

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.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$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	OH	\$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).

S.	Name	Phone	Cell	Passcode	Relationship	Email	Actions
0	Wood, Emily	(602) 315-4444	(602) 315-7070	thunderbird	Owner (Billing)	emilyLwood@gmail.com	Edit Delete
1	Wood, George	(602) 315-4444	(602) 313-7071	7701	Spouse (Billing 2)	georgeMwood@gmail.com	Edit Delete
2	Wood, Angela	(602) 313-4444	(602) 313-7703	frogs	Daughter (Site)	angelaRwood@gmail.com	Edit Delete

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

Edit Contact



First Name

MI

Last Name

Address

Description

Relationship

Phone

Cell Phone

Email

Passcode

Sort Order

Invoice Delivery

Manual

RMR

Work Order