

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.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$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.

Site N.	Site Name	Address	City	Sta...
1	Emily Wood	45722 Chandler	Phoenix	AZ

The Site record opens. 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) 315-6588			Neighbor		 

1 - 1 of 1 items Refresh

The Edit Contact form opens. 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