

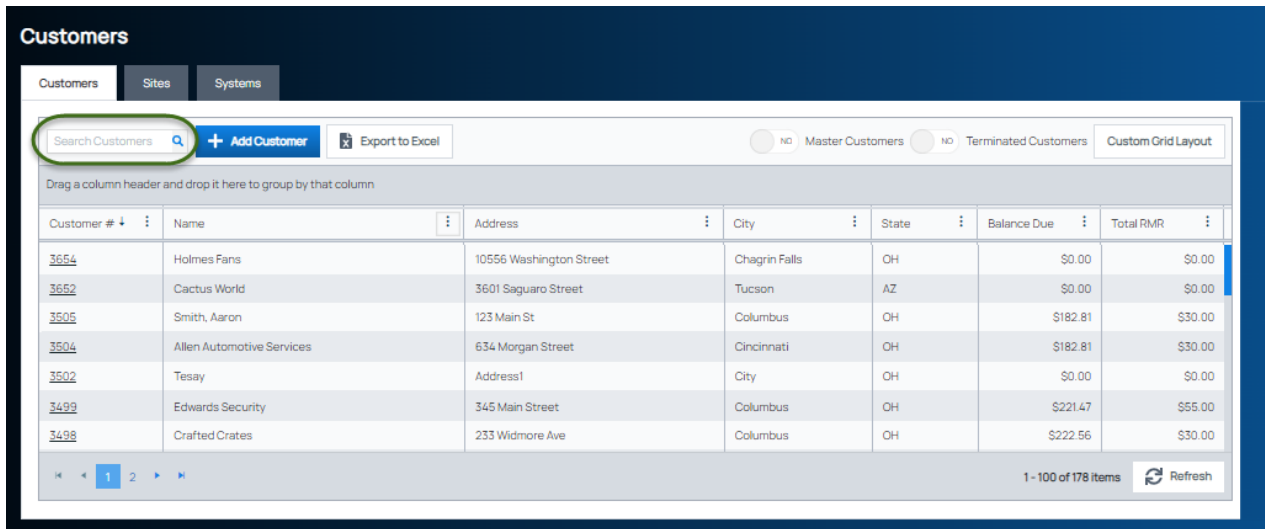
Edit a Site Contact

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

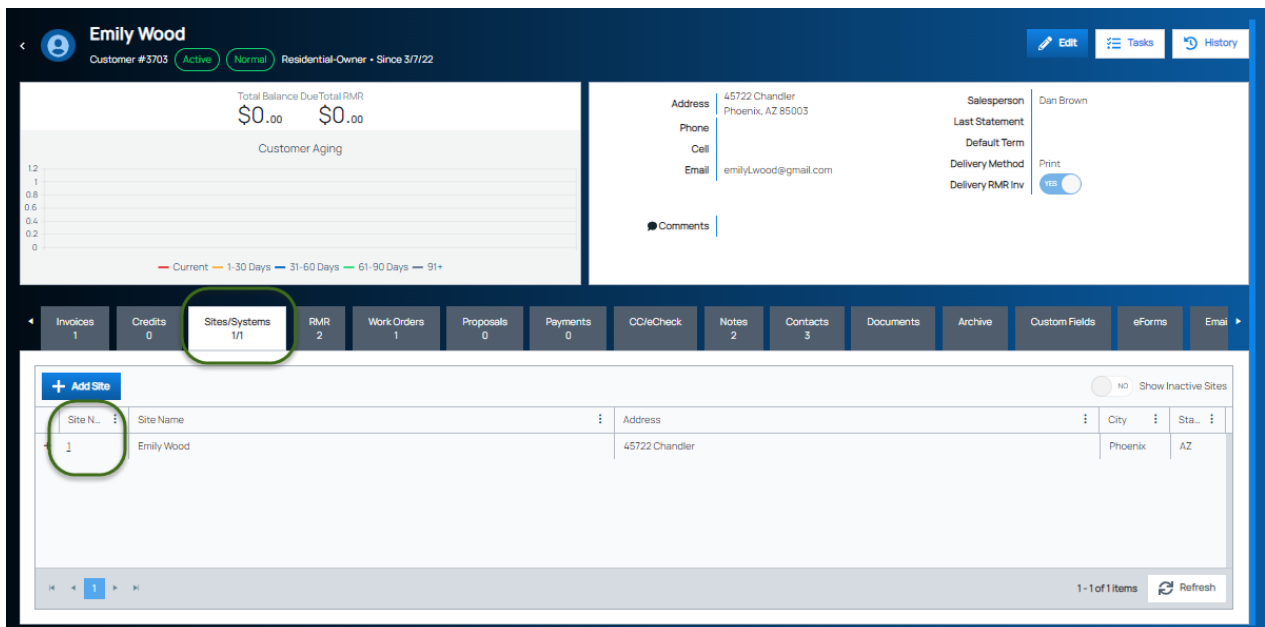
Site Contact records are attached to a Customer record, so you must first access the customer record.

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).

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		 

1 - 1 of 1 Items Refresh

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

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