

# Social Contact Methods

## Introduction

A new, optional, contact method has been added to store **Social Media** account information. When enabled, this will appear alongside the existing **Phone, Address, and Email** contacts.

## Setup

### System Option

This feature must be enabled via a system option before you can set up and use it.

1. Click **Administrative > System Options**.
2. Scroll down to **Customer Options**.
3. Set the **Show Social button on contacts screen** option to **True**.

Customer Options	
Balances to Primary on Split	True
Convert Customer Name and Address on Receipts to Mix	True
Custom Field Names	String[] Array
Customer Duplicate Check	Check_All_Relevant_Fields
Days to include in Customer Rankings	1095
Enable Customer Activity Tab Green Dot	False
Guess Gender if Not Specified	False
Include Spouse/Partner Column on Customer List Views	True
Include Spouse/Partner Name	False
Number of customers to rank.	200
Permission Required to See Sale from Customer Activity	False
Phone Number Format	(xxx) xxx-xxxx
Show Dial button on contacts screen.	False
Show Email button on contacts screen.	False
Show ranks on Customer Display	True
Show Social button on contacts screen.	True
Title Case Names	False
Use Comma After City and Before State in Mailings and o	True
Use Customer Display for Edits.	False
Use Period After Title in Customer's Name in Mailings an	True

### Social Media Types

You must define the social media types you want to store.

1. Click **Administrative > Advanced Settings > Social Contact Methods**. The **Customer Social Contacts** window will appear.

Social Contact Methods

Customer Social Contacts

Modify the selected list below.

Add Edit Delete

Name

Service Address

Store User Name

Close

2. Click **Add**.

3. Enter the **Name**, **Service Address**, and **Store User Name** (optional) for this social media type, then click **Save**.

4. You can use **Edit** to make changes to existing entries or **Delete** to remove them.

## Adding a Social Contact Method

To add a **Social Contact Method**:

1. Find and edit the customer's record.
2. Click the **+Social** button in the **Contact Methods** section on the **General** tab.
3. Select the **Type** and enter the **Social Address**, then click **OK**.

## Notes

- There is no direct integration with any of the social media platforms at this time. This is simply a way to store this information.
- Social contact methods can be selected for **Notifications**, but function like a **Phone Call** notification meaning nothing happens automatically. This is strictly for recording purposes.