



Contacts

 Available in Editions: **All Editions**

Add Contact Details

Contacts can be added in the following ways:

1. Add contacts individually in the **Contacts** module. The details are described below.
2. [Import contacts](#) from external sources.
3. Import contacts from [Invoice](#).

To add a contact:

 **Permission Required:** [Contacts](#)

1. Select **Contacts** from the **Customers** menu and click **Create**.
2. Enter the **Last Name**.
3. Enter an **Email** address.
4. Associate the contact with a [Company](#).
5. Add [Address](#).
6. Select a value for **Taxable**:
 - **Taxable**: A Company Tax should be selected if Taxable is chosen.
 - **Non-Taxable**: An [Exemption Reason](#) should be selected if Non-Taxable is chosen.These values are configured in Zoho Invoice. Click [here](#) for details of Zoho Invoice-FSM integration. These values can also be edited in the FSM application at **Setup > Integrations > Billing > Tax Setting**.
7. Select a **Currency**.

The Currency and Exchange Rate will be displayed only if [multiple currencies](#) are enabled.
8. Add any other necessary contact details and click **Save**.

Create Contact ✕

Quickly import Contact that are already present in Zoho Invoice by clicking here Import

Contact Details

Salutation ▾

First Name

Last Name

Email

Phone

Mobile

Company ✕

Currency ▾

Exchange Rate

Address

Service Address ✕

Cancel Save

The contacts associated with a company should have unique email addresses.

Add Contact Address

To add addresses to a contact, do the following in the *Create/Edit Contact* form:

1. Click the **Service Address** or **Billing Address** field and click **Create New**.
2. In the *Add Address* overlay, enter the details.
3. Click to populate the address geocodes (latitude, longitude).
You can also edit the geocodes.
4. Enter other necessary details and click **Save**.

Add Address ✕

Address Name

Street 1

Street 2

City

State

Zip Code

Country

Territory ✕

Taxable Taxable Non-Taxable

Tax Name

Geo Code

Map Satellite

Map data ©2022 Google Terms of Use Report a map error
Source :Google Geo Code API ,Oct 13, 2022

You can also add additional addresses to a contact from the *Contact Details* page.

To add addresses from the *Contact Details* page:

1. Select the **Addresses** tab and click **Create**.
2. In the *Add Address* overlay, enter the necessary details and click **Save**.

FSM Customers Work Order Management Dispatch Console Services And Parts Assets Reports

Contacts > Mr. Edward Cormoran

edward.cormoran@zylker.com 111-111-1111 Daniel Warne Edit

CONTACT DETAILS

Email: edward.cormoran@zylker.com
 Phone: 111-111-1111
 Mobile: 9930912876

COMPANY

Company: Zylker Inc
 Website: www.zylker.com
 Phone: 987-654-3210

ADDRESSES

Address Name	Street 1	Street 2	City	State	Country	Zip Code	Territory
Service Address	2000 Ogden Ave	—	Aurora	Illinois	United States	60504	Fillmore

+ Create

Any of these addresses can be [assigned](#) as a Service or Billing address of the contact.

Delete Contact Address

You can delete the addresses added to a contact. To delete a contact address:

1. Select **Contacts** from the **Customers** menu and select the contact record whose address you want to delete.
2. Select the **Addresses** tab.
3. Hover over the address and click the **Delete**  icon.
4. Click **Yes, Delete** in the confirmation message to proceed.

FSM Home Customers Work Order Management Dispatch Console Services And Parts Assets Reports

Contacts > Ms. Lucy Robins

lucy.robins@zylker.com 111-111-1111 Marianne Sheehan Edit

Details

Email: lucy.robins@zylker.com
 Phone: 111-111-1111
 Mobile: 9912830485

Company

No Company found

Address

Service Address
 SERVICE ADDRESS
 2935 S 6th St,
 Springfield, Illinois, 62703,
 United States
 Tax : Sales Tax(5%)

Billing Address
 BUSINESS ADDRESS
 2203 S 15th St,
 Springfield, Illinois, 62703,
 United States

ADDRESSES

Address Name	Street 1	Street 2	City	State	Country	Zip Code	Territory
Business Address	2203 S 15th St		Springfield	Illinois	United States	62703	
Service Address	2935 S 6th St		Springfield	Illinois	United States	62703	Zylke

+ Create

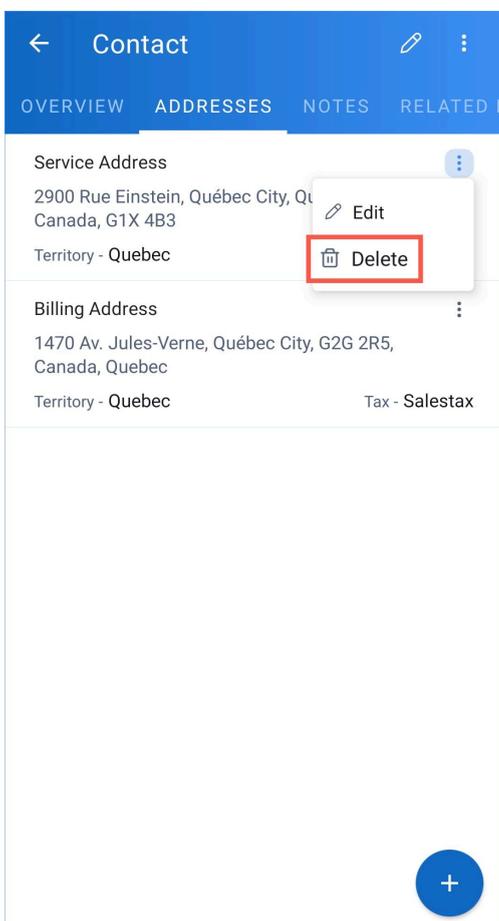
Note:

- Deleting an address will not affect any existing records (work orders, service appointments, etc) where this address is used.
- You can delete a contact address only if you have the **Delete** permission for the Contact, and Company modules.

Delete Contact Address from Mobile App

To delete a contact address:

1. Open the record and tap the **Addresses** tab.
2. Tap **more options** [:] in the address entry and select **Delete**.



Using Contact Addresses

You can perform the following actions on an address, Service or Billing, in the *Edit Contact* form:

1. **Choose another address** : If there are multiple addresses present, then click the **Choose another** icon [↻] to select another address. In the *Select Billing/Service Address* pop-up, select the desired address.

Select Service Address ✕

Search Service Address

Name	Street 1	Street 2	City	State
Depot Address	708 S 6th St	—	Champaign	Illinois
Billing Address	2205 Sangamon Dr #4981	—	Champaign	Illinois
Service Address	2000 Ogden Ave	—	Aurora	Illinois

< 1 >

2. **Edit address** : After adding an address in the Service/Billing address field, click the **Edit** icon [✎]. In the *Edit Address* overlay make the necessary changes and click **Save**.

Edit Address ✕

Address relation: Edward Cormoran
Contact

Address Name: Service Address

Street 1: 2000 Ogden Ave

Street 2:

City: Aurora

State: Illinois

Zip Code: 60504

Country: United States

Territory: Gosford ✕

Taxable: Taxable Non-Taxable

Tax Name: SalesTax [7%]

Geo Code: 41.729558 -88.270374

Map Satellite

Cancel Save

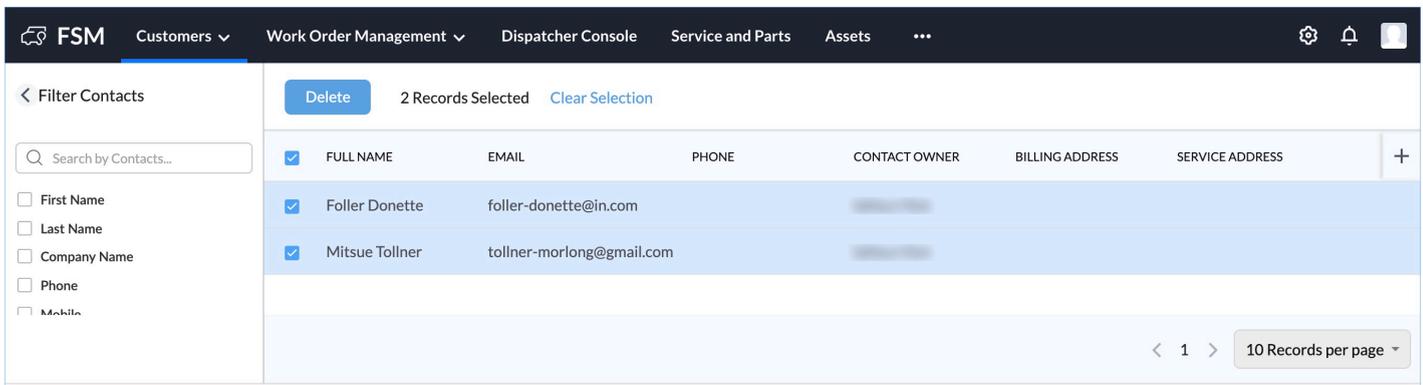
3. **Add address** : Multiple addresses can be added to a contact. Click the **Add** icon [+]. In the *Add Address* overlay, enter the details and click **Save**.

Delete Contacts

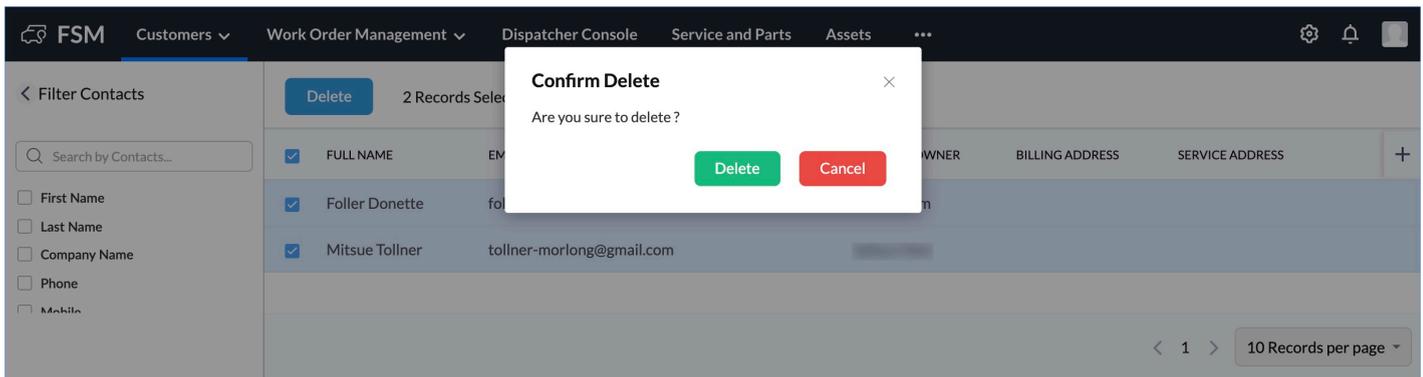
Contacts can be deleted either from the list view page or the contact details page. Contacts associated with active Requests, Estimates, Work Orders, or Appointments can not be deleted.

To delete contacts from the list view:

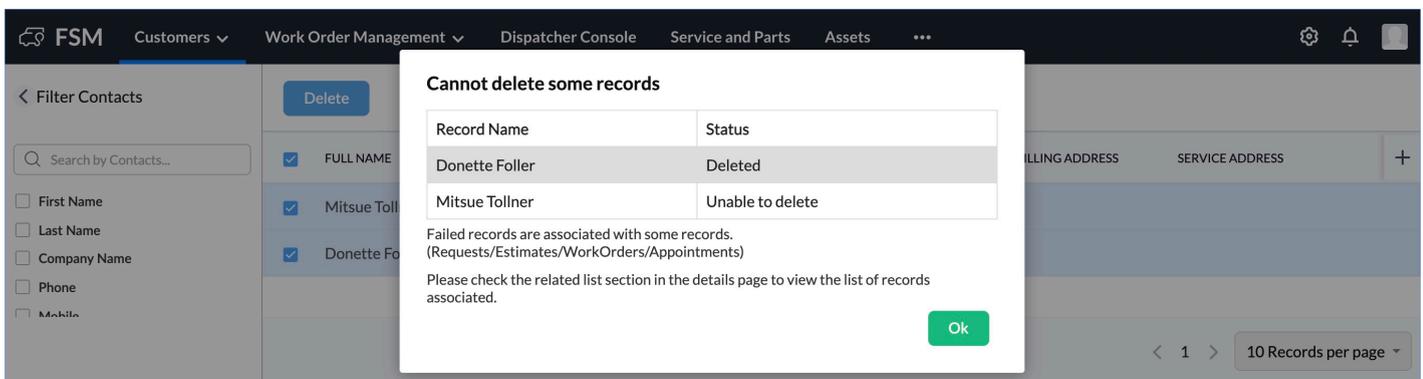
1. Select the **Contacts** module and select the checkboxes of the contacts you want to delete.
2. Click **Delete**.



3. Click **Delete** in the confirmation message.



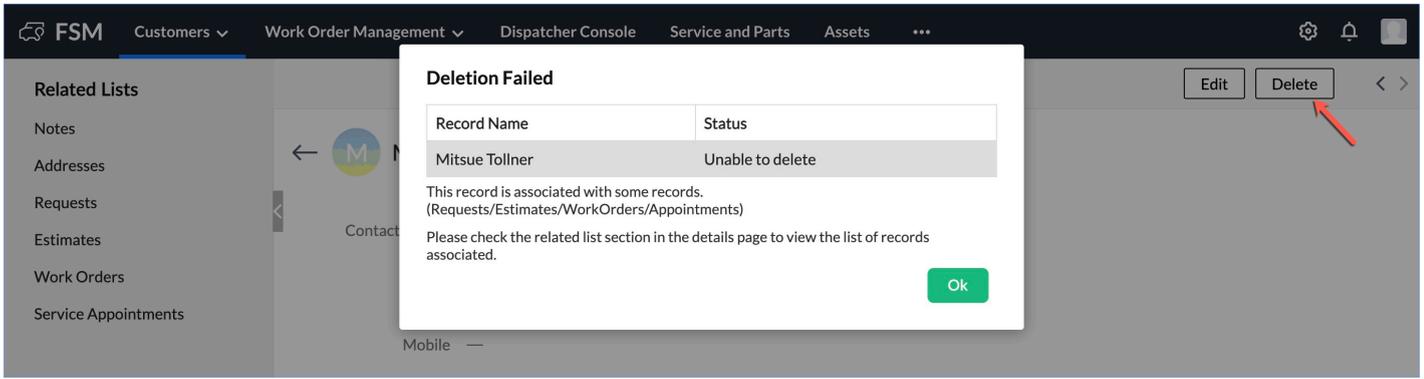
If there are contacts which are associated with active Requests, Estimates, Work Orders, or Appointments, then they cannot be deleted. The outcome of the deletion will be displayed (see the screenshot below).



To delete a contact from its details page:

1. Select the **Contacts** module and click the contact record you want to delete.
2. Click **Delete**.
3. Click **Delete** in the confirmation message.

If there are contacts which are associated with active Requests, Estimates, Work Orders, or Appointments, then they cannot be deleted. The outcome of the deletion will be displayed (see the screenshot below).

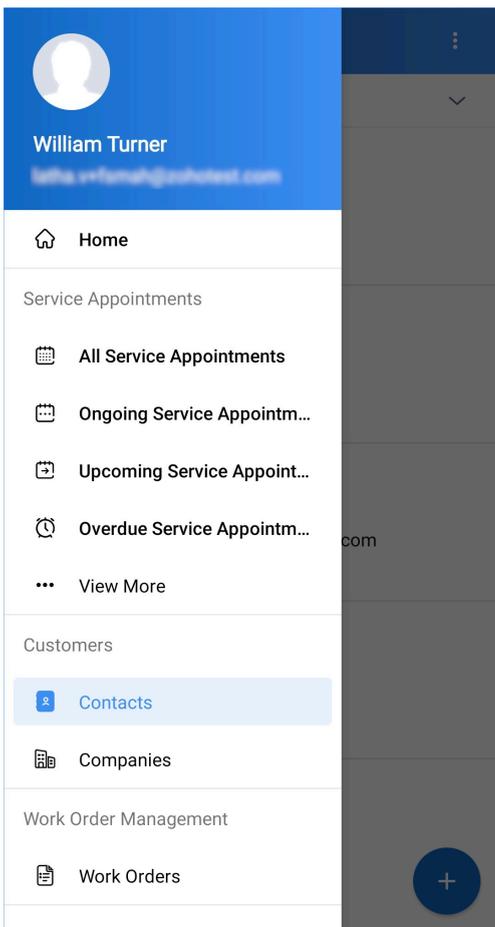


 **Note:** Deleted contacts cannot be recovered.

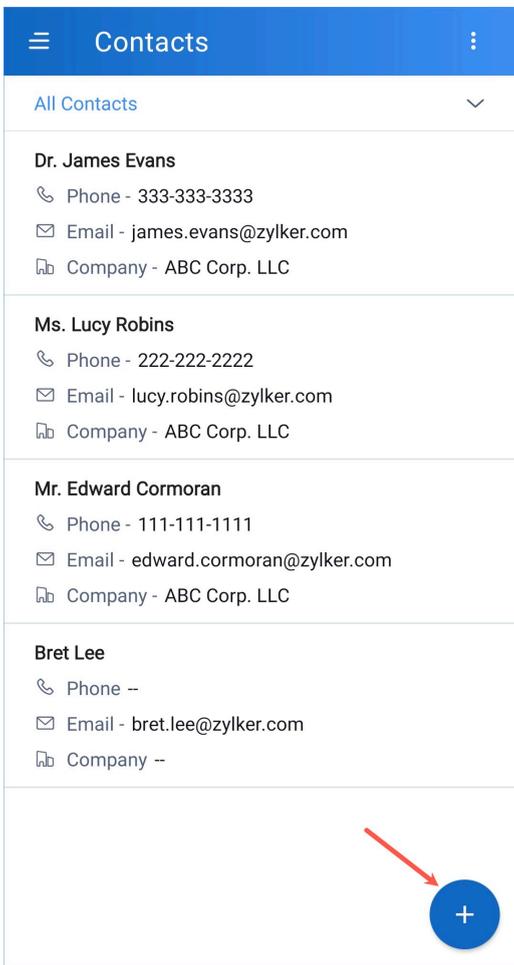
Add Contact from Mobile App

To create a contact:

1. Select **Contacts**, in the left menu.



2. In the *Contacts* screen, tap the add [+] icon.



3. In the *Create Contact* page, enter the necessary details and click **Save**.

← Create Contact
Save

Contact Details

Salutation	Ms. ▼
First Name	Sandra
* Last Name	Mendes
* Email	sandra.m@zylker.com
Phone	555-555-5555
Mobile	9764135482
Company	ABC Corp. LLC >
* Currency	USD ▼
* Exchange Rate	1.000000000

Address

Service Address	Service Address, 939 N Ashland Ave, Chicago, Illinois, United States , 60622 > ⋮
Billing Address	Billing Address, 901 1st St, Colona, Illinois , United States , 61241 > ⋮

Tax

* Taxable	Taxable ▼
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- In the lookup fields, you can do an [advanced search](#).
- In the address fields, you can [add](#) addresses.
- The Currency and Exchange Rate will be displayed only if [multiple currencies](#) are enabled.

The created contact can be edited. To edit a contact:

1. Click the **Edit** [✎] icon on the top right side.
2. Make the necessary changes and click **Save**.

← Contact 

OVERVIEW ADDRESSES NOTES RELATED L

Ms. Sandra Mendes

 Owner - William Turner

 Created on - 03/03/2023 12:20 PM

Details

 Email
sandra.m@zylker.com

 Phone
555-555-5555

 Mobile
9764135482

 Currency
USD

 Exchange Rate
1.00

Company  

 ABC Corp. LLC

← Edit Company Save

Company Details

* Company Name	Zenith Pvt Ltd
Website	
Email	
Phone	888-888-8888
Mobile	9764108234
Company Type	Customer ▼
* Currency	USD ▼
* Exchange Rate	1

Address

Service Address	Service Address, 901 1st St, Colona, Illinois, United States, 61241 ▶ ⋮
Billing Address	Service Address, 901 1st St, Colona, Illinois, United States, 61241 ▶ ⋮

Tax Details

* Taxable	Taxable ▼
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You can also add addresses, and notes.