

(missing or bad snippet)

SERVICE

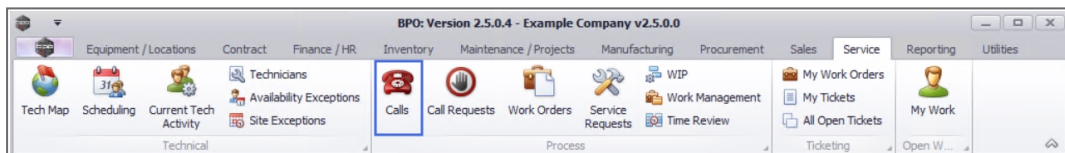
CALLS - ADD NEW CONTACT

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.

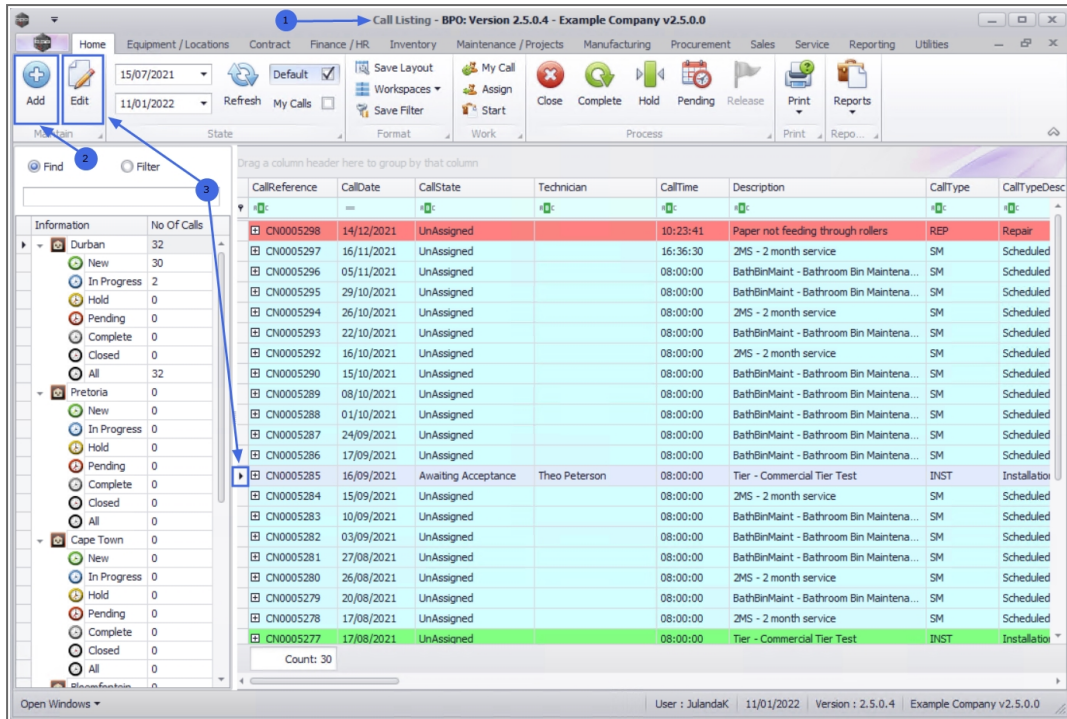


Note that this contact should be set up as a **Standard Contact**.

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**.

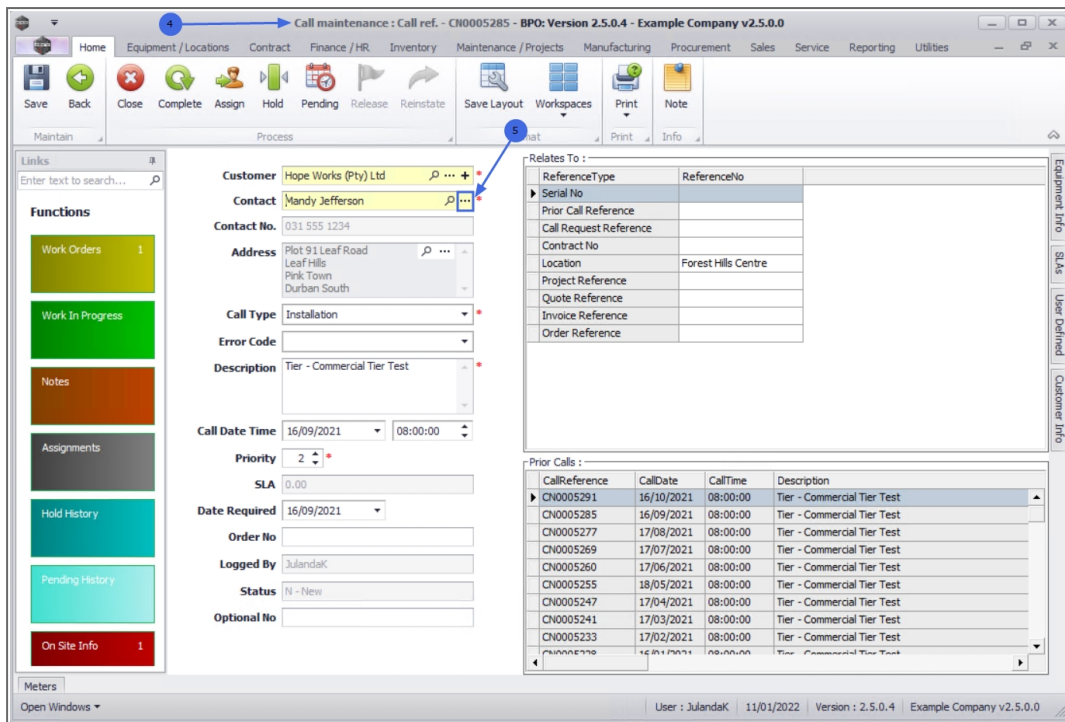


- The **Call maintenance** screen will be displayed for the call you have selected.

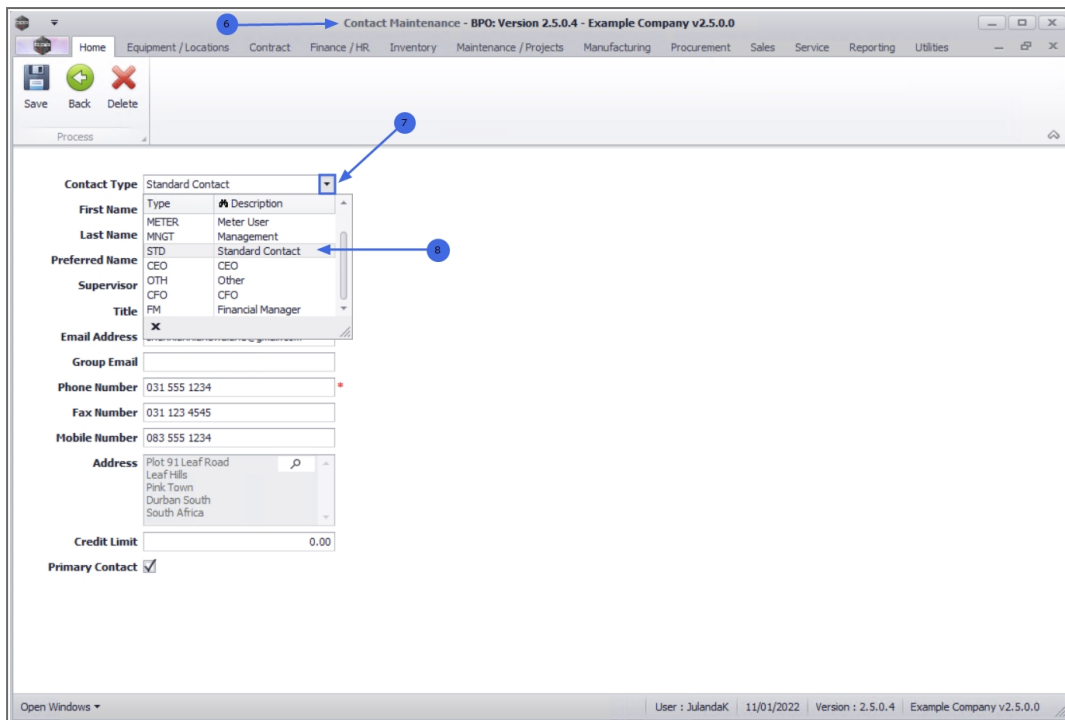


Note that for the example we will be adding a new contact using a call that has already been logged.

- 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.

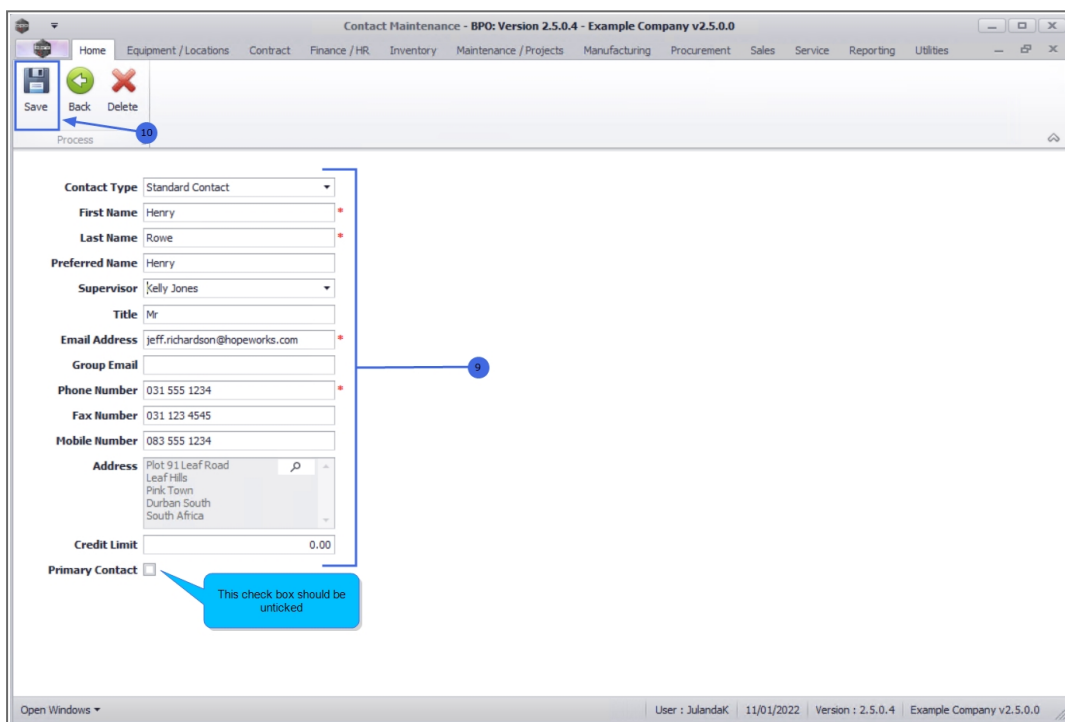


9. Complete the contact details for the new contact as follows;

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

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



The screenshot shows the 'Contact Maintenance' form with the following data:

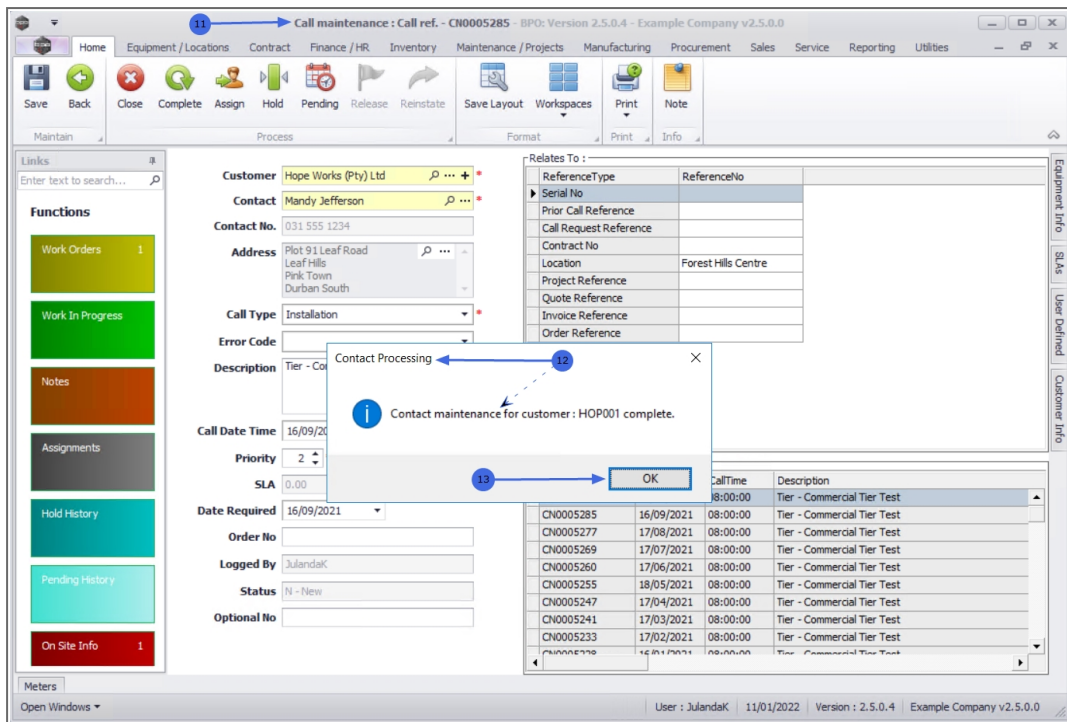
- Contact Type: Standard Contact
- First Name: Henry
- Last Name: Rowe
- Preferred Name: Henry
- Supervisor: Kelly Jones
- Title: Mr
- Email Address: jeff.richardson@hopeworks.com
- Group Email: (empty)
- Phone Number: 031 555 1234
- Fax Number: 031 123 4545
- Mobile Number: 083 555 1234
- Address: Plot 91, Leaf Road, Leaf Hills, Pink Town, Durban South, South Africa
- Credit Limit: 0.00
- Primary Contact:

11. You will return to the **Call maintenance** screen for the call.

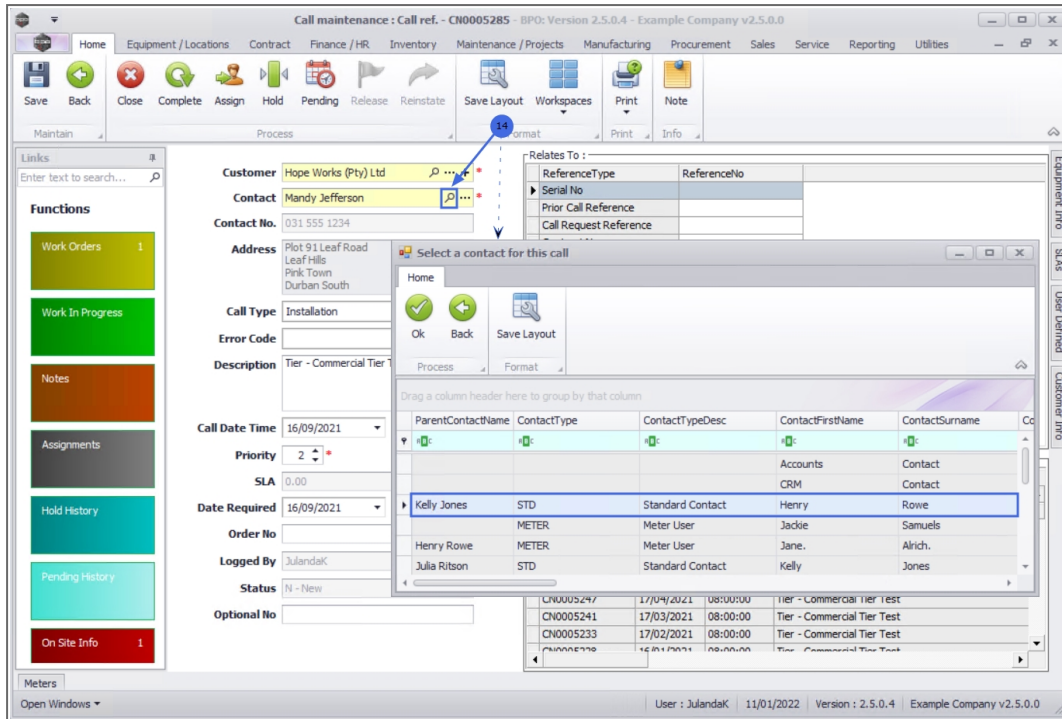
12. When you receive the **Contact Processing** message to confirm;

- **Contact maintenance for customer :** [customer code] **complete.**

13. Click on **OK**.

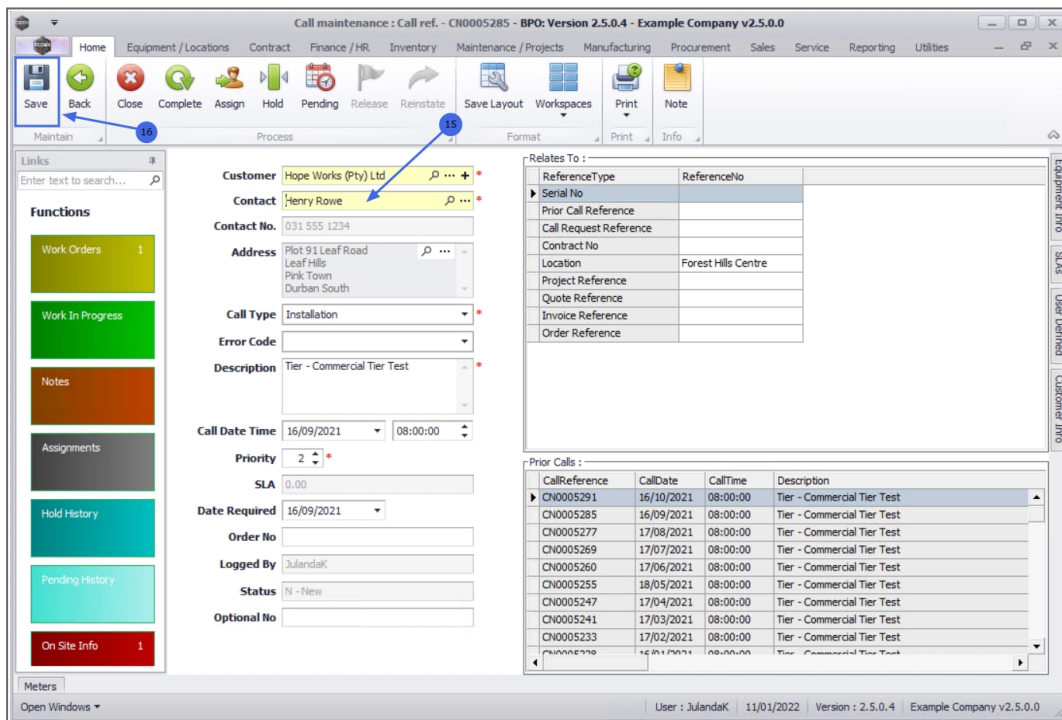


14. The contact you have created will now be available on the **Select a contact for this call** screen, when you click on the **search** button in the Contact field.



15. Update the Contact field with the new contact you have created.

16. Click on **Save**.





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