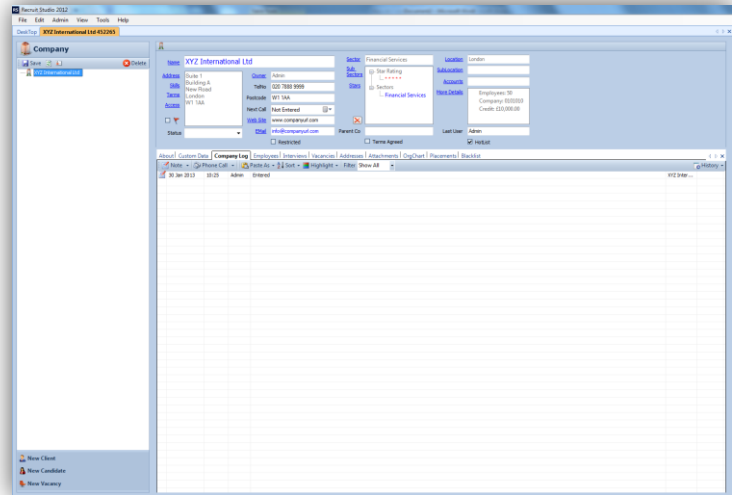


# How do I create a new client record?

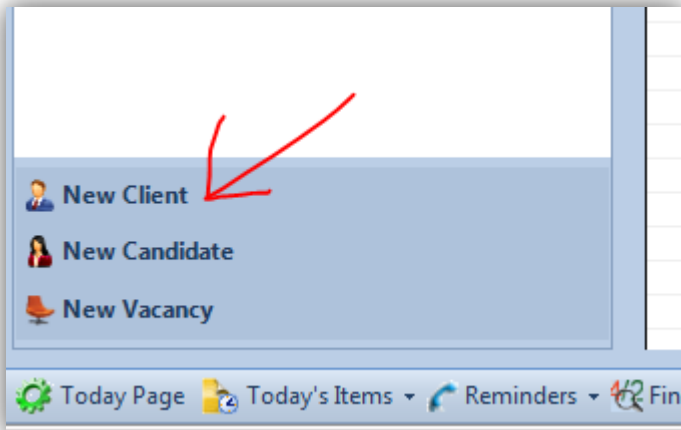
*It is highly recommended that you first create a new company record (if one does not already exist) before making a new client record. This not only makes the process much quicker and simpler, but it ensures that the connections between client and company are set.*

1. First either open the company record for this client, or create one.

*If you need to create one please refer to 'How do I create a new company record?'*



2. Click the 'New Client' button on the bottom left of the record.

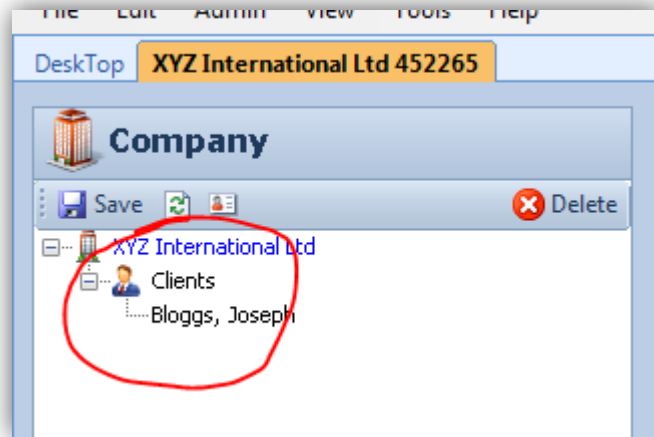


3. Enter the name and details (if possible) of the client.

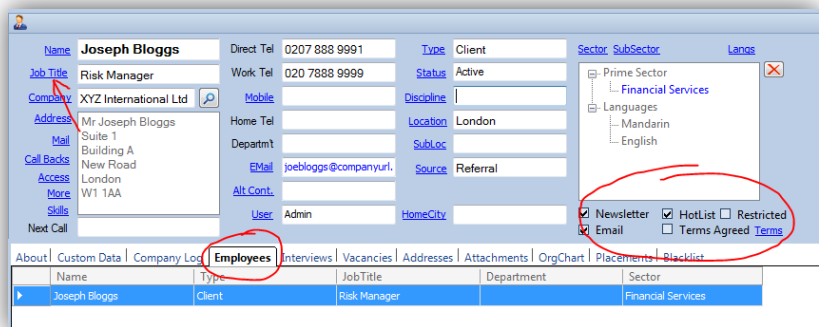
*You can check whether this client already exists in the database by clicking the 'Last Name' and/or 'Email' buttons which will show you a list of possible matches if available.*

A screenshot of a dialog box titled 'Enter Name of Contact'. The dialog box contains several input fields and options. The 'Title' field is set to 'Mr'. The 'First Name(s)' field contains 'Joseph'. The 'Last Name(s)' field contains 'Bloggs'. The 'aka' field contains 'Joe'. The 'Email' field contains 'joebloggs@companyurl.com'. The 'Email2' field contains 'joebloggs@hotmail.com'. There are checkboxes for 'Upper case on leading characters' and 'Auto Duplicate Check On'. The 'OK' and 'Cancel' buttons are on the right side. Red arrows point to the 'Last Name(s)' and 'Email' fields.

- The company record will now show the new client the tree on the left.



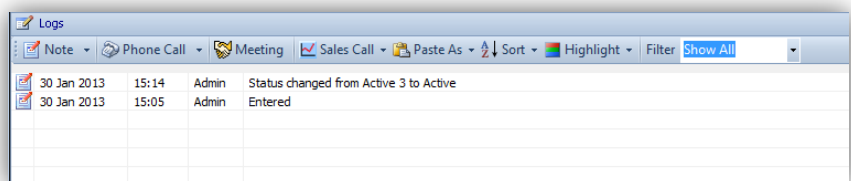
- Populate the new client record as much as you can (bear in mind that you are looking at this client within the company record – a separate and full record will be created for the client when you save the changes to this company).



*You can use the blue buttons such as 'Job Title' to make a choice from a menu. Note the various tick boxes highlighted. See how the Employees tab has become active and is showing the new client.*

- A log for this client has also been created and is visible at the bottom of the screen.

You can make entries at this stage if you wish, simply click the relevant button – Note, Phone Call, Meeting, or Sales Call and choose an option from the menus.



- When you have finished populating the new record, close the record to save the new client's details. You can then open the client's record in full to see and add more data.