Clients – Individual Records – Contacts Tab

Navigate to an individual Client record, then click the Contacts Tab to view contacts for this Client. The top section of the page allows you to create a new Contact record, and the bottom section displays existing Contacts.

Add a Contact

- Click the 'Add New+' link at the top of the page
- Enter the required Contact information such as Salutation, Name, Email, Skills information and Notes if required
- Click Save to create a new Contact record for this Client.

Existing Contact Records

You can view existing Contact records in the bottom section of the screen. You can filter and arrange the records by:

- Start typing in the Search field – the list of Contacts is filtered as you type
- Clicking on the Column headings sorts the records in ascending / descending order for that Column
- Use the First / Previous, Next / Last pagination to move through your records if you have more than one page
- Select the number of records to display with the dropdown menu at the bottom of the list
- Edit an existing Contact record by using the Pencil icon, or delete using the Trashcan icon
- Hover over the icons in the Actions panel to view essential information such as phone and mobile numbers