

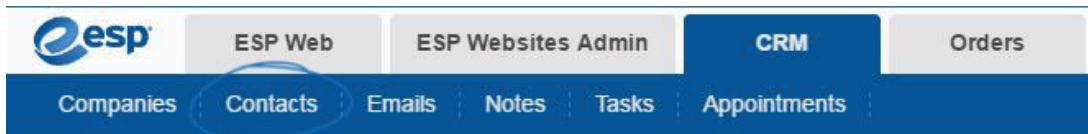


Contacts In CRM

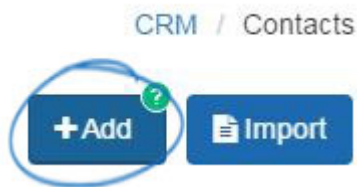
Matt G - 2020-04-03 - CRM

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.

First Name * **Last Name**

Company

ABC Customer Company

Create a new company named **ABC Customer Company**

Phone

[Add Phone](#)

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

Phone

Mobile Phone ▼ + 1 ▼ ✕

Add Phone

Email

Work Email ▼ ✕

Add Email

Website

Corporate Website ▼ ✕

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".

Cancel Save ▼
Save and Create Another

Edit a Contact

To edit a contact, locate the contact record in your CRM. Click on the contact's name to open the record.


Contacts

All Contacts Prospects Users

Q john doe By First Name


Number of Contacts: 5

J

 John Doe johndoe@asicentral.com	←	4800 Street Rd Feasterville-Treose PA, 19053 United States	●
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Next, click on the pencil icon in the upper right.

CRM / Contacts / John Doe

Active  Actions

You will then be able to edit the information for the contact. Click on the Save button when you are finished with your updates.

Delete a Contact

To delete a contact, locate the contact record in your CRM. Click on the contact's name to open the record.


Contacts

All Contacts Prospects Users

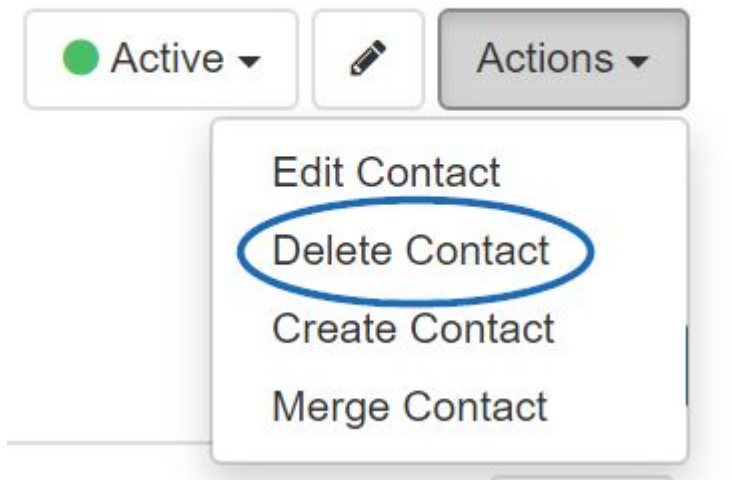
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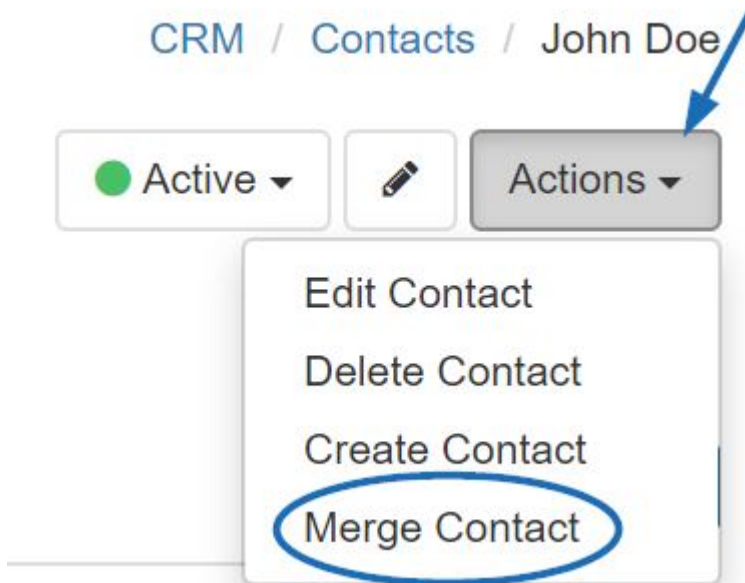
 John Doe johndoe@asicentral.com	←	4800 Street Rd Feasterville-Treose PA, 19053 United States	●
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Next, click on the Actions button and select Delete Contact from the dropdown.



Merge Duplicate Contacts

To combine two contact records within CRM, locate one record and click on the customer's name to open it. Use the Actions to select Merge Contact from the dropdown.



Next, in the Merge Contacts window, use the Contact B field to locate the second, duplicate contact. After reviewing the information for each contact, select which contact (A or B) should be the main contact.

Merge Contact



All information will combine into one single record. No contact information, presentations, orders, emails, notes and tasks will be lost.

Contact A

John Doe

Primary John Doe
4800 Street Rd
Feasterville-Treose, PA
19053
United States

555-555-5555
jdoe@abc.com

Contact B

Select a contact to merge with

Select Contact

Cancel

Merge Contacts

When merging contacts, there are three key aspects:

- This is a permanent action and cannot be undone.
- By choosing to merge into a contact, if information exists for the same field in both contacts, only the information from the main contact will remain after the merge. In other words, let's say both contacts contained address information, but the user has selected to merge Contact A into Contact B. After the merge is complete, the address information will reflect what had been entered for Contact B.
- If one contact contains information that the other did not have, then it will be added during the merging process.