Customer/Vendor Contacts

Vendors are identified within the customer record. Use the vendor checkbox to identify your customer as a vendor, then proceed to add contacts as below.

Within the Customer Record, maintain a list of associated contacts. The contact need only be set up in the database once and can then be linked with many customers/vendors if needed. New contacts can be added from within a customer record and/or existing contacts can be linked to the customer as outlined below.

Use the [✓ Customer Contact] and [✓ Payment Contact] checkboxes (Fig 1.1 below) against any contact record to identify the contact associated with that role in the company

Fig 1.1

Use the options in Fig 1.2 below to search for an existing contact record to link to this customer.

Fig 1.2
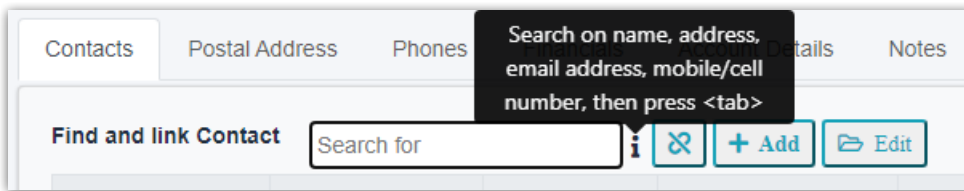
Once located, use to add the contact to the list of contacts for this customer OR to clear the search (Fig 1.3 below)
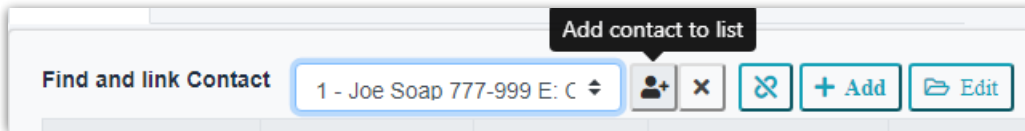
If added, the contact will appear on the grid (Fig 1.4 below)

Fig 1.4

 Unlink or remove a contact from the list associated with this customer

 Add a new contact to the database and link it to this customer

 Edit an existing contact associated with this customer