







Contacts Tab

Last Modified on 11/07/2016 2:31 pm EST

Create a list of contacts for this customer.

Adding a New Customer Contact

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
21	4	7	20	18	5	109	86	6	7	5	0

Sort	Name	Phone	Cell	Pass Code	Relationship	
0	Brown, Eric	(555) 555-5555			friend	 
0	Lattman, Brian	(555) 555-5555	(555) 222-2222		Brother	 
0	Shore, Peter	(555) 555-5555			Landlord	 

Edit 2.

First Name	Relationship:
MI	Phone: <input type="text"/> <input type="text"/> ext. <input type="text"/>
Last Name	Cell Phone: <input type="text"/>
Address 1	Email: <input type="text"/>
Address 2	Password: <input type="text"/>
City <input type="text"/> Please Select <input type="text"/> Zip <input type="text"/> - Plus 4 <input type="text"/>	Sort Order: <input type="text"/> 0 <input type="text"/>

CC Invoice Emails
Manual: RMR: Work Order:

Note:

3.

1. Add New Contact

To add a new contact for this site, click "Add New Contact" on the left 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.