

Add a Customer Contact

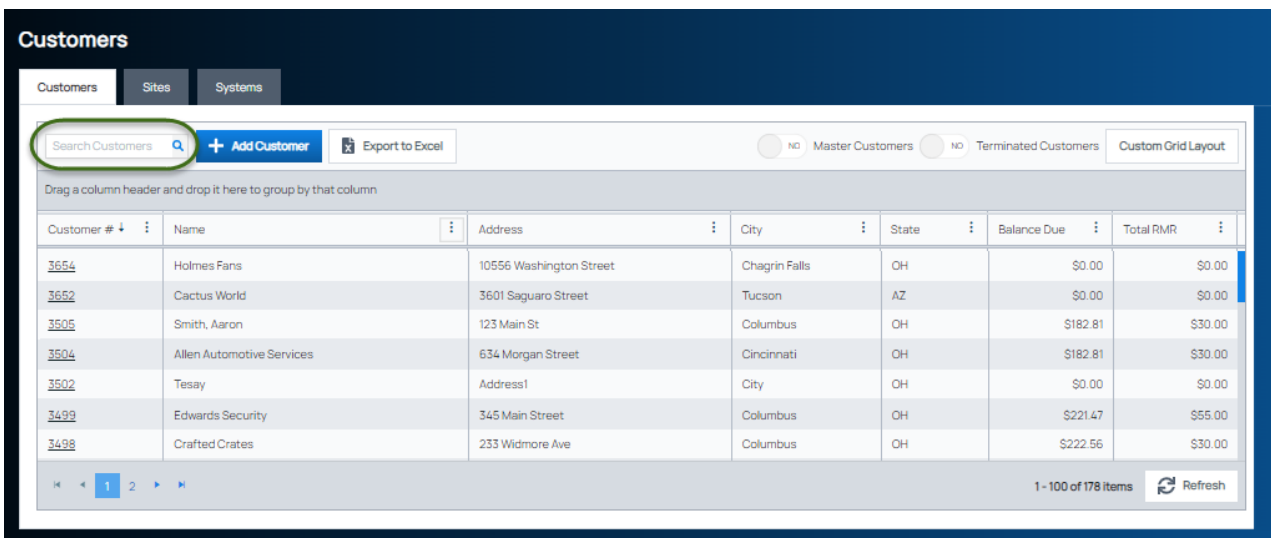
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There are two types of Contacts, Customer Contacts and Site Contacts. A Customer Contact is the person your company would contact to speak about billing matters. Customer Contacts are created and maintained on the Customer record.

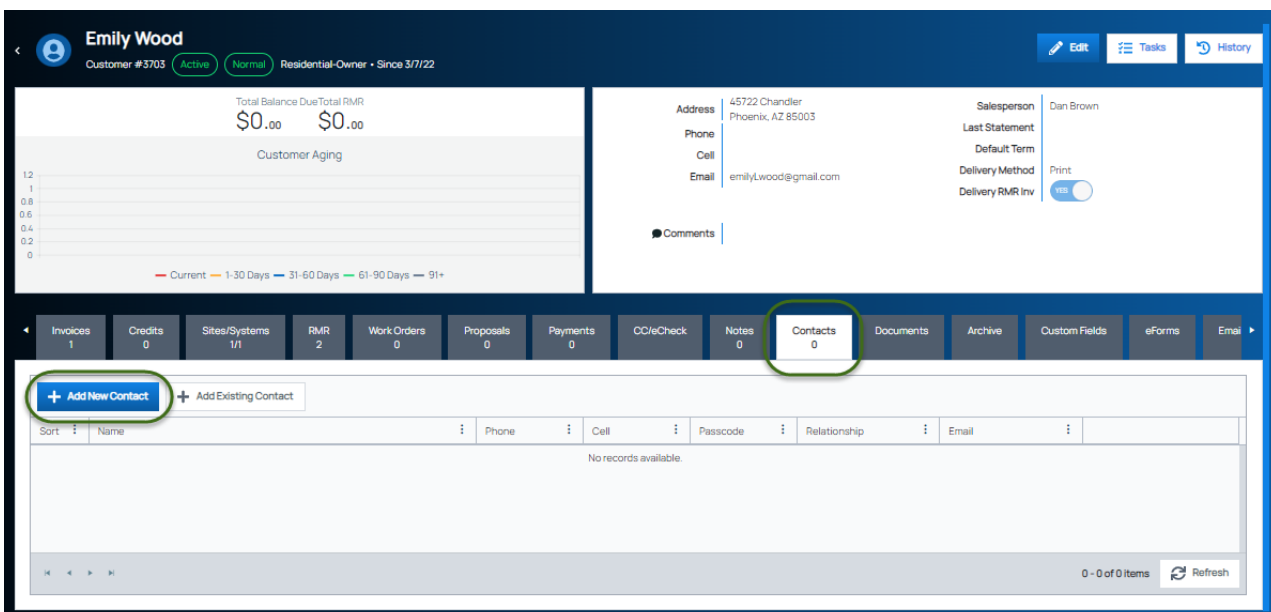
A Site Contact is a person your company would contact to speak about non-billing matters. Site Contacts are typically used by Service and Installation employees within your organization. Site Contacts are created and maintained on a Site record.

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.



The Customer record will be displayed. Click on the Contacts tab, and then click on the Add New Contact button.



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.

i 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 [X]

First Name Emily

MI L

Last Name Wood

Address 45722 Chandler

Address 2

Phoenix Arizona 85003 Plus...

Description

Relationship Owner (Billing 1)

Phone (602) 315-4444 ext.

Cell Phone (602) 315-7070

Email emilyLwood@gmail.com

Passcode thunderbird

Sort Order 0

Invoice Delivery ?

Manual YES

RMR YES

Work Order YES

Save **Cancel**