Edit a Site Contact

Last Modified on 12/16/2024 2:40 pm EST

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: 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.

Sustomers Site	es Systems							
Search Customers Q + Add Customer 🖹 Export to Excel					No Master Customers No Terminated Customers Custom Orio			Custom Grid Layout
Drag a column header	and drop it here to group by the	it column						
Customer # 🕴 🚦	Name	:	Address	1	City :	State :	Balance Due :	Total RMR
3654	Holmes Fans		10556 Washington Street		Chagrin Falls	он	\$0.00	\$0.00
3652	Cactus World		3601 Saguaro Street		Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron		123 Main St		Columbus	ОН	\$182.81	\$30.00
3504	Allen Automotive Services		634 Morgan Street		Cincinnati	ОН	\$182.81	\$30.00
3502	Tesay		Address1		City	ОН	\$0.00	\$0.00
3499	Edwards Security		345 Main Street		Columbus	он	\$221.47	\$55.00
3498	Crafted Crates		233 Widmore Ave		Columbus	ОН	\$222.56	\$30.00

The Customer record opens. 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.

Customer #3703 Active (Normal) Residential-Owner - Since 3/7/22	✓ Edit #Ξ Tasks "③ History							
Total Balance Due Total RMR Address 45722 Chandler \$0.00 \$0.00 Phoenix, AZ 85003	Salesperson Dan Brown Last Statement							
Customer Aging Cell 12 Email 1 Email 08 06 04 Comments	Default Term Delivery Method Delivery RMR Inv							
0.2								
Invoices Credits Sites/Systems RMR Work-Orders Proposals Payments OC/eCheck Notes Contacts Documents 1	Archive Custom Fields eForms Empi							
+ Add Site								
Site N ? Site Name ? Address	E City E Sta							
1 Emily Wood 45722 Chandler	Phoenix AZ							
	1-1 of 1 items Prefresh							

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

< O 1 - Emily Wood Active O Emily Wood - 3703			🖌 Edit 🗄 Tasks 🕲 History
45722 Chandler, Phoenix, AZ 85003 - - emllytwood@gmait.com	BMR \$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 Systems RMR Work-Orders 1 1 2 1	Site Parts Contacts Zones Aut	horities Docs Custom Fields Item Defaults 0	eForms Part Ledger External
+ Add New Contact Sort : Name 0 Wilson, Clenn	I Phone I C (602) 313-6588	ell I Passcode I Relationship Neighbor	Email Edit Delete
H 4 1 F H			1-1of1items SRefresh

The Edit Contact form opens. Make the necessary changes, and then click the **Save** button when finished.

Edit Contact										×
First Name	F _ih.				Polationship	Queres (Dilling 4)				
First Name	Emily				Relationship	Owner (Billing 1)		-		
MI	L				Phone	(602) 315-4444	ext.			
Last Name •	Wood				Cell Phone	(602) 315-7070				
Address	45722 Chandler				Email •	emilyLwood@gmail.com				
	Address 2				Passcode	thunderbird				
	Phoenix	Arizona	▼ 85003	- Plus	Sort Order				0	*
					Invoice Delivery	Ø				
Description				0/150	Manual	VES				
					RMR	YES				
					Work Order	YES				
				Save	Cancel					