

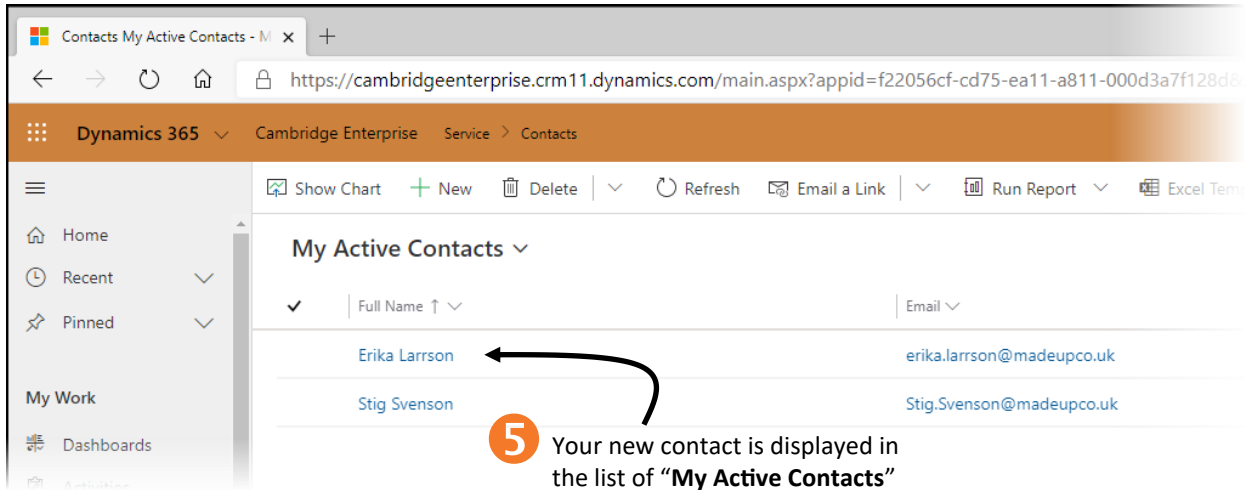
Getting Started with Microsoft Dynamics 365

Adding a New Contact

A contact is someone we are corresponding with whose details we want to save in Dynamics 365. Before adding a new contact, the first thing to do is to check if the contact is already in the system. See the QRG “**Checking if records already exist**” first, and if the contact record is not there, follow the steps below...



If you have a new **Contact** and a new **Organisation** to enter, add the Organisation first. Then the new Organisation will be available to select for the Contact you add.



Things to Remember...

- ☑ If the surname and e-mail address match an existing contact record when you save, you'll get a "Duplicates Detected" warning like this...

Duplicate Records Detected

This record might be a duplicate of one of the records below. Would you like to save it anyway?

Viewing: Contact (1)

Full Name	Email	First Name	Last Name	Modified On
Stig Svenson	Stig.Svenson@...	Stig	Svenson	05/10/2018 15:26

If the new record is different to the existing one, then Save the new one...

Ignore And Save Cancel

...on the browser **Back** button

Unsaved changes

Do you want to save your changes before leaving this page?

Save and continue Discard changes