Add new — Overview

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Applications › Add new

Overview

The Add new area provides entry screens for creating and maintaining operational records used across customer, sales, and project activities. It includes records for accounts, contacts, calls, meetings, tasks, visits, payments, and products.

Sales representatives, project managers, purchasing officers, warehouse managers, and finance users can use these screens to record the parties, activities, transactions, and products relevant to their work. These records support the information required for sales jobs, customer follow-up, procurement, stock management, and financial processing.

Each screen provides controls for confirming, saving, cancelling, or removing the record, as well as access to related application areas where available.

What you can do here

- Use **Save** to save the account, contact, activity, payment, or product record you are creating or updating.
- Use **Save and Close** to save the current record and close its entry screen.
- Use **Select** to choose an available item or related record.
- Use **Ok** to confirm the current selection or action.
- Use **Cancel** to close the current action without confirming it.
- Use **Delete** to remove the current record.
- Use **Attach** to add attachments to the current record.

Related pages

- Contact
- **Call**
- Add new — Learning Path
- Task
- **Payment**
- Direct Order
- Process