Account and Contacts

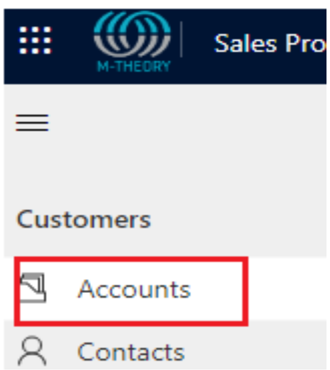
An account (company) can have at least one contact (person/employee). Note: Vendor account might not have contacts.

A contact can be added to an account either from an account record or a contact record.

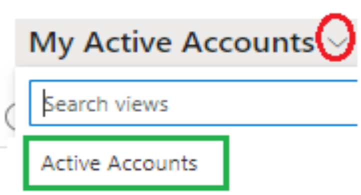
1. Open a web browser such as Google Chrome, Firefox, or Edge.
2. Copy one of these URLs and paste it in the browser's address bar.
   https://mtheory.crm.dynamics.com/main.aspx?appid=79288b8c-2bdf-ea11-a820-000d3a300ec6
   https://mtheory.crm.dynamics.com
   Dynamics Sales Professional app opens in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

Add Contact to an Account from **Account** Record

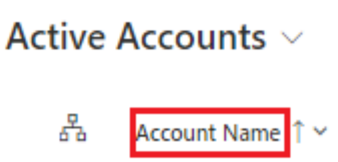
1. In the **Site Map** on the left side of the app in browser, click the **Accounts** tab.



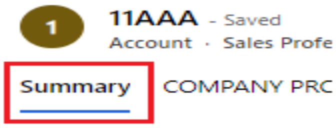
2. In the right pane click the down arrow next to the **My Active Accounts** view name. Then, select the **Active Accounts** view from the list.



3. In the **Account Name** column, click the name of the account that you want to add contact to.



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

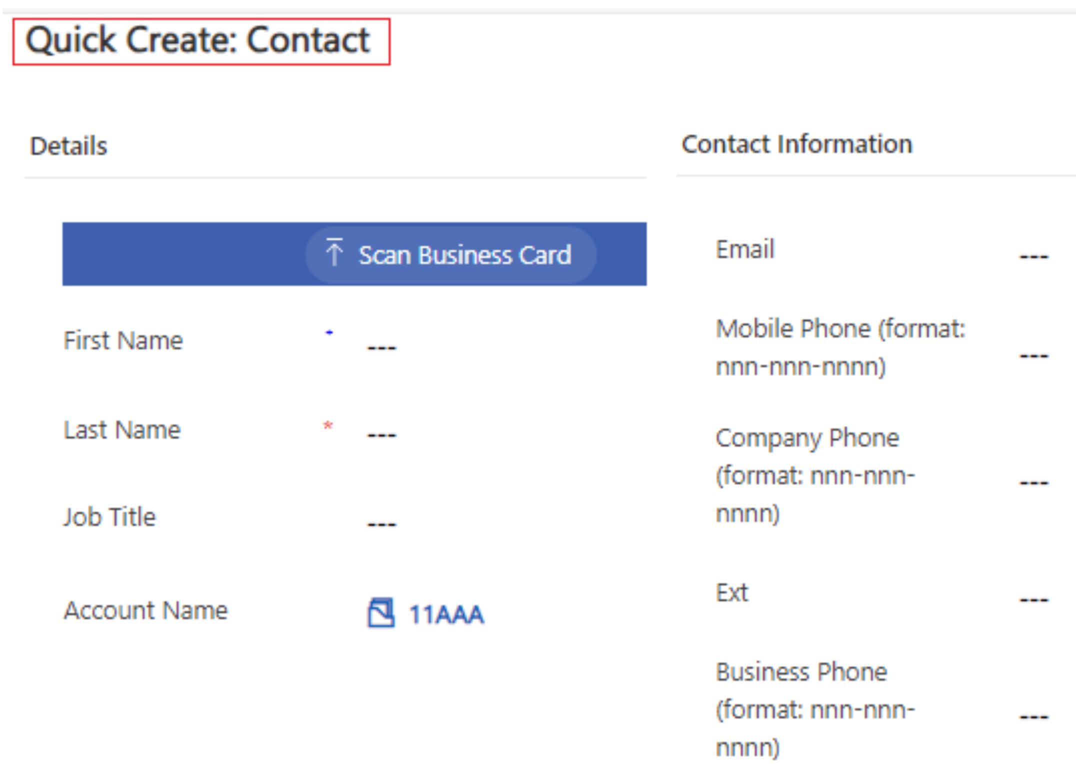


5. In the **Contacts** section located on the right side of the form click the 3 dots.

No contact Record Exists

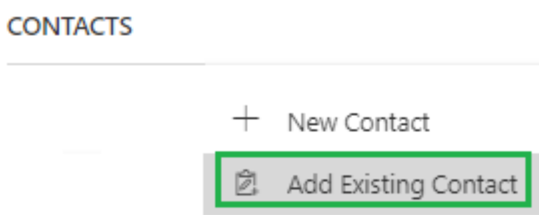
A. click the **+ New Contact** button.

B. In the **Quick Create: Contact** form enter contact information.
Note: These fields' values must be unique:
- First Name + Last Name
- Email
- Business Phone



Contact Record Exists

A. click the **Add Existing Contact** button.

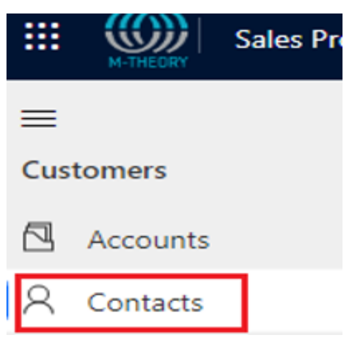


B. In the **Lookup Records** form either type in contact name or click the search icon and select existing contact from the list

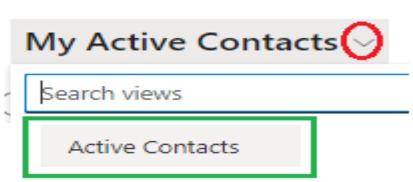
C. Click the **Add** button.

Add Contact to an Account from **Contact** Record

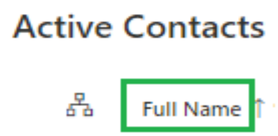
1. In the **Site Map** on the left side of the app in browser, click the **Contacts** tab.



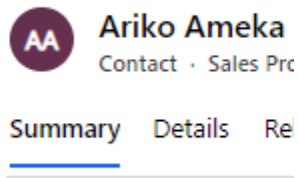
2. In the right pane click the down arrow next to the **My Active Contact** view name. Then, select the **Active Contacts** view from the list.



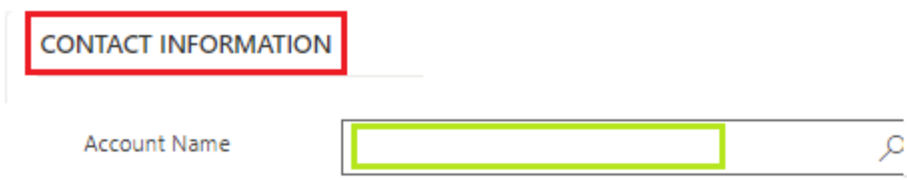
3. In the **Full Name** column, click the name of the contact that you want to add to an account.



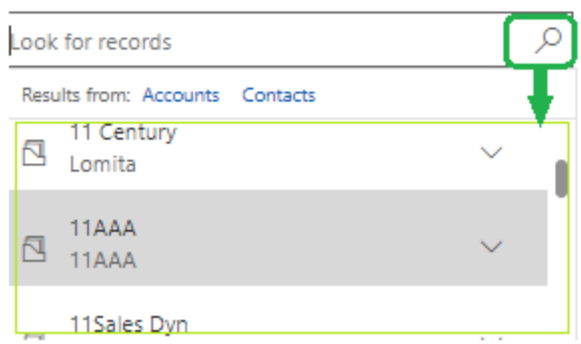
4. Click the **Summary** tab to select the summary section if it is not already selected.



5. Go to the **Account Name** in the **CONTACT INFORMATION**.
   A. either type in account name



   B. or click the search icon to get a list of accounts. Then, select an account.



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