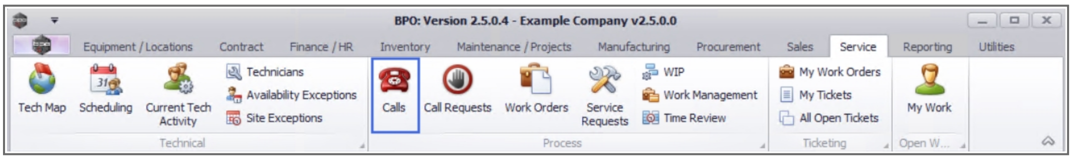
# SERVICE

## CALLS - ADD NEW CONTACT

If you have opened a new call for a customer and have unsuccessfully searched for the contact person, then you can **add a new contact** from the Call Maintenance screen. This contact should be set up as a Standard Contact.

**Ribbon Access:** *Service > Calls*




The ***Call Listing*** screen will be displayed.

- Click on ***Add***.

The ***Call maintenance*** screen will be displayed.

- Click on the ***search*** button in the ***Customer*** field.

- The ***Select a customer for this call*** screen will pop up.
- Click on the ***row selector*** in front of the ***customer*** you wish to ***link*** to this ***call***.
- Click on ***Ok***.

- The selected customer will now be displayed in the ***Customer*** field.

- Click on the ***search*** button in the ***Contact*** field.

- The ***Select a contact for this call*** screen will pop up.
- You discover that your contact is not listed in this screen.
- ***Close*** the contact lookup screen.

- Click on the ***Edit*** (ellipsis) button in the ***Contact*** field.

The ***Add a new contact to Customer - [ ]*** screen will be displayed.

- Click on the ***drop down arrow*** in the ***Contact Type*** field.

- The ***Contact Type*** menu will be displayed.
- You must select ***Standard Contact*** type.

- Fill in the rest of the contact detail fields;
    - **First Name:** Type in the first name of this contact.
    - **Last Name:** Type in the last name of this contact.
    - **Preferred Name:** Type in the preferred name for this contact if applicable.

- **Supervisor:** Click on the drop down arrow and select the correct supervisor for this contact from the menu.
- **Title:** Type in the title for this contact.
- **Email Address:** Type in the email address for this contact. This field is mandatory.
- **Group Email:** Type in the email address for this contact if applicable.
- **Phone Number:** This will be auto populated with the number of the customer initially selected.
- **Fax Number:** Type in the fax number for this contact.

- **Mobile Number:** Type in the mobile number for this contact.
- **Address:** Click on the search button and select from the screen the correct address.
- **Credit Limit:** Type in the contact / customer credit limit if known.
- **Primary Contact:** This must remain un-ticked as this contact should be a Standard Contact.

- When you have finished adding the new contact details, click on ***Save***.

- You will return to the ***Call maintenance*** screen.
- A ***Contact Processing*** message box will pop up informing you that;
    - ***Contact maintenance for customer: [ ] complete.***
- Click on ***Ok***.

- Now click on the ***search*** button in the ***Contact*** field.

- The ***Select a contact for this call*** screen will pop up and will now contain the ***newly added contact*** details.

- Click on the ***row selector*** in front of the ***new contact***.
- Click on ***Ok***.

- The new contact will now be displayed in the ***Contact*** field.

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