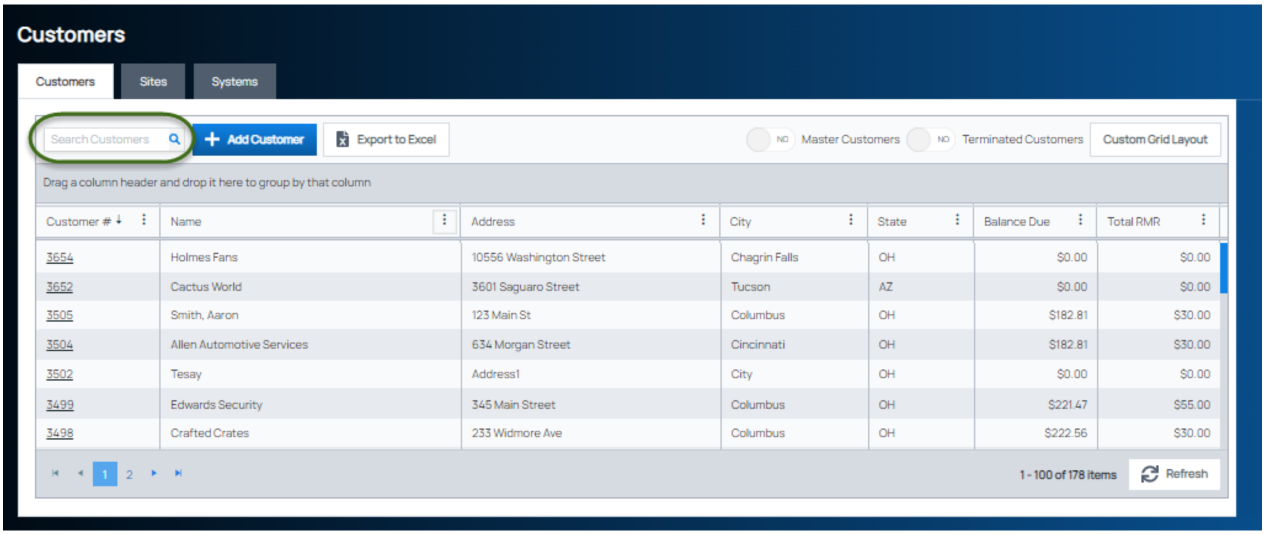
Add a Site Contact

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

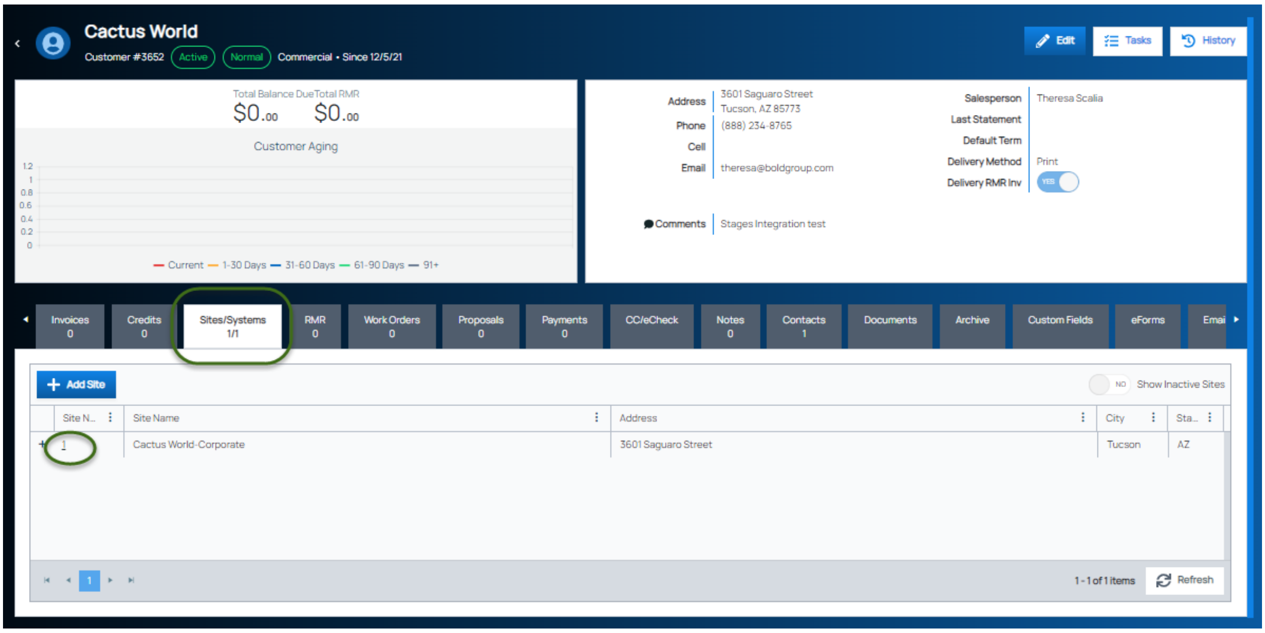
To add a Site Contact, you must first access the customer record.

From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

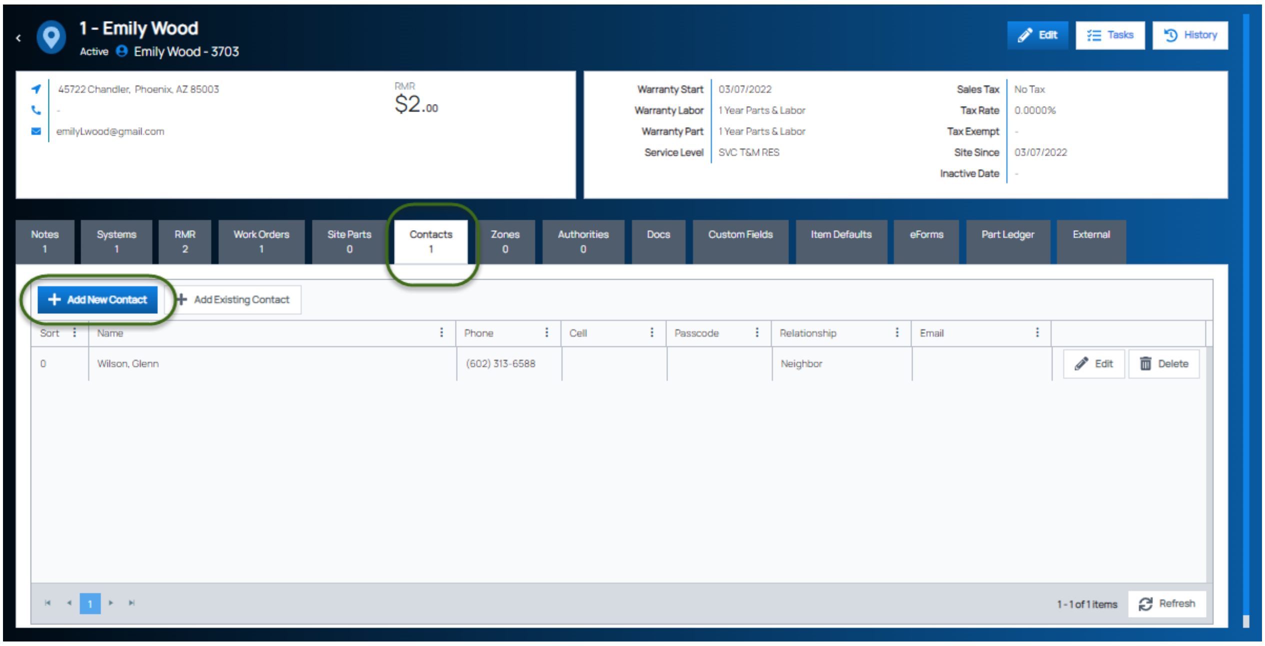
The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



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.



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.