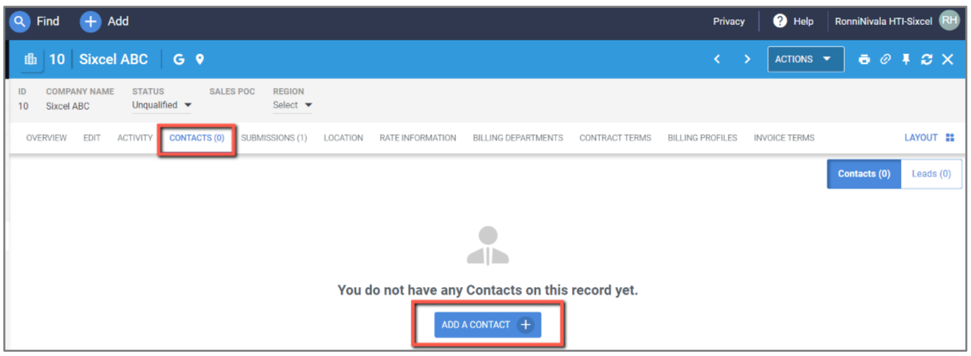
Contact

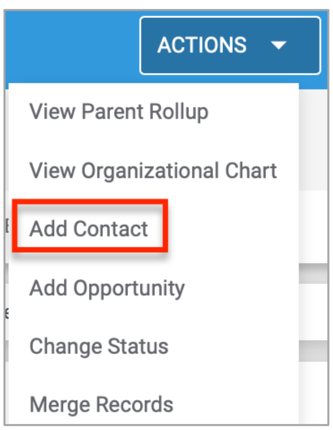
Creating a Contact

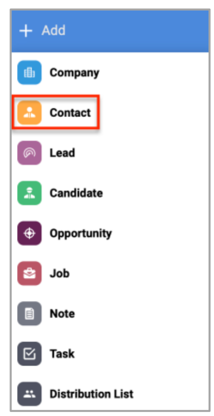
To record calls or visits for a new Company, enter a Job, submit a Candidate to a client or other activity, a Contact record is required.

From the Company record, click the **Contacts** tab and then **Add Contact** to create a Contact.

- Contacts can also be created from the Company *Actions* dropdown
- Alternatively click the + **Add** Fast Add to create a new Contact

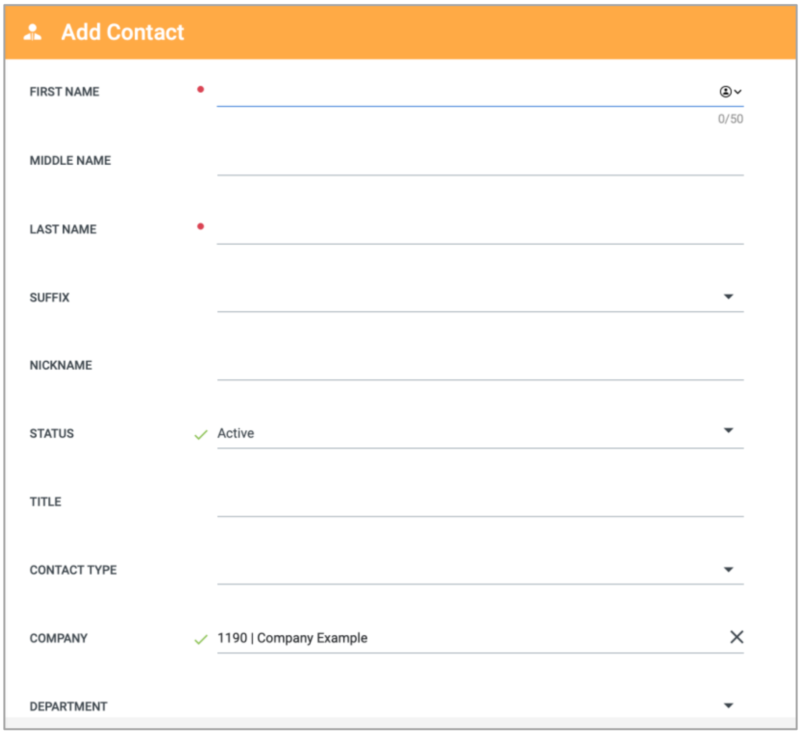




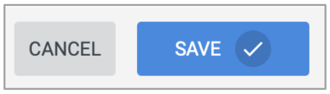


Contact

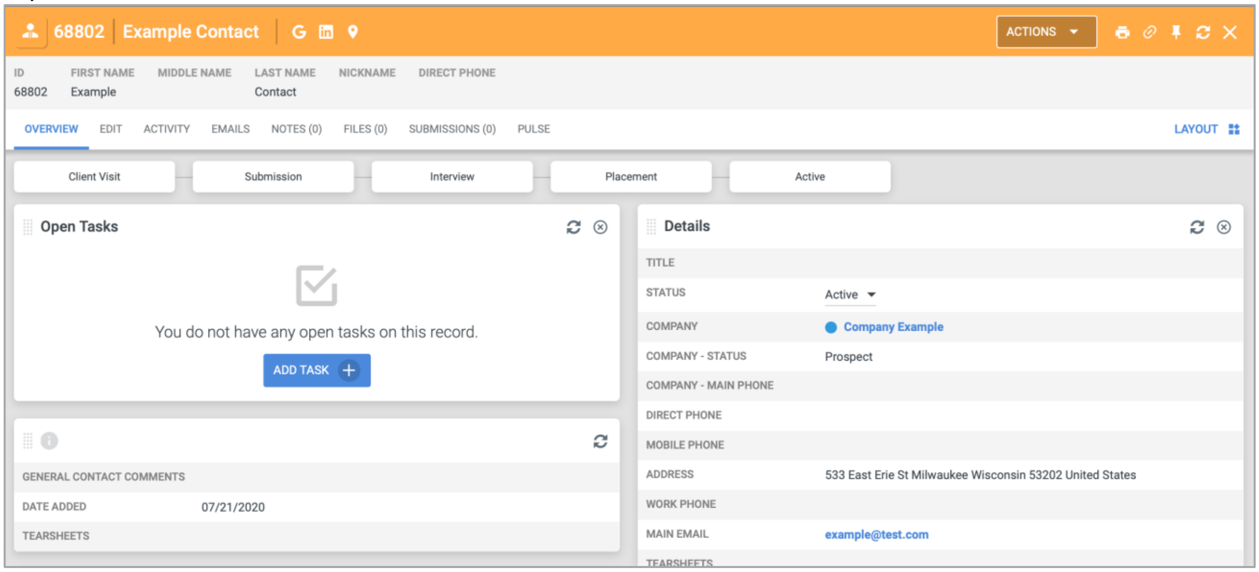
Once the *Add Contact* page opens, populate all required fields, adding as much information as possible. Required fields are indicated by a red dot.



Once all Contact details are populated, click **Save**



The created Contact appears. The unique Contact ID and Contact name appear in the banner across the top.



Contact

The tabs across the top of the Contact contain information about the record. Tabs include:

- **Overview:** provides a view of the Contact Cards, containing general details
- **Edit**: used if details about the Contact require updating
- **Activity**: a summary of related records and actions taken for this Contact
- **Emails**: a list of emails associated with the Contact
- **Notes**: a list of notes associated with the Contact
- **Files**: a list of files associated with the Contact. Files are uploaded under this tab.
- **Submissions**: a list of Candidates who have been submitted to the Contact's Jobs
- **Pulse**: keeps track of the engagement with this Contact

The Contact workflow items track activity associated with the Contact. This includes:

- **Client Visits**: lists the total number of visits, as well as the associated notes, with this Contact
- **Submissions**: tracks the total number of submissions for this Contact's Jobs
- **Interviews**: tracks the total number of interviews that have been scheduled with this Contact
- **Placements**: tracks the total number of placements that have been made for this Contact
- **Active:** indicates the total number of active placements with this Contact

Workflow items may vary depending on how your system is configured.