


We are currently updating our site; thank you for your patience.

SALES

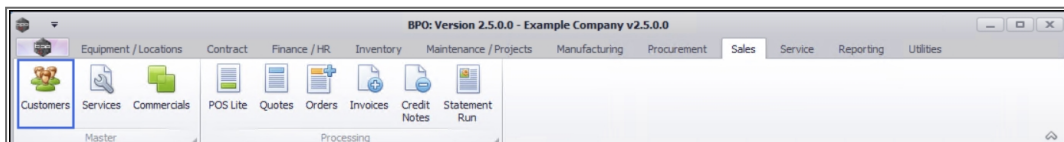
CUSTOMERS – CONTACTS

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

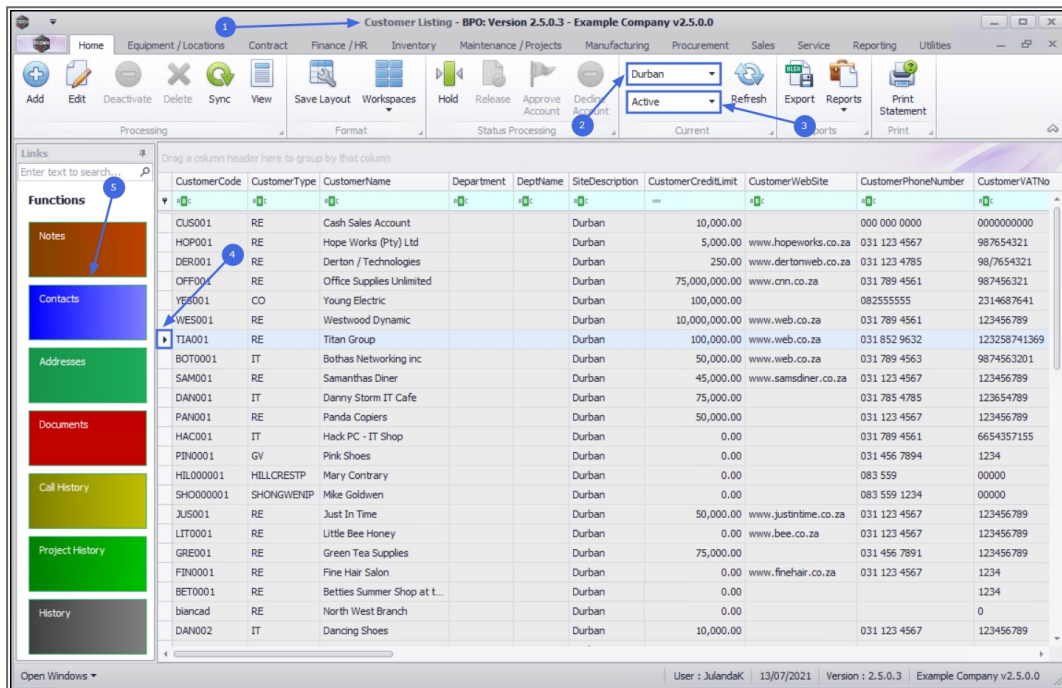
Must Haves:

- 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.



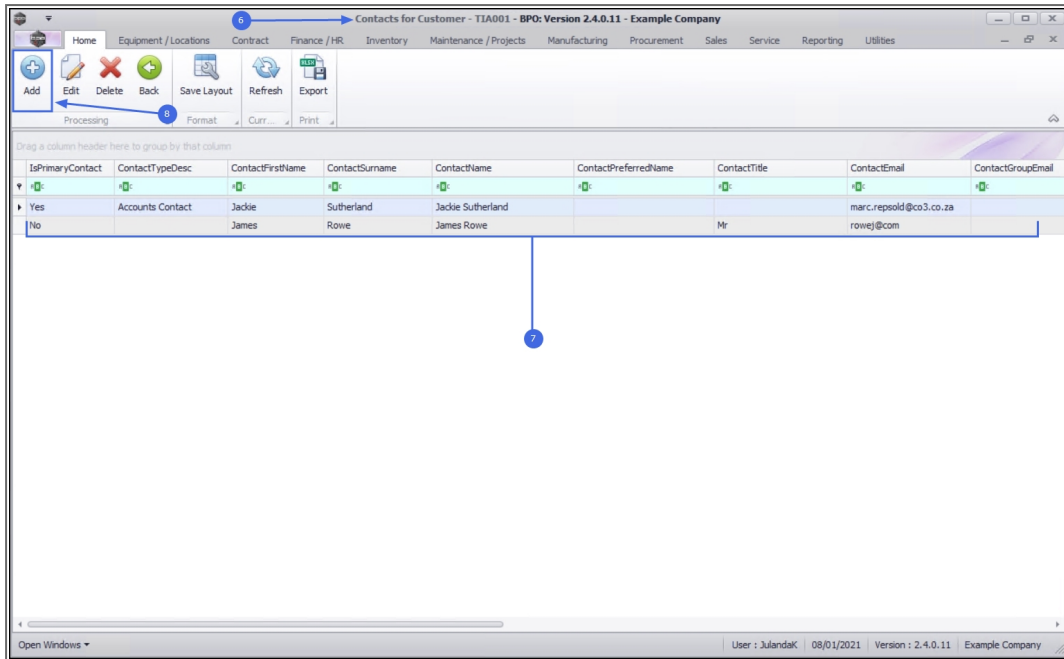
6. The **Contacts for Customer - [customer code]** screen will be displayed.
7. Any existing contact information for the Customer will be listed.

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.

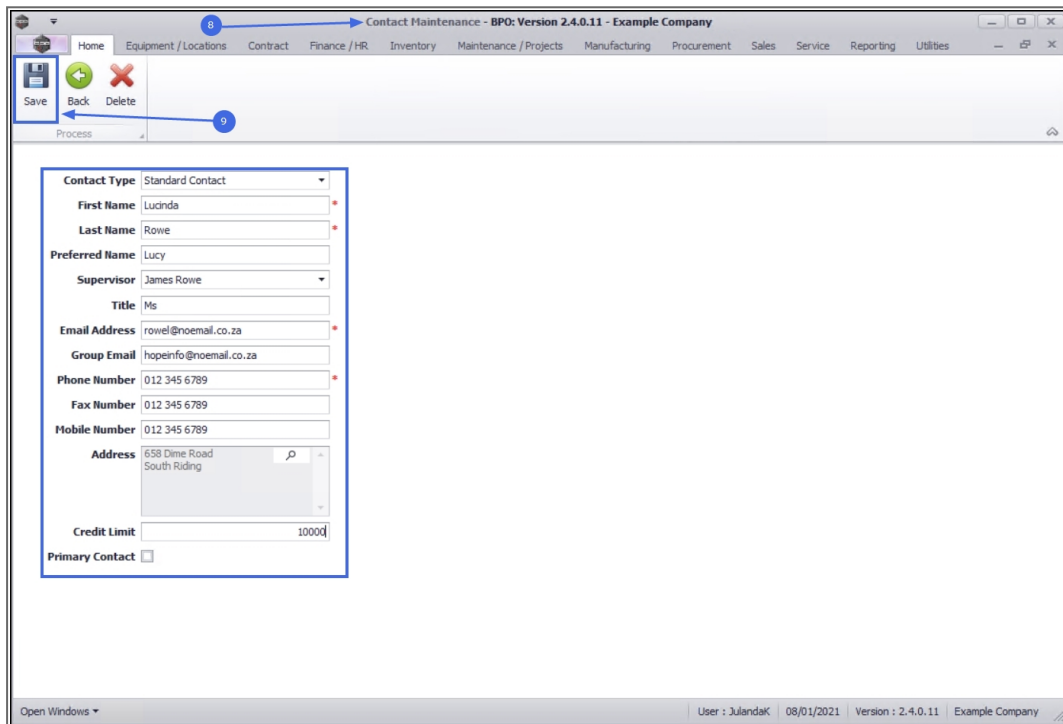
- **Contact Type:** Type in or click the down **arrow** to select the contact type from the menu.
- **First Name:** Type in the name of the contact person.
- **Last Name:** Type in the surname of the contact person.
- **Preferred Name:** Type in the **preferred name**¹ for the contact.
- **Supervisor:** 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.

¹This field is not compulsory and can be left empty if a preferred name is not required.

²This 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**.



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

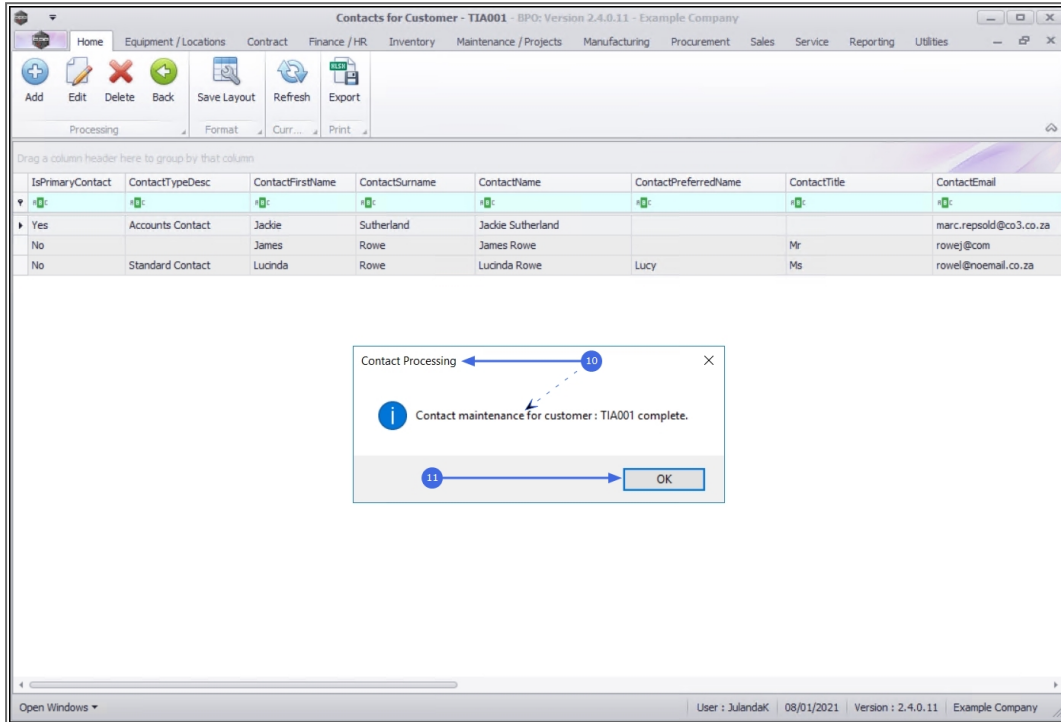
²This field is not compulsory and can be left empty

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

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

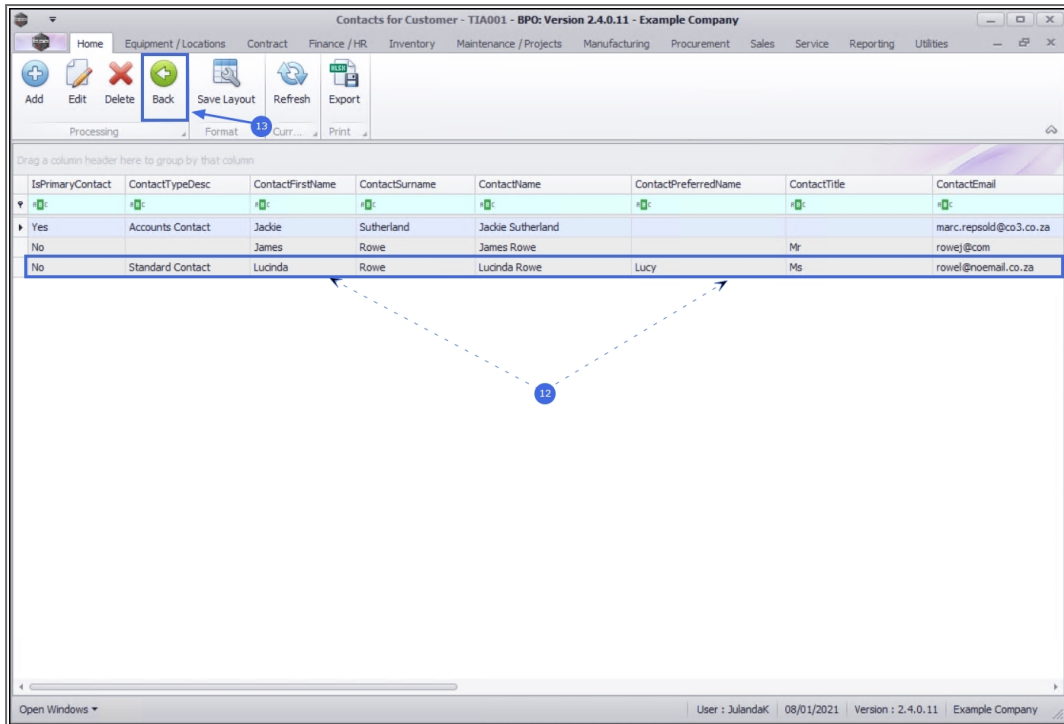
10. When the **Contact Processing** message display, informing you that;
 - **Contact maintenance for customer; [customer code] complete.**

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.

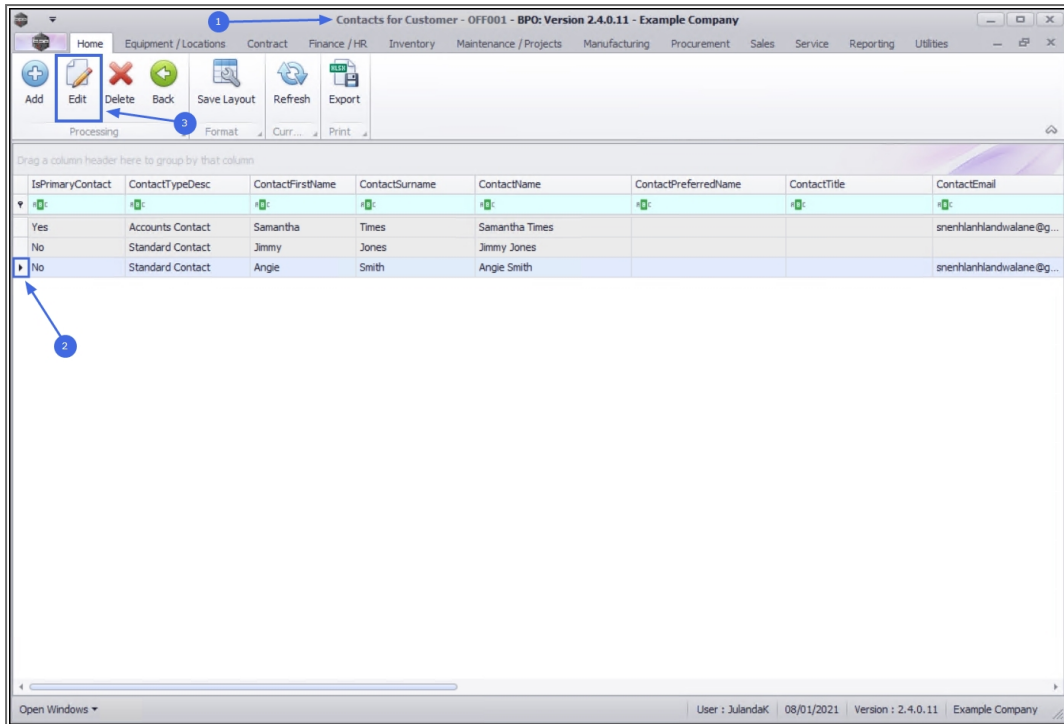


EDIT CUSTOMER CONTACT

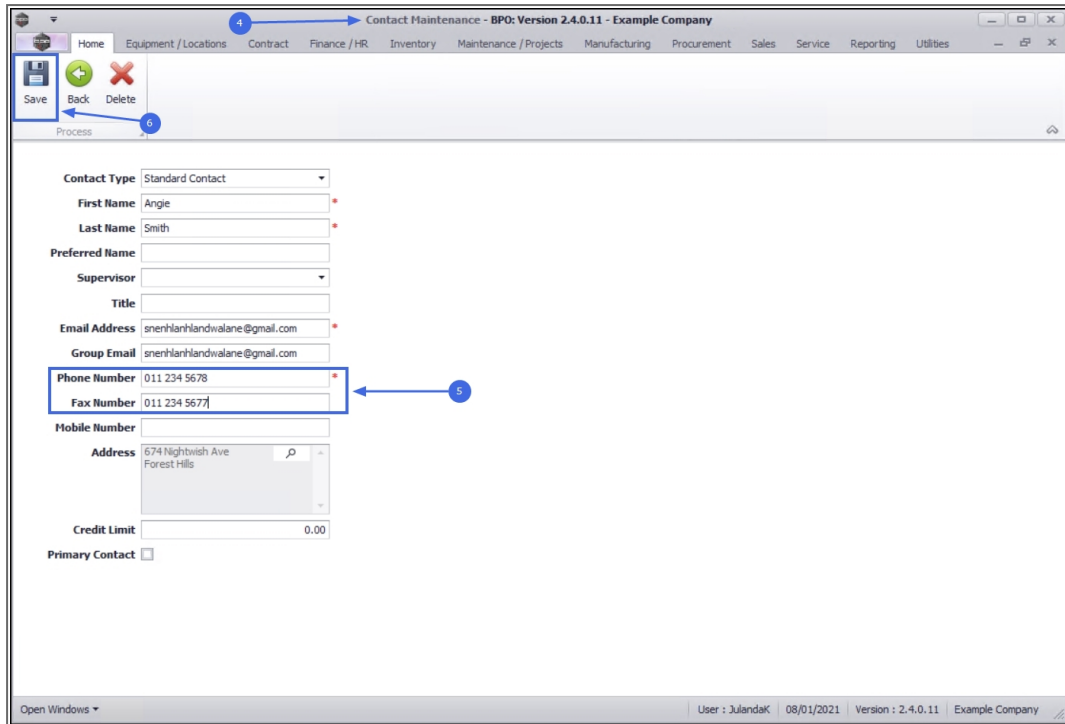
1. From the **Contacts for Customer** - [customer code] screen will be displayed.
2. Select the **row** of the **Contact** whose details you wish to change.
3. Click on **Edit**.



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



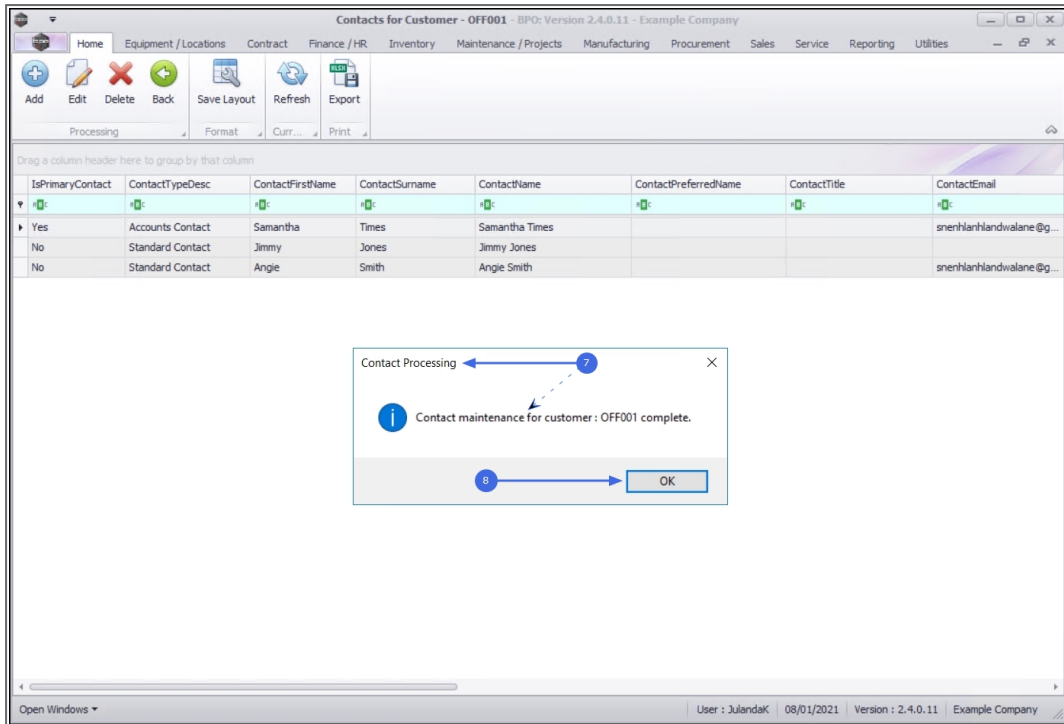
4. The **Contact Maintenance** screen will be displayed.
5. Make the changes to the Contact information as required.
 - In this example, the **Phone Number** and **Fax Number** have been changed.
6. Click on **Save**.



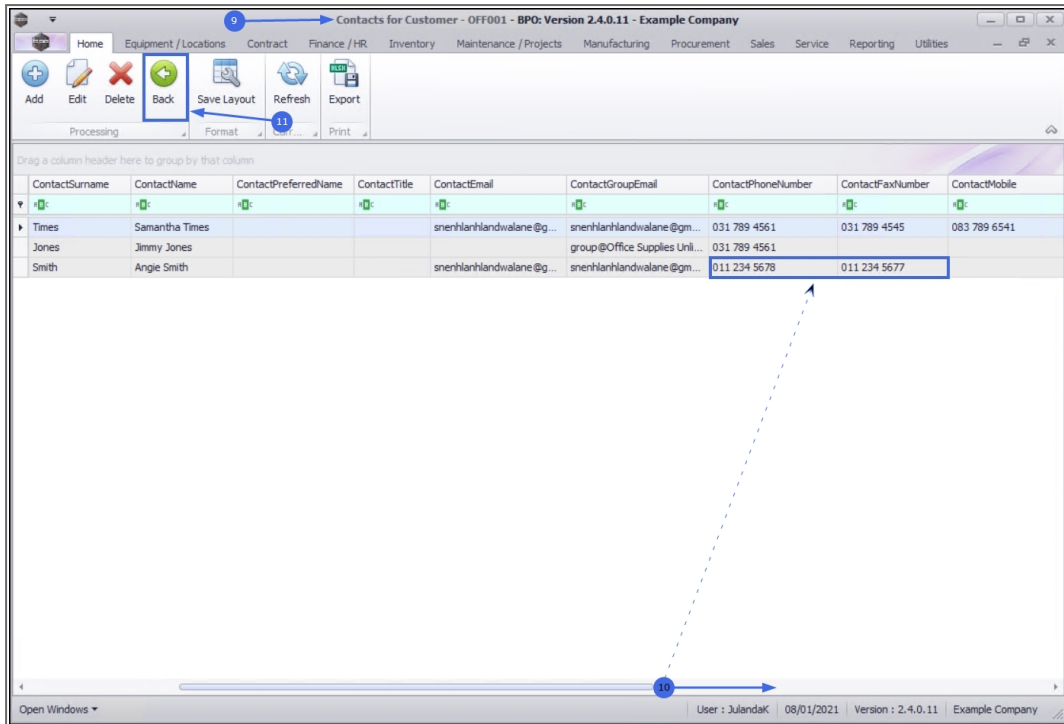
4

5

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.

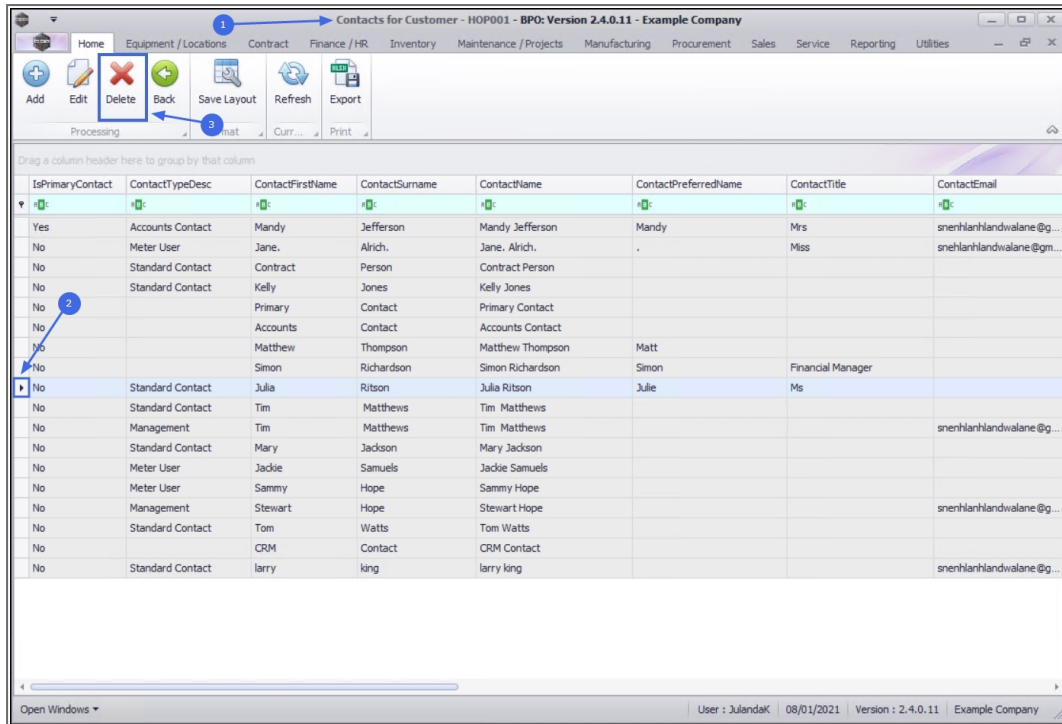


DELETE CUSTOMER CONTACT

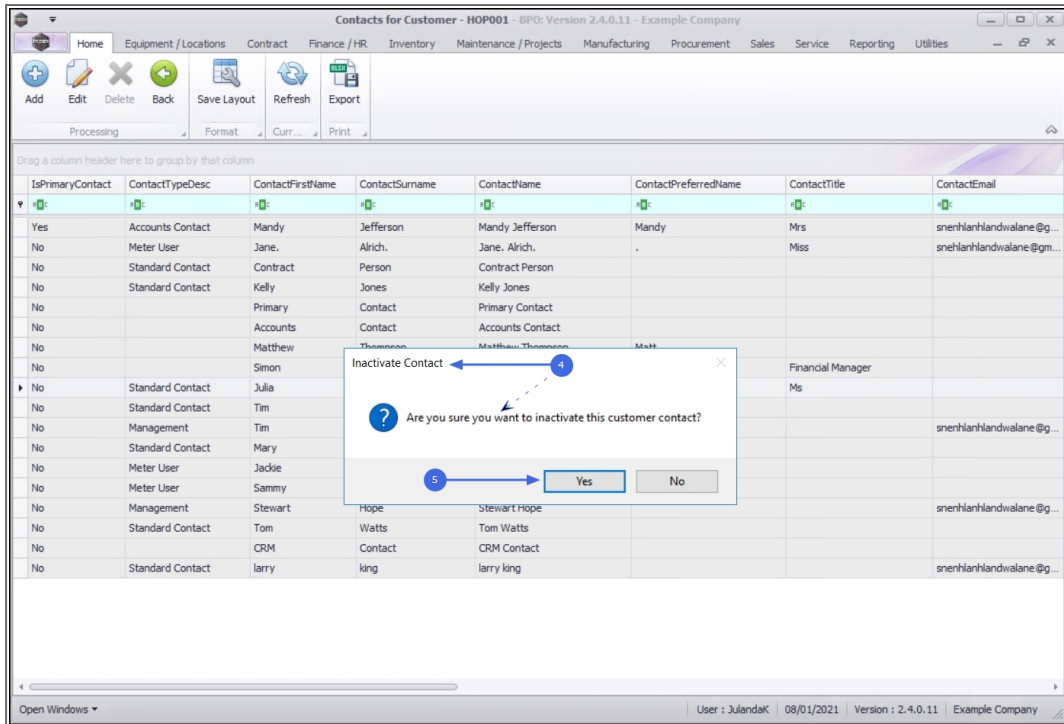
1. The **Contacts for Customer** - [customer code] screen will be displayed.
2. Select the **row** of the **contact** you wish to **delete**.
3. Click on **Delete**.



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.

Contacts for Customer - HOP001 - BPO: Version 2.4.0.11 - Example Company

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Processing | Add | Edit | Delete | Back | Save Layout | Refresh | Export

Drag a column header here to group by that column

	ContactPhoneNumber	ContactFaxNumber	ContactMobile	AddressLine1	AddressLine2	AddressLine3	PostCode	ParentContactName	ContactAuthLimit	Status
	031 555 1234	031 123 4545	083 555 1234	Plot 91 Leaf Road	Leaf Hills	Pink Town	1234	Simon Richardson	=	0 A
pgm...	031 123 45671	031 123 45451	083 456 78911	Plot 91 Leaf Road	Leaf Hills	Pink Town	1234	Mandy Jefferson		1000 A
ty) L...	031 123 4567			Plot 91 Leaf Road	Leaf Hills	Pink Town	1234			0 I
ty) L...	031 123 4567	031 123 4545	083 698 4561	Plot 91 Leaf Road	Leaf Hills	Pink Town	1234			0 A
ty) L...	031 123 4567			Plot 91 Leaf Road	Leaf Hills	Pink Town	1234			0 A
ty) L...	031 123 4567			Plot 91 Leaf Road	Leaf Hills	Pink Town	1234			0 A
ty) L...	031 123 4567	031 123 4545	083 123 4567	PO Box 7452	Forest Hills	New Town	1234			0 I
ty) L...	031 123 4567	031 123 4545	083 123 4567	PO Box 7452	Forest Hills	New Town	1234			0 I
ty) L...	031 768 9876	031 234 5678	0812 345 678	1 Postal	Address	postal 3	postal code	Kelly Jones		0 I
ty) L...	031 123 4567									0 A
gmail...	031 123 4567									0 A
ty) L...	031 123 4567									0 A
ty) L...	031 123 4567									0 A
ty) L...	031 123 4567									0 A
pgm...	031 123 4567									0 A
ty) L...	031 123 4567			Plot 91 Leaf Road	Leaf Hills	Pink Town	1234			0 A
ty) L...	031 123 4567			Plot 91 Leaf Road	Leaf Hills	Pink Town	1234			0 A
pgm...	031 123 4567			Plot 91 Leaf Road	Leaf Hills	Pink Town	1234			0 A

Open Windows | User: JulandaK | 08/01/2021 | Version: 2.4.0.11 | Example Company

MNU.061.004

