

# Contacts Tab

Last Modified on 11/07/2016 12:40 pm EST

View and add contacts linked to this site.

## Adding a New Contact

The screenshot shows a web interface with a navigation bar at the top containing tabs: Notes, Systems, RMR, Work Orders, Site Parts, Contacts, Zones, Authorities, and Docs. The 'Contacts' tab is active. Below the navigation bar is a section titled 'Contacts' with two buttons: '+ Add New Contact' and '+ Add Existing Contacts'. The '+ Add New Contact' button is circled in purple and has a '1.' next to it. Below the buttons is a table with columns: Sort, Name, Phone, Cell, Pass Code, and Relationship. The table contains two rows of contact information.

Sort	Name	Phone	Cell	Pass Code	Relationship
0	Westfield, Jake	(555) 555-5555			Manager
0	Smith, Andrew		(555) 555-5555		Asst. Mgr

The screenshot shows an 'Edit' contact form. The form is titled 'Edit' and has a close button (X) in the top right corner. The form is divided into two main sections. The left section contains input fields for: First Name, MI, Last Name, Address 1, Address 2, City, a 'Please Select' dropdown menu, Zip, and Plus 4. The right section contains input fields for: Relationship, Phone (with an 'ext.' field), Cell Phone, Email, Password, and Sort Order (with up/down arrows). Below these sections are checkboxes for 'CC Invoice Emails' with options for Manual, RMR, and Work Order. At the bottom of the form is a 'Note' field. At the bottom right of the form are two buttons: 'Update' (with a checkmark icon) and 'Cancel' (with a close icon). The 'Update' button is circled in purple and has a '3.' next to it.

### 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

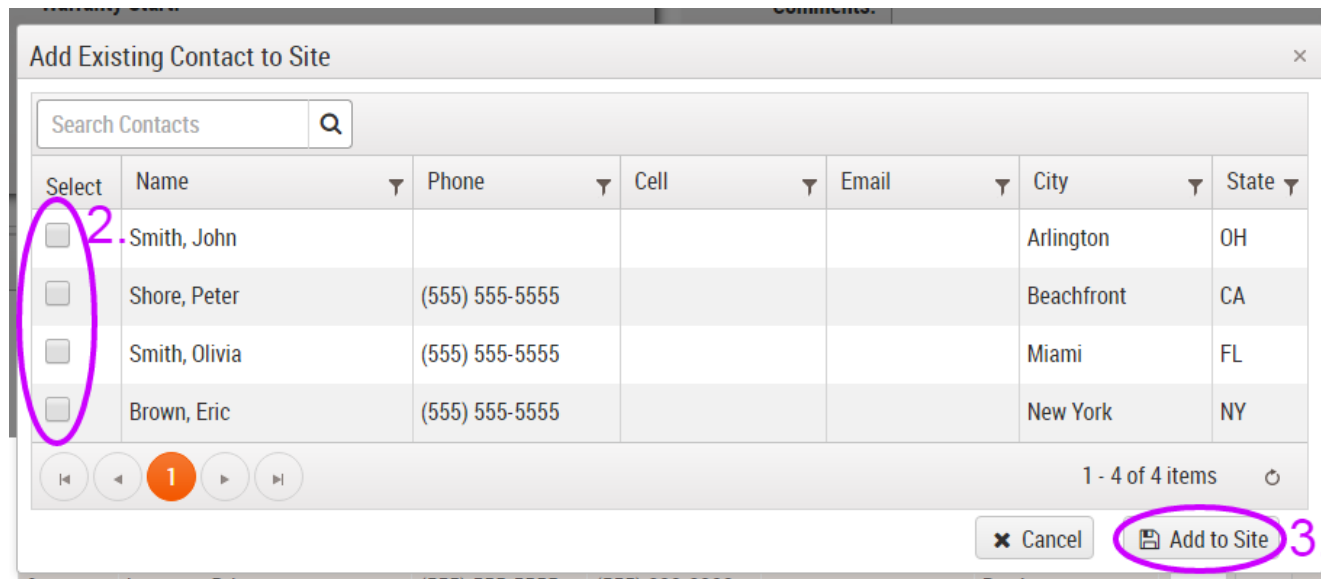
Click "Update" in the bottom left corner to save.

## Add Existing Contacts To Site

The existing contact list is created on the "Customer Manager Page" [\(hyperlink\)](#)



Notes	Systems	RMR	Work Orders	Site Parts	Contacts	Zones	Authorities	Docs
<b>Contacts</b>								
						+ Add New Contact		+ Add Existing Contacts
Sort	Name	Phone	Cell	Pass Code	Relationship			
0	Westfield, Jake	(555) 555-5555			Manager			
0	Smith, Andrew		(555) 555-5555		Asst. Mgr			



Select	Name	Phone	Cell	Email	City	State
<input type="checkbox"/>	Smith, John				Arlington	OH
<input type="checkbox"/>	Shore, Peter	(555) 555-5555			Beachfront	CA
<input type="checkbox"/>	Smith, Olivia	(555) 555-5555			Miami	FL
<input type="checkbox"/>	Brown, Eric	(555) 555-5555			New York	NY

1 - 4 of 4 items

Cancel Add to Site

## 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.