

## Contacts - Customer (Add - Edit)


This article describes how to Add a new Contact (Customer). Once a Customer is added, you can Select/Enter/Edit the Customer's default Contact Details, Settings and Contact People.

### To Add a new Contact (Customer);

Adding a new Contact (Customer) is done from the CONTACTS Tab's Library.

### Quick Flow;

**CONTACTS** Tab > **[Add]** > **Account Name** > **Customer** > **Address(s)** > **PRIMARY PERSON** > **[Save]**

1. Press on the **CONTACTS** Tab to display the CONTACTS Library, then press on the **[Add]** button  to display the CONTACT: NEW CONTACT Window



2. From the CONTACT: NEW CONTACT Window, Enter an **Account Name** and Tick a Contact Type **Customer**

Account Name	<input type="text"/>
Customer	<input checked="" type="checkbox"/>
Supplier	<input type="checkbox"/>

3. Enter a Street **Address** and/or Postal **Address** and/or a Default Job **Address**
4. Enter the **PRIMARY PERSON** details

**NOTE:** Fields with a red "\*" are compulsory fields. If the Contact's email address is unknown, enter your Company's email address

5. Scroll to the top of the CONTACT: NEW CONTACT Window and press the **[Save]** button  to save the new Contact and return to the CUSTOMER Window


Having created the Customer, the next step requires you to Select/Enter/Edit the Customer's Contact Details and Settings.

**To Select/Enter/Edit a Customer’s default Contact Details and Settings;**

Selecting/Entering/Editing a Customer’s default Contact Details and Settings is done from a CUSTOMER Editing Window

**Quick Flow;**

**CUSTOMER Window > [Edit] > Contact Details > Contact People > Brand > Price Rules > DEFAULT PAYMENT TERMS > DEFAULT INCLUSIONS AND EXCLUSIONS > [Save]**

1. From the **CUSTOMER** Window press the **[Edit]** button  to display the CONTACTS Editing Window
2. From the CONTACTS Editing Window Enter/Edit the Customer’s default **Contact Details**


<b>Email</b>	<input type="text"/>
<b>Account Phone</b>	<input type="text"/>
<b>Account Fax</b>	<input type="text"/>
<b>Mobile</b>	<input type="text"/>
<b>Direct Dial</b>	<input type="text"/>
<b>Skype Username</b>	<input type="text"/>

3. Select/Edit the Customer’s default **Contact People**

<b>Primary Contact</b>	<input type="text" value="Jog Bloggs"/>
<b>Primary Billing Contact</b>	<input type="text" value="Jog Bloggs"/>
<b>Primary Quote Contact</b>	<input type="text" value="Jog Bloggs"/>
<b>Primary Job Contact</b>	<input type="text" value="Jog Bloggs"/>

**NOTE:** The entered Primary Person will populate to the Primary Billing, Quote and Job Contacts fields. Other people can be Selected in these fields but must be Entered in to the Contact’s PEOPLE Subnav first. See KAT-0314

4. Select/Edit the Customer’s default **Brand** and default **Price Rules**

<b>Default Brand</b>	<input type="text" value="HPM Excel Life"/> 
<b>Invoicing Price Rule Book</b>	<input type="text" value="D Pricing - Low volume"/>
<b>Quotes Price Rule Book</b>	<input type="text" value="D Pricing - Low volume"/>
<b>Estimates Price Rule Book</b>	<input type="text" value="D Pricing - Low volume"/>
<b>Variations Price Rule Book</b>	<input type="text" value="D Pricing - Low volume"/>

5. Select/Edit a **Xero Ledger Code for Sales** to this Customer


Xero Ledger Code for Sales

6. Press on the DEFAULT PAYMENT TERMS Subnav to expand, then Select/Edit the Customer's default Payment Terms


▼ DEFAULT PAYMENT TERMS

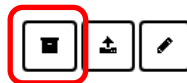
7. Press on the DEFAULT INCLUSIONS AND EXCLUSIONS Subnav to expand, then Select/Edit the Customer's default Inclusions and Exclusions


▼ DEFAULT INCLUSIONS AND EXCLUSIONS

8. Scroll to the top of the CONTACTS window and press the **[Save]** button  to save the Selections/Entering/Editing

### To Archive/Restore a Contact (Customer);

- 1) From the Contact (Customer), Press the [Archive] button  to archive the (Customer),



- 2) From the Contacts Tab, Filter "Archived", then open the required Contact, from the Contact (Customer) Window, Press the Restore button  to restore the Contact (Customer)

