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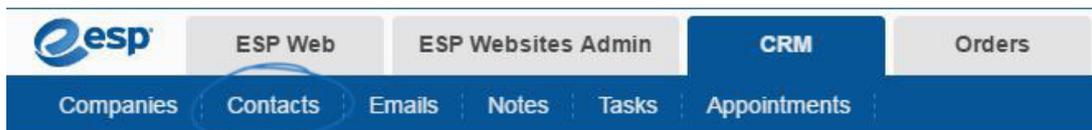
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Adding A New Contact In CRM

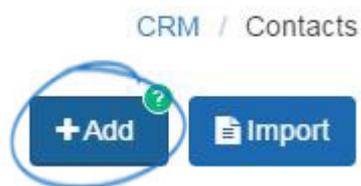
Matt G - 2019-06-18 - in CRM

To create a contact in CRM, the first recommended step is to [create a company](#).

Once your company has been created, you will want to create contacts and link them to the company. To create a contact, click on Contacts from the CRM toolbar.



In the Contacts area, click on the Add button.



Enter the first and last names of the contact. Then, use the company dropdown and select the company to which this contact should be linked.

Create Contact

Fill out the required fields below to add a contact. Additional information can be added later.

First Name *	Last Name
<input type="text" value="Jane"/>	<input type="text" value="Doe"/>
Company	<input type="text" value="Title"/>
<input type="text" value="ABC"/>	<input type="text"/>
<input type="text" value="ABC company"/>	<input type="text"/>
<input type="text" value="ABC Company"/>	<input type="text"/>
<input type="text" value="ABC PEST POOL & LAWN SVC"/>	<input type="text"/>
<input type="text" value="The ABC Promo Corporation"/>	<input type="text"/>
<input type="text" value="Create a new company named ABC"/>	<input type="text"/>
Work Email	<input type="text"/>

Fill in as much as information as possible in the remaining fields including the contact's phone number, email, and website.

Phone	<input type="text" value="Mobile Phone"/>	<input type="text" value="+ 1"/>	<input type="text"/>
Add Phone			
Email	<input type="text" value="Work Email"/>	<input type="text"/>	<input type="text"/>
Add Email			
Website	<input type="text" value="Corporate Website"/>	<input type="text"/>	<input type="text"/>

Use the Tag dropdown to enter or select a tag for this contact. A tag is used to quickly locate contacts when sorting and filtering.

Lastly, select the which users will be able to view this contact:

- Everyone: All users within your organization.
- Only the Record Creator: Only you will be able to view and search for this contact.
- Teams or Individuals: You select the team of users or individual users that will be able to view this contact's information.

Once you have finished, click on the Save button. If you need to add more than one contact, use the arrow next to the Save button to select "Save and Create Another".

