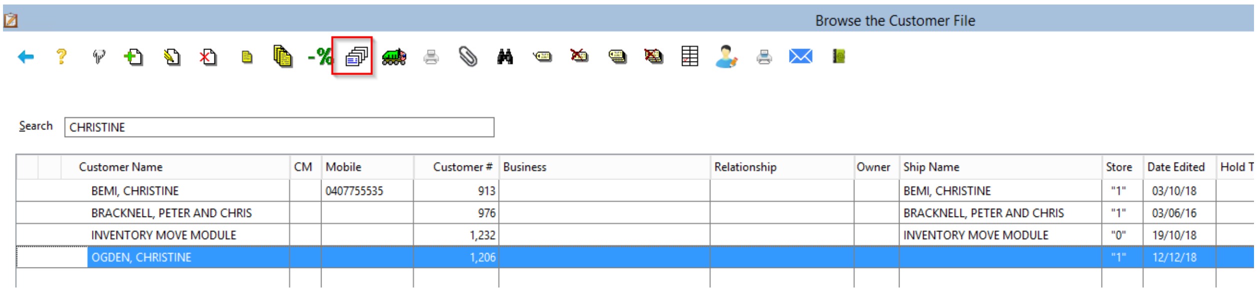
How To: AddCustomerContacts

Customers can have contacts. A Contact is an individual person, who can be related to a Customer, like a Purchasing Agent who works for a builder, or a non-related Contact, like a Sales Rep.

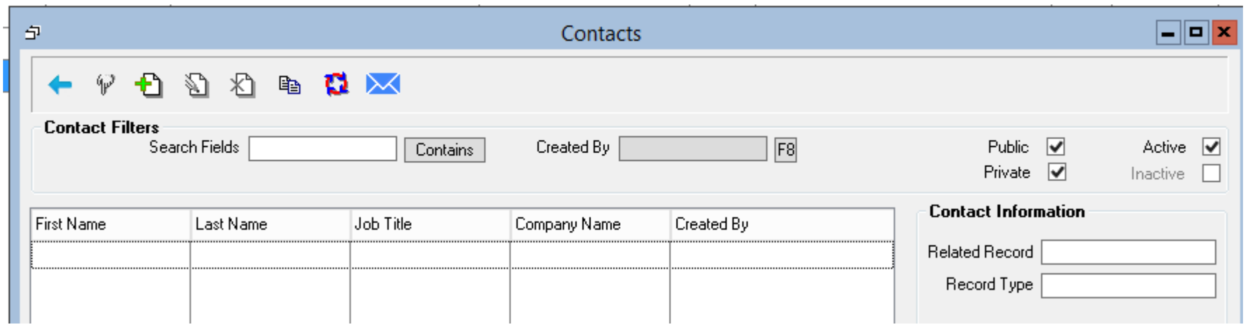
Go to Order Entry > File > Customers to be returned with the Browse the Customer File screen.

Search the Customer Record and highlight the customer for which the additional contacts need to be added:

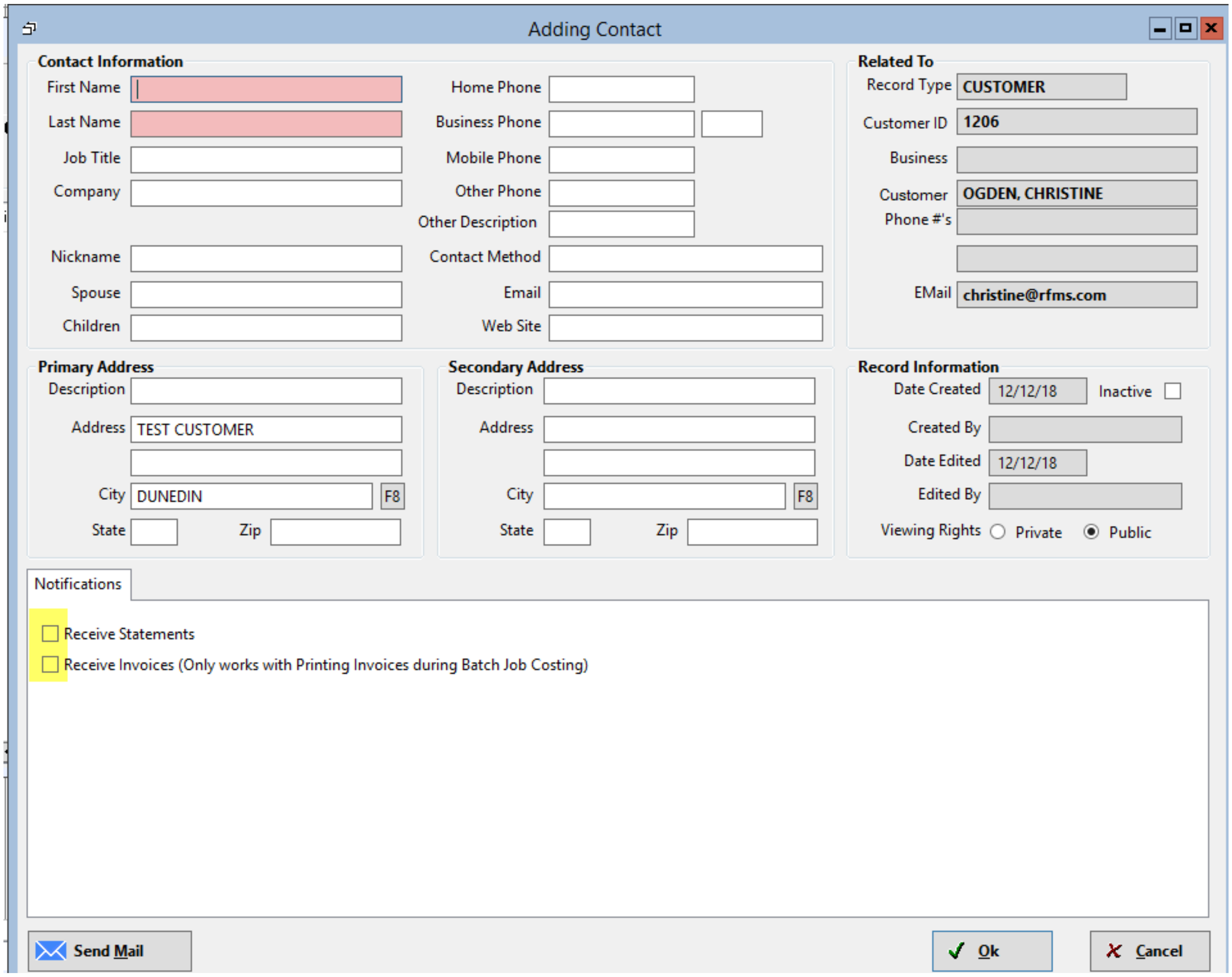


Click the Contact button on the Customer toolbar to be returned with the Contacts Screen

From the Contact screen, a contact can be selected, added, edited, deleted, or copied. An email can also be sent from this screen.



Click to add a contact



On the Adding/Editing Contact screen, if the contact is to receive statement or invoices by email then the appropriate boxes in the bottom left need to be checked.

If more than one contact is checked to receive statements for one customer record, then all of the contacts will receive the statement email.

If a statement email address is already listed for a customer, it will automatically create a contact for the customer.

Document Ends.