Managing Customer Contacts

Setting up customer contacts is vital to make authorized charges to the customers' accounts. The customer can provide their approved personnel's details to make purchases on their behalf. You can use these contacts as the customer's emergency contacts.

This course will demonstrate adding and maintaining customer contacts. You will also learn how to authorize a contact for the customer's charge list.

Objectives

- Set Up Contacts
- Maintain Contacts
- Authorized to Charge List

Set Up Contacts

In Eagle, you can have multiple contacts for a customer account. You can use these contacts to keep in touch with your customers.

In the Eagle Browser, type MCR in the **Launch** bar and press **Enter**.

In the **Customer Maintenance** screen, enter the customer number in the **Customer** field

or

Click the drop-down arrow to view existing customers.

Select the customer you want to add a contact.

Select the **Contacts** tab.

Existing contacts are displayed here.

Click **Add** to add a new contact.

Enter a name for the contact in the pop-up.

Select Y in the **Show in POS** drop-down menu if you want this contact to appear at Point-of-Sale.

This means that this contact will have permission to make purchases on behalf of the customer.

In the POS screen, you can just select the contact and make an authorized charge to the customer's account.

These fields are *optional* but it is recommended to add in *as many* details as possible.

You can provide an expiration date for this contact after which the contact will not appear at Point of Sale.

If this is a primary contact for this customer, select **Y** in the **Primary Contact** drop-down menu.

Select **Y** in the **Opt Out** drop-down menu to exclude this contact from email lists. Select **N** to include.

The **Statements** drop-down menu has four options.

Select **N** if you do not want this contact to receive email statements.

Select **Y** to let the contact receive all email statements.

Select **C** or **B** for the contact to receive email statements as CC or BCC, respectively.

If you choose to send email statements to this contact, you have to enter an email address.

The **Invoices** drop-down menu has several options for the contact to receive email invoices, credits, orders, special orders, and estimates.

Here you can select **Y** for primary contact and select **N** for non-primary contacts.

Select **OK**.

Now the contact is added to the table.

Maintain Contacts

Use the **Change**, **Delete**, **Merge To**, **Viewer**, and **Set Image** links to maintain contact records.

The **Change** link is used to edit an existing contact.

Just select a contact and then click **Change**.

Change the information you want to change and select **OK**.

Similarly, use the **Delete** link to delete a contact that is no longer needed.

The **Merge To** link is useful to add the same contact list to a customer having more than one job account.

Click **Merge To.**

Enter the customer ID.

The **Job** drop-down menu displays the existing job accounts of the customer.

Select an account.

Select the **Merge** button.

Select **Yes** to confirm.

Now, the contact list is added to all job accounts of the customer.

The **Viewer** link displays all existing contacts of the customer in the **Viewer** pop-up.

You can perform basic operations like sort, filter, print, and export in the pop-up.

It is a best practice to export the list of contacts to your customers regularly for review.

The **Set Image** link lets you add images to contacts.

Use this feature for additional verification.

Authorized to Charge List

An Authorized to Charge list is a list of contacts that are authorized to make purchases on behalf of your customers.

The charges for the transactions are made to the customer's account.

Note that the Authorized to Charge list is available only for *credit accounts*.

Make sure to set the **Charge Allowed** drop-down menu in **Customer Maintenance** to **Y**.

In the POS screen, enter the customer ID in the **Customer** field and hit Enter.

The **Customer Detail** pop-up displays for your review.

Click **OK**.

The **Authorized to Charge** pop-up displays the contacts selected as "Show in POS".

You can select the name of an existing contact or

select **Add a Name** to enter a name.

The name that you enter here is not added to the contact list but is displayed in the receipt.

If not, you can also choose **Cash Only** and request cash without charging the customer's account.

Post items as usual and click **Total** to complete the transaction.

Enter the charge amount in the **Charge** field and press Enter to finish.

The transaction is charged to the customer's account.

Recap

Set up customer contacts to maintain an easily accessible list of customer contacts. These contacts ease Point of Sale and customer service.

In this course, we learned how to add and maintain customer contacts. We also used the Authorized to Charge list at Point of Sale.

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