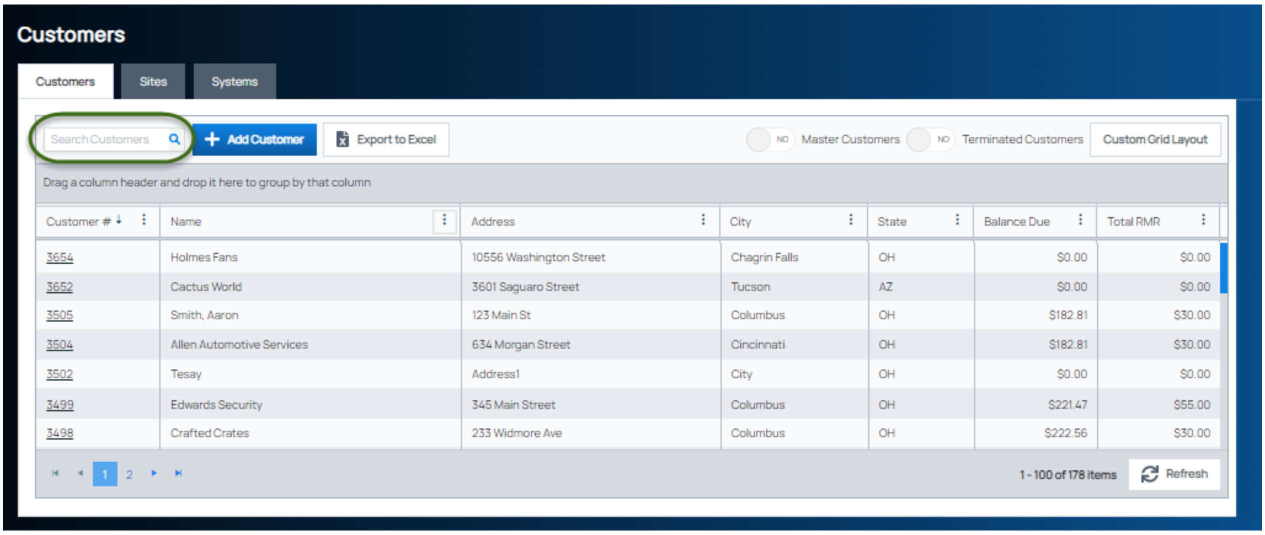
Edit a Site Contact

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

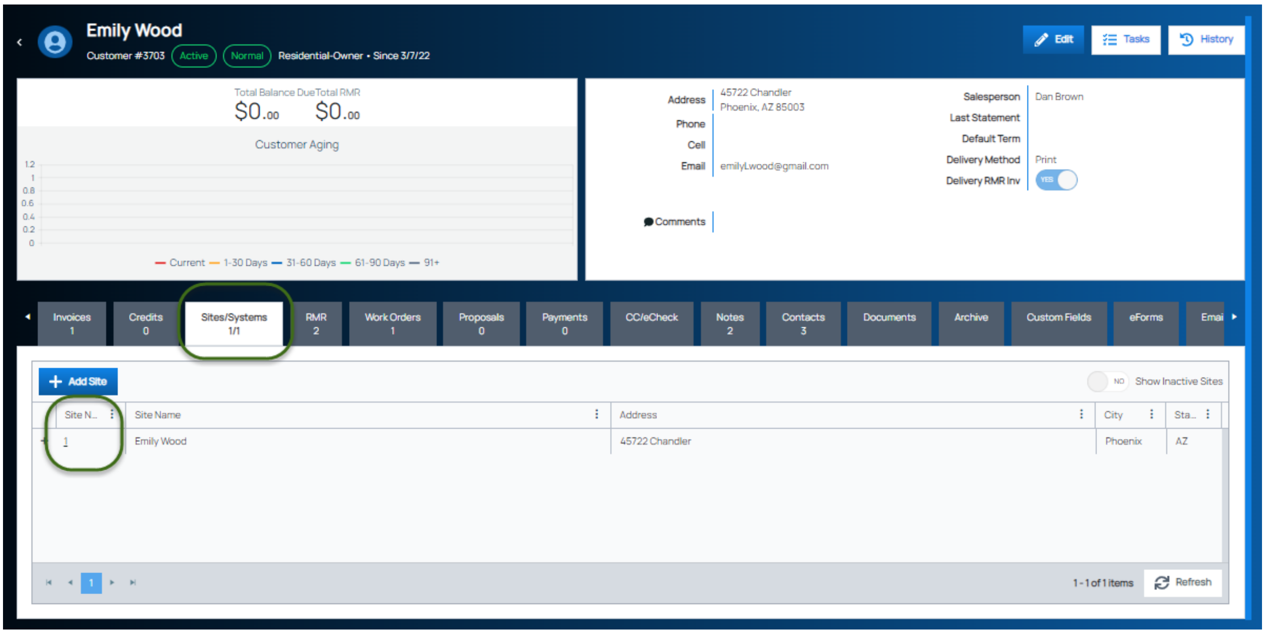
Site Contact records are attached to a Customer record, so you must first access the customer record.

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

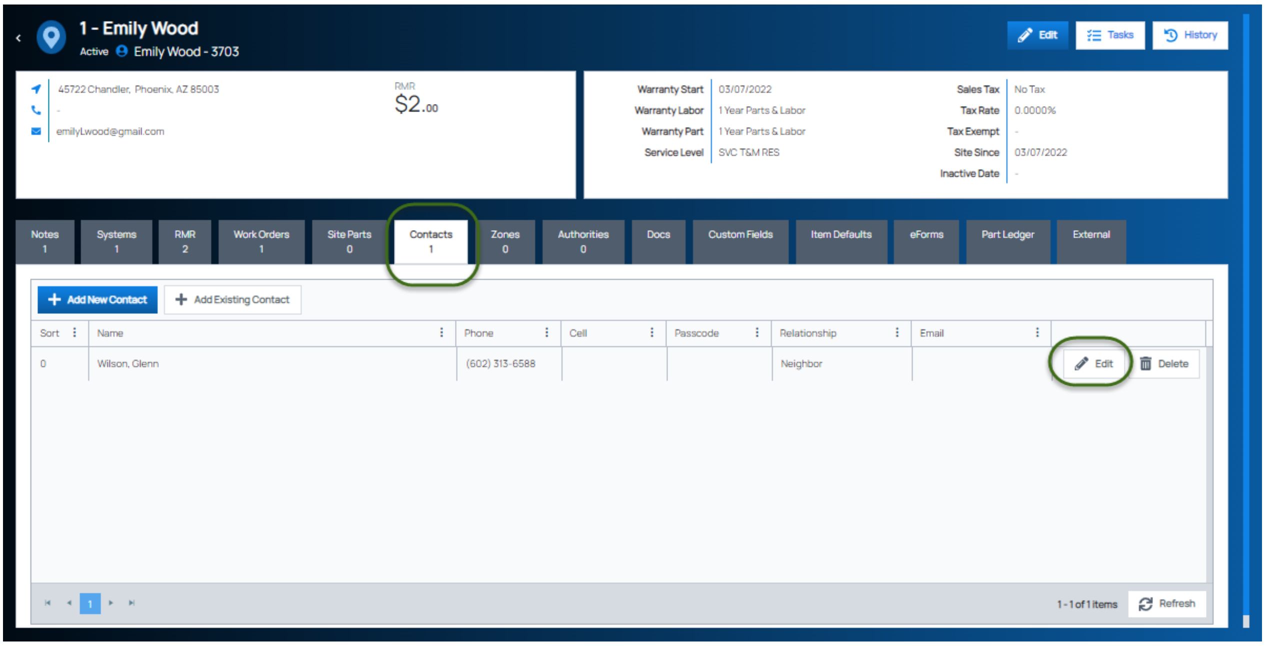
The Customers list will be displayed. Locate the Customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



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 for which you want to edit a contact.



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



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