

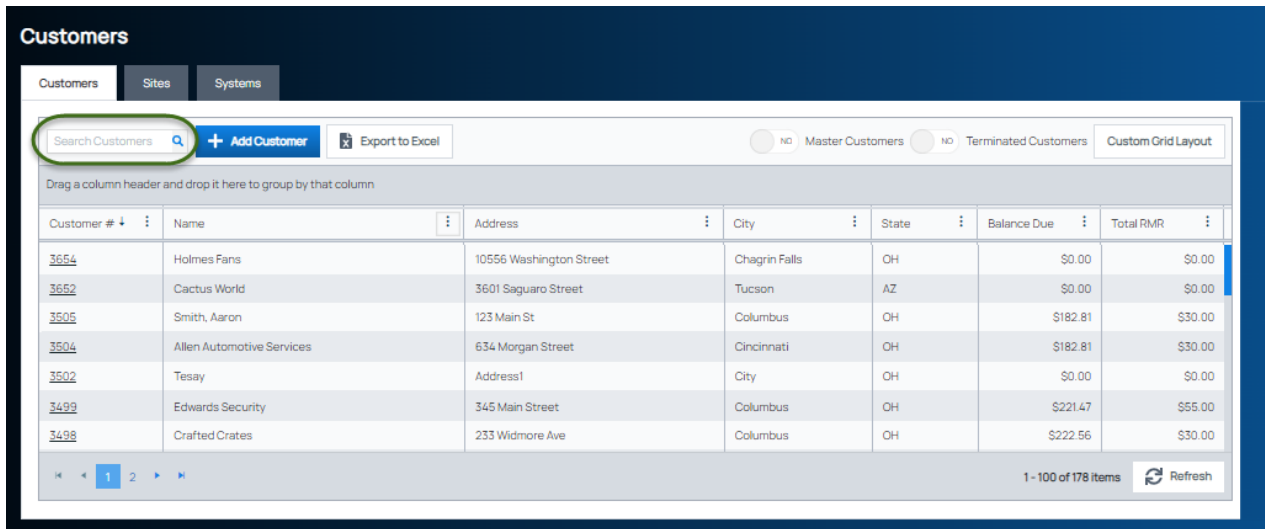
# Add a Site Contact

Last Modified on 05/01/2022 6:24 am EDT

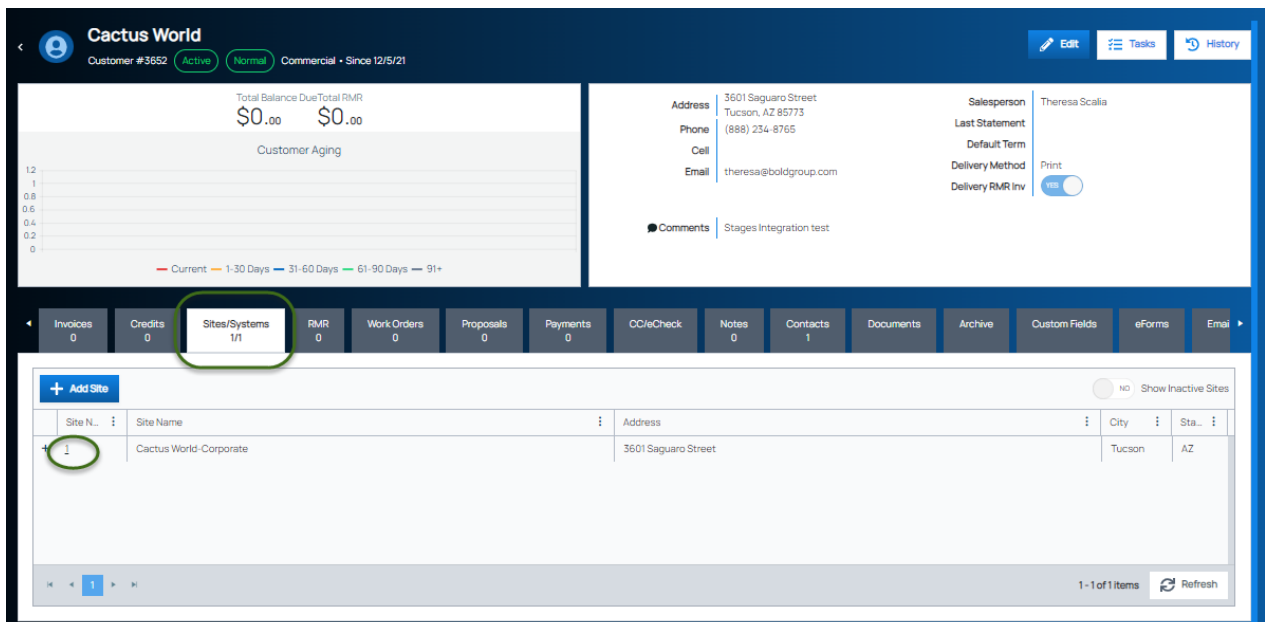
To add a Site Contact, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: Accounts Receivable> 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 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 Site record will be displayed. Click on the Contacts tab, and then click on 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) 313-6588			Neighbor		Edit Delete

1-1 of 1 Items Refresh

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.

Edit Contact

First Name Emily

MI L

Last Name Wood

Address 45722 Chandler

Address 2

Phoenix Arizona 85003 Plus...

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