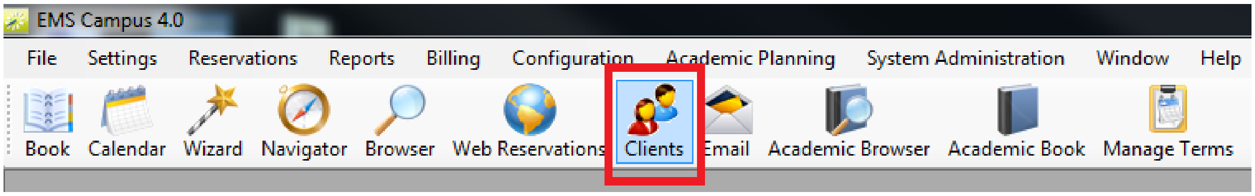
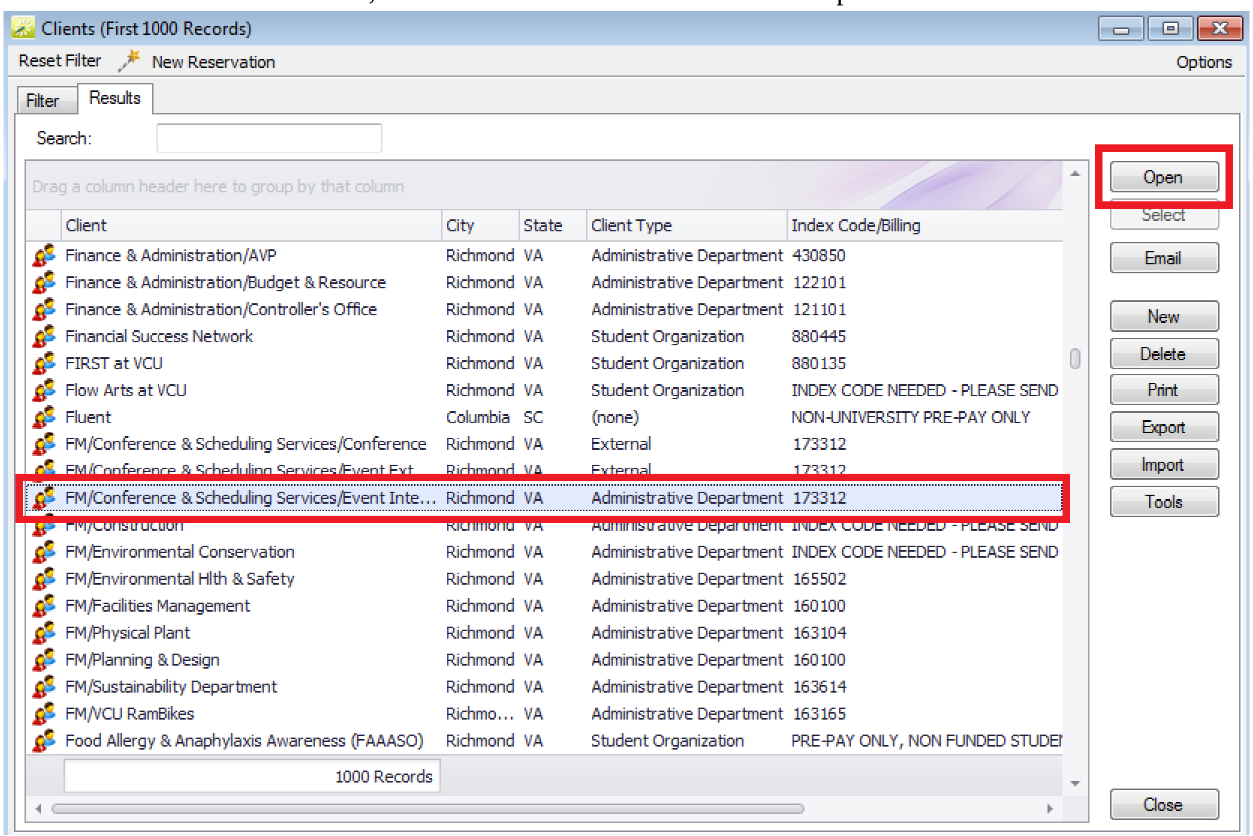
How to Change Client Contact Information

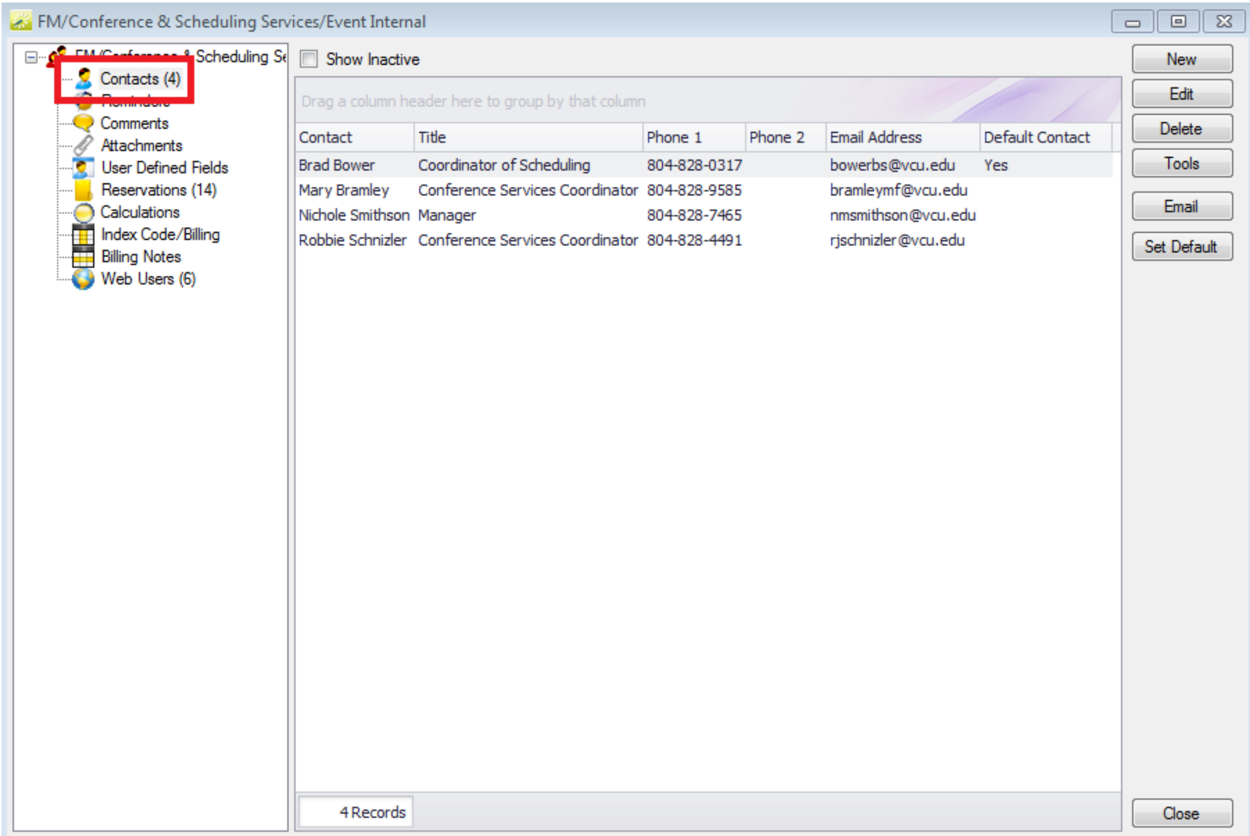
1. Select “Clients” from the main menu.



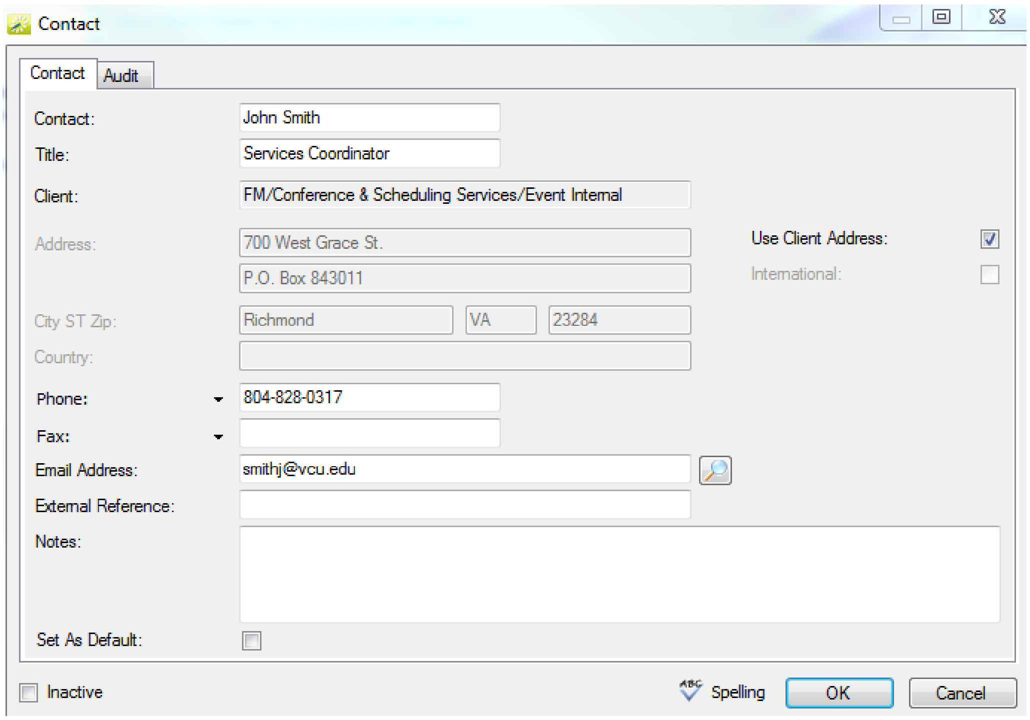
2. The Client information box will appear listing all of the clients in the system. To add, edit or delete the contact information for a client, select the client from the list. Click “Open.”



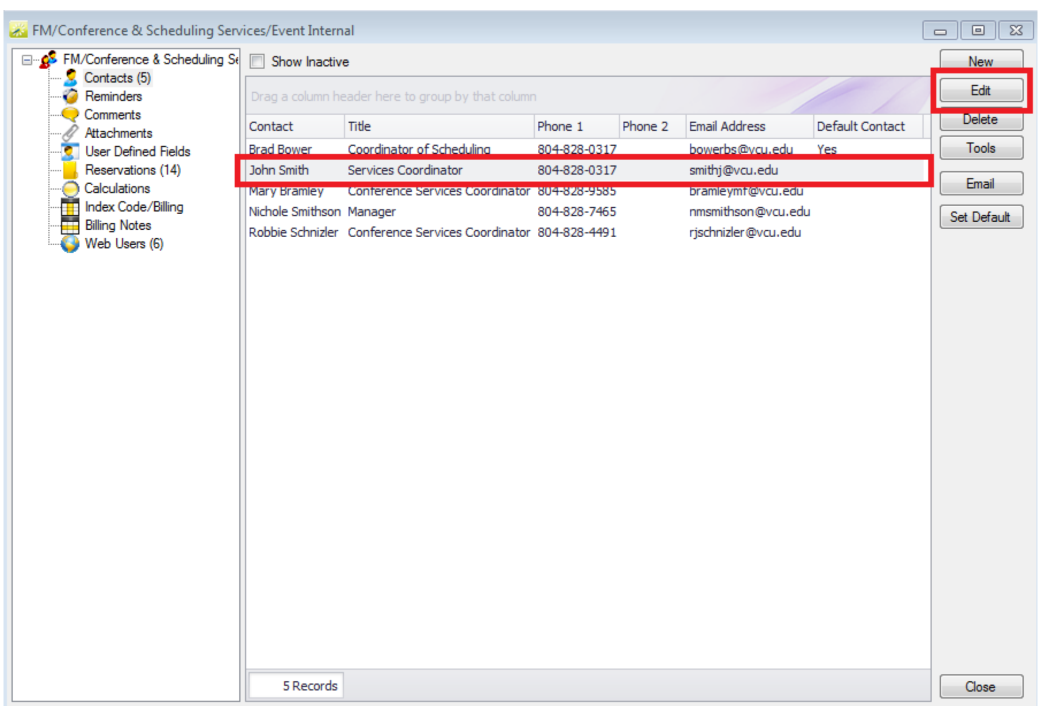
3. An information box will appear giving all the information of that client. From the list on the left, select "Contacts." A list of contacts will appear. Here you can add a new contact, edit a contact or make a contact inactive.



a. To **add a new contact**, click “New.” An information box will appear where you fill in all the general information regarding the new contact. Click “OK” when finished. For this example, we will add John Smith to our contact list.



b. To **edit an existing contact’s information**, select the contact from the list and click “Edit.”



c. To **make a contact inactive**, select the contact from the list and click “Edit.” In the bottom left corner of the contact’s information box select “Inactive.” We recommend making your contacts inactive instead of deleting them.