Adding a New Contact to an Existing Record in CRM

This guide provides a straightforward, step-by-step approach to adding a new contact in your CRM system, ensuring that you can efficiently manage your clients contacts. By following these detailed instructions, you can save time and avoid potential errors when entering important information. It's an essential resource for anyone looking to streamline their CRM processes and enhance their organisation skills.

1 Navigate to the Applicant/Landlord/Vendor/Tenant record you want to add a new contact to.

2 Click "Contacts"

Applicant Temp.	**H**
Created	08:42 04/08/2023
Last Contacted	07/03/2025 11:19

- 👤 **Details**
- ⊘ Checklist
- 👁 Viewings
- 🖥 Offers
- 👥 Linked Applicants
- 📇 Contacts
- 📁 Documents
- 🗃 Journal
- ✏️ E-Sign
- ⊘ Audit

SA Mr Sales Applicant11
zagg.dave5@gmail.com

AP ⓘ Warning

1 Kingsway, Darlington, County Durham

Reference:	Negotiator: David-George Morgan ▾	Branch Morgan & Co ▾	Status Active

Personal Information

Title	Forename	Surname	Company Name
Mr	Sales	Applicant11	

Website	Phone Number	Work phone	Mobile phone

Email Address	Salutation	Source	Temperature
zagg.dave5@gmail.com ✉	Applicant11 🔧	Advert	Hot

Applicant Address   📍 Edit Me

Postcode	Address
DL1 3EY 🔍	1 Kingsway, Darlington, County Durham, DL1 3EY, UK

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3 Click "New Contact"

iam property

My day   Lettings ⌄   Sales ⌄   Accounts ⌄   Reporting ⌄   Communications ⌄   ▦ 🗓 🔔 🔍   👤 My a...

Applicant Status	✓
Applicant Temp.	**H**
Created	08:42 04/08/2023
Last Contacted	07/03/2025 11:19

- 👤 Details
- ⊘ Checklist
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Reference:	Negotiator: David-George Morgan ▾	Branch Morgan & Co ▾	Status Active

+ New Contact

▦ ▤ ▤ 2 Contacts

⇅ Sort Contacts ▾

Search

Clear filters

| CC On Statements ⬭ 🗑	CC On Statements ⬭ 🗑
CK	**CK**
Charles w kingsfield jr	Charles w kingsfield jr
zagg.dave@gmail.com	zagg.dave@gmail.com
—	—
2 Duke Street, DL1 0ZA Darlington, Co Durham	2 Duke Street, DL1 0ZA Darlington, Co Durham

4 Click here and search if you are picking an existing contact e.g. a Solicitor
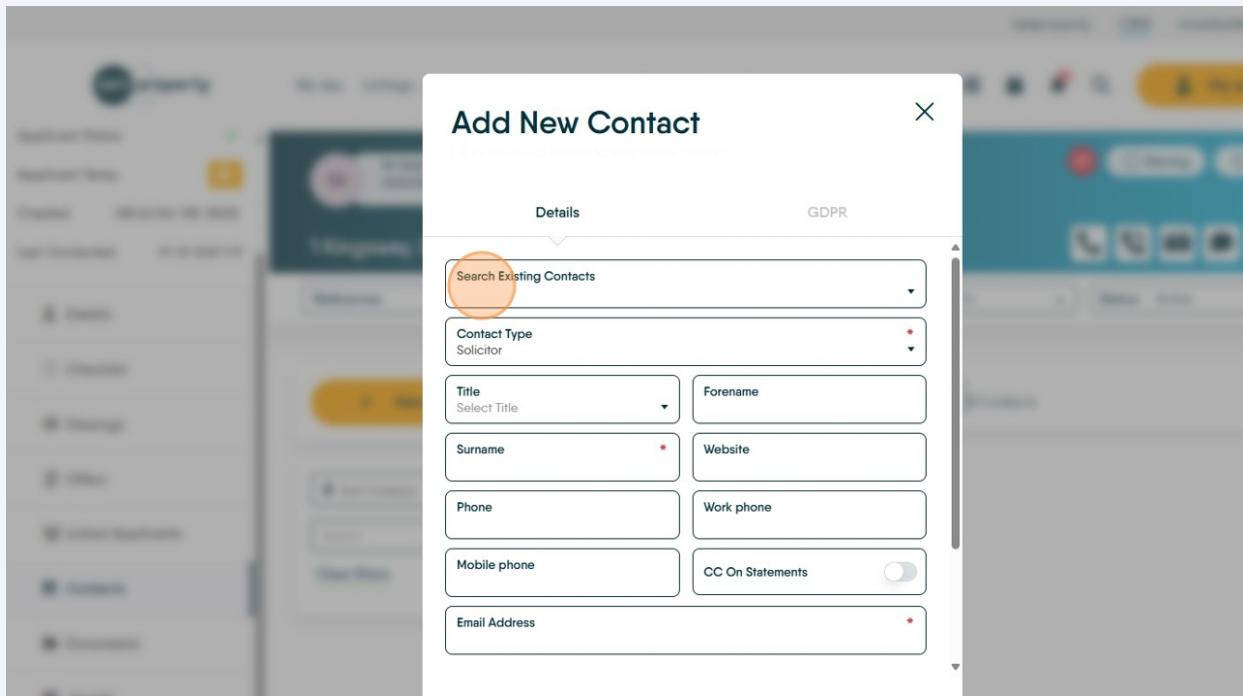
5 Type the name of the Contact you are searching for and select from the drop down menu.
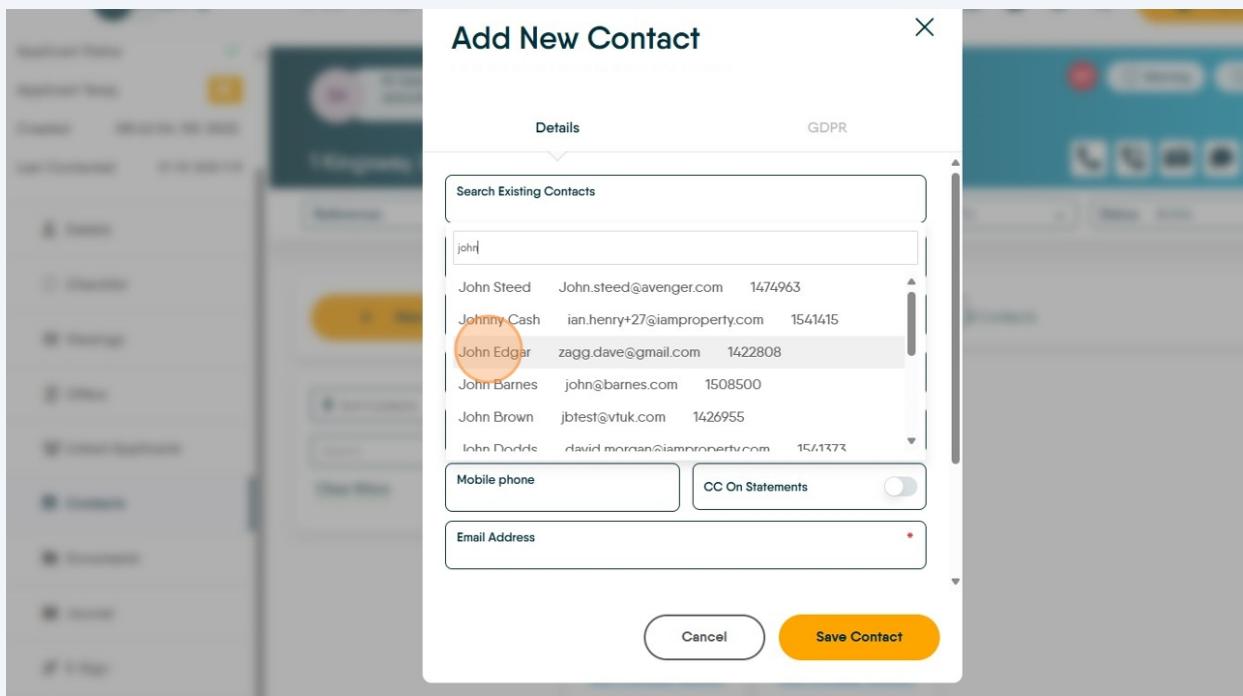
6 If you are adding a new Contact. Click here.
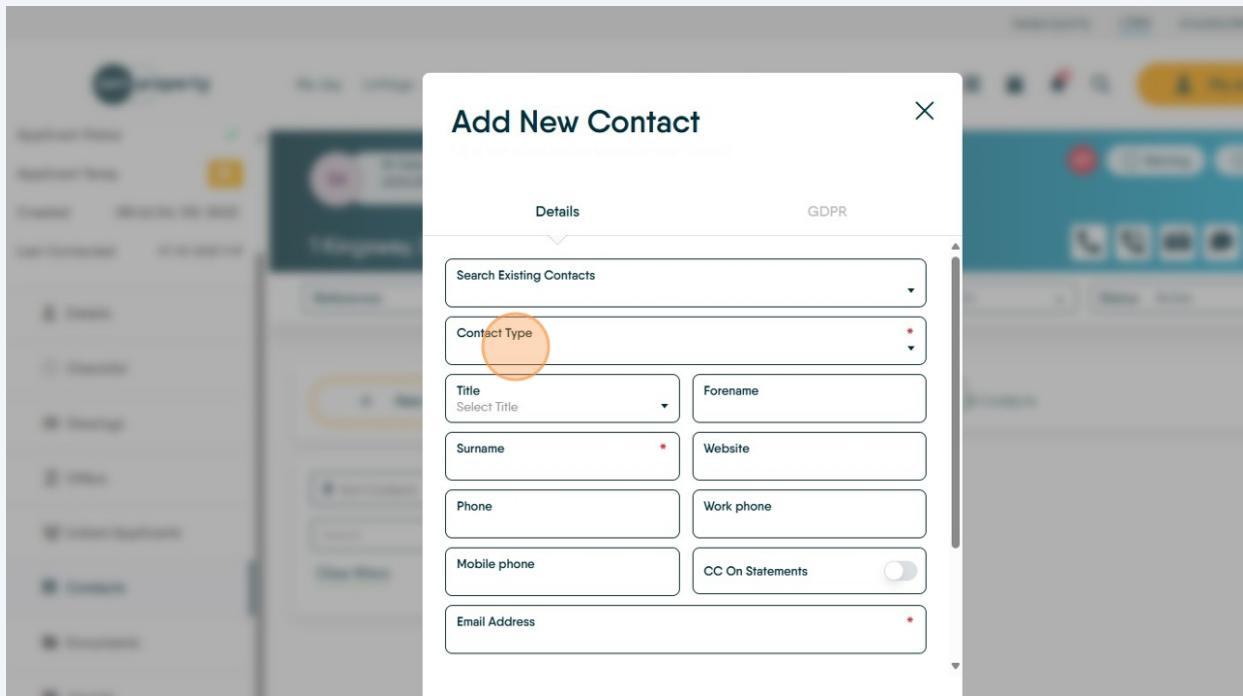
7 Select the Contact type from the drop down menu, for example click "Solicitor"
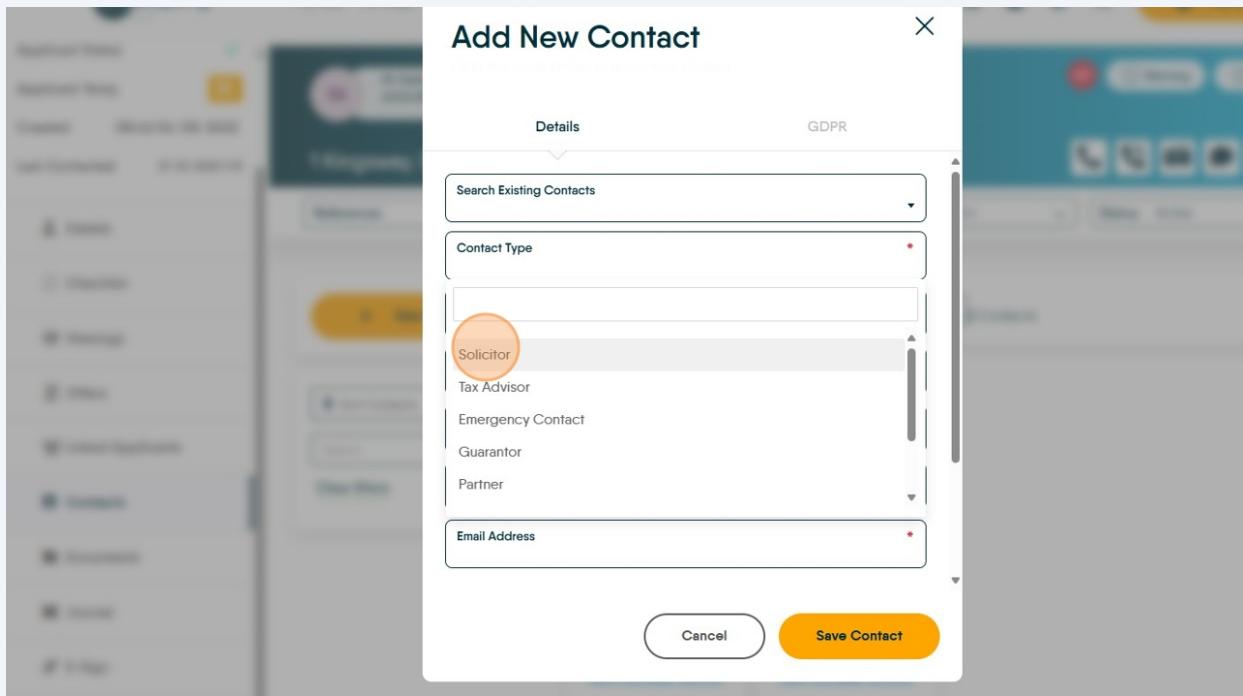
8 Complete all the fields
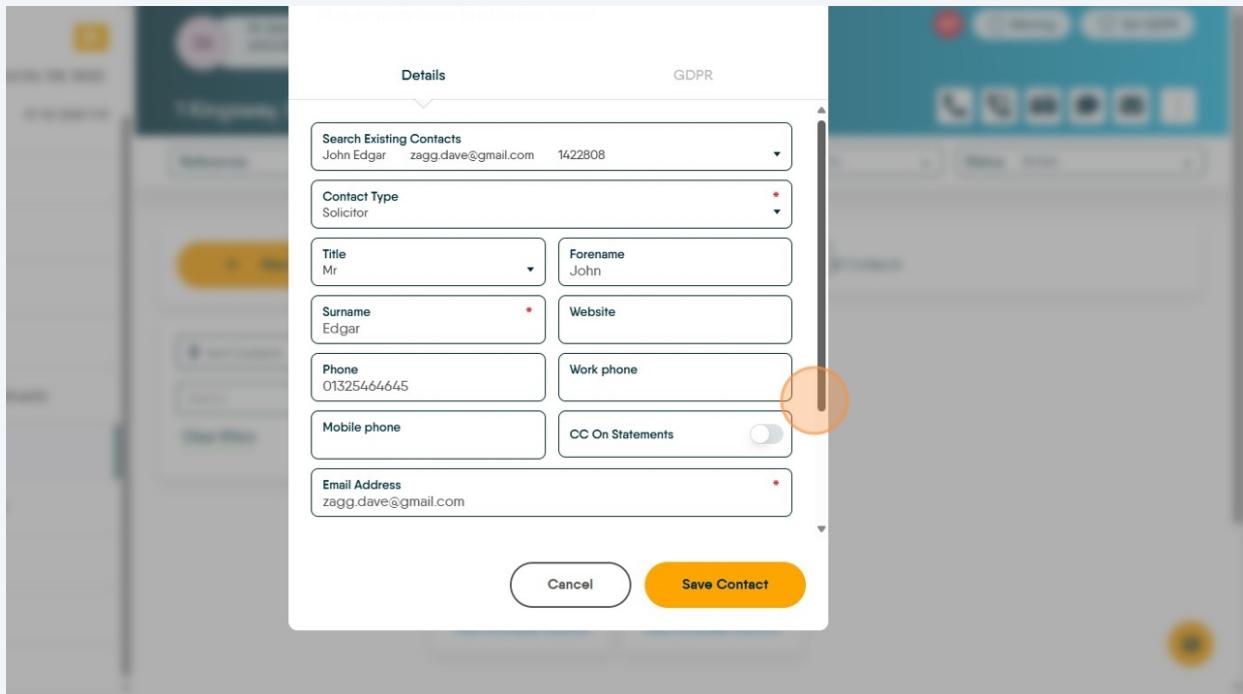
9 Click this field and add the postcode if you have it.
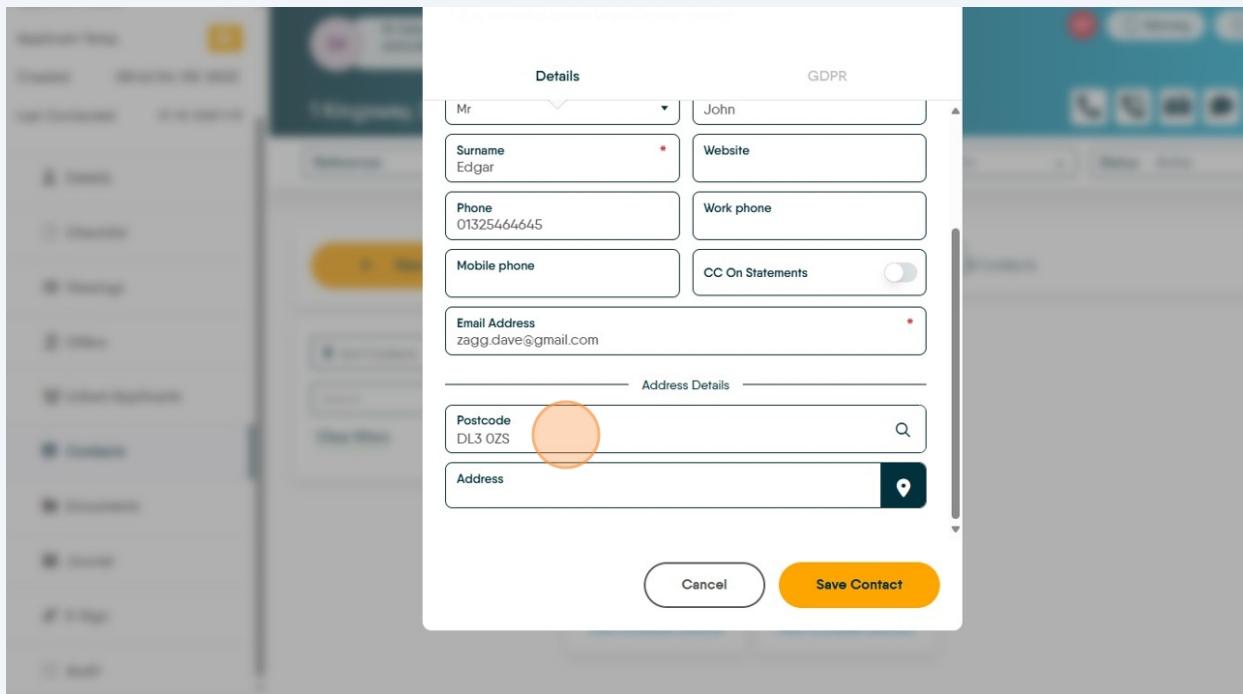
10 Click here to search.
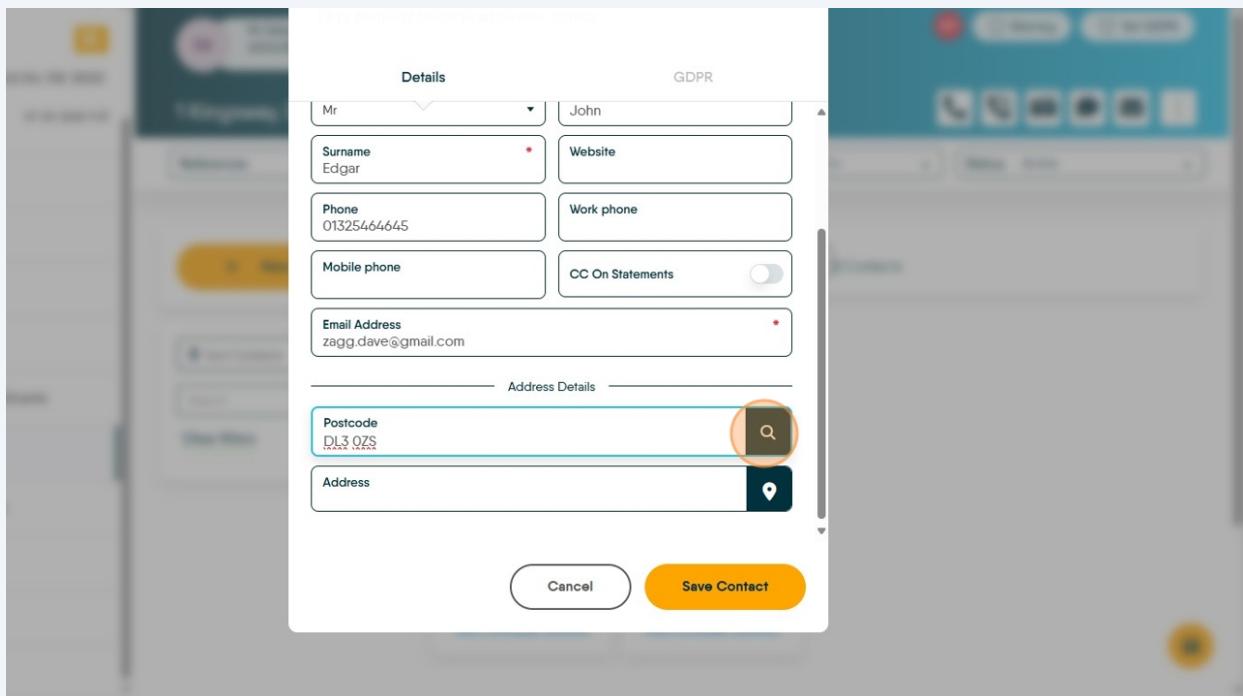
11 Click "-- Select Address --" to find the contact.
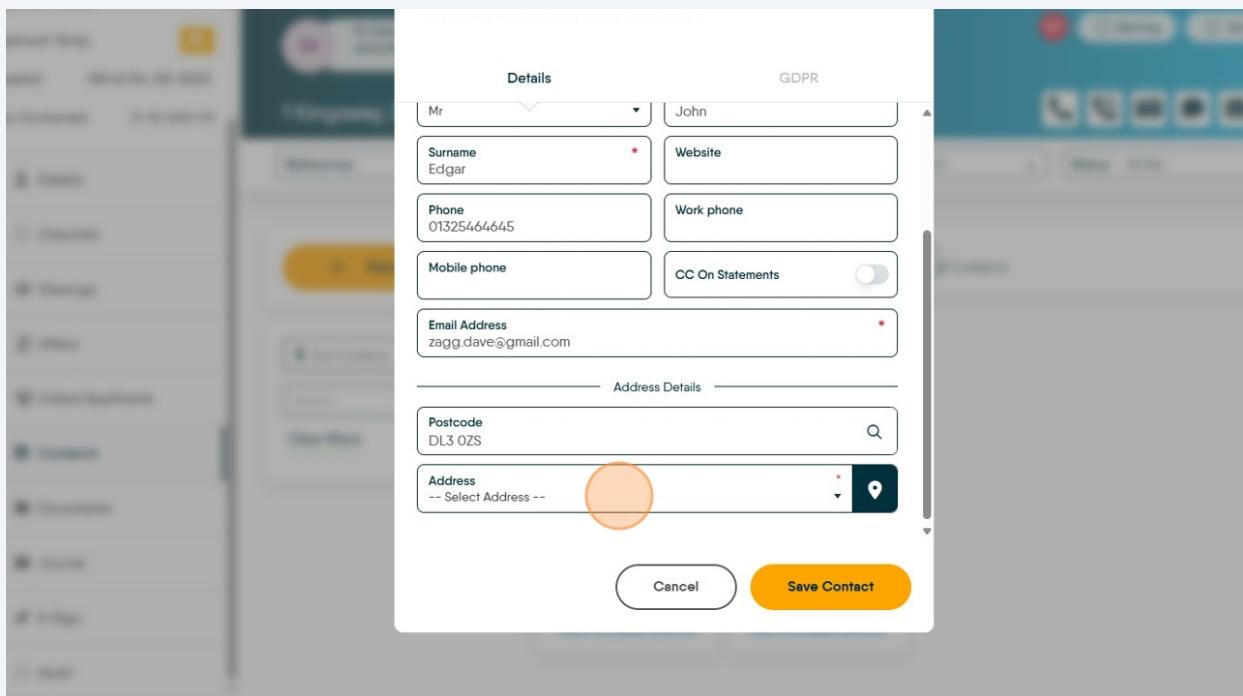
12 Click "Save Contact"
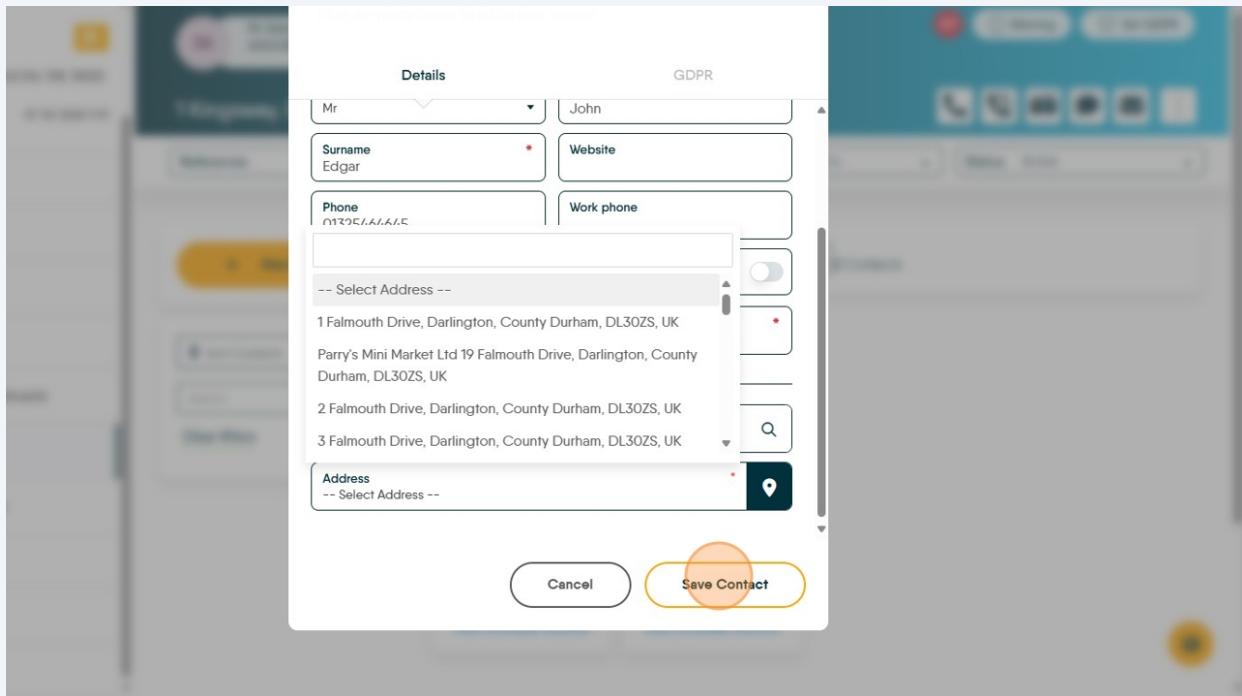
⚠ Alert! At this point you may be asked to update the GDPR information for the contact and add the negotiator details.

13 Click "GDPR" select all the options as appropriate to your company policy.
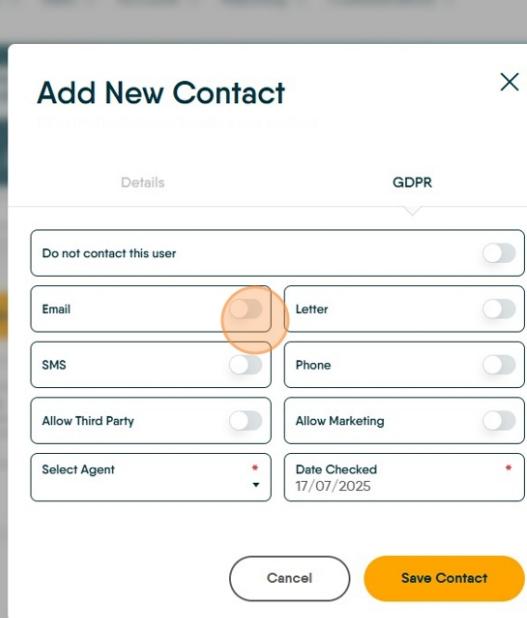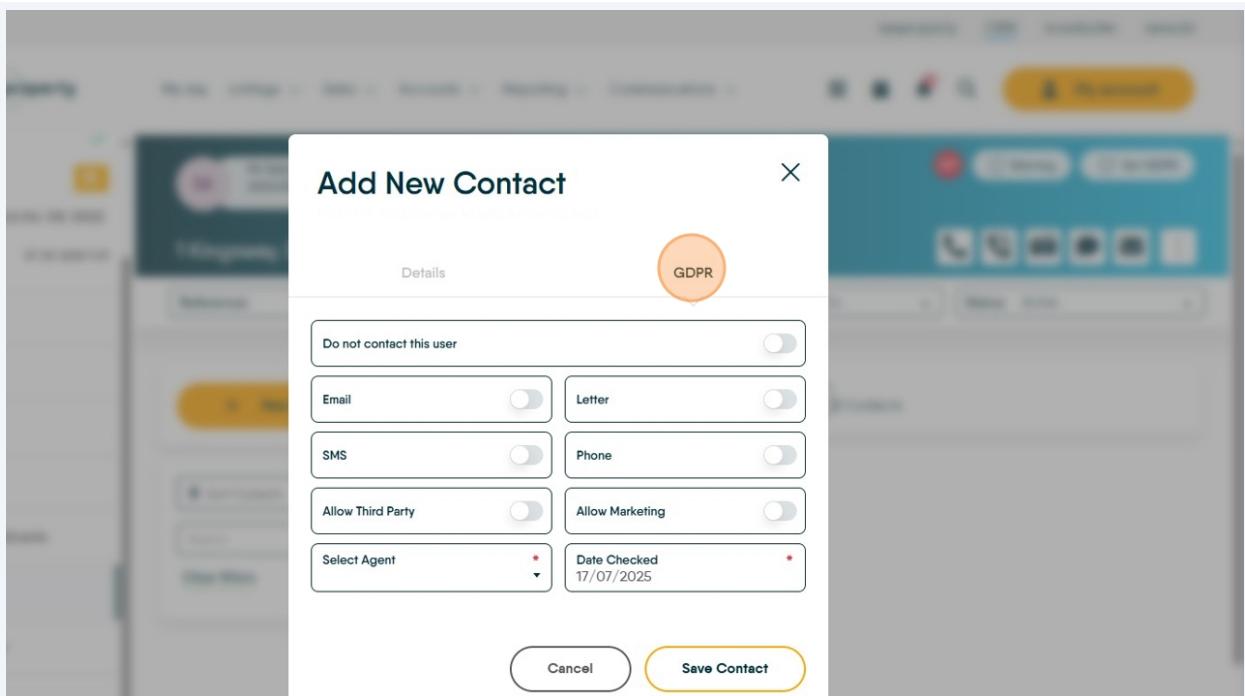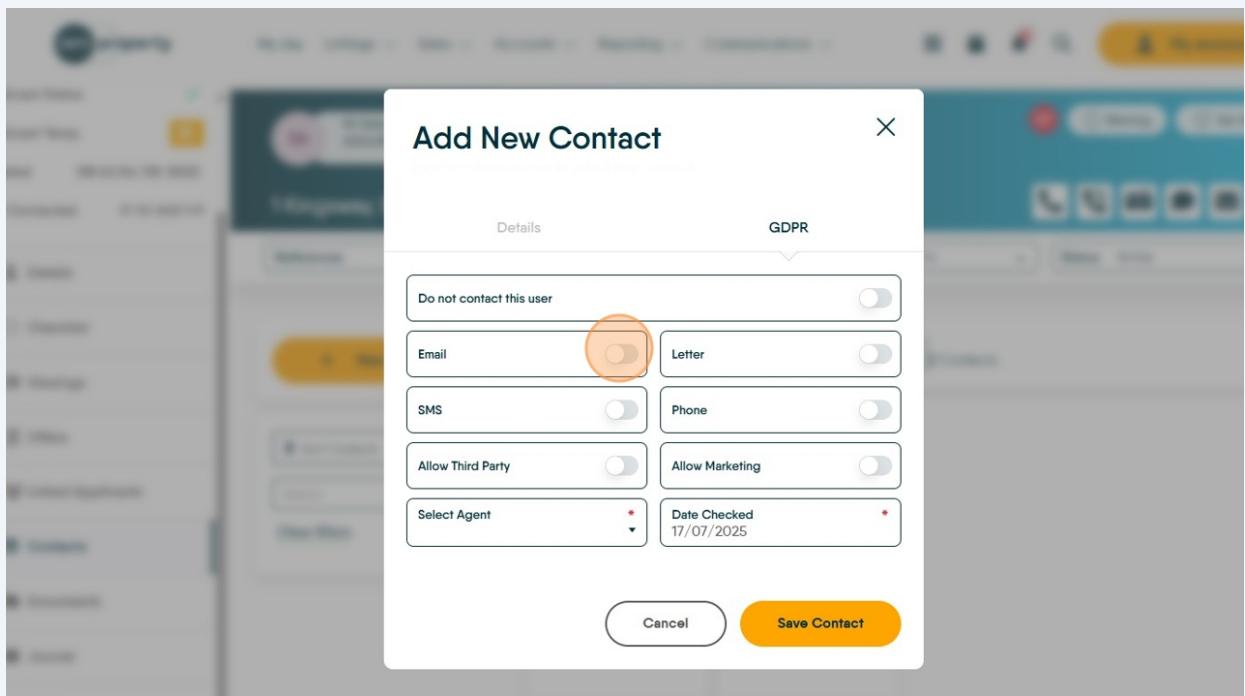
14 Click here to select the Negotiator from the drop down list.

15 Click "Save Contact"