



# Creating New Contacts

1

Click on the + button in the top right corner, and click **Create Contact**.

2

Enter all of your contacts information.

3

Click Submit.

4

View your contacts by clicking on their first name.

The screenshot shows the TotalExpert dashboard with a table of contacts. The table has columns for Actions, First Name, Last Name, Email, Phone Cell, Creation Date, Contacted On, User, Assigned To, Shared With, Referred By, and Referred To. Two contacts are visible: Alice Firstimer and Deven Gillen. A 'Create Contact' button is highlighted with a blue circle and the number 1.

The screenshot shows the TotalExpert contact creation form. It is divided into several sections: Contact Info - Name (with fields for Title, First Name, Last Name, Nickname, Suffix, and Salutation), Contact Info (with fields for Email, Work Email, Cell Phone, and Work Phone), Source/Type (with dropdowns for Lead Source and Lead Status), Sharing/Assignment (with a dropdown for Assigned To and a list of users to share with), and Referrals (with fields for Referred By and Referred To). A 'Save' button is highlighted with a blue circle and the number 2.

The screenshot shows the TotalExpert dashboard with a table of contacts. The table has columns for Actions, First Name, Last Name, Email, Phone Cell, Creation Date, Contacted On, User, Assigned, and Assigned. The contact 'Deven Gillen' is highlighted with a blue circle and the number 4.