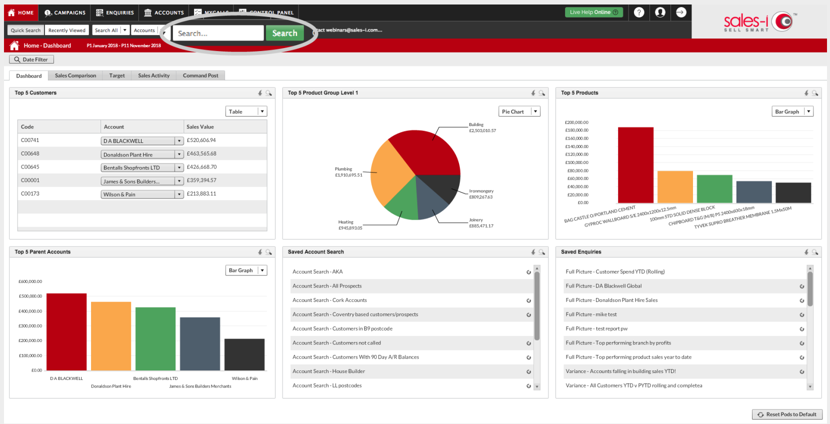
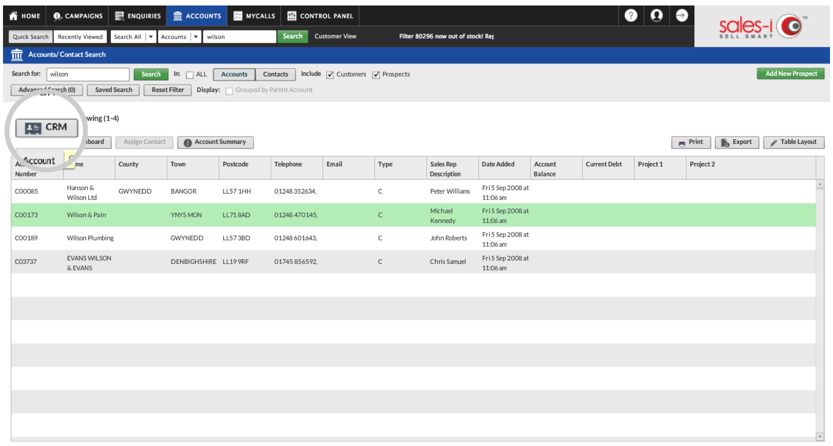
HOW TO ADD A CONTACT

This guide will show you how to add a new contact to a Prospect or Customer Record Card allowing you to track your conversations with multiple contacts at any one company. You can also use the 'email contact' functionality in sales-i to save you valuable time.

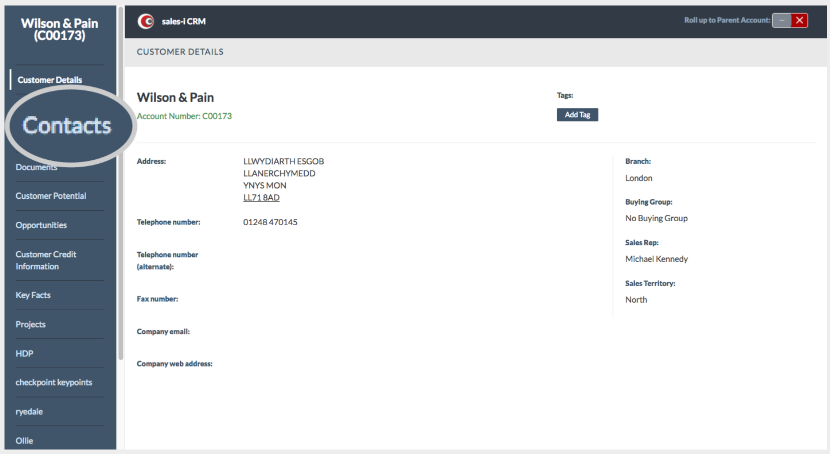
01 Use the **Quick Search** to find the account you wish to add a contact to.



02 Select the correct customer/prospect from the results list and click **CRM** to open their record card.



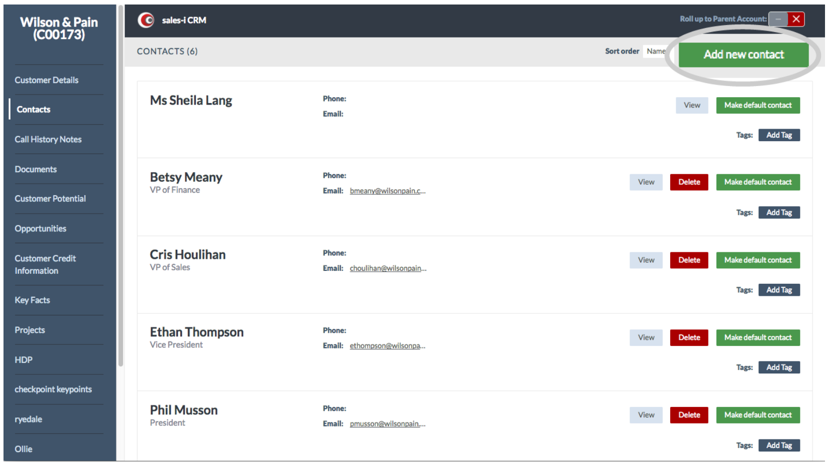
03 Click **Contacts** from the menu at the left of the screen

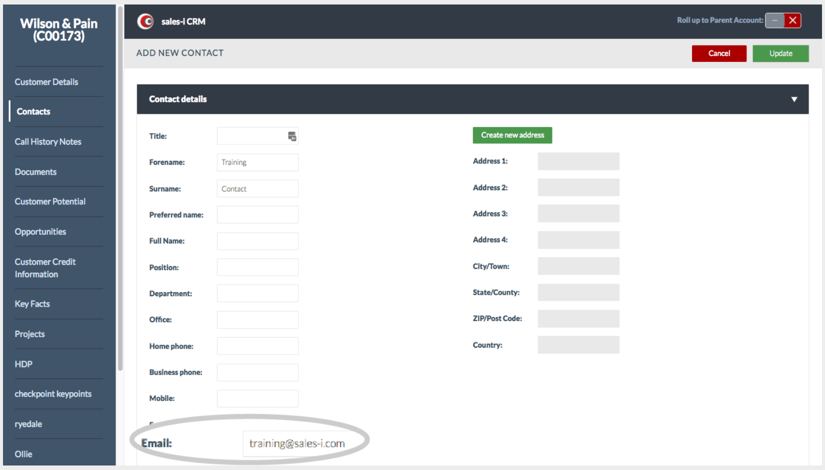


04

This will show any existing contacts for this customer.

Click the green **Add New Contact** button to add a new contact to this list.





05

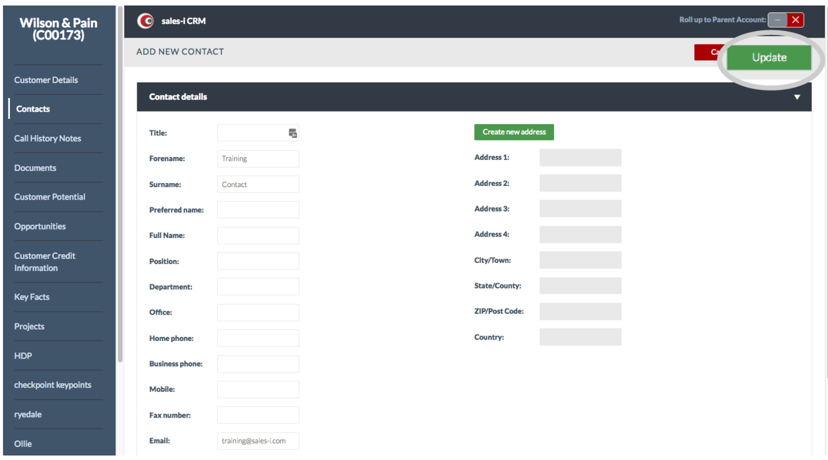
Fill in the required information.

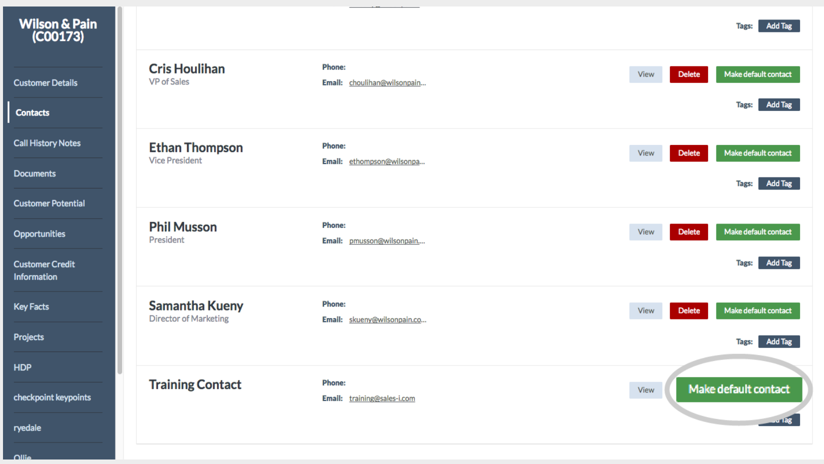
Please note: You will need to add an email address if you want to use the 'email contact' functionality.

06

Click the green **Update** button in the top right.

Please note: Your Power User may have set some fields as mandatory (e.g. first name, surname, email address, etc...) - these will be indicated in red at the top of the screen should you miss any required fields.





OPTIONAL

You can make this contact the Default contact by clicking the green **Default contact** button next to their contact details.

Doing this means the contact will be auto-selected when adding call notes to sales-i in the future.