



# Handy guides



## Checking email address Status Flag

*When reviewing a Customer Record – Look out for the Red Warning Flag – This will indicate the email address is no longer valid and needs updating.*

Person Account  
**Mr. PIERRE BERONI**

+ Follow   New Relationship   Additional information   New Quick Opportunity ▼

Email: pierre2121@beroni.train   **Email Status** (1)   Phone (2) ▼: +34123456789   National Id: 32170501X   Professional:

**1.** On the main page of a customer account. If the **Email Status flag** is red, it means that the Email address is no longer valid. We recommend using this opportunity to **update** and confirm all contact information for the customer.

360° VIEW   RELATED   **DETAILS**   NOTES

∨ **Customer Information** (2)

Account Name: Mr. PIERRE BERONI

Maiden Name

Professional:

**Personal Email**: pierre2121@beroni.train (3)

**2.** Once confirming all other contact details, go to the **DETAILS** tab of the customers account.

**3.** Click on the pen button next to the **Personal Email** field, update the customers email address and save all changes.