Contacts Tab

View and add contacts linked to this site.

Adding a New Contact

1. Add New Contact

To add a new contact for this site, click "Add New Contact" on the right side of the page.

2. Edit

FIll out the fields in the "Edit" box that appears.

CC Invoice Emails

If your customer would like to send emailed copies of Manual, RMR or Work Order invoices to this contact check the corresponding boxes.
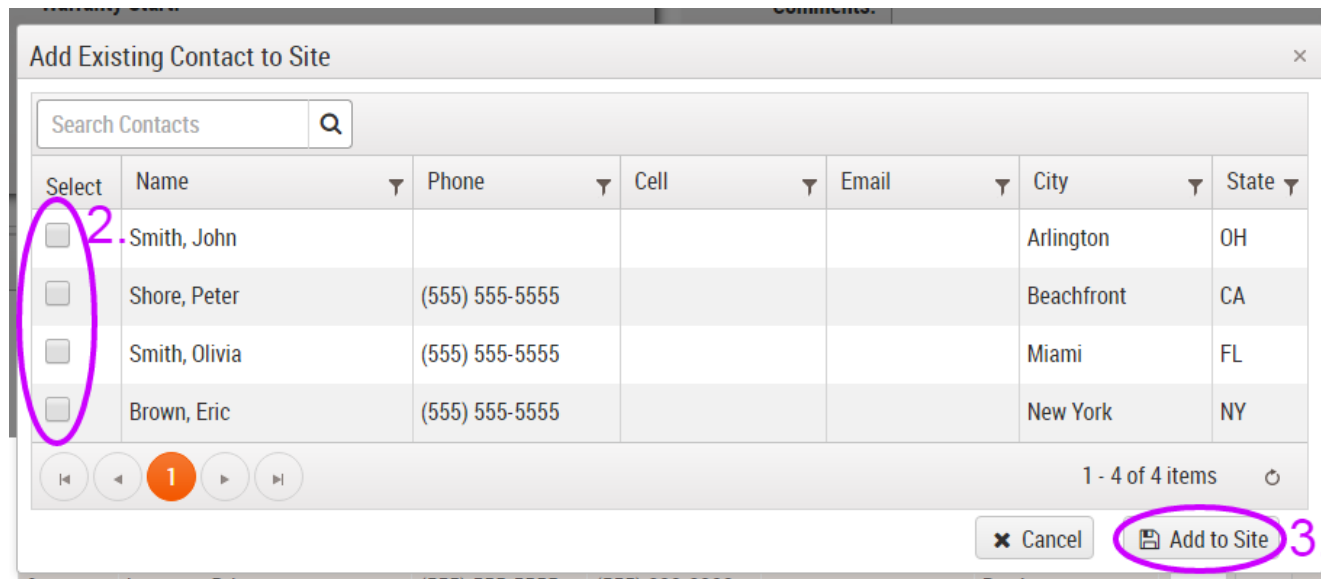
3. Update

Click "Update" in the bottom left corner to save.

Add Existing Contacts To Site

The existing contact list is created on the "Customer Manager Page" (hyperlink)

1. Add Existing Contacts

click "Add Existing Contacts" on the right side of the page.

2. Select

Check the box(es) to the left of the customer(s) you wish to add.

3. Add to Site

Click "Add to Site" in the bottom right corner to update.