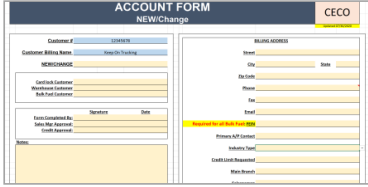


In order to ensure that Carson's digital communications are reaching the appropriate parties, a **Marketing Contact** should be identified on all New Customer Forms moving forward. Find instructions outlining how to properly demonstrate the Marketing Contact below.

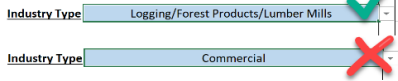
HOW TO ADD MARKETING CONTACT



The screenshot shows the 'ACCOUNT FORM' with a 'NEW/Change' button and a 'CECO' label. It contains several sections for entering customer details, including 'CUSTOMER INFORMATION', 'CONTACT INFORMATION', and 'BILLING ADDRESS'.

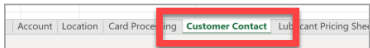
1 In *New Customer Account Form*, fill out information as you normally would.

EXAMPLE ABC Arborists, LLC



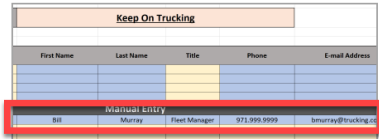
The screenshot shows the 'Industry Type' dropdown menu. The selected option is 'Logging/Forest Products/Lumber Mills', which is marked with a green checkmark. The option 'Commercial' is marked with a red X, indicating it is not the preferred choice.

2 On the "Account Tab", be sure to choose an industry from the dropdown list. If the specific industry is not included, select the closest descriptive industry over a generic term like Commercial.

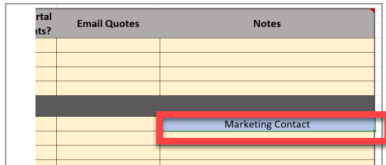


The screenshot shows the navigation tabs: 'Account', 'Location', 'Card Processing', 'Customer Contact', and 'Lubricant Pricing Sheet'. The 'Customer Contact' tab is highlighted with a red box.

3 Go to "Customer Contact Tab". Under "Manual Entry", complete Marketing Contact Details.



The screenshot shows the 'Keep On Trucking' form. The 'Manual Entry' section is highlighted with a red box, showing contact details for Bill Murray, Fleet Manager, with phone number 971.999.9999 and email bmurray@trucking.co.



The screenshot shows a table with columns for 'Email Quotes' and 'Notes'. The 'Notes' column contains the text 'Marketing Contact', which is highlighted with a red box.

4 Under "Notes" column, add "Marketing Contact".