Contacts Tab

Last Modified on 06/03/2026 11:48 am EDT

The Contacts tab displays 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

Click the Add New Contact button to open a form for entering a new contact for the customer.

Add Existing Contact Button

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

Edit Button

Click the Edit button to open the contact record for viewing and/or editing.

Delete Button

Click the Delete button permanently delete the contact record.