

HOW TO ADD A CONTACT - APPLE

This guide will show you how to add a new contact to a Prospect or Customer Record Card allowing you to track your conversations with multiple contacts at any one company.

From the sales-i home screen, use the Quick Search bar to search for the account you would like to add a contact to.



A08398~2 Northtowne Auto Service Ship-To

750 3rd Ave, New York, NY, 10017

Acc Type: Custom

Walker Automotive

A09660

722 E Osborn Rd, Phoenix, AZ, 85014

Acc Type: Custom

Custom Parts Inc

7 Concourse Pky Ne, Atlanta, GA, 30328

Acc Type: Customer

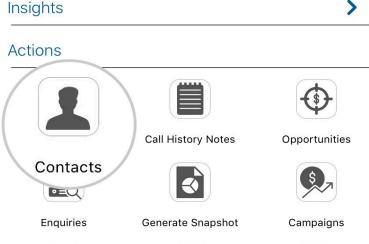
Riviera Autos Of Tampa

910 Harlash St, Kendallville, IN, 46755

Scroll down to the Actions section and tap Contacts.

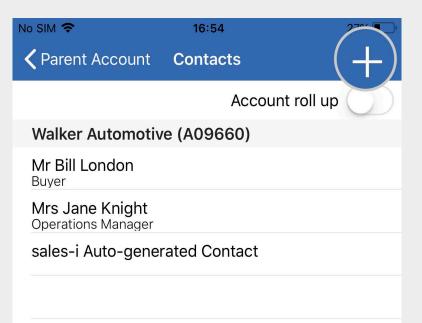
A09270

O2 Select the desired Account from the results list.



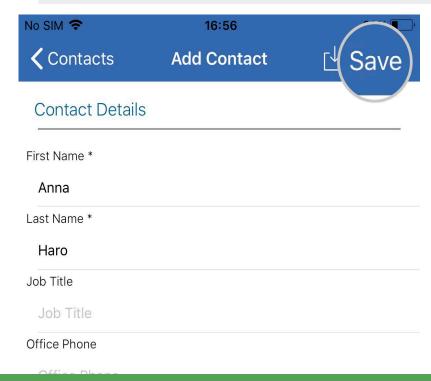






Tap the + symbol in the top right hand corner of your screen.

Next, enter your contact's details. You can do this manually or if you already have contacts on your iPhone or iPad, you can upload their details by tapping the Upload icon (located next to the Save Icon in the top right hand corner). Once you have entered all relevant details, tap Save. (Right hand corner).



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https://support.sales-i.com