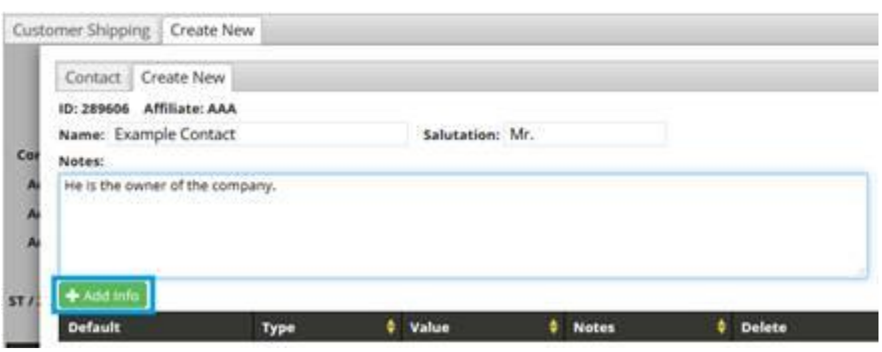
Creating customer contacts

Before an order can be entered for a customer, the customer record must be created. Because Xebra will allow multiple contacts to be associated with a shipping or a billing customer, give careful consideration to how you set your customers up in the system.

Customer Contacts can be created for the first time from either the customer shipping screen, or the customer billing screen. Once a contact has been created in the system from the shipping screen you should be able to find them and add them to the billing screen (and vice versa):

From the "Customer Shipping" screen, click the "Add Contacts" button.

Enter the name of the contact person in the search field. If there is another contact with that name, you will be able to see them in the search results and you can select or edit their information. If you need to create a new contact, click the "Create New" button.



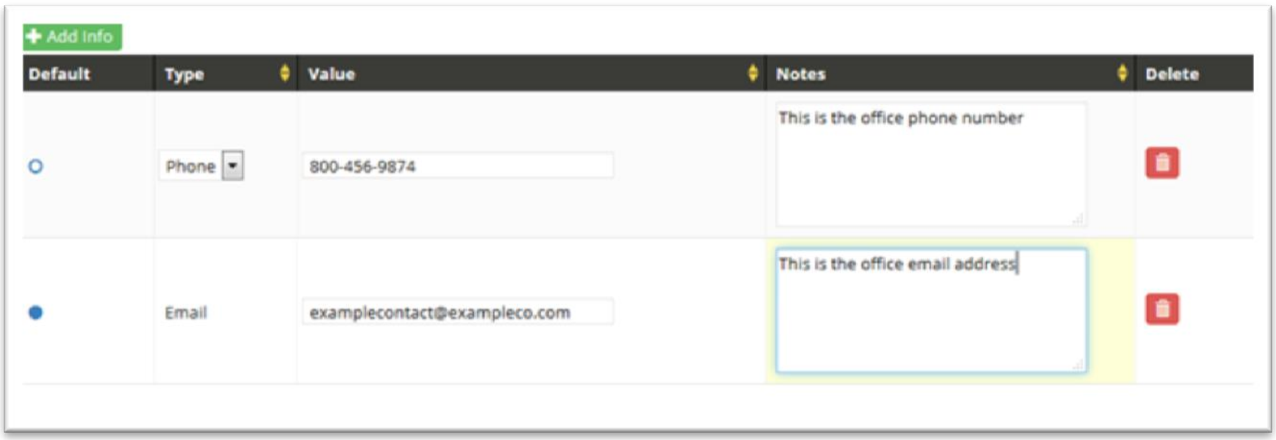
The "Salutation" field allows you to add a salutation if necessary. The "Notes" section can be used to record general information about the contact. There is no need to enter contact information here since it can be added by clicking the "Add Info" button.

To enter the contact information, select the type of contact details from the drop down list under the column “Type”. Then type the actual details (email address, phone number etc.) in the column titled “Value”. If you need to add any additional information about the contact information, you can add it in the notes section under the column “Notes”.

In order to designate default contact information, click the corresponding radio button under the column “Default”.

***This is recommended for email address info**

If you would like to delete a contact, click the trash can icon under the column labeled “Delete”.



Once you have completed entering your contact information, click the “Close” button in the bottom right-hand corner.

An Add Contacts button is also available from the billing screen: