

# Contacts Tab

Last Modified on 04/29/2022 10:22 am EDT

The Contacts tab will display all contacts on file for the customer. Customer contacts are not to be confused with Call List Contacts. Call List Contacts are setup on a System record.

## Add New Contact Button

Clicking on the Add New Contact button will open a form for entering a new contact for the customer.

## Add Existing Contact Button

Clicking on the Add Existing Contact button will open a list of all contacts in the database for all customers. Users may select one or more contacts from the list to save on the current customer's contact list.

## Edit Button

Clicking on the Edit button will open the contact record for viewing and/or editing.

## Delete Button

Clicking on the Delete button will permanently delete the contact record.

The screenshot displays the software interface for customer Emily Wood. At the top, the customer's name and status are shown: "Emily Wood", "Customer #3719", "Active", "Normal", "Residential-Owner", and "Since 3/4/22". Navigation buttons for "Edit", "Tasks", and "History" are visible. The main content area is divided into two sections. The left section shows financial data: "Total Balance Due \$ 822.71" and "Total RMR \$ 120.00". Below this is a "Customer Aging" bar chart with a legend for "Current", "1-30 Days", "31-60 Days", "61-90 Days", and "91+". The right section displays contact information: "Address 45722 Chandler Plymouth, MI 48170", "Phone (734) 258-4646", "Cell (734) 258-3311", "Email emilyLwood@gmail.com", "Salesperson Dan Brown", "Last Statement", "Default Term", "Delivery Method", and "Delivery RMR Inv" with a "Print" button. A "Comments" section is also present. Below the main content is a navigation bar with tabs for "Invoices 7", "Credits 2", "Sites/Systems 2/3", "RMR 5", "Work Orders 2", "Proposals 0", "Payments 8", "CC/eCheck", "Notes 0", "Contacts 2", "Documents", "Archive", "Custom Fields", "eForms", and "Emails". The "Contacts" tab is active, showing a table with two contact entries. The table has columns for "Sort", "Name", "Phone", "Cell", "Passcode", "Relationship", and "Email". Each entry has "Edit" and "Delete" buttons. The first entry is for "Wood, Emily" with phone number "(734) 258-7941" and passcode "thunderbird". The second entry is for "Wood, George" with phone number "(734) 555-7878". At the bottom, there is a pagination bar showing "1" of 2 items and a "Refresh" button.

Sort	Name	Phone	Cell	Passcode	Relationship	Email	
0	Wood, Emily		(734) 258-7941	thunderbird		emilyLwood@gmail.com	Edit Delete
0	Wood, George	(734) 555-7878					Edit Delete

