Create a Contact Record

Once a contact record is created, it can be used to create a new user account. See the Account article for more information on creating a new user from the contact record.

1. To add a new user, click the Contacts icon in the navigation bar.

2. Click Add.

3. Enter a first and last name in the First Name and Last Name fields.

Contacts

General

Salutation:	Select a prefix ▾
First Name:	
Mid. Initial:	
Last Name:	
Suffix:	Select a suffix ▾
Folder:	Contacts 📁 Choose Folder
Site:	Select a site ▾
Department:	Select a department ▾
Title:	
Company:	
Notes:	
Alternate Contact Name:	
Alternate Contact Phone:	
Alternate Contact Relationship:	

4. Complete any custom fields as needed.

5. Click Add & Continue to save the record and display additional options.