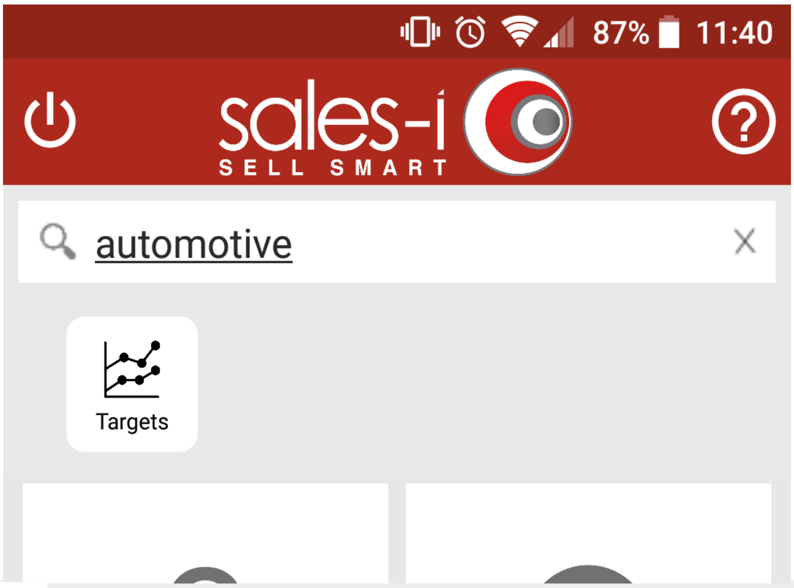
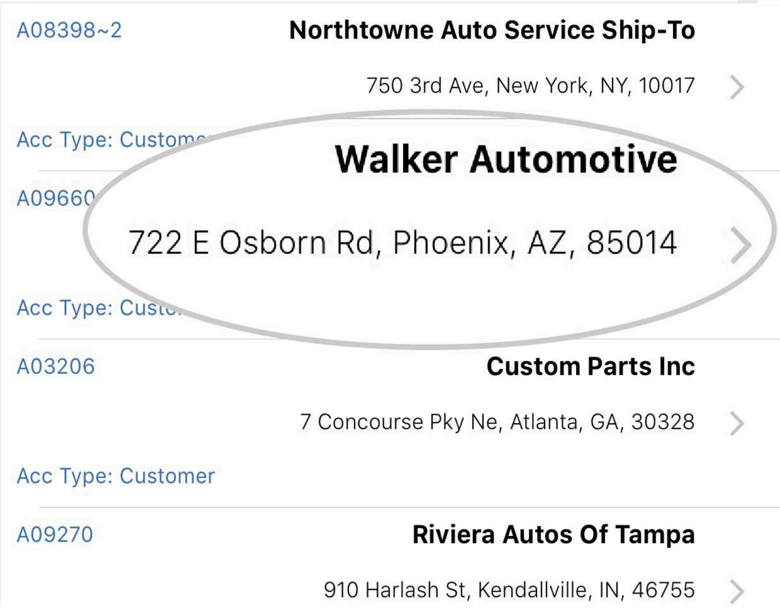
HOW TO ADD A CONTACT - ANDROID

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.

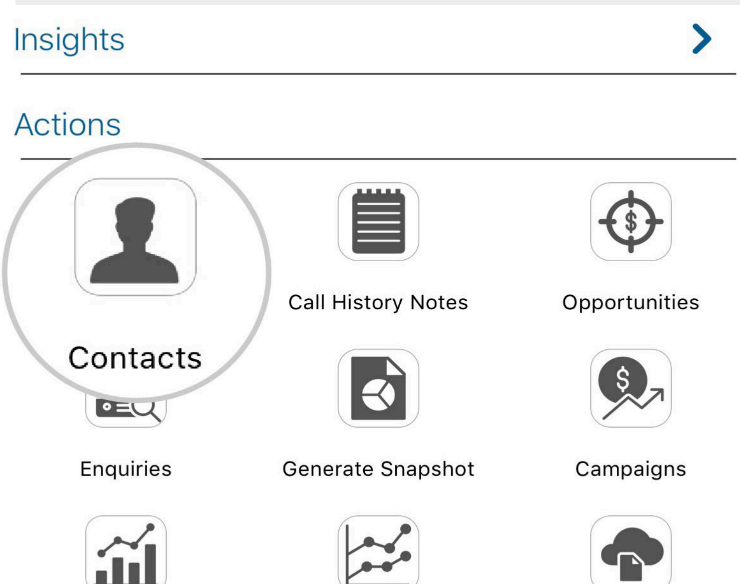
01 From the sales-i home screen, use the Quick Search bar to search for the account you would like to add a contact to.

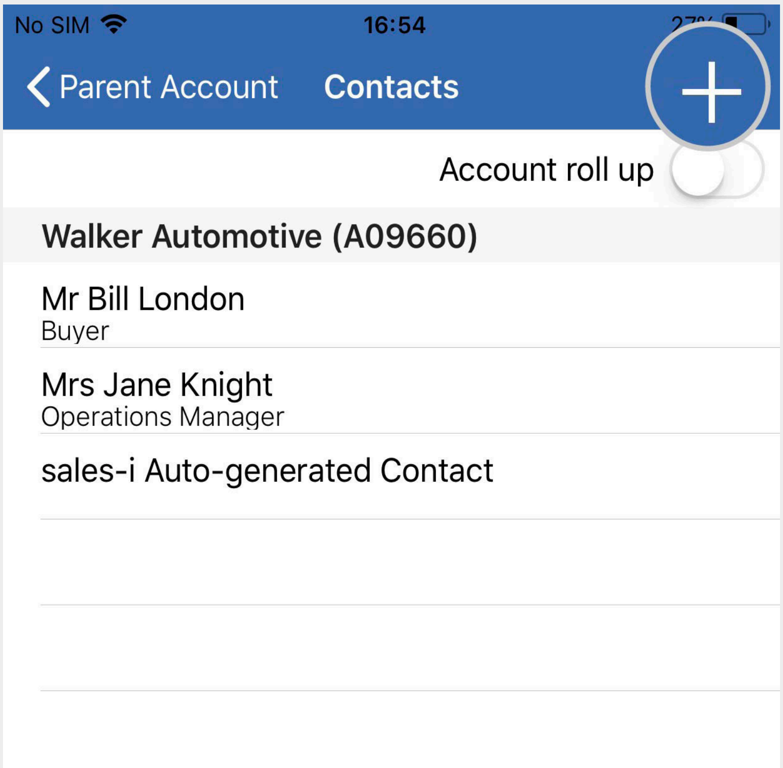


02 Select the desired Account from the results list.



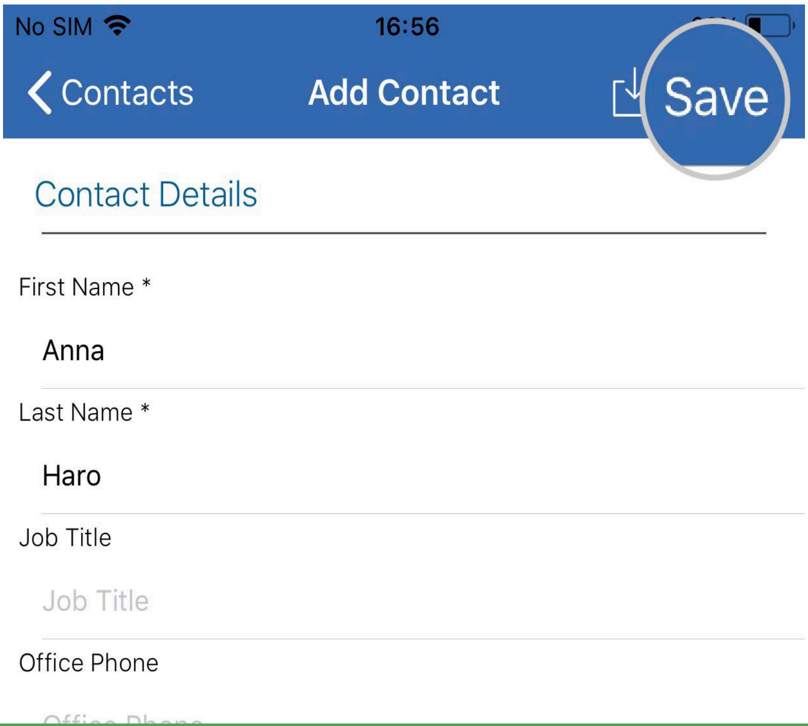
03 Scroll down to the Actions section and tap Contacts.





04 Tap the + symbol in the top right hand corner of your screen.

05 Next, enter your contact's details. You can do this manually or if you already have contacts on your iPhone or iPad, you can upload their details by tapping the Upload icon (located next to the Save Icon in the top right hand corner). Once you have entered all relevant details, tap Save. (Right hand corner).



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https://support.sales-i.com