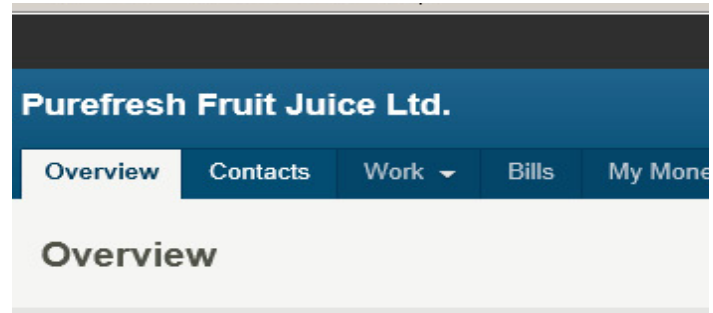
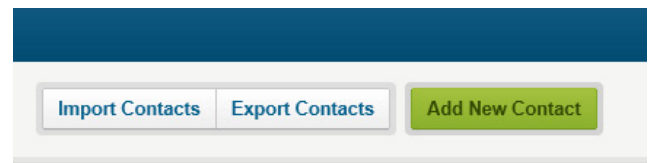


How to create a contact

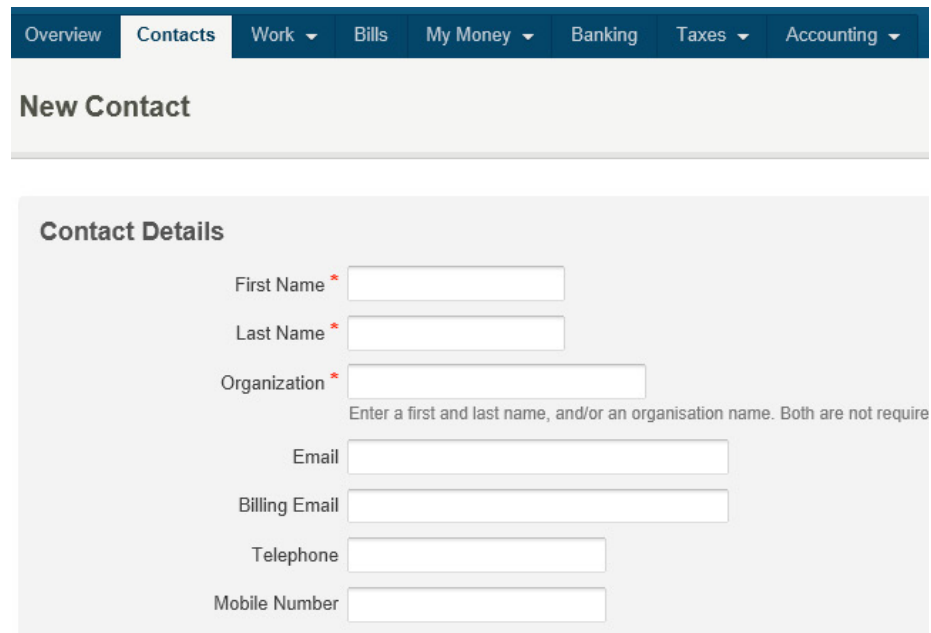
1. On the top of your screen, click on Contacts



2. At the top right hand corner, you will find a bright green button "Add New Contract" click on this



3. Complete all of the contact details for your new contract.



The screenshot shows the 'New Contact' form. The navigation bar at the top includes 'Overview', 'Contacts', 'Work', 'Bills', 'My Money', 'Banking', 'Taxes', and 'Accounting'. The form is titled 'New Contact' and has a section for 'Contact Details' with the following fields:

- First Name *
- Last Name *
- Organization *
Enter a first and last name, and/or an organisation name. Both are not required
- Email
- Billing Email
- Telephone
- Mobile Number

4. Add in the invoice address for your contact to allow invoices to be emailed from the system

Invoicing Address

Address

Town

Region or State

Post/Zip Code

Country

5. Add in your contacts VAT number if known and click on create new contact.

Invoicing Options

Already sent invoices will not be affected by changes made here.

Contact-level Invoice Sequence?
(Can be overridden by project-level sequences).

Display Contact Name
Check this box if you want invoices to show the Contact name as well as an Organization Name.

Charge VAT

VAT Registration Number
If applicable, and needing to be displayed on invoices.
Also required if EC Sales of Goods or Services to this contact need to be reported.

Invoice/Estimate Language:
This allows you to display Invoices and Estimates in different languages.

[Create New Contact](#) [Create and Add Another](#) [Cancel](#)

Tips:

Adding a contact will allow you to easily email your invoices direct to your client/agency. If you need to create more than one contact click on Create and Add Another.