SALES

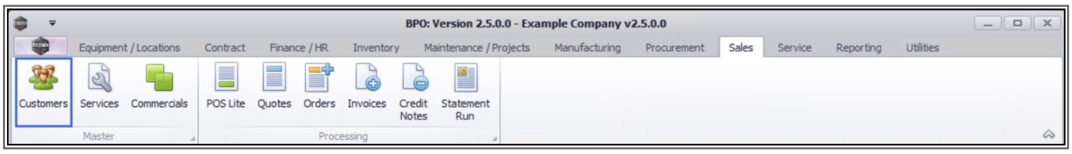
CUSTOMERS - CONTACTS

Customers can be **debtors** (account created in pastel on save) or **cash on delivery** clients (customer linked to an account in pastel on save).

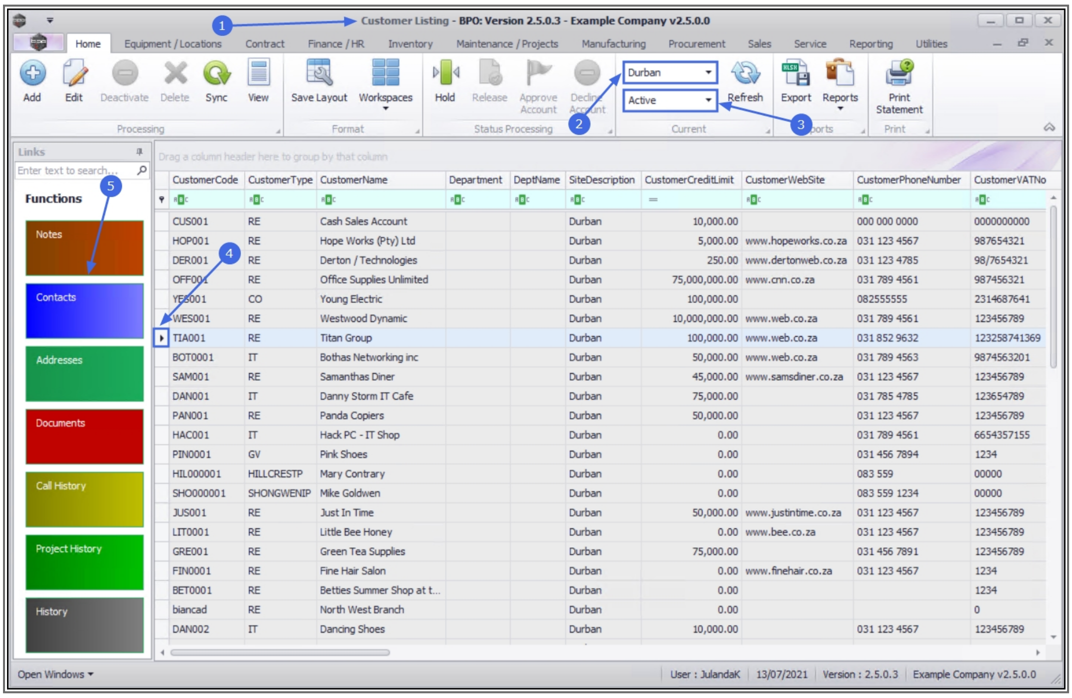
Must Haves:

- An **Accounts Contact** (Pastel account contact). The Accounts Contact receives all the financial related emails.
- A **Primary Contact** (as a fail safe, if an 'Accounts' contact does not exist, the system will use the primary contact as the default account contact in Pastel).
    - The primary contact receives all operational or business-related emails, e.g. **call status change** and **contract closure notification** emails. The primary contact is also required for **customer item task generation**.
- An Invoice Delivery method (for contract billing - invoice emailing).

Ribbon Access: *Sales > Customers*



1. The ***Customer Listing*** screen will be displayed.
2. Select the ***Site*** where the Customer can be located.
    - The example has ***Durban*** selected.
3. Select the ***Status*** for the Customer.
    - The example has ***Active*** selected.
4. Select the ***row*** of the ***Customer*** for whom you wish to add ***Contact*** information.
5. Click on the ***Contacts*** tile.

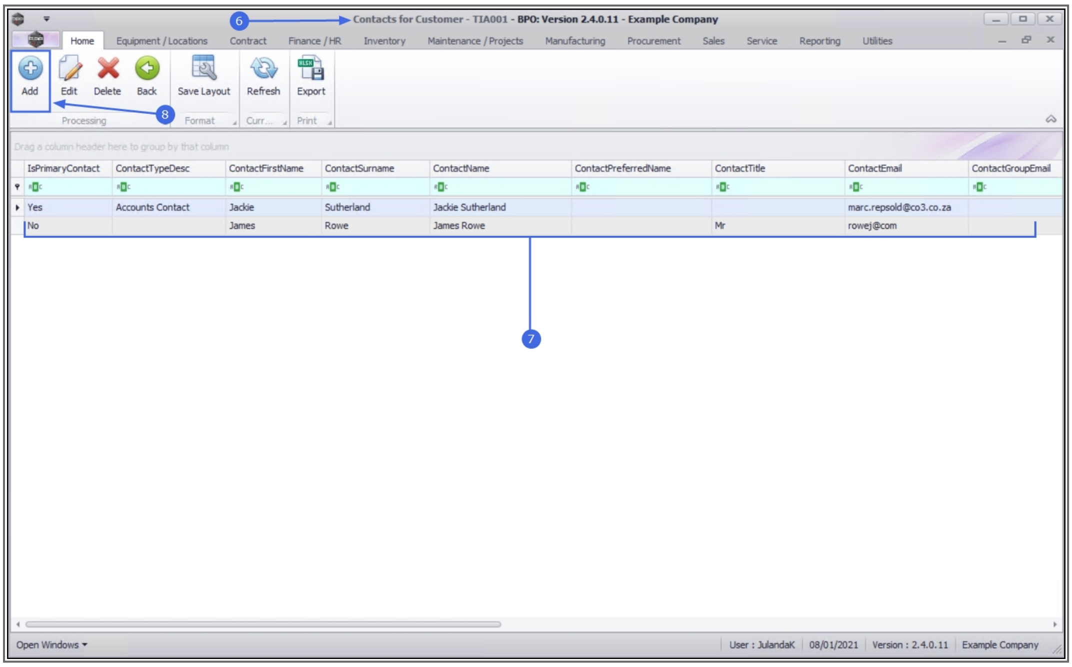


6. The ***Contacts for Customer - [****customer code****]*** screen will be displayed.
7. Any existing contact information for the Customer will be listed.

ADD CUSTOMER CONTACT

7. Click on ***Add***.

Short cut key: ***Right click*** to display the ***Process*** menu list. Click on ***Add***.



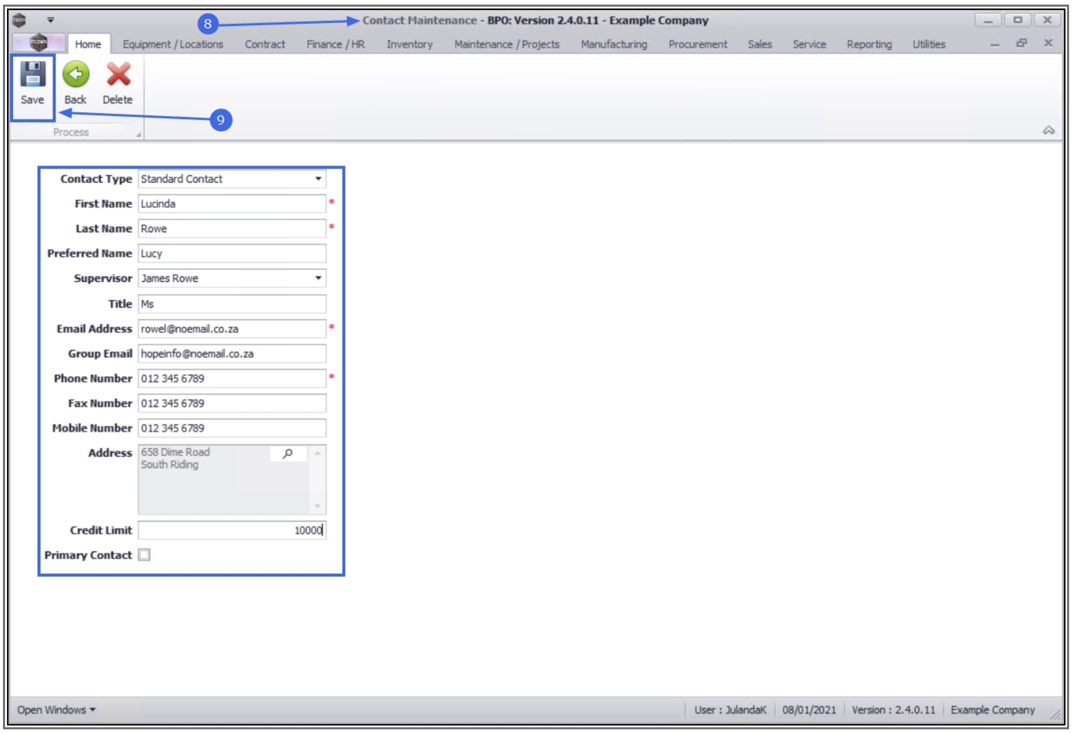
8. The ***Contact Maintenance*** screen will be displayed.
    - **Contact Type:** Type in or click the down ***arrow*** to select the contact type from the menu.
    - **First Name:** Type in the name of the contact person.
    - **Last Name:** Type in the surname of the contact person.
    - **Preferred Name:** Type in the preferred name[1] for the contact.
    - **Supervisor:** Click on the down ***arrow*** and to select the supervisor from the menu.
    - **Title:** Type in the title for the contact.
    - ***Email Address:*** Type in an email address for the contact.
    - **Group Email:** Type in the group email address[2] of the contact.
    - **Phone Number:** Type in the phone number for the contact.

---

[1] This field is not compulsory and can be left empty if a preferred name is not required.
[2] This is normally a company email address e.g. hopeinfo@company.co.za

- **Fax Number:** Type in the fax number[1] for the contact.
- **Mobile Number:** Type in the mobile number[2] for the contact.
- **Address:** Click on the ***search icon*** to select the contact address[3] from the menu.
- **Credit Limit:** Type in the credit limit of the new contact.
- **Primary Contact:** Click on this check box if this is the primary contact[4] for this Customer.

9. When you have finished adding the new Contact details, click on ***Save***.



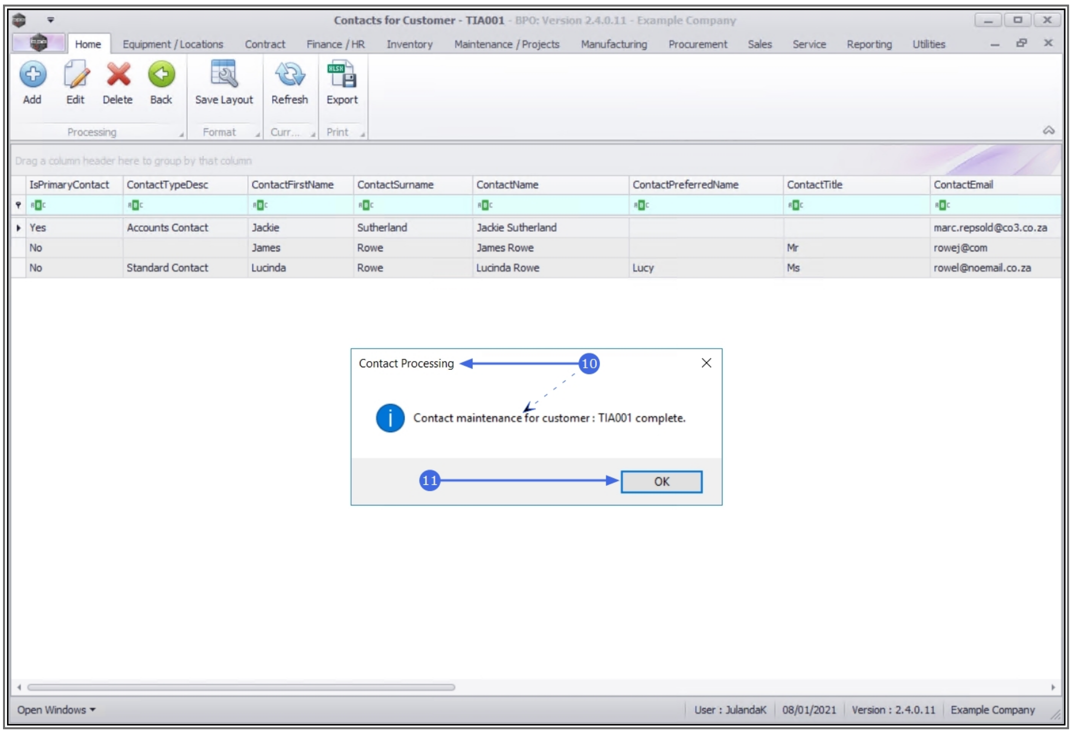
[1]This field is not compulsary and can be left empty if no fax number exist for the contact

[2]This field is not compulsary and can be left empty

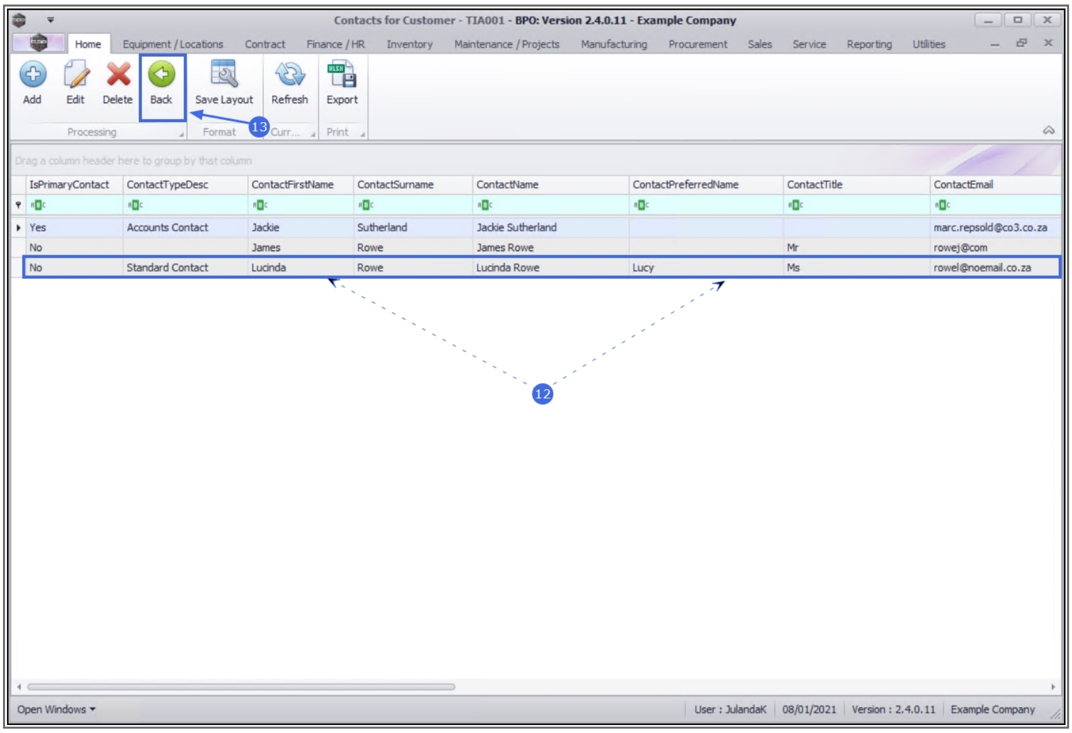
[3]This address will be the Company address where this contact can be located

[4]A Primary Contact person must exist for the Customer and only one primary contact person can be created for the Customer.

10. When the ***Contact Processing*** message display, informing you that;
    - ***Contact maintenance for customer; [****customer code****] complete.***
11. Click on ***OK***.



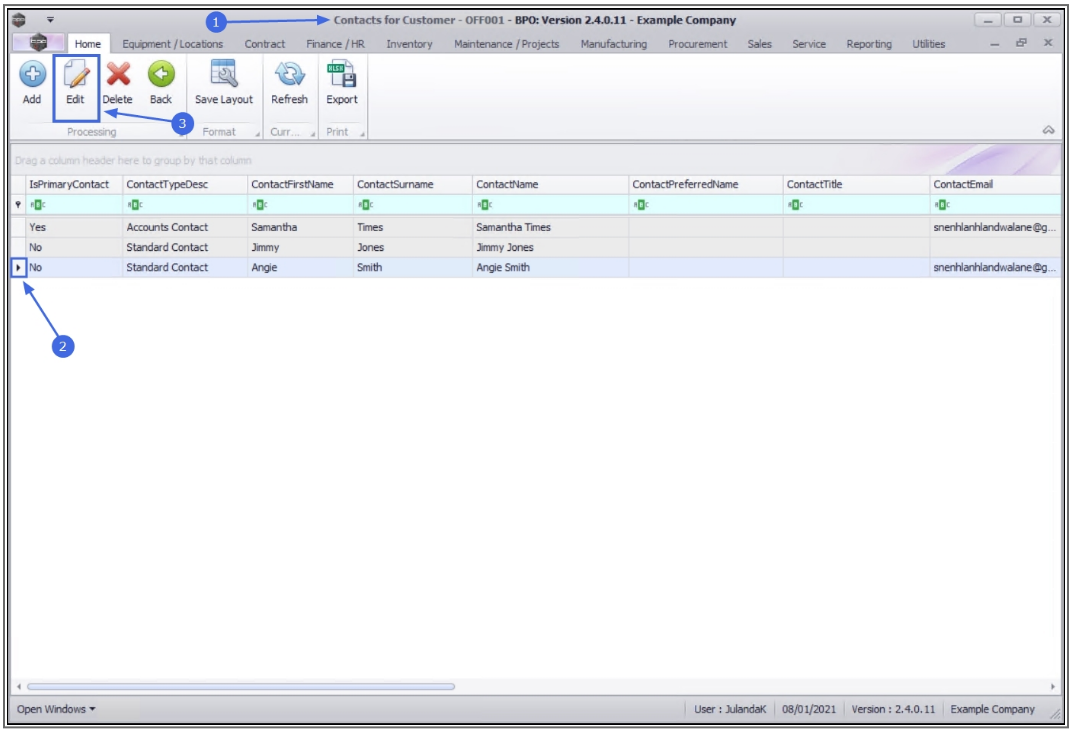
12. The new contact can be ***viewed*** in the ***Contacts for Customer*** screen.
13. Click on ***Back***, to return to the ***Customer Listing*** screen.



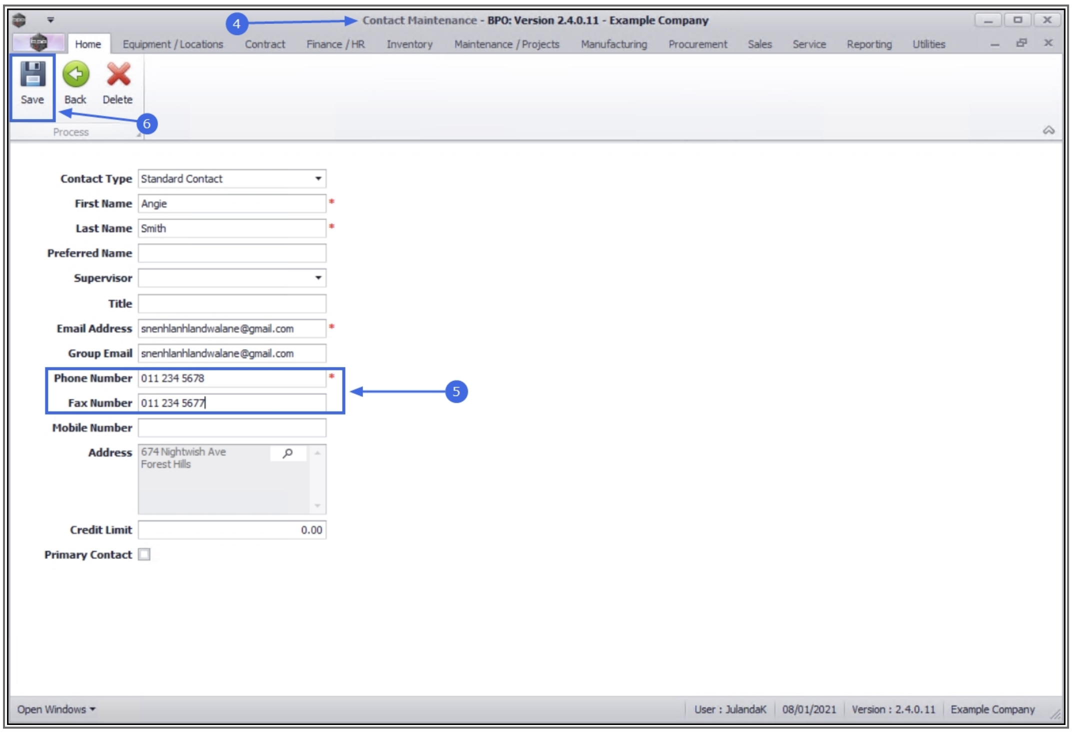
EDIT CUSTOMER CONTACT

1. From the ***Contacts for Customer - [****customer code****]*** screen will be displayed.
2. Select the ***row*** of the ***Contact*** whose details you wish to change.
3. Click on ***Edit***.

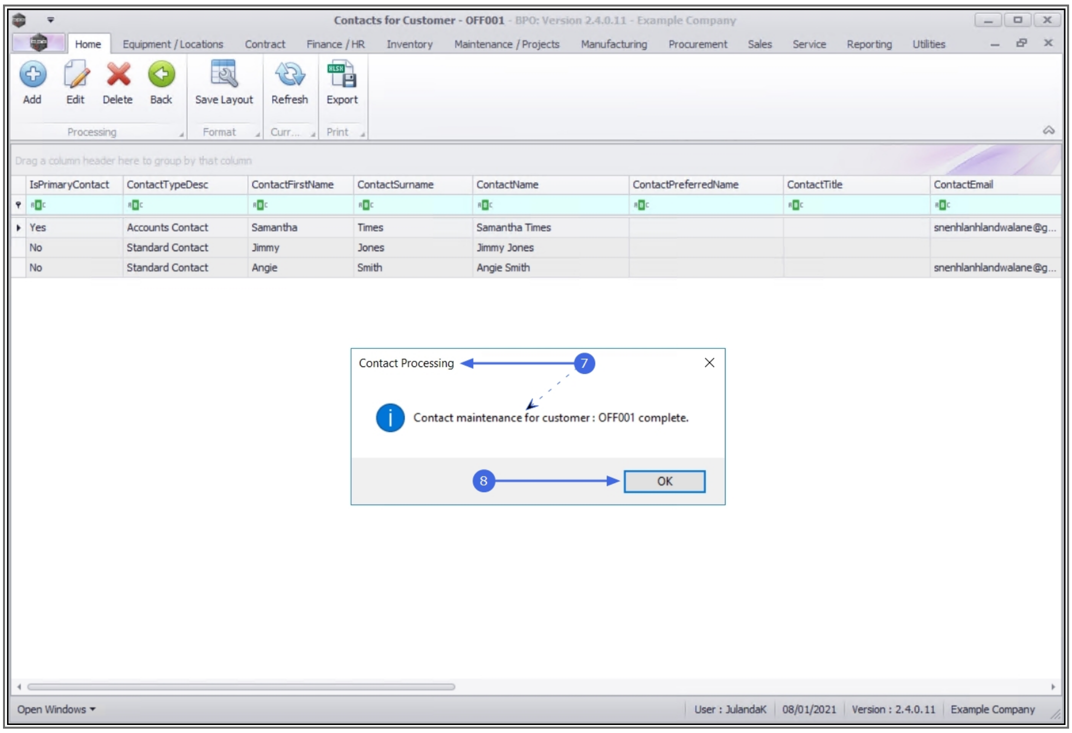
Short cut key: ***Right click*** to display the ***Process*** menu list. Click on ***Edit***.



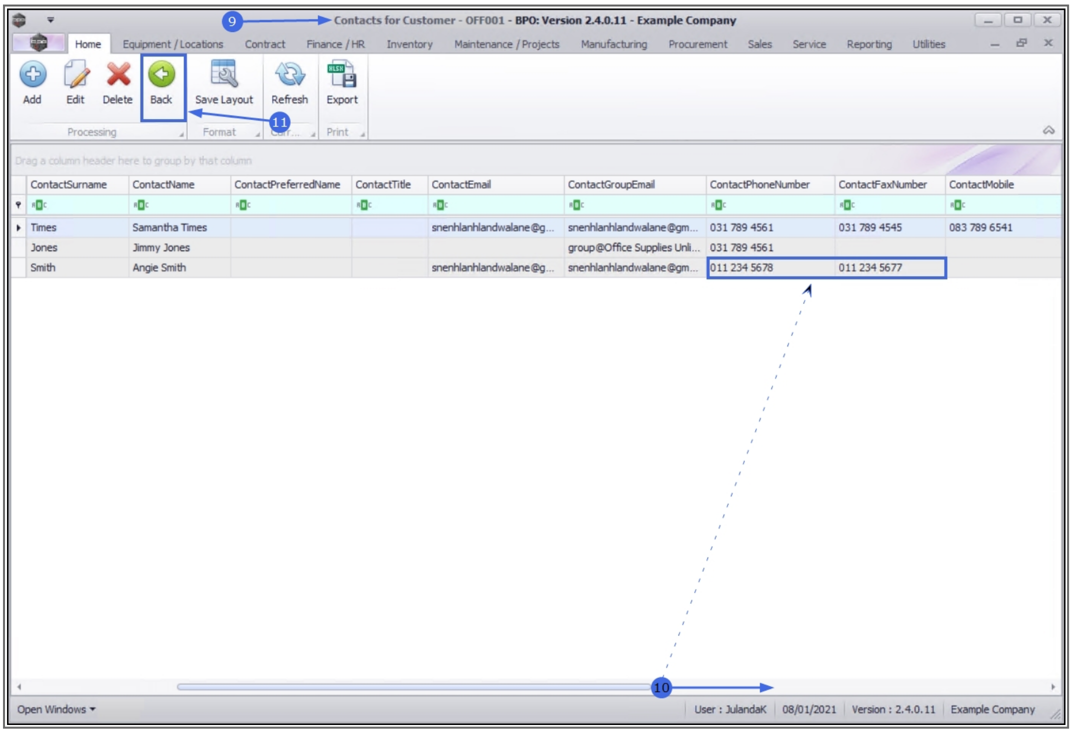
4. The ***Contact Maintenance*** screen will be displayed.
5. Make the changes to the Contact information as required.
    - In this example, the ***Phone Number*** and ***Fax Number*** have been changed.
6. Click on ***Save***.



7. When you receive the ***Contact Processing*** message to confirm that;
    - ***Contact maintenance for customer: [****customer code****] complete.***
8. Click on ***OK***.



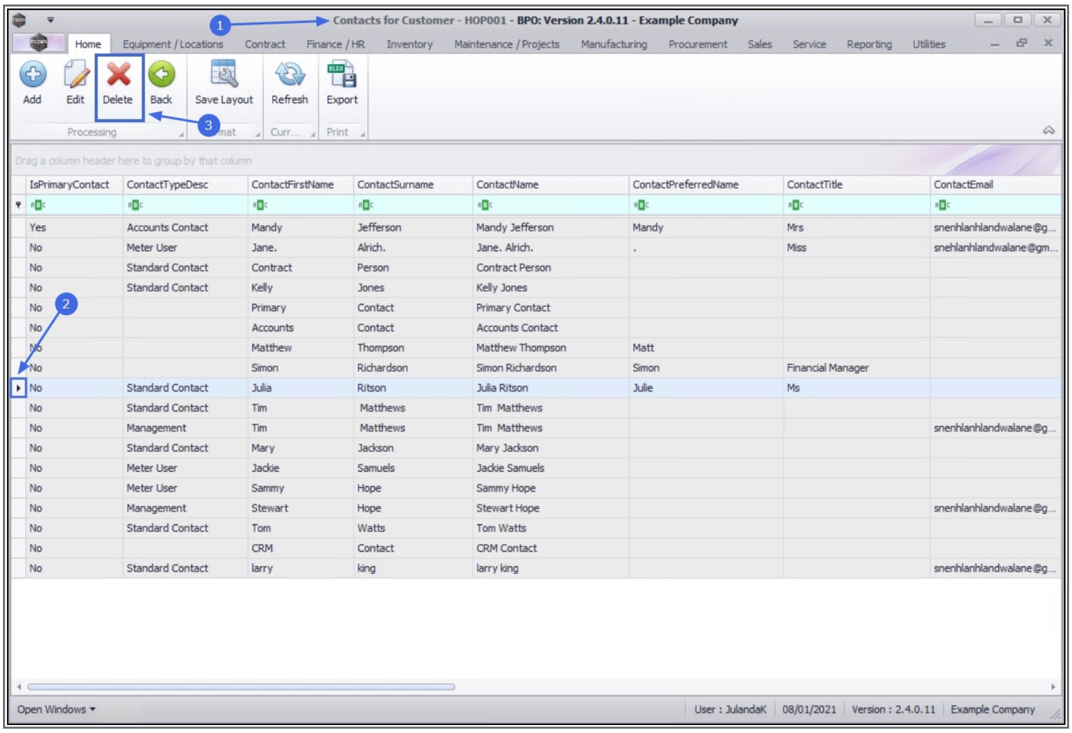
9. You will return to the ***Contacts for Customer - [****customer code****]*** screen.
10. Use the scroll bar to move across the screen to view the ***edited*** customer details.
11. Click on ***Back*** to return to the ***Customer Listing*** Screen.



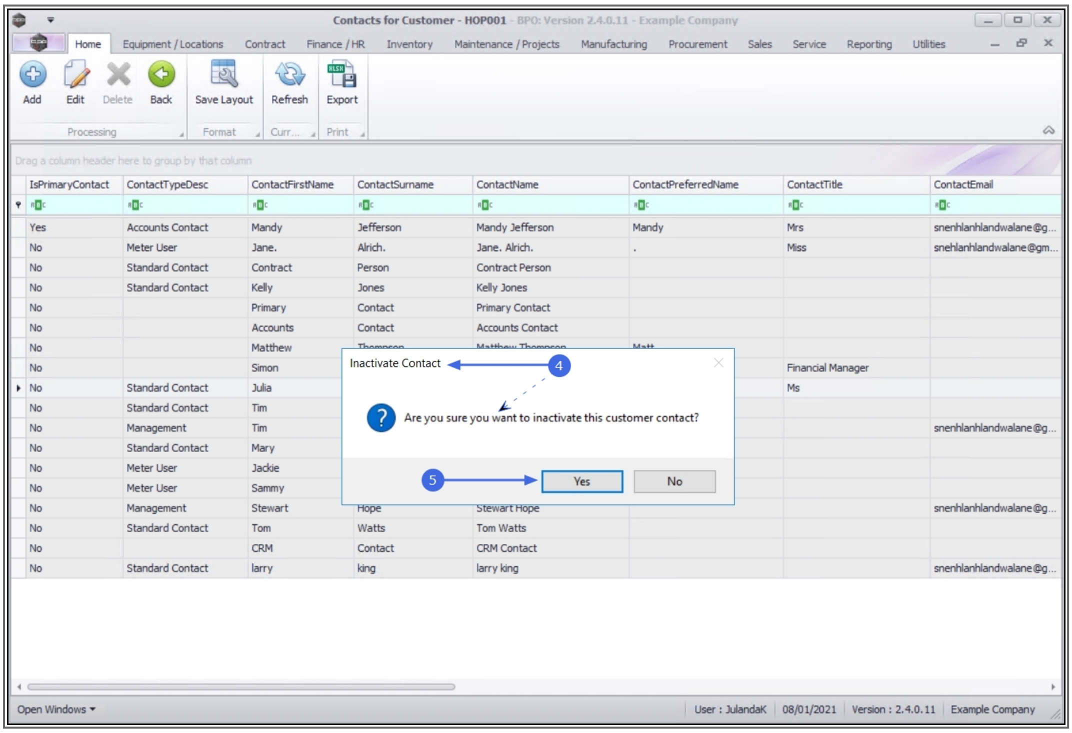
DELETE CUSTOMER CONTACT

1. The ***Contacts for Customer - [****customer code****]*** screen will be displayed.
2. Select the ***row*** of the ***contact*** you wish to ***delete***.
3. Click on ***Delete***.

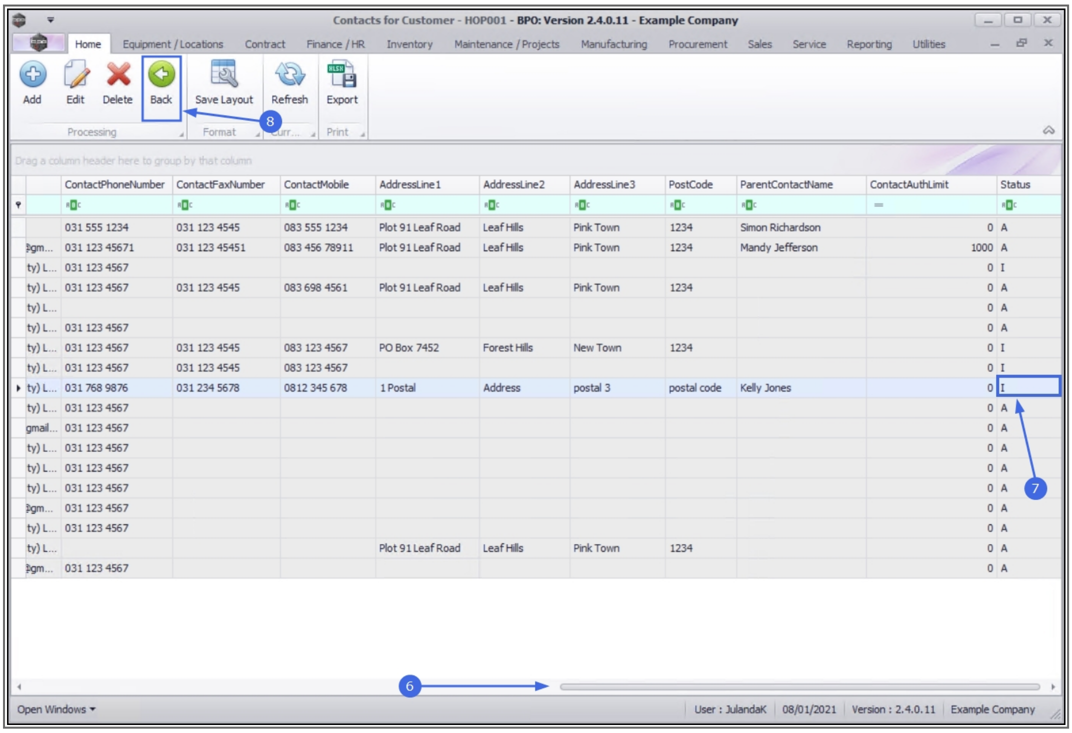
Short cut key: ***Right click*** to display the ***Process*** menu list. Click on ***Delete***.



4. When you receive the ***Inactivate Contact*** message to confirm that;
    - ***Are you sure you want to inactivate this customer contact?***
5. Click on ***Yes*** *if you are certain about your selection.*



6. Use the ***scroll bar*** to move across this screen to view the ***deleted*** customer contact ***status***.
7. The status has changed to ***I (Inactive)***.
8. Click on ***Back*** to return to the ***Customer Listing*** screen.



MNU.061.004