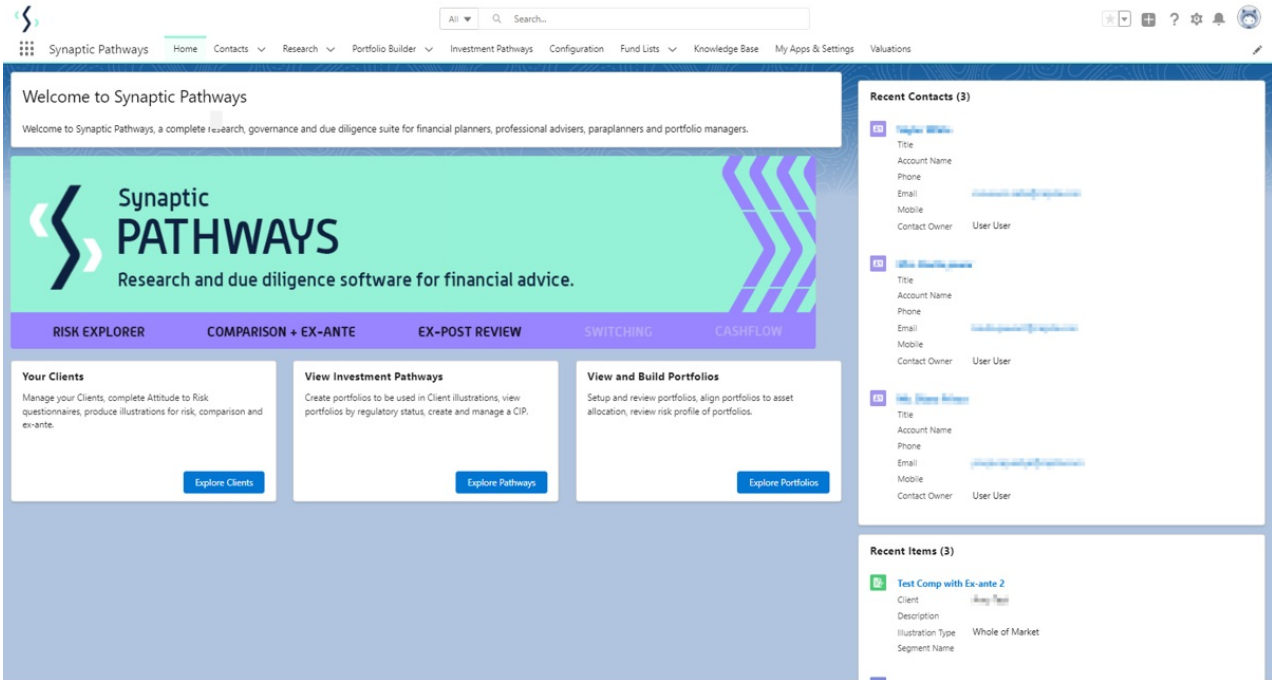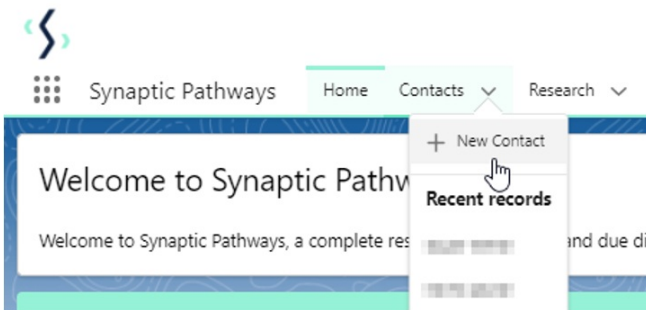# Creating a Contact

Last Modified on 25/05/2022 4:42 pm BST

Create a new contact by navigating to **Contact** in the top toolbar:

Select the drop down arrow to create a new contact:

Complete the details of your client:

When entering the birthdate, start by selecting the year, month and day:

The birthdate can be overridden by clicking into the field:

Complete address details by clicking 'Search Address':

As you enter the details, it will narrow down the search results. Select the correct address from the drop down and the relevant fields with be populated:
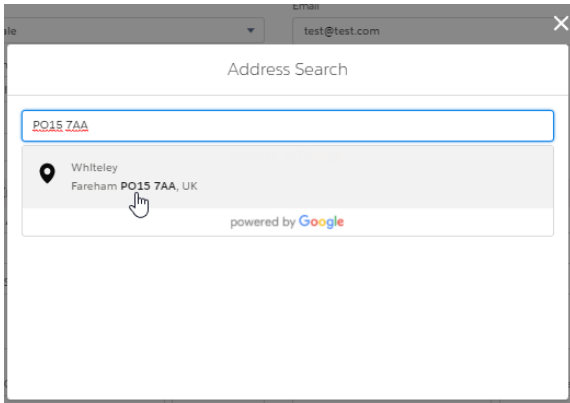
Once complete, if you are only adding the one contact click 'Save'.

If you need to add further contacts, click 'Save& New' (This will save the current contact and will open a new record to complete).

Once saved, you will be taken to the new contact record:

Home   Contacts ⌄   Research ⌄   Portfolio Builder ⌄   Investment Pathways   Configuration   Fund Lists ⌄   Knowledge Base   My Apps & Settings   Valuations
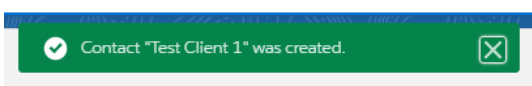
Contact
Mr. Test Client1

+ Follow   Edit   New Contact   New Opportunity   ⌄

Title   Account Name   Phone (2) ▾   Email   Contact Owner
07771111111   test@test.com   👤 Amy Paulsen

Related   Details   Holdings

👤 We found 1 potential duplicate of this Contact.   View Duplicates

📄 **Attitude To Risk Questionnaires (0)**   New   Change Owner

📊 **Risk Illustrations (0)**   New   Change Owner

📗 **Research (0)**   New   Change Owner

🗂 **Opportunities (0)**   New

📒 **Cases (0)**   New   Change Owner

🔧 **Off-Platform Holdings (0)**   New

🔧 **Platform Holdings (0)**   New

🎯 **Campaign History (0)**   Add to Campaign

Recent Items (3)

📄 **Risk Questionnaire**
Contact   Client Test

📄 **Risk Questionnaire.**
Contact   Jane Doe

📄 **Risk Questionnaire**
Contact   Jane Doe

Activity   Chatter

New Task   New Event   Log a Call   Email

Create a task...   Add

Filters: All time • All activities • All types   ⚙

Refresh • Expand All • View All

⌄ Upcoming & Overdue
No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.