How to Add a Contact to an Existing Tenant Details

Overview

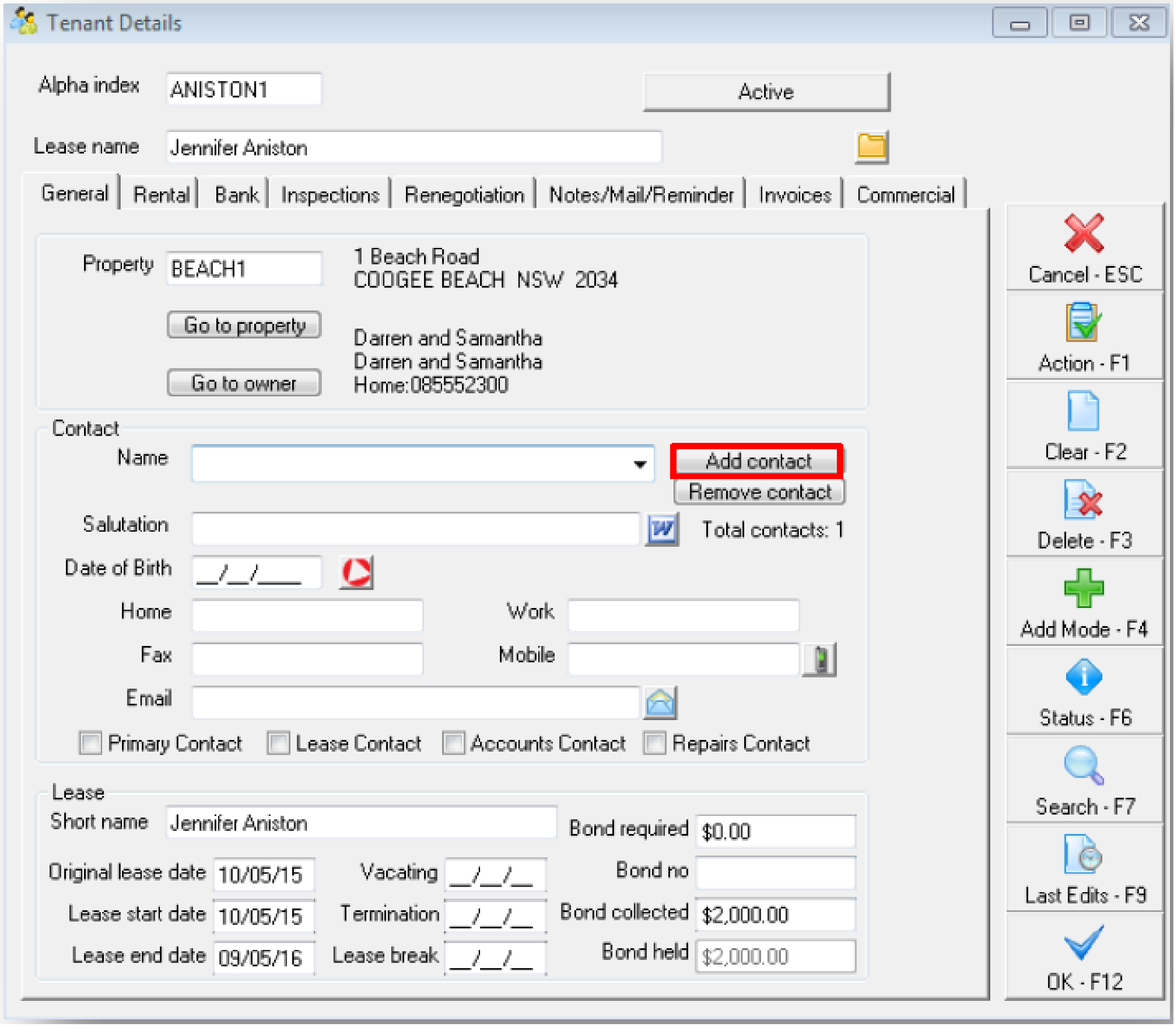
You may wish to add a contact to an existing Tenant Details if there is several tenant contacts under the one lease name. You may also require to setup tenant contacts for a commercial tenant where you require an accounts contact, lease contact, repairs contact etc.

This document will cover:

- How to Add a Contact
- How to Delete a Contact

How to Add a Contact

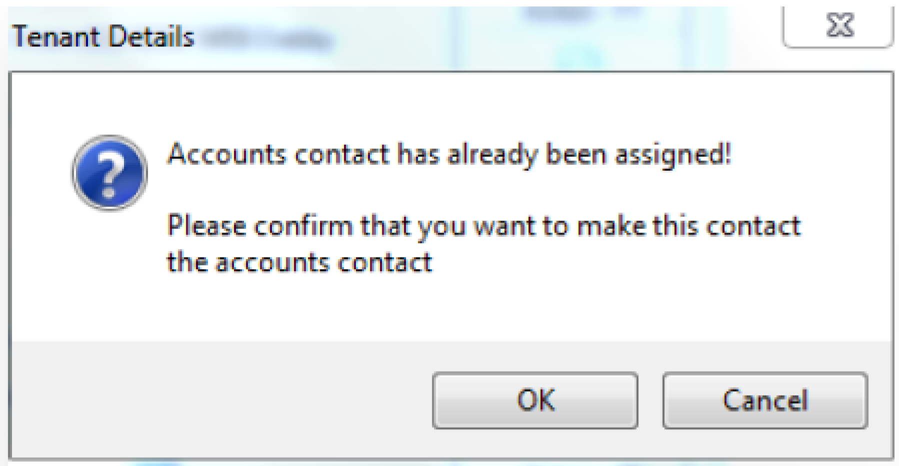
1. Go to Files > Tenant or click on the tenant icon on the desktop 
2. Put in the tenant alpha index and press ENTER
3. Click on Add Contact
4. Enter the details of the secondary contact including details for the name, salutation, phones numbers and email address



Mark this contact as required-

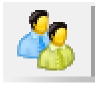
- Lease Contact
- Account Contact
- Repairs Contact

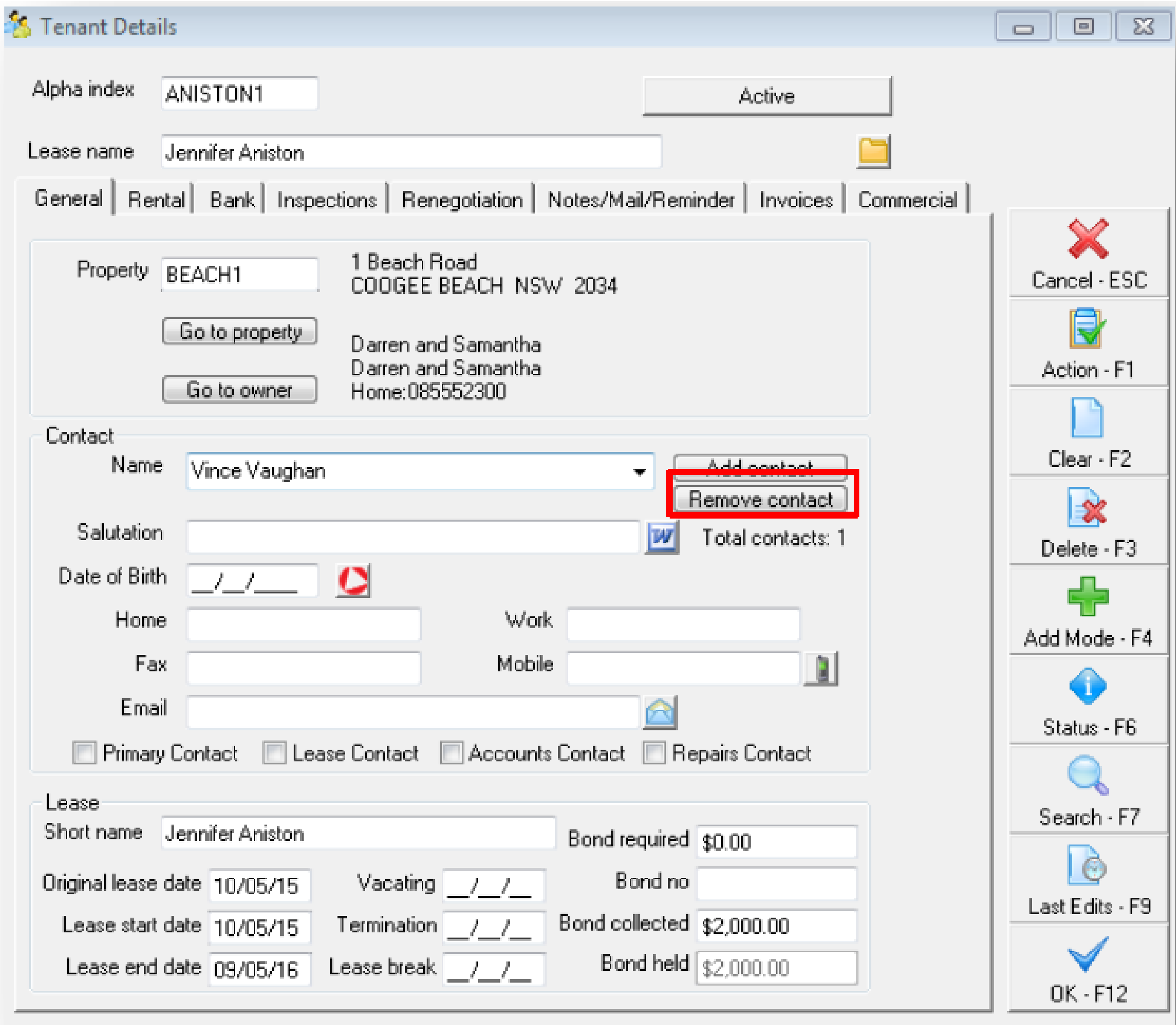
NOTE: You may encounter the following message as the primary contact will be set to be the contact for all:



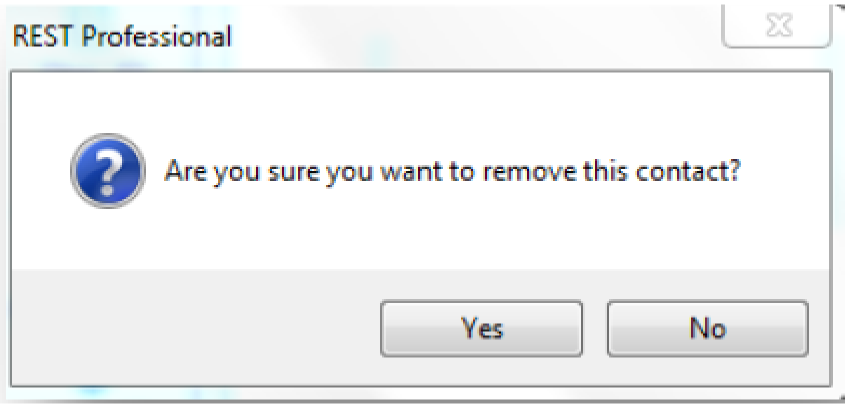
5. Click OK
6. Click OK-F12 to save details

How to Remove a Contact

1. Go to Files > Tenant or click on the tenant icon on the desktop 
2. Put in the tenant alpha index and press ENTER
3. Look at the drop down menu under Contact Name and find the contact you wish to remove
4. Click on Remove Contact



5. A message will appear confirming that you want to remove this contact, Click on YES.



6. Click OK-F12 to save changes

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