Contact

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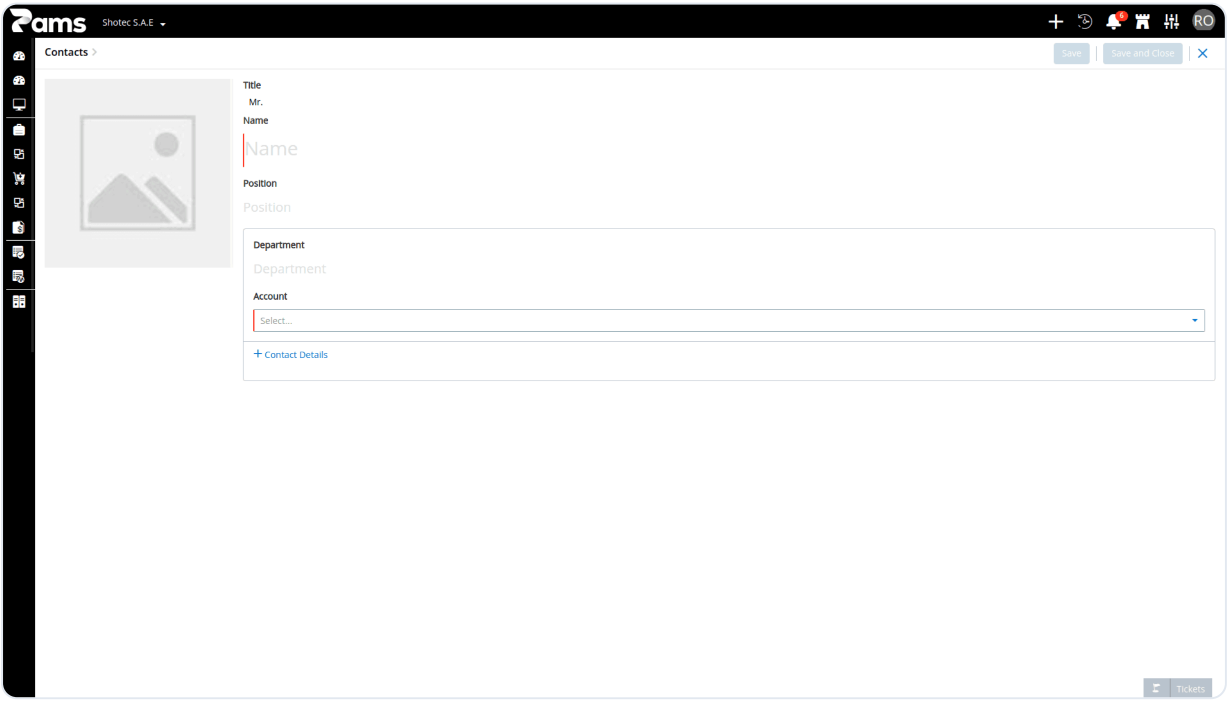
Contact

Applications › Add new › Accounts



Contact — Add new › Accounts › Contact

Overview

Use **Contact** to create and maintain an account contact record from **Add new > Accounts > Contact**. Sales representatives, project managers, purchasing officers, warehouse managers, finance accountants, and accounts receivable/payments officers can record the contact’s name, role, department, and account credentials where applicable. Complete the contact record before saving it for later use.

Workflow

1. Start a new contact record

Open **Add new > Accounts > Contact**. Enter the contact information that is available and relevant to the account.

1. In **Enter User Name**, enter the user name for the contact account, if one is required.
2. In **Enter Password**, enter the corresponding password, if applicable.
3. Complete **Title**, **Name**, **Position**, and **Department** to identify the person and their role.
4. Use **Select...** where a selection is required.
5. Review the entered values before deciding whether to save, continue editing, or leave the record.

> **Note:** No field is identified on this screen as mandatory. Enter complete and accurate contact details so that the record can be identified clearly by other business users.

2. Decide whether to save or continue editing

After entering the contact details, choose the action that matches your next step.

1. To save the record and remain on the Contact screen, select **Save**. Use this option when you need to review the saved record or continue entering information.
2. To save the record and exit the Contact screen, select **Save and Close**. Use this option when the contact record is complete.
3. To leave without continuing the current editing action, select **Cancel**.
4. To exit the screen, select **Close**.

> **Tip:** Use **Save** before opening a related action such as **Tickets** or **Attach** so that the contact details entered so far are retained.

3. Add supporting files when needed

Use attachments when you need to keep supporting files with the contact record.

1. Select **Attach**.
2. Add the required file to **files[]**.
3. Select **Ok** to confirm the attachment action when prompted.
4. Select **Save** to retain the contact record after adding files, or select **Save and Close** when all work is complete.

4. Review related tickets when required

Use the available ticket action when you need to work with tickets associated with the contact.

1. Select **Tickets**.
2. Review the available ticket information.
3. Return to the Contact record and select **Save** or **Save and Close** after completing any required updates.

5. Remove an incorrect contact record

If the contact record should not be retained, use the deletion action.

1. Review the record carefully to confirm that it is the contact you intend to remove.
2. Select **Delete**.
3. Select **Ok** if confirmation is requested.

> **Warning: Delete** removes the contact record. Confirm the contact name and account details before using this action.

Examples

A purchasing officer needs to add a contact for a supplier account.

1. Open **Add new > Accounts > Contact**.
2. Enter `supplier.portal` in **Enter User Name**.
3. Enter the approved account password in **Enter Password**.
4. Enter `Ms.` in **Title**.
5. Enter `Amina Rahman` in **Name**.
6. Enter `Procurement Coordinator` in **Position**.
7. Enter `Purchasing` in **Department**.
8. Use **Select...** if a selection is needed for the contact.
9. Select **Attach** and add the supplier contact document to **files[]**, where required.
10. Select **Ok** to complete the attachment action.
11. Select **Save and Close** to save the completed contact record and return from the screen.

Tips

> **Tip:** Use a clear value in **Name** together with **Position** and **Department** so that users can distinguish contacts with similar names.

> **Note:** Select **Save and Close** only after you have finished entering the contact details. Select **Save** when you need to remain on the record.

> **Warning:** Treat values entered in **Enter Password** as sensitive account information and enter them only when required for the contact record.

Troubleshooting

Symptom	Likely cause	Fix
You need to continue editing after entering contact details.	The record has not yet been saved while remaining on the screen.	Select **Save**, then continue editing the contact record.
You left the Contact screen before completing the record.	**Close** or **Cancel** was selected instead of a save action.	Reopen **Add new > Accounts > Contact**, enter the details, and select **Save** or **Save and Close**.
A contact record was removed unexpectedly.	**Delete** was selected for the record.	Verify the contact before using **Delete**. Create a new Contact record if the details must be entered again.

Related pages

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