

Beyond - Creating a Contact Record

Last Modified on 05/26/2021 10:44 am CDT

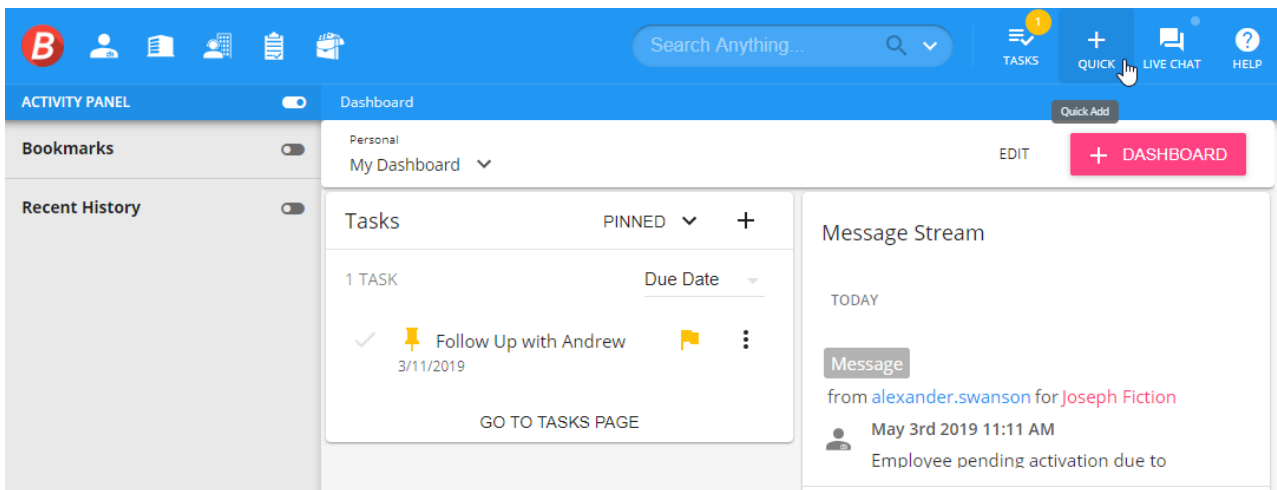
Contacts

Who answers the phone when you call your Customers? Who are the hiring managers coming to you with new orders to fill? Who are the gatekeepers making it tricky to reach your intended recipient of e-mails and phone calls? These are your Contacts, and you will want to keep track of each one- past, present, and future. Use the fields on the Contact record to store notes on all of your interactions, sales leads, and future opportunities.

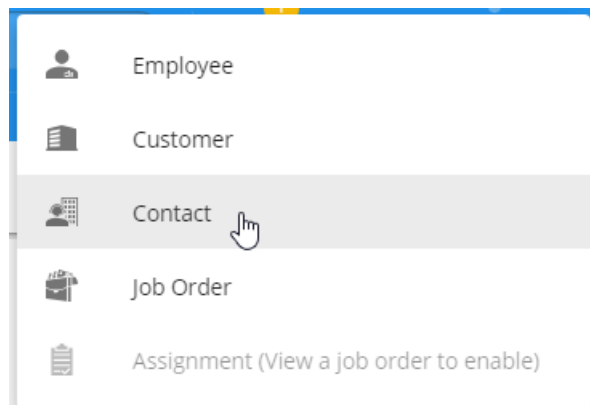
Trainer tip Contacts may include hiring managers, supervisors, receptionists, and even members of the c-suite!

Creating a Contact

Select the '+ Quick' button in the upper right corner of the screen:



Select the 'Contact' option from the quick add drop-down:



This will open a wizard allowing you to log important information pertaining to the Contact record, including name, address, title and, most importantly, the Customer record associated with the Contact.

Add new contact - Enter Contact Information

First Name Michelle	Last Name Martins
Associated Customer Martins Lumberyard - Primary	Title Owner
Address	
Street	Street 2
City	State
Zip Code	Country United States of America
Contact Information	
Phone Format U.S. +1	Office Phone Number
Email Address	

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There are three important sections to consider when filling out this wizard:

1. The Contact's vital information should be entered including their first and last name, the Customer record they are associated with, and the Contact's self described title.
 - ***Note*** It is possible and acceptable for a Contact record to not be associated with a Customer record.
2. The Contact's address can be different than the Customer's address. However, if it is the same, we can utilize the 'Copy' button to copy the address from the Customer record
3. The Contact's information will also be very important to gather and enter here as it will provide you with a method to reach the newly created Contact.

Note If the Customer record does not exist for the Contact you are adding into your database, a '+' toggle can be flipped to alternate the "Associated Customer" field to a "New Customer" field. **This will create a Customer record.** It is highly advisable that you immediately update that Customer record.

Add new contact - Enter Contact Information

1 Enter Contact Information

2 Address Standardization

First Name

Mike

Last Name

Sweet

Associated Customer

Search by customer name...



Title

Manager

Add new contact - Enter Contact Information

1 Enter Contact Information

2 Address Standardization

First Name

Mike

Last Name

Sweet

New Customer

Hillside Home|



Title

Manager

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