

# 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.

Note that this contact should be set up as a <u>Standard Contact</u>.

Ribbon Access: Service > Calls



- 1. The *Call Listing* screen will be displayed.
- 2. Click on Add to log a new call, or
- 3. Click on the *row* of the Call log you wish to *edit*, click on *Edit*.



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4. The *Call maintenance* screen will be displayed for the call you have selected.

Note that for the example we will be adding a new contact using a call that has already been logged.

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



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		Leaf Hills Pink Town			Location	For	est Hills Centre		
		Durban South		-	Project Reference				
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	Order No			_	CN0005277	17/08/2021	08:00:00	Tier - Commercial Tier Test	
	Order No				CN0005269	17/07/2021	08:00:00	Tier - Commercial Tier Test	
	Logged By	JulandaK			CN0005260	17/06/2021	08:00:00	Tier - Commercial Tier Test	
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Pending History On Site Info 1	Optional No				Chi0005230	16/01/2021	09.00.00	Tion Commercial Tion Test	•

- 6. The *Contact Maintenance* screen will be displayed.
- 7. Click on the down *arrow* in the *Contact Type* field.
- 8. Select *Standard Contact* from the drop-down list.



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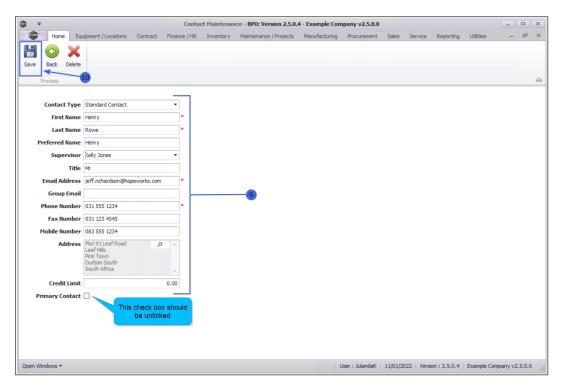
- 9. Complete the contact details for the new contact as follows;
  - **First Name:** Type in the first name of the contact you are adding.
  - Last Name: Type in the last name of the contact.
  - **Preferred Name:** Type in the preferred name for this contact, if applicable.
  - **Supervisor:** Click on the down *arrow* to select the supervisor for the contact from the *drop-down list*.
  - **Title:** Type in the title for the contact.
  - Email Address: Type in the email address for the contact. Note that this is a <u>mandatory</u> field.
  - **Group Email:** Type in the company email address for this contact, if applicable.
  - **Phone Number:** This field will populate with the number of the customer you have initially selected. Type in an alternative number, if required.



- **Fax Number:** Type in the fax number for this contact, if applicable.
- Mobile Number: Type in the mobile number for the contact.
- Address: Click on the *search* button to select an alternative address, if required.
- Credit Limit: Type in the contact / customer credit limit, if known.
- Primary Contact: <sup>1</sup> This *check box* must remain <u>unticked</u>

as this contact should be created as a *Standard Contact*.

10. When you have completed the contact information, click on *Save*.



- 11. You will return to the *Call maintenance* screen for the call.
- 12. When you receive the *Contact Processing* message to confirm;
  - Contact maintenance for customer : [customer code] complete.
- 13. Click on *OK*.



<b>♀</b> ▼ 11	Call maintenance : Call ref CN0005285	BPO: Version 2.5.0.4 - Example	e Company v2.5.0	.0	_ <b>D</b> X
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14. The contact you have created will now be available on the *Select a contact for this call* screen, when you click on the *search* button in the Contact field.



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- 15. Update the Contact field with the new contact you have created.
- 16. Click on Save.

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