

Overview of the General Tab

Abstract

The purpose of this guide is to show what can be found on the *General Tab* screen and explain what can be accomplished here.

Steps: Click on General Tab

Details

1. **Click on the *General Tab*.**

The screenshot shows the 'General' tab of the Customer Service Toolkit. The form contains the following fields:

- 2** Decision maker: BUSHMAN ASSOCIATES INC
- 3** Name: BUSHMAN ASSOCIATES INC (dropdown menu)
- 4** Business: BUSHMAN_ASSOC
- 5** Address: 9097 RIVER RD (dropdown menu); 9097 RIVER RD, WITTENBERG, WI 54499
- Business: None available (dropdown menu)
- Home: None available (dropdown menu)
- Business Fax: None available (dropdown menu)
- Mobile: None available (dropdown menu)
- Email: None available (dropdown menu)

At the bottom of the form are three buttons: Add Associated Customer, Edit/ Delete Associated Customer, and Add to Outlook Contacts.

2. *Decision Maker* – tells who has been designated the Decision Maker for this Company. This can be changed using the Edit/Delete Associated Customer button (see graphic - **2**).
3. *Name* – lists the name of the decision maker (see graphic - **3**). If you select the drop down arrow you will see a list of other people associated with this company.
4. *Business* – shows the Toolkit business name (see graphic - **4**).
5. *Address thru Email* – This is data derived from SCIMS (see graphic - **5**). If you notice an error, notify the SCIMS manager to change it. This data cannot be changed in Toolkit.

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6. These buttons are located along the bottom of the General tab (see graphic – 6)

Add Associated Customer, will allow you to add a person as an Associated Customer of this business such as the operator, family member etc.

Edit/Delete Associated Customer will allow you to remove or replace an Associated Customer or change the Decision Maker for the Company

Add Outlook Contact will allow you to add this customer to your email contacts. Only use this button if you intend to email this individual regularly.