

Recurring Update Default Contact Person for Emailing

Update can be done on the invoice document or template or customer setup contact person

Debtors Module> Configuration> Debtors Setup> Edit Debtor> Contact Person> Add

Add Debtor Contact Details

Debtor Contact Person

Details

Additional

Custom Fields

Name:

Tsile

Title:

Ms

Surname:

Loa

Gender:

Female (F)

Post Title:

Consultant

South African ID:

☐

Telephone:

011 123 12311

ID No:

9906060606089

Cell Phone:

081 123 12311

Contact Image:

Additional No.:

Date Of Birth:

960606

Category:

Support

Fax No:

Email:

otsile@hugesoftware.co.za

e-Mail

Active:

☒

Update Company

Set as default contact

Statement SMS:

☒

Statement Email:

☒

Debit Order SMS:

☒

Debit Order Email:

☒

Do Not Bulk Email:

☐

Document Email:

☒

No Email Reason:

Save & New

Save & Close

Save

Close

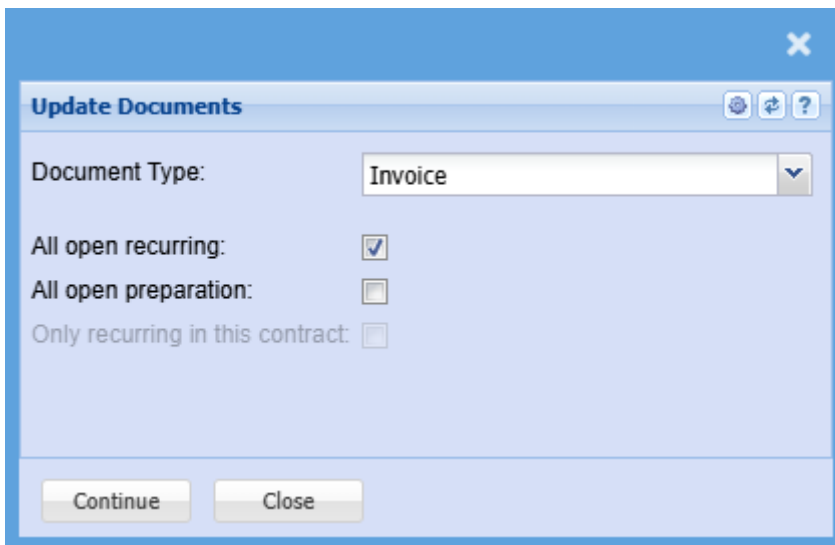
Update Documents

There are two option

All Open Recurring	All Open Preparation
This will update all contracts with all unprocessed recurring invoices	Updates all invoices that are in preparation
Does not change processed documents	

Updates all invoice templates for this customer

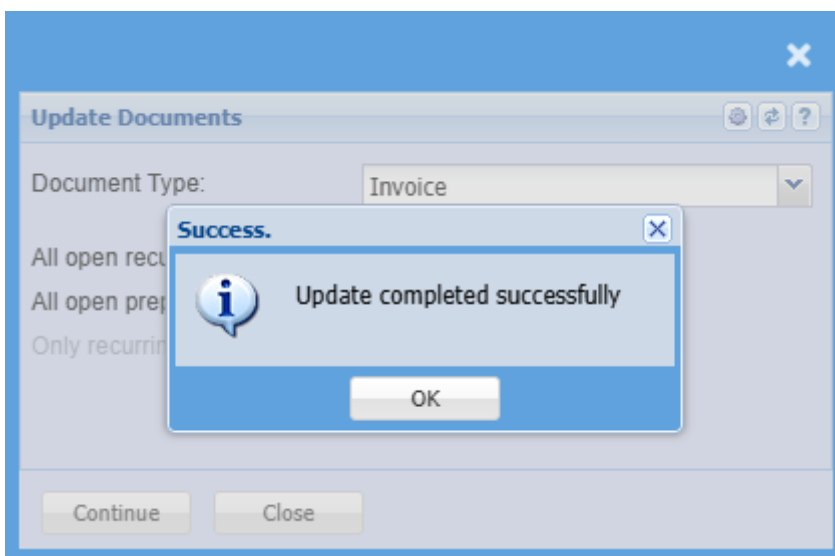
After clicking update documents you will see the screen below:



Select a document you want to update and put a tick on the option you want to update

Once, complete click continue

and the screen below will appear notifying you that the update has been completed successfully



To access Contacts Via debtors documents

Go to an open document

After, accessing the invoice you wish to view, or you have added go to the Address Tab of document

Click on View button

Invoice

Address Type: Postal

Address Line 1: 4 Play St

Address Line 2: Klippiessdal

Address Line 3: Paarl

Address Line 4:

Address Code: 7646

VAT No.: 47891236

Contact Person: Tsile Loa - 081 123 12311

Contact No.: 011 123 12311

Project:

Division: Wholesaler

Region: Gauteng

Invoice Group:

Branch: Web - Dev HSOF & Co

Items

Page 1 of 1

Displaying 1 - 1 of 1

To edit, add or delete a contact person click on the view button,

It will take you to the screen below:

View Debtor Contact Details

Debtor Contact Persons

Add Edit Delete Close

Page 0 of 0

No data to display

#	Active	Last Name	First Name	Telephone	Fax	Cell phone	Post Title	Email Address
1	Yes	.	Chris	123		123		chris@erpso
2	Yes	Monroe	Mark	0222989997		022 298 9997		andrew@hu
3	Yes	Loa	Tsile	011 123 12311		081 123 12311	Consultant	otsile@huge

Add	Click this button to add a new contact
Edit	Click this button to edit an existing debtor contact persons
Delete	Click this button to delete an existing contact persons

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Created 19 July 2023 13:26:55 by Paige
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