

Bill to – How to manage primary email

12/03/2024 3:13 pm EST

When creating a Bill to contact there are a few options for the Email address tab for the new contact.

- You can leave the primary email blank if the customer does not have the email option selected for any invoices.
- You can add only one primary email address.
- You cannot delete the primary email address, you can update the primary email address, if the customer no longer wants the original email address to be used.
- You can make the primary email address Invalid only if you add a new primary address in its place.

The screenshot displays a software interface for managing customer billing. On the left, a tree view shows the hierarchy of data for 'Miguel Gutierrez', including 'Customer Information', 'Other Sub Accounts', 'Payment Options', 'Bill To', 'Contacts', 'Sites', 'Systems', 'Documents', 'Invoices', 'Jobs', 'Notes', 'Recurring', 'Recurring History', 'Recurring Master Items', 'Service', 'Group Tickets', 'Activity Ledger', 'Aging', 'Collections', 'Credit Memos', 'Credit Auto', 'Deferred Income (Unposted)', 'Documents', 'EFT History', 'Inner Office Message', 'Invoices', 'Jobs', 'Journal Detail', 'Journal Summary', 'Notes', 'Payments', 'Prospects', 'Recurring', 'Recurring History', and 'Refunds'. The main window shows 'Customer Billing 49707-1' for 'Miguel Gutierrez' at '3125 Legacy Oaks Cir, Greenville, TX 75402 - 2519'. The 'Email Addresses' tab is selected, showing a table with one email address: 'miguel.gutierrez@boldgroup.com'. The 'Primary' checkbox is checked. Below the table, there are fields for 'Email Address', 'Primary', 'Invalid', and 'Inactive' checkboxes, along with 'Update', 'New', 'Save', and 'Close' buttons. On the right, a summary of customer information is displayed, including 'Balance Due: \$0.00', 'Total Active RMR', 'Total Active RAR', 'Customer Type: Residential', 'Chain Account', 'Customer Since: 10/11/2022', and 'Days of Disp Last 30 Days: 1'.

Email Address List			
Email Address	Primary	Invalid	Inactive
miguel.gutierrez@boldgroup.com	☒	☐	☐

Email Address:

☐ Primary ☐ Invalid ☐ Inactive

Customer Information

Customer # 49707-1

Customer Name Miguel Gutierrez

Billing Information Email Addresses

Balance Due: \$0.00

Total Active RMR :

Total Active RAR :

Customer Type: Residential

Chain Account:

Customer Since: 10/11/2022

Days of Disp Last 30 Days: 1