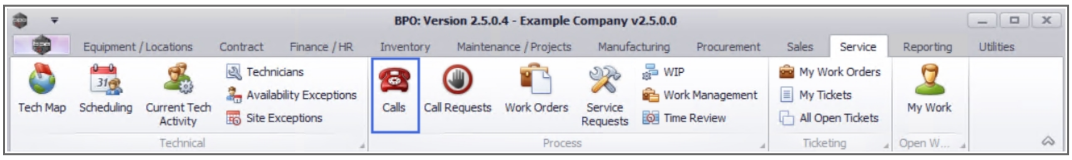
SERVICE

CALLS - ADD NEW CONTACT

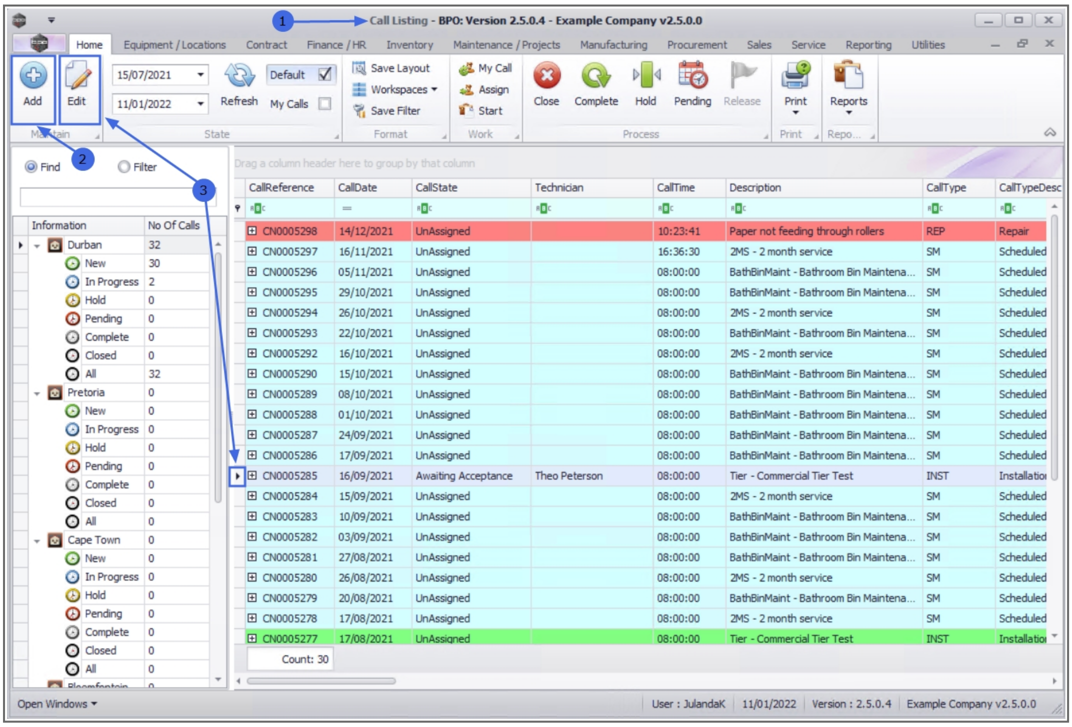
If you have opened a new call for a customer and have unsuccessfully searched for the contact person, then you can **add a new contact** from the Call Maintenance screen.

Note that this contact should be set up as a **Standard Contact**.

Ribbon Access: *Service > Calls*



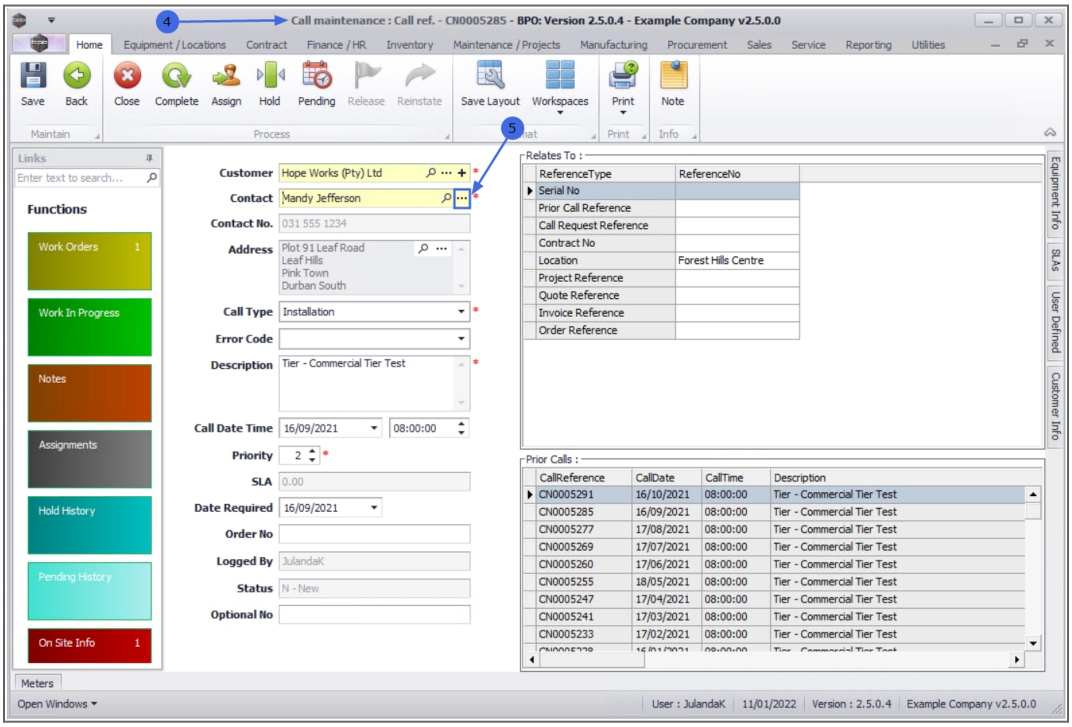
1. The ***Call Listing*** screen will be displayed.
2. Click on ***Add*** to log a new call, or
3. Click on the ***row*** of the Call log you wish to ***edit***, click on ***Edit***.



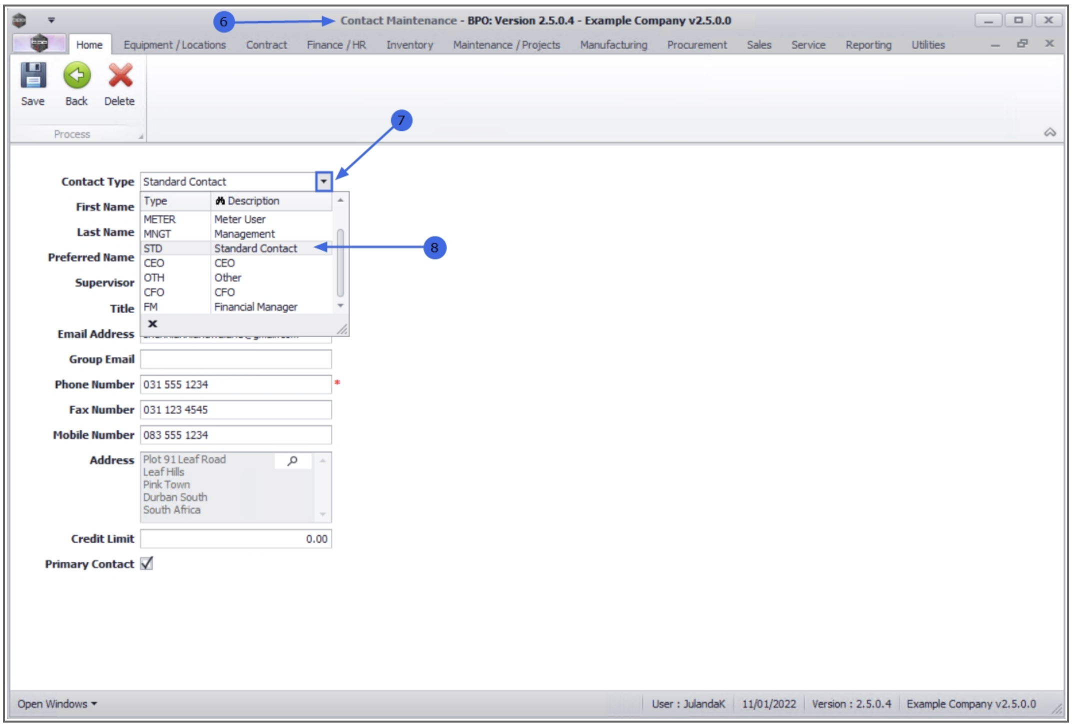
4. The ***Call maintenance*** screen will be displayed for the call you have selected.

> 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.



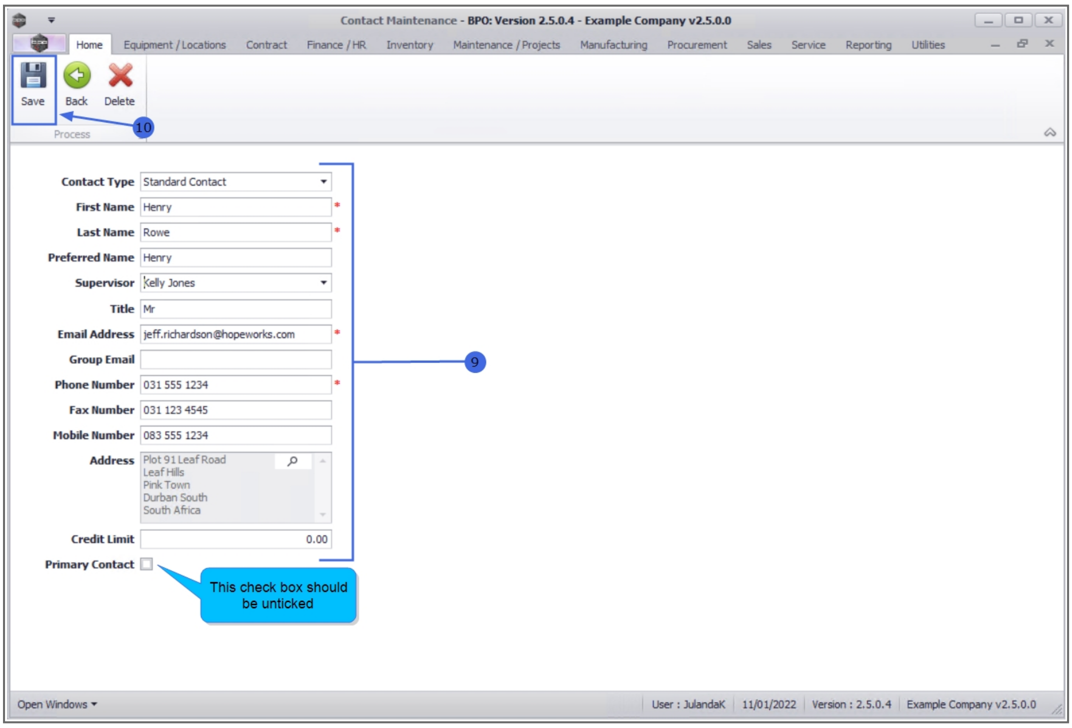
6. The ***Contact Maintenance*** screen will be displayed.
7. Click on the down ***arrow*** in the ***Contact Type*** field.
8. Select ***Standard Contact*** from the drop-down list.



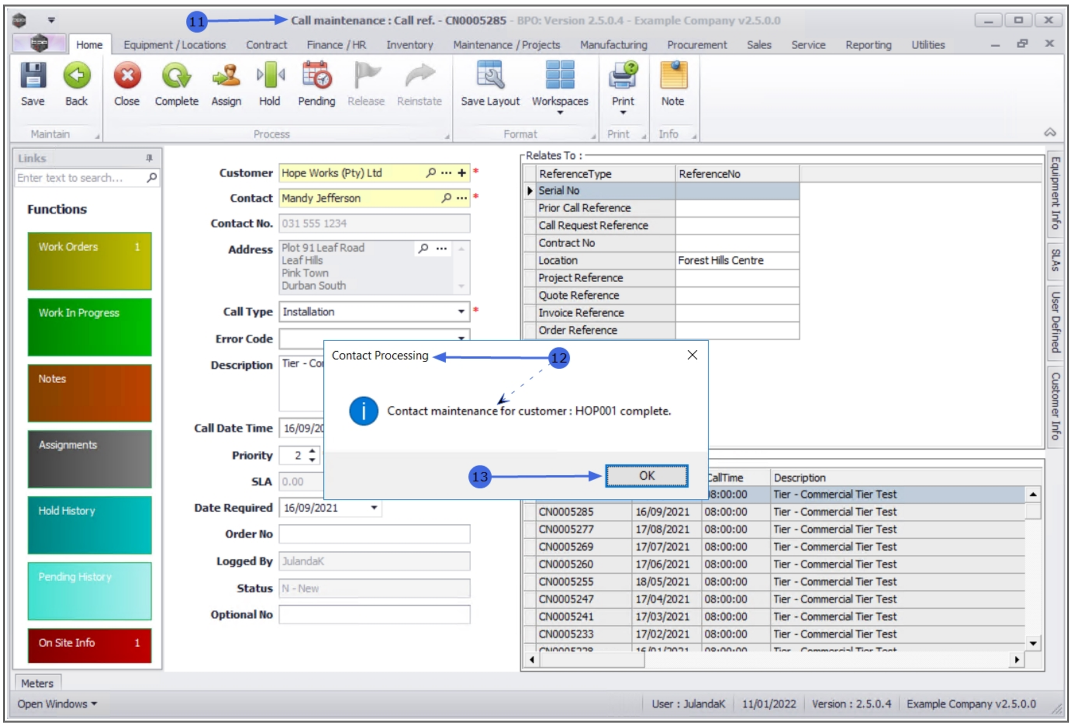
9. Complete the contact details for the new contact as follows;
    - **First Name:** Type in the first name of the contact you are adding.
    - **Last Name:** Type in the last name of the contact.
    - **Preferred Name:** Type in the preferred name for this contact, if applicable.
    - **Supervisor:** 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 mandatory 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:** This ***check box*** must remain <u>unticked</u> as this contact should be created as a ***Standard Contact***.

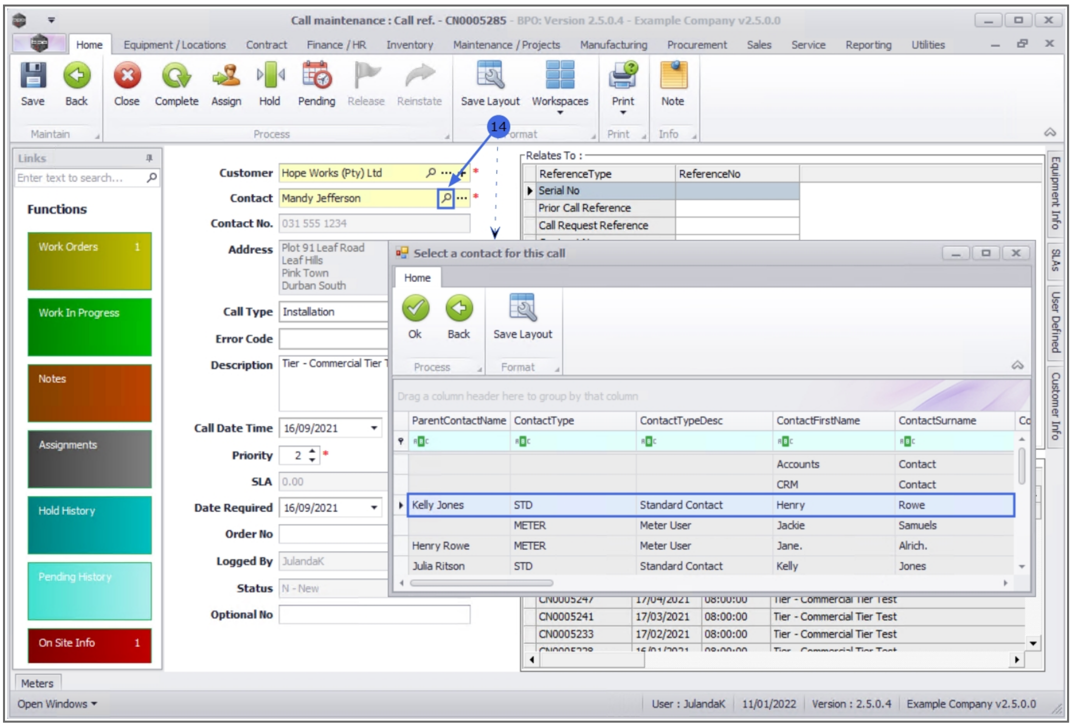
10. When you have completed the contact information, click on ***Save***.



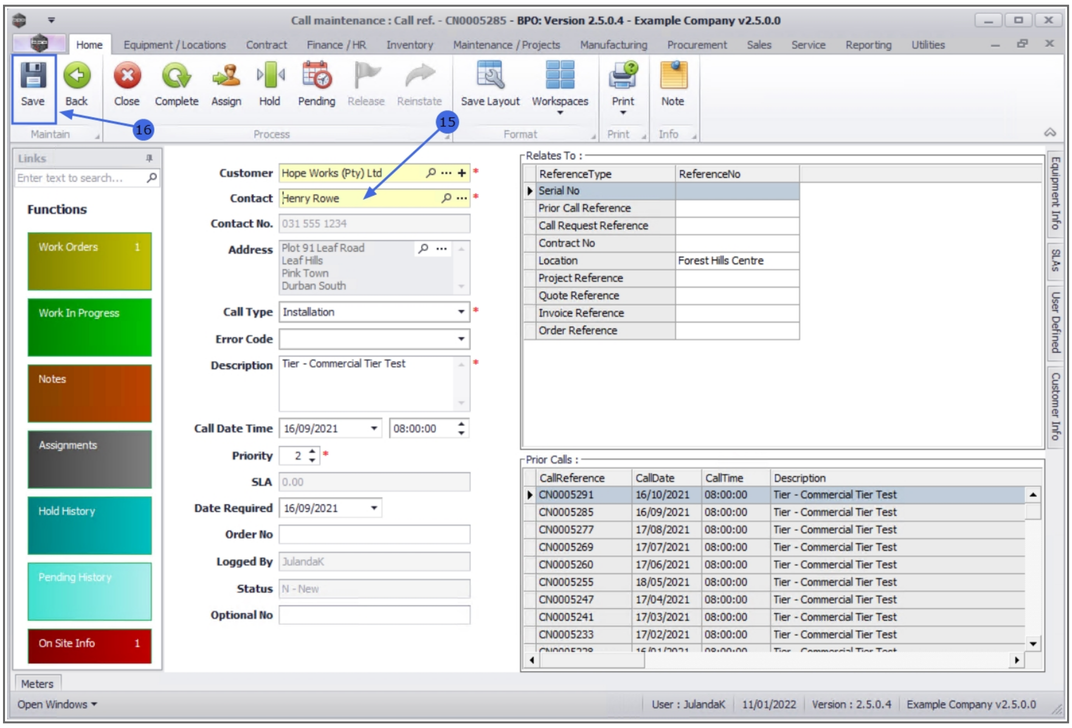
11. You will return to the ***Call maintenance*** screen for the call.
12. When you receive the ***Contact Processing*** message to confirm;
    - ***Contact maintenance for customer :*** *[customer code]* ***complete.***
13. Click on ***OK***.



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.



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



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