



Contact Type Field on Customer Card

Megan De Freitas - 2024-11-22 - Sales

Overview

The Contact Type field on the customer card can be directly linked to a user defined field on the GP customer card. This allows the user to label what type of contact a specific address is for and will also add that field to the chosen field on the customer card in GP.

Instructions

To enable the Contact Type field, go to Settings > Customer Inquiry. Change the *Contact Type Field for a Customer Address* to the specific user defined field you have created within GP. This field defaults to Not_Used, so it will be grayed out by default on the customer card. Specifying a user defined field will enable the Contact Type field.

Customer Inquiry	
Auto Popup Customer Note	False
Contact Type Field for a Customer Address	USERDEF2
Contact Type Field for a Vendor Address	Not_Used
Customer Default Warehouse Enabled	False
Remember Doc IDs	True
Warn When Updating A Customer Addr	False

Next, set the Contact Types to choose from in the *Contact Type List* (under *Customer Contact Options* - ex: Customer;Biller;Shipper):

Customer Contact Options	
Accts Payable Contact Type	
Contact Type List	Customer;Biller;Shipper
Phone 1 Label	Phone 1:
Phone 2 Label	Phone 2:
Phone 3 Label	

Save the settings.

Open any customer in your database and find the Contact Addresses tab.

If an address exists for the customer, click on the Address Code for that specific address. This will open the Customer Contact Card, where you can edit the Contact Type under Contact Information:

Sales Documents (ORDER) ORDST2373 Contact: BILLING/Roberta Masouras

Customer Name: Adam Park Resort

Contact Information

Contact Type: Customer

Phone 1:

Phone 2:

phone3LayoutControlItem

Fax:

Email:

Web Site:

Other A

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IN

y: USA

Once you save the changes, the specific user defined field on the Customer Maintenance card in GP will be changed to the contact type set for that address:

Customer Maintenance

File Edit Tools Additional Help sa Fabrikam, Inc. 4/12/2017

Save Clear Delete Write Letters

Customer ID: ADAMPARK0001

Name: Adam Park Resort

Short Name: Adam Park Resor

Statement Name: Adam Park Resort

Address ID: PRIMARY

Contact: Roberta Masouras

Address: Suite 9876

321 Chestnut Drive

City: Indianapolis

State: IN

ZIP Code: 46206-1391

Country Code: US

Country: US

Ship To: PRIMARY

Bill To: BILLING

Statement To: PRIMARY

Salesperson ID: GREG E.

Territory ID: TERRITORY 2

Type: Retail

User-Defined 2: Customer

Parent Customer ID:

Class ID: USA-INMI-T2

Priority: None

Phone 1: (317) 555-0102 Ext. 0000

Phone 2: (000) 000-0000 Ext. 0000

Phone 3: (000) 000-0000 Ext. 0000

Fax: (000) 000-0000 Ext. 0000

UPS Zone:

Shipping Method: GROUND

Tax Schedule ID: USASTCITY-6*

Ship Complete Documents

Comment 1:

Comment 2:

Trade Discount: 0.00%

Payment Terms: NET 30

Discount Grace Period: 0

Due Date Grace Period: 0

Price Level: RETAIL

Accounts

Address

Options

by Customer ID