

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).

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 clos- ure notification emails. The primary con- tact is also required for customer item task generation.

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.

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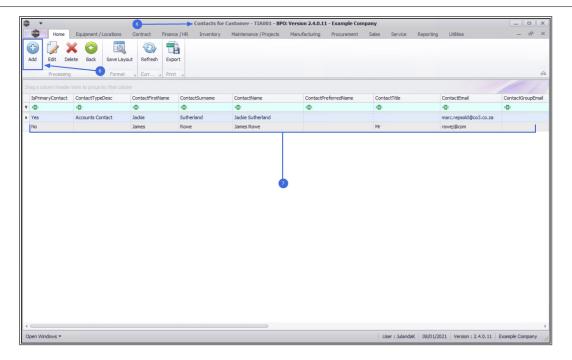
- 6. The **Contacts for Customer [**customer code**]** screen will be displayed.
- 7. Any existing contact information for the Customer will be listed.

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 address² of the contact.
 - **Phone Number:** Type in the phone number for the contact.

²This is normally a company email address e.g. hopeinfo@company.co.za

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



- **Fax Number:** Type in the fax number¹ for the contact.
- Mobile Number: Type in the mobile number² for the contact.
- Address: Click on the search icon to select the contact address³ 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 contact⁴ for this Customer.
- 9. When you have finished adding the new Contact details, click on **Save**.

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 $^{^1 {\}rm This}$ field is not compulsary and can be left empty if no fax number exist for the contact

²This field is not compulsary 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**.

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



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+	/es	Accounts Contact	Jackie	Sutherland	Jackie Sutherland			marc.repsold@co3.co.za
	No		James	Rowe	James Rowe		Mr	rowej@com
	No	Standard Contact	Lucinda	Rowe	Lucinda Rowe	Lucy	Ms	rowel@noemail.co.za
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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.



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Yes	s	Accounts Contact	Samantha	Times	Samantha Times			snenhlanhlandwalane@g
No		Standard Contact	Jimmy	Jones	Jimmy Jones			
No		Standard Contact	Angie	Smith	Angle Smith			snenhlanhlandwalane@g
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- 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.



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Contact Type	Standard Contact		•										
First Name	Angie		•										
Last Name	Smith		*										
Preferred Name													
Supervisor			•										
Title													
Email Address	snenhlanhlandwalane@gr	mail.com	•										
Group Email	snenhlanhlandwalane@gr	mail.com											
Phone Number	011 234 5678		*										
Fax Number	011 234 5677												
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Address	674 Nightwish Ave Forest Hills	Q	*										
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- 7. When you receive the **Contact Processing** message to confirm that;
 - Contact maintenance for customer: [customer code] complete.
- 8. Click on OK.



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۲	Yes	Accounts Contact	Samantha	Times	Samantha Times			snenhlanhlandwalane@g
	No	Standard Contact	Jimmy	Jones	Jimmy Jones			
	No	Standard Contact	Angie	Smith	Angie Smith			snenhlanhlandwalane@g
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- 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.



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	Jones	Jimmy Jones				group@Office Supplies Unli	031 789 4561		
	Smith	Angie Smith			snenhlanhlandwalane@g	snenhlanhlandwalane@gm	011 234 5678	011 234 5677	
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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.



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IsPrimaryContact	ContactTypeDesc	ContactFirstName	ContactSurname	ContactName	ContactPreferredName	ContactTitle	ContactEmail
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Yes	Accounts Contact	Mandy	Jefferson	Mandy Jefferson	Mandy	Mrs	snenhlanhlandwalane@
No	Meter User	Jane.	Alrich.	Jane. Alrich.		Miss	snehlanhlandwalane@g
No	Standard Contact Standard Contact	Contract	Person Jones	Contract Person Kelly Jones			
No 2	Standard Contact	Kelly Primary	Contact	Primary Contact			
No		Accounts	Contact	Accounts Contact			
NO		Matthew	Thompson	Matthew Thompson	Matt		
No		Simon	Richardson	Simon Richardson	Simon	Financial Manager	
No	Standard Contact	Julia	Ritson	Julia Ritson	Julie	Ms	
No	Standard Contact	Tim	Matthews	Tim Matthews	Juic	115	
No	Management	Tim	Matthews	Tim Matthews			snenhlanhlandwalane@
No	Standard Contact	Mary	Jackson	Mary Jackson			
No	Meter User	Jackie	Samuels	Jackie Samuels			
No	Meter User	Sammy	Hope	Sammy Hope			
No	Management	Stewart	Hope	Stewart Hope			snenhlanhlandwalane@
No	Standard Contact	Tom	Watts	Tom Watts			
No		CRM	Contact	CRM Contact			
No	Standard Contact	larry	king	larry king			snenhlanhlandwalane@

- 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.



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	Yes	Accounts Contact	Mandy	Jefferson	Mandy Jefferson	Mandy	Mrs	snenhlanhlandwalane@g
	No	Meter User	Jane.	Alrich.	Jane. Alrich.		Miss	snehlanhlandwalane@gn
	No	Standard Contact	Contract	Person	Contract Person			
	No	Standard Contact	Kelly	Jones	Kelly Jones			
	No		Primary	Contact	Primary Contact			
	No		Accounts	Contact	Accounts Contact			
	No		Matthew	Thompson	Matthew Thompson	Matt		
	No		Simon	Inactivate Contact 🔫	4	×	Financial Manager	
۲	No	Standard Contact	Julia		11		Ms	
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	No	Meter User	Jackie					
	No	Meter User	Sammy	5-	Yes	No		
	No	Management	Stewart	Hope	Stewart Hope			snenhlanhlandwalane@g
	No	Standard Contact	Tom	Watts	Tom Watts			
	No		CRM	Contact	CRM Contact			
	No	Standard Contact	larry	king	larry king			snenhlanhlandwalane@g

- 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.



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