

Contacts / Addresses

You can create individual contacts / addresses by clicking **Trading Partner > New Contact/Address** from the menu areas

The screenshot shows a web application interface for creating a contact or address. The top navigation bar includes 'Home', 'Trading Partners', 'Products', 'Commercial', 'Billing | Payment', 'Bank/Cash', 'Accountancy', 'Tools', 'DocEdit', and 'Quick shipment'. The user's name 'Dwight' is visible in the top right corner. The main content area is titled 'Create contact/address'. On the left, there is a sidebar menu with categories: 'Trading partner' (with sub-items: New trading partner, List, List of customers, New customer, List of suppliers, New supplier), 'Contacts/Addresses' (with sub-items: New contact/address, List, Customers, Suppliers, Other), 'Customers tags/categories' (with sub-item: New tag/category), 'Contacts tags/categories' (with sub-item: New tag/category), and 'Suppliers tags/categories' (with sub-item: New tag/category). The 'Contacts/Addresses' category is highlighted with a red circle and the number '2'. The form fields are: 'Name / Label' (text input), 'Full name' (text input), 'Trading partner' (dropdown menu with a red arrow pointing to it), 'Address' (text input), 'Postcode / City' (text input), 'Country' (dropdown menu showing 'Great Britain (GB)'), 'State/Province' (dropdown menu), 'Work Phone' (text input), 'Pers. phone' (text input), 'Mobile' (text input), 'Fax' (text input), 'Email' (text input with a note: 'Note - Add multiple emails separated by comma and no spaces'), 'Instant messaging' (text input), 'Visibility' (dropdown menu showing 'Shared'), 'Tags/categories' (text input), 'Division' (text input), 'Xero contact' (checkbox), and 'Delivery address' (checkbox). At the bottom of the form, there are 'Add' and 'Cancel' buttons. The footer of the sidebar shows 'Appli-ERP (c4f5db3 31072024) 7.0.0'.

These could be individuals at the Trading Partner, or different branches of the Trading Partner.

You can associate it with the appropriate Trading Partner from the drop down indicated in the screen above

Revision #1

Created 9 August 2024 16:07:05 by RakataTech

Updated 9 August 2024 16:10:48 by RakataTech