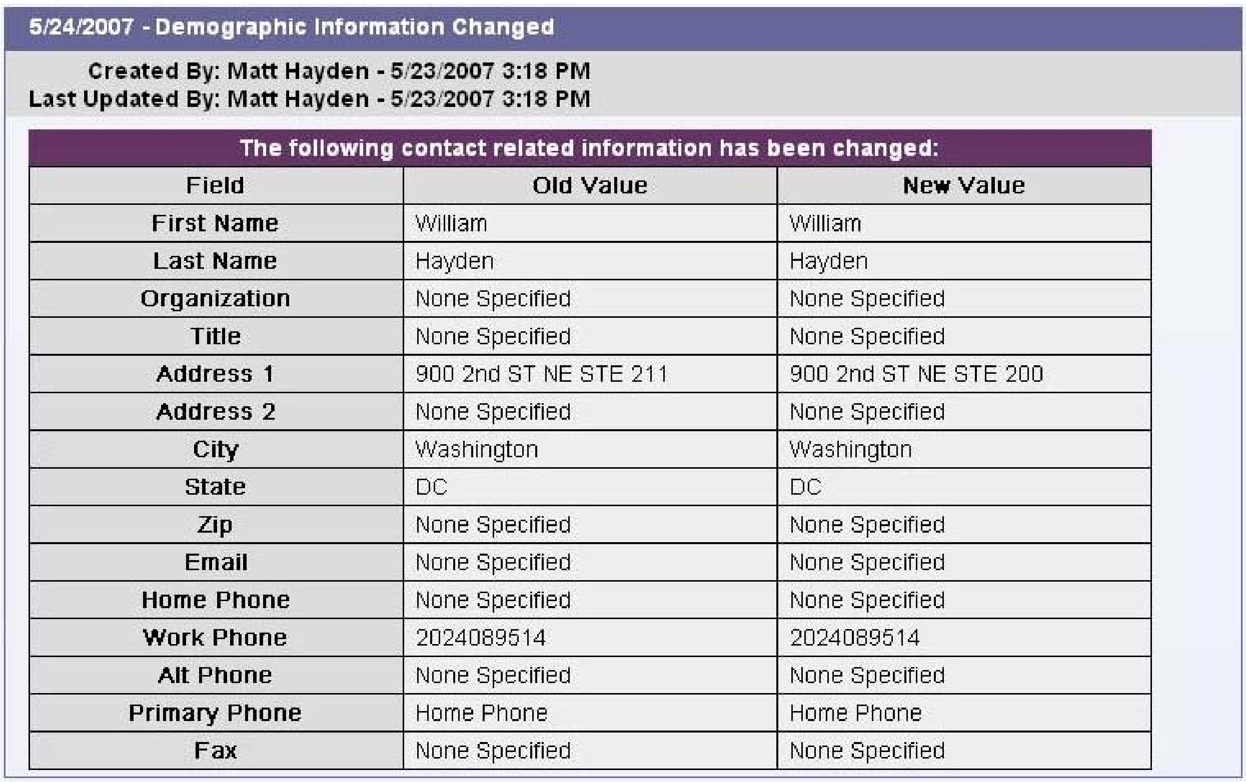
Editing a Client

Once a Client has been created it can be edited from the Client Detail or Summary View by selecting Edit Client from the Actions dropdown menu. Any changes made to the Client demographic information will create a note associated with the client noting the change.


5/24/2007 - Demographic Information Changed

Created By: Matt Hayden - 5/23/2007 3:18 PM
Last Updated By: Matt Hayden - 5/23/2007 3:18 PM

The following contact related information has been changed:

Field	Old Value	New Value
First Name	William	William
Last Name	Hayden	Hayden
Organization	None Specified	None Specified
Title	None Specified	None Specified
Address 1	900 2nd ST NE STE 211	900 2nd ST NE STE 200
Address 2	None Specified	None Specified
City	Washington	Washington
State	DC	DC
Zip	None Specified	None Specified
Email	None Specified	None Specified
Home Phone	None Specified	None Specified
Work Phone	2024089514	2024089514
Alt Phone	None Specified	None Specified
Primary Phone	Home Phone	Home Phone
Fax	None Specified	None Specified

Contacts can be edited, added and deleted for the Client by selecting Display Client Contacts. Items in the grid can be edited and deleted by selecting the matching button. New contacts can be added by selecting the contact type you want to add from the Actions dropdown menu.


Client
Actions Display Client Contacts
Desktop Client Service Request Project Time

Contacts For William Hayden

Name	Contact Type	Relationship	Primary Phone	View Details	Edit	Delete
Matt Hayden	Primary Contact	Relative	None Specified	View Details	Edit	Delete