Create a Contact Record

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Tags: Keap-Pro Keap-Max lambda

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Manually Add a New Contact to Infusionsoft

1. Click on the (**+**) icon at the top right of any page inside of Infusionsoft. This "Quick-Add" feature is the fastest and most convenient way to manually create a contact in Infusionsoft.

2. Simply enter the contact information and click the **Save** button.

3. Now, just click on the link to go to navigate to the contact record.

An Alternative Method is the following:

1. Go to **CRM > Contacts** in the main nav

2. Select **Add a Contact** from the Contacts drop-down.

3. Enter the contact's information, and then click on the **Save** button to view the new contact record, or click **Save & Add Another Person** to refresh the form so you can quickly add another contact.

Add a Contact With an Internal Form

You can select an internal form from the drop-down at the top of the contact record entry page.

- **Quick Add-New-Person Form**: This is the short form. You can customize the fields that appear on this form by going to **CRM > Settings** and scrolling down to the bottom of the page.

- **Standard Add-New-Person Form**: This is the default contact entry form and cannot be changed.

- **Custom Internal Forms:** Internal Forms also show up in this drop-down. These internal forms are created in the campaign builder. When an internal form is used to add a contact, it has the added benefit of initiating campaign automation (starting a campaign sequence). Internal Forms are a powerful business automation tool.