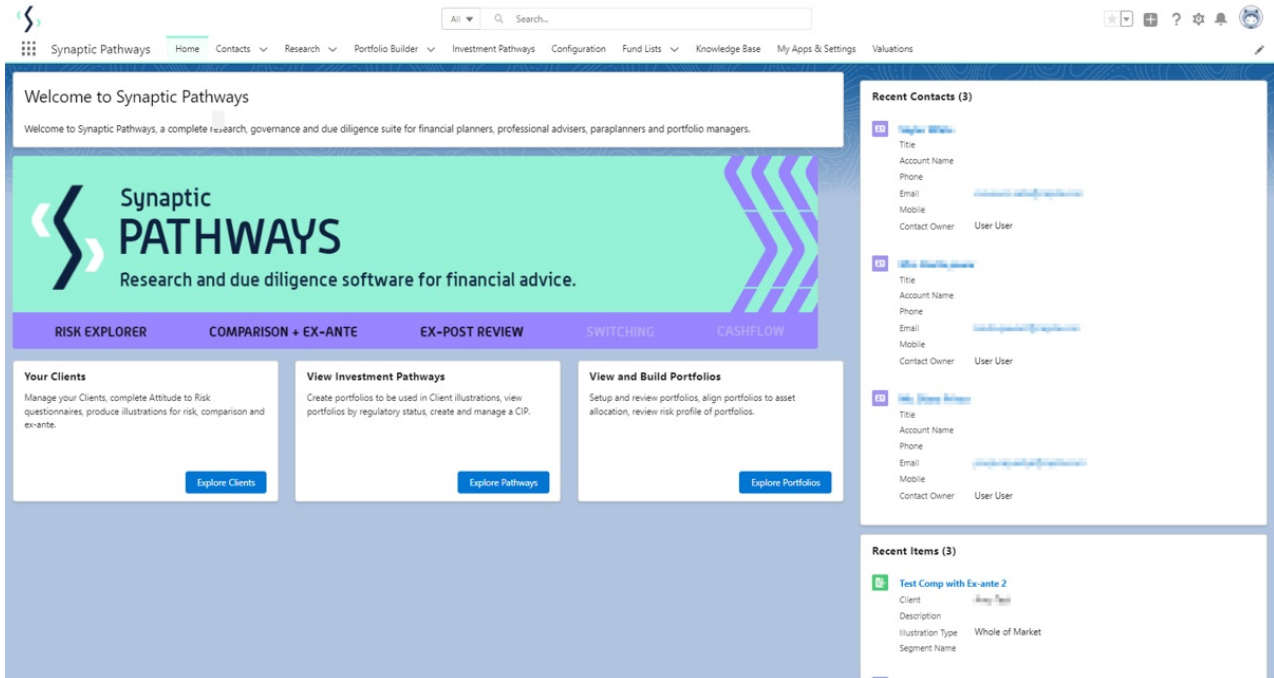


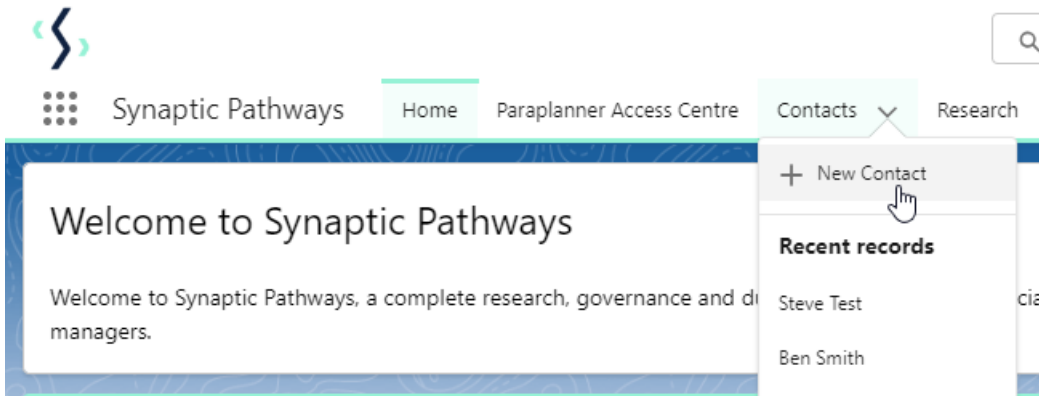
Creating a Contact

Last Modified on 13/02/2024 3:35 pm GMT

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:

New Contact

Contact Information

Contact Owner
Amy Paulsen

Phone
0777777771

* Name

Salutation
Ms.

Home Phone
0142222222

First Name
Test

* Last Name
Client 1

Account Name
Search Accounts...

Mobile

Birthdate

Other Phone

Occupation
Search Occupations...

Fax

Sex
--None--

Email

Employment Basis
--None--

Salary

Address Information

Mailing Address
Search Address

Other Address
Search Address

Mailing Street

Other Street

Cancel Save & New Save

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

Contact Information

Contact Owner
Amy Paulsen

Birthdate

1970

2020

1965
1966
1967
1968
1969
1970
1971
1972
1973
1974
1975
1976
1977
1978
1979
1980
1981
1982
1983
1984

OCTOBER 1970

Go to previous month

Mon 28 29 30 1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31 1
2 3 4 5 6 7 8
Today

SEPTEMBER 1970

Mon Tue Wed Thu Fri Sat Sun
31 1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 1 2 3 4
5 6 7 8 9 10 11
Today

The birthdate can be overridden by clicking into the field:

Birthdate

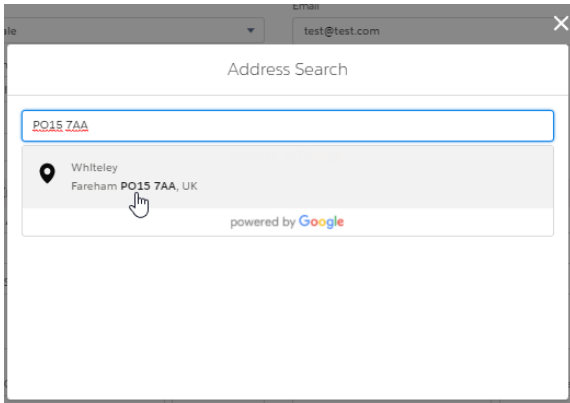
24/09/1970

Complete address details by clicking 'Search Address':

Mailing Address

Mailing Street

As you enter the details, it will narrow down the search results. Select the correct address from the drop down and the relevant fields will be populated:



Mailing Address

Mailing Street

Mailing City

Mailing State/Province

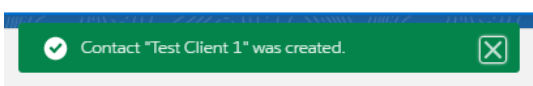
Mailing Zip/Postal Code

Mailing Country

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:





Contact **Mr. Test Client1**

+ Follow Edit New Contact New Opportunity

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

Related Details Medical Holdings Related Contacts Family AUM

- We found no potential duplicates of this Contact.**
- Attitude To Risk Questionnaires (0)** New
- Risk Illustrations (0)** New
- Research (0)** New
- Income Analysis (0)** New
- Protection (0)** New
- Opportunities (0)** New
- Cases (0)** New

Recent Items (3)

- Test Questionnaire**
Contact Susanna West
- Test**
Contact Susanna West
- Test Questionnaire**
Contact Mike Smith

Activity Chatter

Calendar Chat Email

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

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