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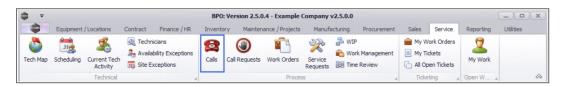
# SERVICE

## **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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- 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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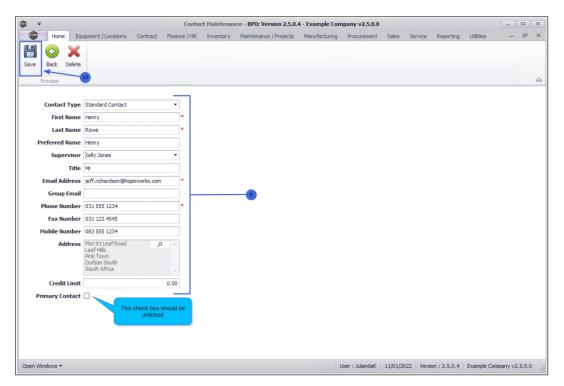
- 9. Complete the contact details for the new contact as follows;
  - **First Name:** Type in the first name of the contact you are adding.
  - Last Name: Type in the last name of the contact.
  - **Preferred Name:** Type in the preferred name for this contact, if applicable.
  - **Supervisor:** Click 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.



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 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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