

Add a Site Contact

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To add a Site 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 opens. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.

The screenshot shows the 'Customers' list interface. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Customers' and a button labeled '+ Add Customer', which is highlighted with a green circle. To the right of the search bar are toggle switches for 'Master Customers' and 'Terminated Customers', and a 'Custom Grid Layout' button. Below these is a table with columns: Customer #, Name, Address, City, State, Balance Due, and Total RMR. The table contains several rows of customer data. At the bottom right, there is a pagination control showing '1 - 100 of 178 Items' and a 'Refresh' button.

The Customer record opens. Click on the Sites/Systems tab, and then in the Site Number column, click on the hyperlink of the Site to which you want to add a contact.

The screenshot shows the customer record for 'Cactus World'. The top header includes the customer name, status ('Active', 'Normal'), and 'Commercial - Since 12/5/21'. Below this is a 'Customer Aging' chart and a 'Total Balance Due' section showing '\$0.00' for both 'Total Balance Due' and 'Total RMR'. To the right, there is a 'Salesperson' section with 'Theresa Scalia' and a 'Comments' section with 'Stages Integration test'. At the bottom, there is a navigation bar with tabs for 'Invoices', 'Credits', 'Sites/Systems', 'RMR', 'Work Orders', 'Proposals', 'Payments', 'CC/eCheck', 'Notes', 'Contacts', 'Documents', 'Archive', 'Custom Fields', 'eForms', and 'Email'. The 'Sites/Systems' tab is highlighted with a green circle. Below the navigation bar is a table with columns: Site N., Site Name, Address, City, and Sta.. The table contains one row with Site N. '1' (highlighted with a green circle), Site Name 'Cactus World-Corporate', Address '3601 Saguario Street', City 'Tucson', and Sta. 'AZ'. At the bottom right, there is a pagination control showing '1 - 1 of 1 Items' and a 'Refresh' button.

The Site record opens. Click on the Contacts tab, and then click the **Add New Contact** button.

1 - Emily Wood
Active Emily Wood - 3703

45722 Chandler, Phoenix, AZ 85003
emilyLwood@gmail.com

RMR \$2.00

Warranty Start: 03/07/2022
Warranty Labor: 1 Year Parts & Labor
Warranty Part: 1 Year Parts & Labor
Service Level: SVC T&M RES

Sales Tax: No Tax
Tax Rate: 0.0000%
Tax Exempt: -
Site Since: 03/07/2022
Inactive Date: -

Notes: 1 | Systems: 1 | RMR: 2 | Work Orders: 1 | Site Parts: 0 | **Contacts: 1** | Zones: 0 | Authorities: 0 | Docs | Custom Fields | Item Defaults | eForms | Part Ledger | External

+ Add New Contact | + Add Existing Contact

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wilson, Glenn	(602) 315-6588			Neighbor		Edit Delete

1 - 1 of 1 items Refresh

The Edit Contact form opens. Fill in the form, and then click 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.

Edit Contact

First Name: Emily

MI: L

Last Name: Wood

Address: 45722 Chandler

Address 2:

Phoenix, Arizona, 85003

Description: 0/150

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