

Create a CRM Contact Record

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2018







Create a CRM Contact Record

1. Log in to the Workforce CRM: <https://recruiter.mc3.edu/coned>
2. Click the + icon in the top right.













3. Select **Contact**.

Activities

-  Task
-  Phone Call
-  Email
-  Appointment

Records

-  Account
-  Case
-  Category
-  Competitor
-  **Contact**
-  Invoice
-  Lead
-  Opportunity
-  Order
-  Quote

4. Enter all fields that are required denoted by the red asterisk *. At least one type of contact information is required (email or phone #).

Contact



Details

First Name ⁺	--
Last Name [*]	<input type="text"/>
Job Title	--
Account Name	--

Contact Information


Email	--
Mobile Phone	--
Business Phone	--
Description	--

Save

Cancel

5. If associated with an account/company, select the magnify glass and search.

Details

First Name ⁺	--
Last Name [*]	Smith
Job Title	--
Account Name	<input type="text"/> 

6. If the account/company does not exist, create it by clicking the magnify glass on the account name then clicking on **New**.



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