ERM User Manual

What to do with the customer account who is no longer working there at the company and the secretary asks to send the email to school email address associated with the same account. Should we make new account in the name in the company name but the email address is same as linked with the customer who is not working at the company anymore?

This requires a little more work to do. We cannot remove a person's name from a customer account. This is because that customer who no longer works at the compay many have had a previous booking or arrangement or conversation with Iconic and changing the name would change the details and history notes that are associated with that specific customer. At no stage are we allowed to change a customer contact name that is linked or associated with an account.

What we do in this situation is the following:

1. Write up your history note explaining that the person no longer works.
2. Change the contact customer status to No Longer working at Company.
3. Press the Add Customer to Company button
4. Follow the steps of how to Add a new customer to an existing company, except
5. Ask the person you are speaking to for the name you should write on the email to professionally address that person. This is always a smart way to obtain the name.
    1. If no name is given to you then:
        1. write something general or generic for first name and last name. For example:

            1. You can write ***first name field:*** New Contact and ***last name field:*** the company name.
            2. You can write ***first name field:*** Dear Sir Madam and ***last name field:*** the company name.
            3. You can write ***first name field:*** TBA and ***last name field:*** the company name.
                1. TBA means to be announced.
            4. You can write ***first name field:*** Info Email and ***last name field:*** the company name.
            5. You can write ***first name field:*** Secretary Email and ***last name field:*** the company name.
6. Write the put down the name of the new customer account.
7. Copy and paste the work email address of the previous customer account into the New Account you are making.
8. Ask for a supervisor code on slack to remove the email address of the contact not working at the company.
9. Copy and paste the supervisor code to make changes in the existing customer account.
10. Press Save Changes.
11. In the New Customer account you are making, make sure you have copied and pasted the email address into the new customer account for the company
12. Press Add new Customer button.

Attached files:

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