Add a new contact with an internal form w

Set default internal form for quick adding contacts

1. Go to **CRM > Settings** in the main navigation menu



2. Scroll down to "Adding contacts" at the bottom of the page



3. Select the form you want to set as the default from "Default Quick-Add Form" list



Note: The internal form must be published before it will be listed in the "**Default Quick-Add Form** " list. Click here if you are looking to learn how to set up an internal form in the campaign builder.

Add additional internal form options to quick add



1. Go to **CRM > Settings** in the main navigation menu

2. Scroll down to "Adding contacts" at the bottom of the page

Adding Contacts Default Add-I Antact Form:	Advanced Add Contact Form	
Short Add He	First Name Last Name Email Company Phone 1 Phone 2 Fax 1 Person Type Street Address 1	0

3. Click each form that you want to be able to access from the quick add



Select internal form

1. Go to **CRM > Contacts** in the main navigation menu



2. Hover over Contacts and select "Add a Contact" or click the "Add contact" button

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	View Contacts			
	Add a Contact			
	Add a Note			
	Import Contacts	•		
	Search	General	Address	Phone/Email

Add contact from drop down

		Saved Searches Add a Contact	
elds	Misc Criteria	Colum	

or by Add Contact button

3. At the top of the contact creation page, select the internal form you would like to use

Select which	form you want	to fill out:	Advanced Add Contact Form	
		N	Please select one Basic Add Contact Form	
General	Addree	Ac	Advanced Add Contact Form	
		-	ADMIN - Add to Weekly Check-In	
			Birthday Collection	
General Inf	ormation		ADMIN - New Lead Intake	
			Hard Bounce - Working Email Collection	1
First Name			Tag Goal	
			-	
	act Name			

4. Fill out the form and click Save or click Save & Add Another Person to create more

contacts using the form

City		Glot
State		
Postal Code		Lan
Country	Please select a country	, Time
Save Save & Add	Another Contact	