

CUSTOMER

HOME > ACTIONS > ADD NEW CUSTOMER > Contacts

Customer

Home > Customer

LIST OF CUSTOMERS

Sent Received Templates **Actions**

10 records Print PDF CSV Excel Column visibility

Search Report

Customer Name	Category	Products/Services	Address	Contact Details			Compliance	Status	Action
				Name	Address	Contact Info			

Add New Customer

2. New Customer Form > Contacts Tab > Click **Add New Contact**

New Customer Form

Details **Contacts** Requirements Products Audit & Review

Add New Contact

Name	Title	Address	Contact Details	Receive Notification?	Action

Close Save

New Contact Form – Fill-out the following:

New Contact

Contact Name Title

Address

Email Phone

Cell No. Fax

Close **Add Contact**

Contact Name	Input the name of the customer's contact person. Note: Multiple contacts are allowed to include the alternate and substitute personnel.
Title	Input the position/job title of the contact person.
Address	Input the business address of the contact person.
Email	Input the business email address of the contact person.
Phone	Input the business phone number of the contact person.
Cell No.	Input the business cell number of the contact person.
Fax	Input the business fax number of the contact person, if any.
Add Contact	Click to add and save input progress.