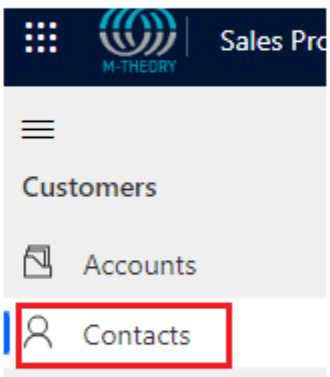
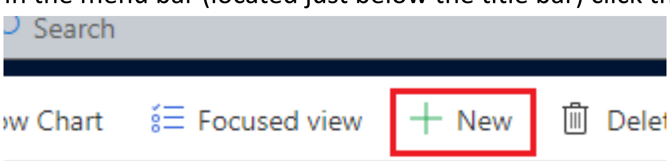
Create a New Contact

The red asterisk sign (*) indicates that you must enter data in the field i.e., the field is required. It cannot be left blank.

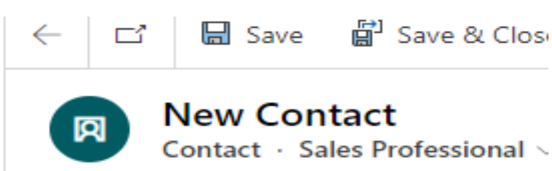
The blue plus (+) sign indicates that it is recommended to enter data in the field.

1. Open a web browser such as Google Chrome, Firefox, or Edge.
2. Copy one of these URLs and paste it in the browser's address bar.
   https://mtheory.crm.dynamics.com/main.aspx?appid=79288b8c-2bdf-ea11-a820-000d3a300ec6
   https://mtheory.crm.dynamics.com
   Dynamics Sales Professional app opens in the browser. You should see this title bar.
   

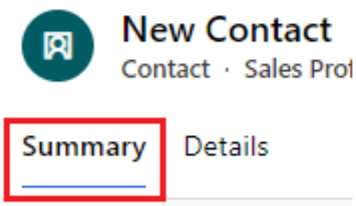
3. In the **Site Map** on the left side of the app in browser, click the **Contacts** tab.
   

4. In the menu bar (located just below the title bar) click the + **New** button.
   

   A new Main form opens. You should see the form whose upper section looks like:

5. Click the **Summary** tab to select the summary section of if it is not already selected.

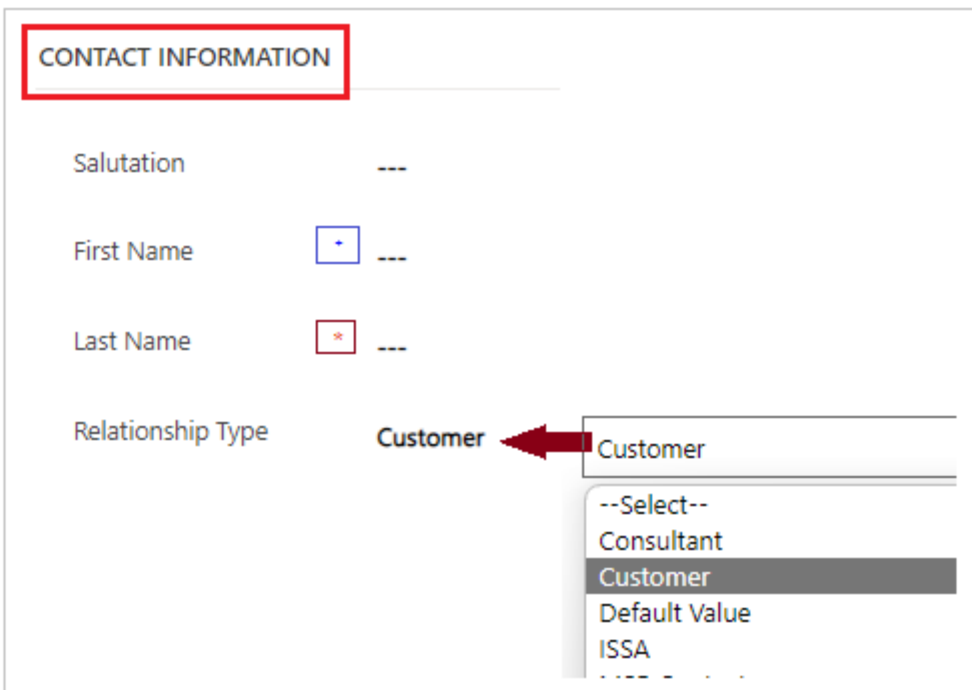


Provide as much data as you know about the new contact in the **CONTACT INFROMATION** section.

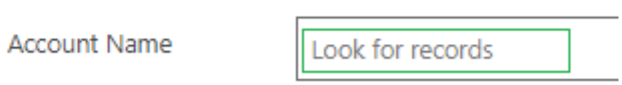
6. Type in **First Name** and **Last Name**. They must be unique.

Note:

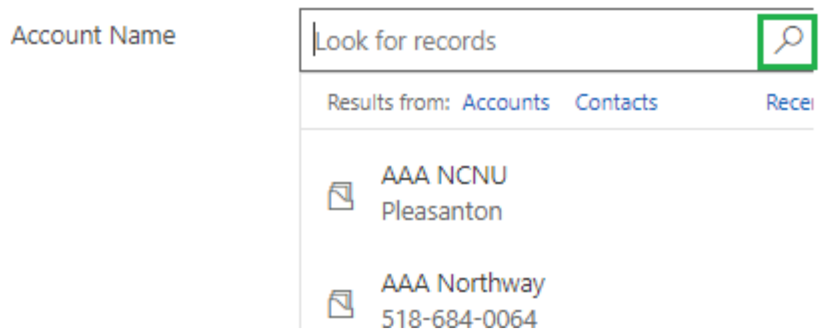
Relationship Type: **Customer** is selected by default. You could select other options. For example, select Vendor when you create contact records for vendors.



7. Provide contact's company name in **Account Name** field.
   Perform one of these 2 actions:
   a. Either type the account name or account number in the ***Look for records*** box.



   b. Or click the search icon at the right end of the box to get a list of accounts.



8. Select an account from the list.
9. Enter phone numbers – Company (and ext. if known), Business, Mobile.
   Notes:
   - Enter the phone numbers in this format: 123-456-7890.
   - **Company Phone** is the main phone of the account that the new contact belongs to.
   - **Business Phone** is the contact's direct phone. It must be unique.

10. Enter contact's **Email** address. It must be unique.
11. Provide as much data as you know in the **ADDRESS** section. The address is the business address (i.e., the address of the account record).

    Notes:

    - If applicable, enter the suite number in **Address 1: Street 2** field.
    - Use 2-letter state abbreviation in **Address 1: State/Province** field (such as CA for California).

12. Click **Save** (to keep the main form open) or **Save & Close** (to close the main form) button in the menu bar.