Add a Customer Contact

Last Modified on 12/12/2024 1:17 pm EST

There are two types of Contacts, Customer Contacts and Site Contacts. A Customer Contact is the person your company would contact to speak about billing matters. Customer Contacts are created and maintained on the Customer record.

A Site Contact is a person your company would contact to speak about non-billing matters. Site Contacts are typically used by Service and Installation employees within your organization. Site Contacts are created and maintained on a Site record.

To add a Customer Contact, you must first access the customer record. From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.

Customers											
Customers Sites Systems											
Search Customers Q + Add Customer 🔀 Export to Excel					NO Master Customers NO Terminated Customers				Custom Grid Layout		
Drag a column header	and drop it here to group by that column										
Customer # 🕴 🚦	Name	÷	Address :	0	City :	State	:	Balance Due 🕴	Total RMR	:	
3654	Holmes Fans		10556 Washington Street	0	Chagrin Falls	он		\$0.00		\$0.00	
3652	Cactus World		3601 Saguaro Street	1	Tucson	AZ		\$0.00		\$0.00	
3505	Smith, Aaron		123 Main St	0	Columbus	ОН		\$182.81		\$30.00	
<u>3504</u>	Allen Automotive Services		634 Morgan Street	0	Cincinnati	ОН		\$182.81		\$30.00	
3502	Tesay		Address1	0	City	он		\$0.00		\$0.00	
<u>3499</u>	Edwards Security		345 Main Street	0	Columbus	ОН		\$221.47		\$55.00	
3498	Crafted Crates		233 Widmore Ave	(Columbus	он		\$222.56		\$30.00	
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The Customer record will be displayed. Click on the Contacts tab, and then click on the Add New Contact button.

	Emily Wood Qustomer #3703 Active (Normal) Residential-Owner - Since 3/7/22						🧨 Edit 🚝	Tasks	🕲 History	
1.2 1 0.8 0.6 0.4 0.2 0	Total Balance Due Total RMR \$0.00 \$0.00 Customer Aging		Ad P © Comm	tress 45722 Chandil Phoenix, AZ 8 Cell Email emilyLwood@+	er 5003 gmail.com	Salesperson Last Statement Default Term Delivery Method Delivery RMR Inv	Dan Brown Print			
0	- Current - 1-30 Days - 31-60 Days - 61-90 Days - 91+									
٩	Invoices Credits Sites/Systems RMR WorkOrders Pro 1 0 1/1 2 0	oposals Paymen 0 0	ts CC/eCheck	Notes 0	Documents	Archive	Custom Fields	eForms	Emai 🕨	
(+ Add New Contact + Add Existing Contact									
	Sort : Name :	Phone :	Cell i	Passcode :	Relationship :	Email	i i			
	No records svailable.									
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1										

The Edit Contact form will be displayed. Fill in the form, and then click on the Save button at the bottom of the form when finished.

Data entry fields with a red bullet next to the field name are required.

If you have several Customer Contact records, but only certain individuals should be contacted for billing related matters, in the Relationship field you may want to type in (Billing) after the relationship text.

Edit Contact							×
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First Name	Emily				Relationship	Owner (Billing 1)	
М	L				Phone	(602) 315-4444 ext.	
Last Name •	Wood				Cell Phone	(602) 315-7070]
Address	45722 Chandler				Email •	emilyLwood@gmail.com]
Address 2				Passcode	thunderbird		
	Phoenix	Arizona	* 85003	- Plus	Sort Order	0 🗘	
					Invoice Delivery	0	
Description				0/150	Manual	YES	
					RMR	YES	
					Work Order	YES	
				Save	Cancel		