Contacts -People (Add-Edit)

This article describes how to Add or Edit a Customer or Supplier's Contact People.

To Add or Edit a Customer or Supplier's Contact Person;

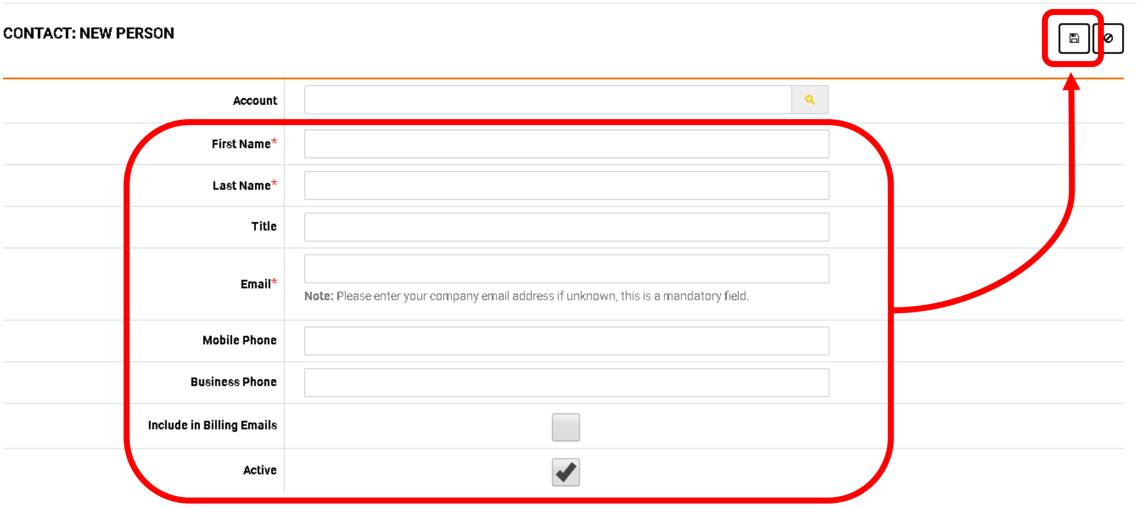
Adding or Editing a Customer or Supplier Contact Person is done from PEOPLE Subnav of a CUSTOMER / SUPPLIER Window.

Quick Flow;

CUSTOMER / **SUPPLIER** Window > **PEOPLE** > **[Add]** > **Person's Details** > **[Save]**

1. From the **CUSTOMER** / **SUPPLIER** Window press on the **PEOPLE** Subnav to expand, then press on the **[Add]** button to display the CONTACT: NEW PERSON Window

2. From the CONTACT: NEW PERSON Window, Enter the **Person's Details**



NOTE: Ticking the "Include in Billing Emails" tickbox will copy this person in when sending Customer Invoices to the "Primary Billing Contact"

3. Press the **[Save]** button to add the new Person and return to the CUSTOMER / SUPPLIER Window

NOTE: This person will display in the dropdown selection options of the contact's Primary Person, Billing, Quote and Job Contacts fields.

To Edit a Person's information, from the PEOPLE Subnav, Press on that person's FULL NAME to open the person's CONTACT Window, then Edit, then Press the [Save] button to save