TIME!LOG

D 2 How to Create a New Contact

Access level: All, except external users

Learn: How to create a new contact in TimeLog Project.

TimeLog's index of contacts makes it possible to manage people related to the company. Contacts are used in projects and invoicing, and it's possible to relate a contact to an invoice or a project.

When You Want to Register a New Contact:

Figure 1: Main Menu -> Customers & Contacts [New Contact]

- Enter the *First Name:* and the *Last Name:* belonging to the new contact ❶.
- Select an *Owner:* of the contact ❷. The owner is usually equal to the employee in the company responsible for managing the customer's relations.
- Select which *Customer:* ❸ the contact belongs to. It is also possible to select a title or department that the contact belongs to.
- Fill in the *Contact Details* ❹ from *Phone:* to *E-mail:* with correct information.
- Complete the fields from *Address:* to *Country:* ❺ with correct information.
- Click on *Save* in order to save the entered information. Click on *Save and New* ❻ in order to store the information and continue with a new contact.
- After the new contact has been created, it is possible to select which person the contact *Reports to:* ❼ e.g. the contact's superior. This makes it possible to get an overview of relations within a company. Please notice that this is only possible after the contact has been saved.
- How to create a new customer see ⇨**D1**.

Tip: TimeLog Project CRM is a useful add-on module that can be used for extended management of customer relations and sales. TimeLog CRM can control events, leads and opportunities.

Figure 1: Main Menu -> Customers & Contacts [New Contact]