## Edit a Customer Contact

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

Customer Contact records are attached to a Customer record, so 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.

ustomers Site	es Systems							
Search Customers	Add Customer	Export to Excel		erminated Customers	Custom Grid Layout			
Drag a column header	and drop it here to group by the	at column						
Customer # 🕴 :	Name	:	Address	1	City :	State :	Balance Due :	Total RMR
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	он	\$0.00	\$0.00
3652	Cactus World		3601 Saguaro Street		Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron		123 Main St		Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services		634 Morgan Street		Cincinnati	OH	\$182.81	\$30.00
3502	Tesay		Address1		City	OH	\$0.00	\$0.00
3499	Edwards Security		345 Main Street		Columbus	ОН	\$221.47	\$55.00
3498	Crafted Crates		233 Widmore Ave		Columbus	OH	\$222.56	\$30.00

The Customer record will be displayed. Click on the Contacts tab. Locate the Contact you want to edit, and then click the Edit button (pencil icon).

	Total Balance Due Total RMR \$0.00 \$0.00 Customer Aging			F	dress 45722 Chandi Phoenix, AZ 81 Cell emilyLwood@	5003	Salesperson Dun Brown Last Statement Default Term Delivery RMR Inv T	
Invoice 1	Current — 1-30 Days — 31-60 Days — 61-90 Days — 9 28 Credits Sites/Systems RMR Work Orders 0 1/1 2 0		oposals Paymer 0 0	nts CC/eCheck	Notes 2	Contacts Documents	Archive Oustom Fields eFor	rms Eme
+ Add	d New Contact + Add Existing Contact							
+ Add	A New Contact Add Existing Contact Name	:	Phone :	Cell :	Passcode :	Relationship :	Email	
		÷	Phone :	Cell :	Passcode :	Relationship : Owner (Billing)	Email : emiłyLwood@gmail.com	Delete
s† i	Name	i					$\frown$	Delete

The Edit Contact form will be displayed. Make the necessary changes, and then click the Save button when finished.

Edit Contact								:	×
First Name	Emily				Relationship	Owner (Billing 1)			1
М	L				Phone	(602) 315-4444	ext.	]	1
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				