

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.

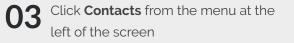


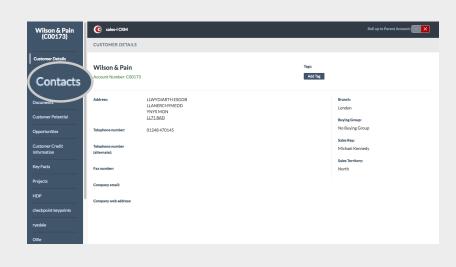
Use the **Quick Search** to find the account you wish to add a contact to.



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Quick Search	Recently Viewed	Search All 🛛 🛪 🗛	ccounts 🛛 🔹 wilse	20	Search Cu	istomer View	Filter 803	196 now out of stor	ski Reg						9
m Accounts/Contact Search															
Search for: w	ílsan	Search	Irc 🗌 ALL	Accounts Co	intacts Include	Customers	Prospects							Add N	lew Prospect
Advanced-Krewh MI Sand Search Rest Filter Display: Orouged by Pierric Account															
CRM wing1-4															
	iboard	Assign Contact	Account	Summary									Print	Export /	Table Layout
AL. ACCOUNT	me	County	Town	Postcode	Telephone	Enail	Type	Sales Rep Description	Date Added	Account Balance	Current Debt	Project 1	Project 2		
C00085	Hanson & Wilson Ltd	GWYNEDD	BANGOR	LL57 1HH	01248 352634,		с	Peter Williams	Fri 5 Sep 2008 at 11:06 an						
000173	Wilson & Pain		YNYS MON	LL718AD	01248 470145,		с	Michael Kennedy	Fri 5 Sep 2008 at 11:06 am						
COO 189	Wilson Plumbing		GWYNEDD	LL5738D	01248 601643,		с	John Roberts	Fri 5 Sep 2008 at 11:06 am						
C03737	EVANS WILSON & EVANS		DENBIGHSHIRE	LL199RF	01745 856592,		с	Chris Sanuel	Fri 5 Sep 2008 at 11:06 an						
															*

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





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.

ain C sales-I CRM		Roll up to Parent Account:		
CONTACTS (6)		Sort order Name Add new cont		
Ms Sheila Lang	Phone: Email:	View Make default		
		Tags:		
Betsy Meany	Phone:	View Delete Make default		
al VP of Finance	Email: bmeanv@wilsonpain.c			
		Tags:		
Cris Houlihan	Phone: Email: choulihan@wilsonpain	View Delete Make default		
	LINER. COUNTERPORTED	Tags:		
Ethan Thompson Vice President	Phone: Email: <u>ethompson@wilsonpa</u>	View Delete Make default of		
		Tags:		
nts				
Phil Musson President	Phone: Email: prusson@wilsonpain	View Delete Make default (
		Tags:		

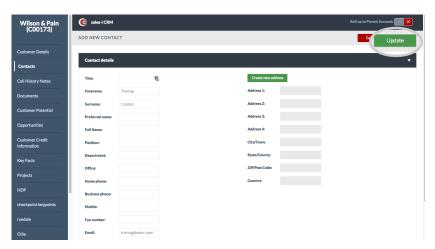
Wilson & Pain (C00173)	C sales-i CRM	Roll up to Parent Account:	
(000173)	ADD NEW CONTAG	Cancel Update	
Customer Details			
Contacts	Contact details		Ŧ
Call History Notes	Title:	5	Create new address
locuments	Forename:	Training	Address 1:
Customer Potential	Surname:	Contact	Address 2:
opportunities	Preferred name:		Address 3:
	Full Name:		Address 4:
Customer Credit nformation	Position:		City/Town:
Key Facts	Department:		State/County:
Projects	Office:		ZIP/Post Code:
IDP	Home phone:		Country:
	Business phone:		
heckpoint keypoints	Mobile:		
yedale	Email:	training@sales-i.com	
Ollie	small.	or anning weates 4.com	

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.

 $06 \overset{\text{Click the green } \textit{Update button in the}}{}_{\text{top right.}}$

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.



Wilson & Pain (C00173)			Tags: Add Tag
Customer Details	Cris Houlihan VP of Sales	Phone: Email: chouliban@wilsonsain	View Delets Maie default contact
Call History Notes	Ethan Thompson	Phone: Email: ethompson@wilsonpa	View Delete Make default contact
Documents	VICEPTESIGEN	Email: SINGTESON29Wilsonga	Tags: Add Tag
Customer Potential			
Opportunities	Phil Musson President	Phone: Email: pmusson@wilsonpain	View Delete Make default contact
Customer Credit Information			Taga: Add Tag
Key Facts	Samantha Kueny Director of Marketing	Phone: Email: <u>skuerw@wilsonpain.co</u>	View Delete Make default contact
Projects			Tags: Add Tag
HDP	Training Contact	Phone:	
checkpoint keypoints	manning contact	Email: training@sales-i.com	View Make default contact
ryedale			utag

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.