdown trigger



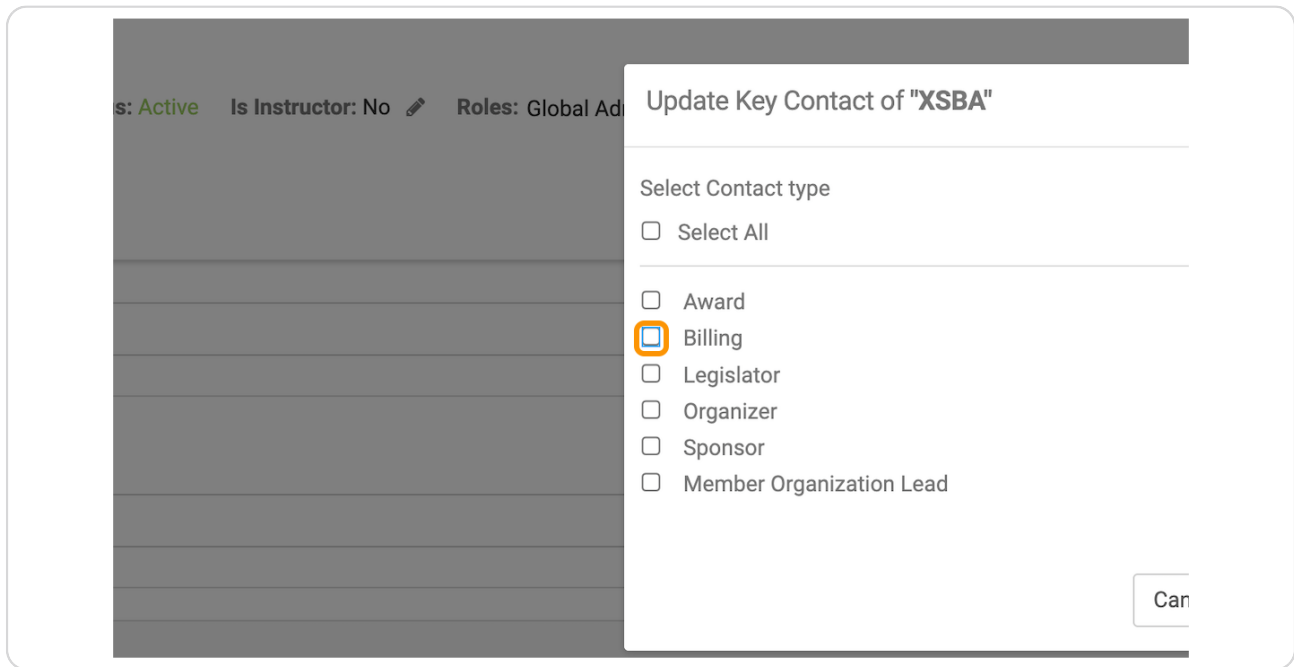
STEP 15

Click on Update Key Contact



STEP 16

Uncheck Billing if you wish to change or update it.



STEP 17

Click on OK

