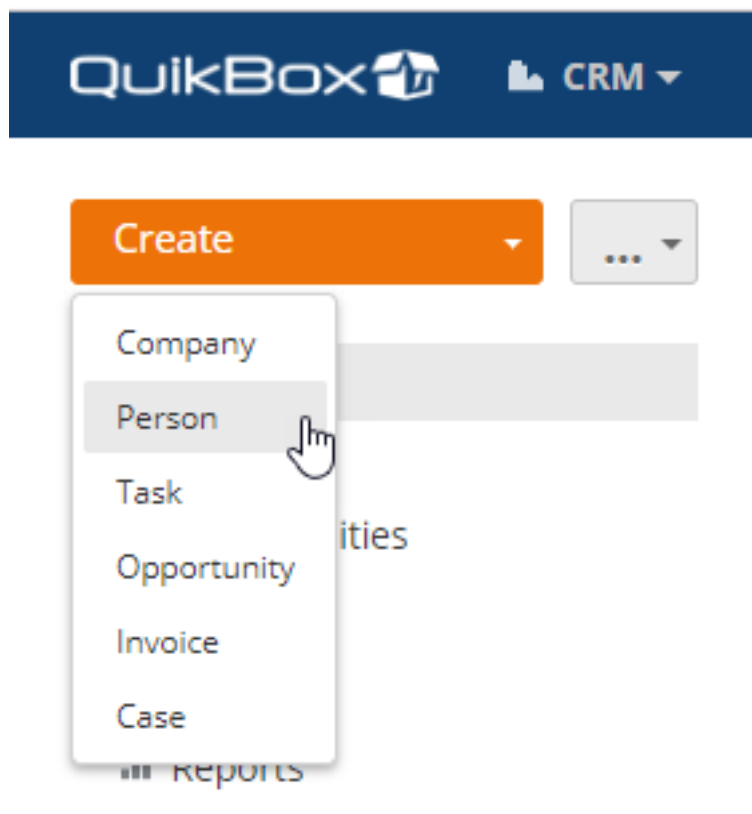# Adding contacts to the CRM

To add a new contact to your customer database:

1. Click the Create button in the upper left corner and select one of two options: Person or Company.

2. Fill in the obligatory fields: First Name and Last Name for persons, Company Name for companies.
3. Select a Contact Type or leave the type not specified.
4. Enter any other available information: Email, Phone, Web Site/Social Networks, Address, Description.
5. Select the Currency for this contact from the list of the available ones. The selected currency will be used in the invoices you create for this contact.
6. Add some existing Tags selecting them from the list or create a new one.

7. Upload a photo.

   To add/change a picture click the Change photo link below the image area. The Choose a profile photo window will open. If you wish to upload a picture from PC click the Browse button, locate a desired picture stored on your hard disk drive and double-click it to load.

   You can upload an image not larger than 200x300 pixels, otherwise resizing will take place. The maximum image size cannot exceed 1 MB.

   If you previously filled the social network user field in the contact profile the images from the social networks will be displayed in the Choose a profile photo window. Click the one you wish to use for a contact.

8. Assign a contact manager.

   By default, the contact you create is assigned to you. If you wish to appoint another manager for this contact, click the Add user link and select the necessary user. The selected user will be notified about a new contact assigned to him/her.

9. Make the contact available to other users.

   By default, the access to the newly created contact is granted to its managers only. Check the Allow access to the company/person for all CRM users box if you wish to grant access to all CRM users i.e. make the contact public. Specify the access type selecting the necessary option from the drop-down list:

Make this person public

The access is granted to contact managers only. To allow access to this contact for all users check the box below

☑ Allow access to the person for all CRM users for reading ▼

    for reading
    for reading/writing

[Save]   [Save and Cr...]   [Cancel]

- ○ **for reading** - to allow all users to view this contact (this option is selected by default),
- ○ **for reading/writing** - to allow all users to view and edit this contact.

Public contacts are marked with the icon on their photos.

10. Click the Save button or use the Save and Create New Contact button to start creating a new contact right after saving the current one.

Online URL: https://support.quikbox.com/article.php?id=60