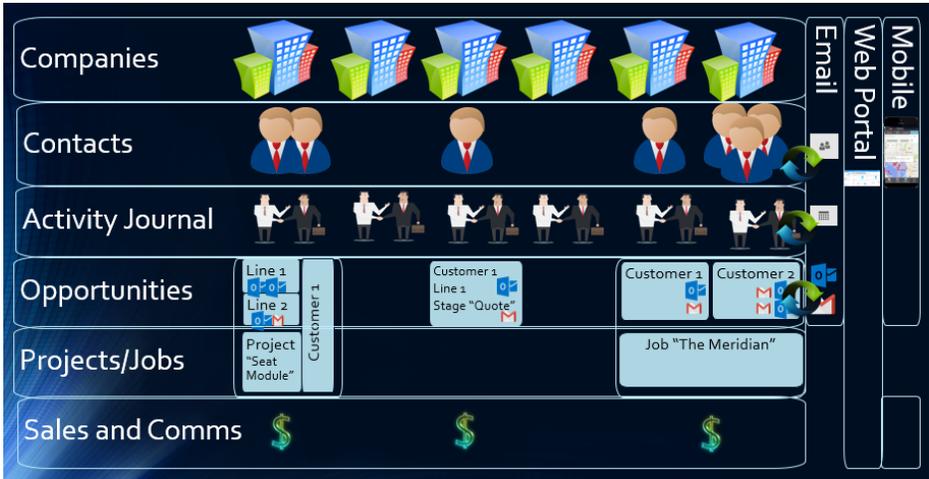


How to Create a Contact (Online)



repfabric®

Connecting the threads of multi-line selling



Need help?

Email:

Support@repfabric.com

Or call

(844) 737-7253

For videos and more tutorials, log on to:

<https://support.repfabric.com>



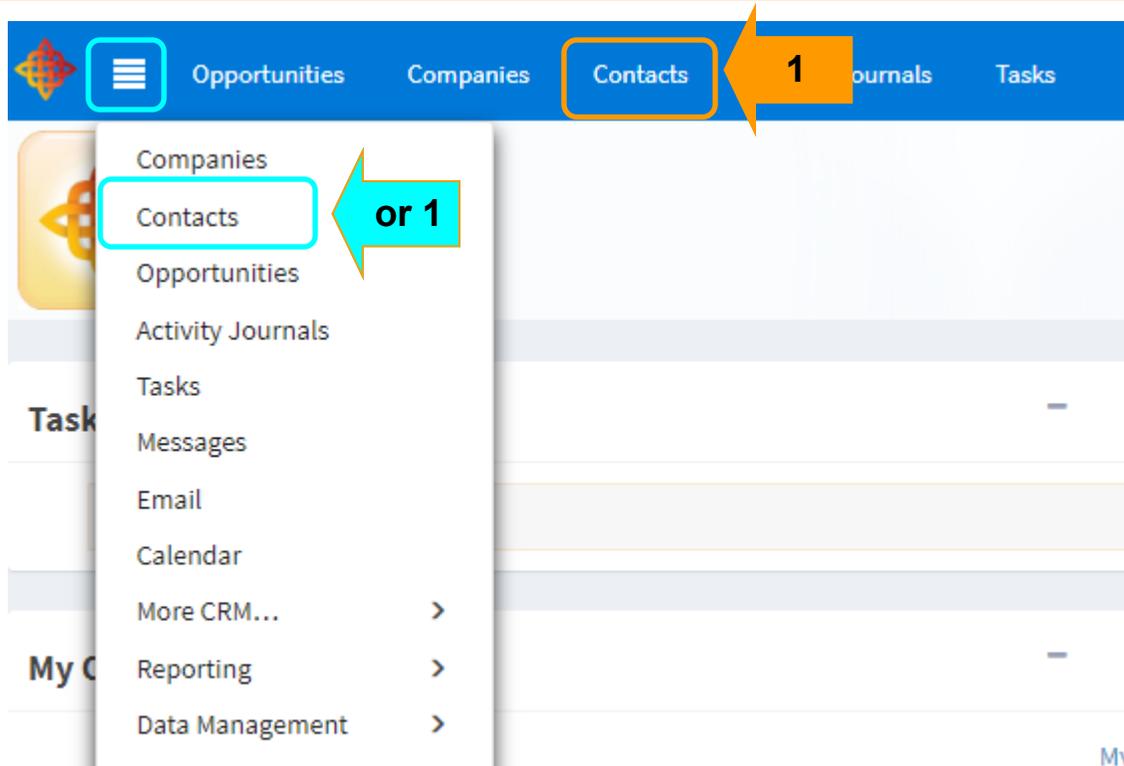


How to Create a New Contact in Repfabric (web portal)

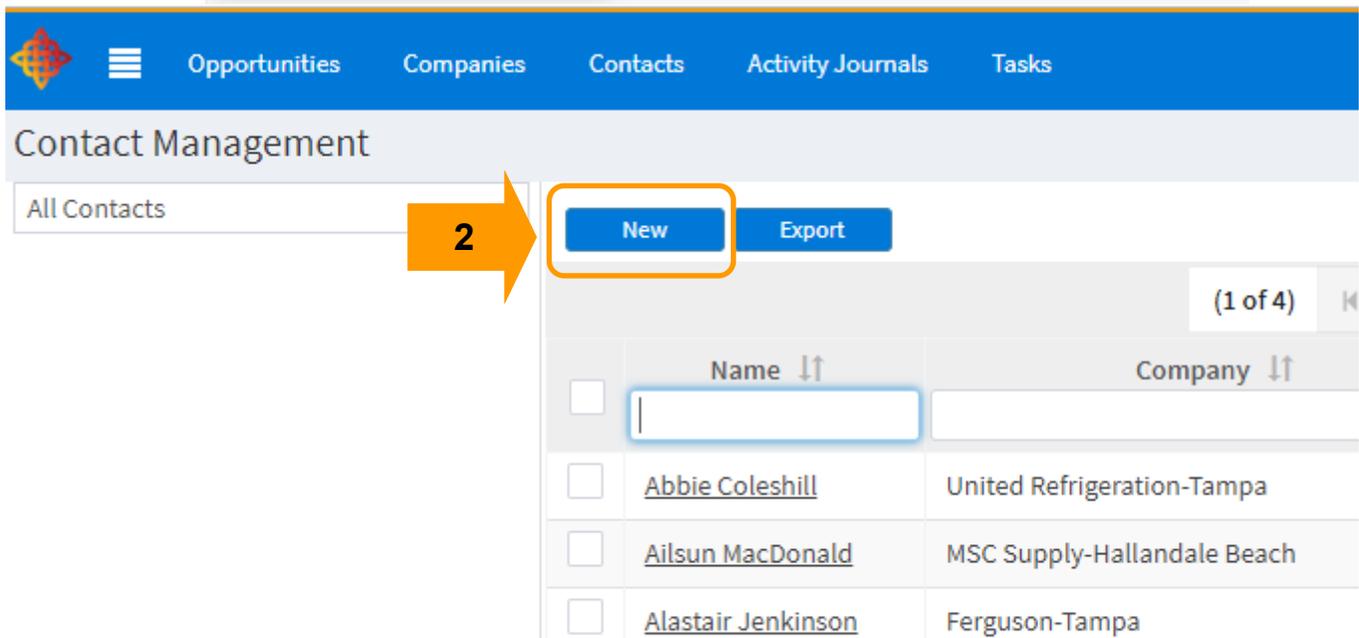
Contacts should always be tied to a Company.

1. Left click “Contacts” (if you do not have menu shortcuts set up, use the menu bars)
2. Left click “New” button.

This image shows two examples of where you might find “Contacts.”



This image shows the “New” button.





3. Fill in "First Name" and "Last Name" (the "Full Name" field will auto populate).
4. Left click magnifier to search for "Company" (type first few letters to narrow search).
If you need to add a Company now, see page 16.
5. Left click desired company.

This image shows where to enter "First Name" and "Last Name."

Contacts Activity Journals Tasks

Save Cancel

Basic Personal

Basic Information

First Name * Shannon

Last Name Kauffman

Full Name Shannon Kauffman

Business Information

Company *

"Copy business fields" will add the address and phone number information of the company selected to this contact record. It will **NOT** overwrite any fields you have already filled in.

This image shows an example customer to choose. You can search for customers by name in the box at the top of each column.

Company Lookup

Copy business fields

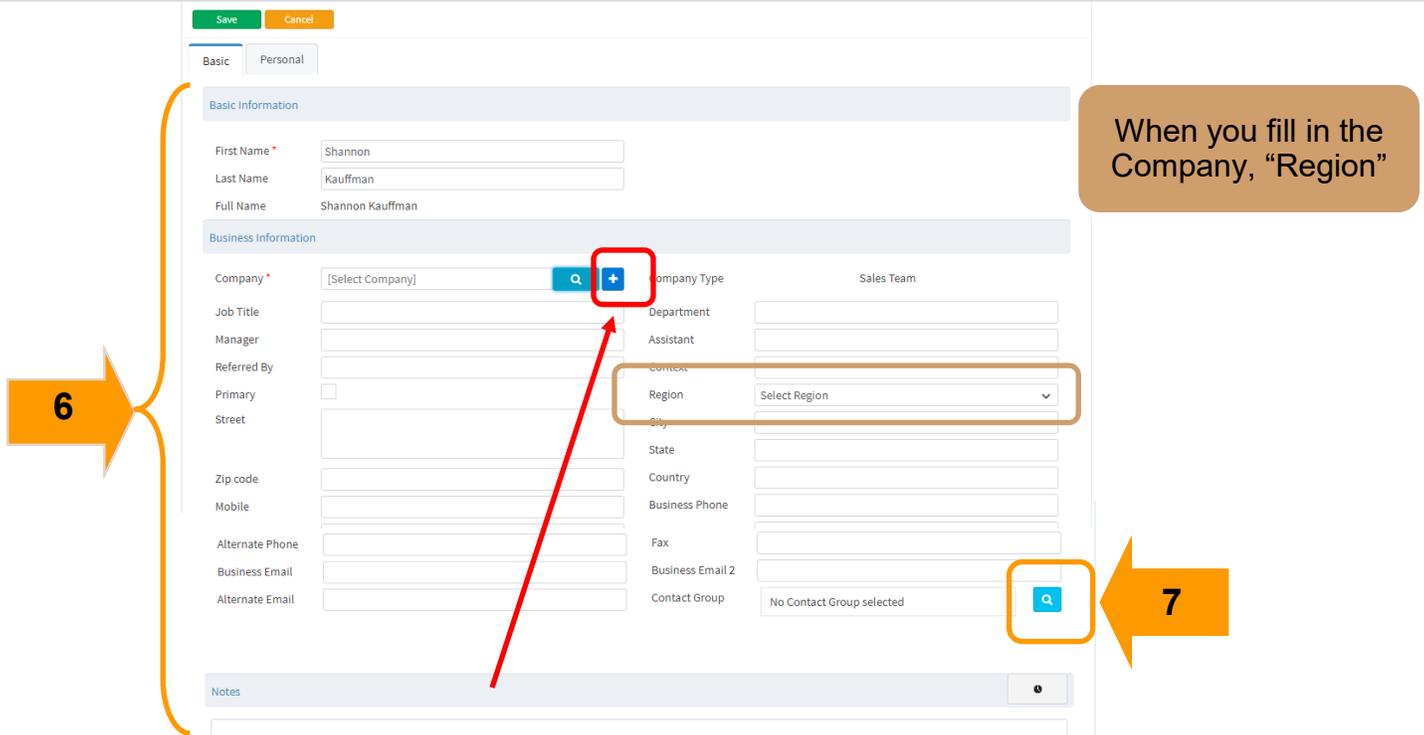
(1 of 17) 1 2 3 4 10

Name ↑↓	Phone ↑↓	Sales Team ↑↓	Phone ↑↓	Region ↑↓	City ↑↓	Zip ↑↓
Comp1	Customer	Admin Accounts				
WillowTree		Chris Farley				

How to Create a New Contact in Repfabric.(web portal) (continued...)

6. Fill in all applicable blank fields that you have information for. (For this new contact, best practice is to assign it to a company.)
7. Left click magnifier for “Contact Group.”
8. Select desired “Contact Group” (select as many as needed).
9. Left click “OK.”

This image shows all the fields in a Contact in the “Business Information” section.



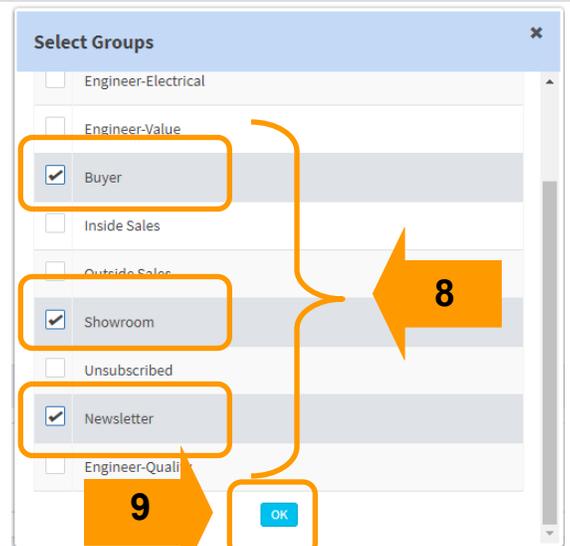
You can create a new company (if it doesn't exist), while creating the contact

Left click the “+” icon and add the new company.

See the next page for instructions on how to create a company from scratch (instead of creating it while creating a contact). It also shows the details on each of the fields within a company record.

This image shows some example Contact Groups to select for this contact.

Contact Groups in Repfabric can sync with your “Categories” in Outlook. This is NOT personal categories to each individual. As a group, you should decide what “Contact Groups” you will use in Repfabric. Then each person should create those **exact categories** in Outlook. There are some examples shown here.



This concludes the instructions for this tutorial.

