How to Create a Contact (Online)



Companies				Email	Web P	Mobile
Contacts	YY	2		25	ortal	
Activity Journal			**			
Opportunities	Line 1 Line 2 Line 2	Customer 1 Line 1 Stage "Quote"	Customer 1 Customer 2			
Projects/Jobs	Project "Seat Module"		Job "The Meridian"			
Sales and Comm	is 💲	\$	\$			

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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.

- Left click "Contacts" (if you do not have menu shortcuts set up, use the menu bars
 Left click "New" button.

	This image sho	ws two examples	of where you mig	ht find "Contacts."	
(Opportunities	Companies	Contacts	1 ournals	Tasks
	Companies	<u> </u>			
	Contacts	or 1			
	Opportunities				
	Activity Journals				
	Tasks				_
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	Calendar				
	More CRM	>			
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	Data Management	>			Mv
		This image show	ws the "New" butt	on.	
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ontacts	2	Nev	v Export		
				-	(1 of (
		,			(1014
			Name ↓↑	_	Company ↓
			<u>bbie Coleshill</u>	United Refr	igeration-Tampa
			<u>bbie Coleshill</u> ilsun MacDonald	MSC Supply	igeration-Tampa /-Hallandale Beac

- 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 3	
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
Name ↓↑ 1 2 3 4 7 M 10 7 Name ↓↑ 2 3 4 7 M 10 7	
Comp1 Customer Admin Accounts	
WillowTree 5 Chris Farley	

For training on this topic or to schedule a support session, please go to <u>www.meetme.so/RepfabricMeeting</u> At anytime, you can email <u>support@repfabric.com</u> for help or call 844-737-7253.

- 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 ir	n a Contact i	n the "Business Information"	section.
-	Save Cancel Basic Personal				
	Basic Information First Name Last Name Full Name	Shannon Kauffman Shannon Kauffman			When you fill in the Company, "Region"
6	Business Information Company * Job Title Manager Referred By	[Select Company]	ompany Type Department Assistant	Sales Team	1
	Street Zip code Mobile Alternate Phone Business Email Alternate Email		State Country Business Phone Fax Business Email 2 Contact Group	No Contact Group selected	
	Notes			•	

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 <u>each person</u> should create those <u>exact categories</u> in Outlook. There are some examples shown here.



