

Accounts and contacts

Create a contact

Version 7.17



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Table of Contents

Create a contact	4
Create a contact manually	4
Add a new contact from an email	7
Create a contact from a case	7

Create a contact

PRODUCTS: [ALL CREATIO PRODUCTS](#)

Creatio contacts are the contact persons of the customers and partners, individual clients, and other business contacts.

Use the [*Contacts*] section to work with contacts. Use this section to group the contacts by various parameters, analyze the history of interactions with customers, and view the resulting statistics.

Contact personal data are stored in the contact's profile, on the [*Communication channels*] and [*Addresses*] details at the [*Contact info*] tab, and on the [*Job experience*] detail at the [*current employment*] tab. In the database, they correspond to the following tables: "Contact," "ContactCommunication," "ContactAddress," and "ContactCareer."

In Creatio, a contact can be:



- added manually
- [imported](#) from Excel
- imported from the [landing page](#)
- saved manually or automatically during [lead qualification](#) (available in Sales Creatio and Marketing Creatio)
- received through [synchronization](#) with social networks
- received through [Google synchronization](#)
- created with [incoming mail processing](#)
- created with [Single Sign-On](#) authentication.

Attention. To synchronize with external resources, you need to perform the initial setup. Social network integration, Google synchronization, and Single Sign-On technology are described in the "[Base integrations](#)" section.

Create a contact manually

1. Open the [*Contacts*] section
2. Click the [*New Contact*] button.
3. In the opened window, fill out the contact profile:

Full name	First and last names of the contact. The field is required.
Type	Type of contact, for example, "Customer" or "Contact person."
Account	The company whose employee the contact is.
Full job title	Contact's current position.
Department	The department of the company where the contact works.
Mobile phone	Contact's mobile phone number. The value is synchronized with the [<i>Communication options</i>] detail of the [<i>General information</i>] tab.
Email	The email address of the contact. The value is synchronized with the [<i>Communication options</i>] detail of the [<i>General information</i>] tab.

4. Click [*Save*].
5. On the page that opens, add a photo of the contact to display on the contact page, the section list, and the feed. To add a photo, click  and upload the photo using the standard file selection window. We recommend uploading a square image (aspect ratio: 1:1). Click on the  button to remove the photo. If you mouse over the photo area, the buttons will become visible.
6. On the [*General information*] tab, populate the contact data:

Type	Type: customer, supplier, contact person, or employee. If you populate this field on the previous step, the data will automatically display on the [<i>General information</i>] tab.
Owner	Name of the responsible employee.
Title	Honorific for the contact, for example, “Mr” or “Mrs.”
Gender	Gender of the contact.
Salutation	The preferred way to address the contact.
Preferred language	The language to use by default for automated communications with the contact. Affects the language of email notifications. If no preferred language is set for a contact, the notifications will be sent in English (the default language). The drop-down list of this field contains only languages whose status is set to “Active” in the [<i>Customer languages</i>] lookup.
Age	Contact age. The field is populated automatically and is grayed out if automatic calculation of contact age is enabled. Creatio calculates a contact’s age based on the value in the [<i>Birthdate</i>] field. If the [<i>Birthdate</i>] field is empty, the value in the [<i>Age</i>] field will be “0.” If you disable the automatic calculation of contact age, the [<i>Age</i>] field will become editable. More information about age calculation is available in the “ Contact age calculation ” article.

- Specify the addresses and communication options of the contact. Learn more in the “[Manage contact communication options](#)” article.
- Add dates important for the contact on the [*Noteworthy events*] detail. The detail fields are displayed when you select the corresponding commands in the + menu.

Type	Type of the noteworthy event, such as “Birthday” or “Company day.” Defined when a record is added. You can change it afterward.
Date	Date of the noteworthy event.

Note. Noteworthy events of the “Birthday” type are linked to the [*Birthdate*] field of the contact. If you populate the [*Birthdate*] field, a “Birthday” noteworthy event will be automatically created for the contact. Likewise, if you add a noteworthy event of the “Birthday” type, the [*Birthdate*] field will be populated accordingly. The same applies whenever the existing data is modified.

- Specify the connections between the selected contact and other contacts and accounts using the [*Connected to*] detail. Learn more in the “[Create connections between companies and accounts](#)” article.
- Navigate to the [*Current employment*] tab and populate contact career data. Learn more in the “[Manage contact career](#)” article.
- Go to the [*Communication channels*] tabs to restrict the usage of the communication options. Specify the

communication options no to use for communicating with the contact. The [*Do not use email*], [*Do not use phone*], [*Do not use SMS*], [*Do not use mail*] checkboxes signify which communication options should not be used to contact the person. These fields are non-editable. The values are filled in on the [*Communication options*] detail of the [*General information*] tab.

12. Click [*Save*].

As a result, a new contact record will be added to Creatio. Update the contact information at any moment, for example, via [data enrichment](#).

When you save a record, additional actions are available:

- The contact age is calculated based on the specified birth date. The contact's age is calculated based on the value in the [*Birthdate*] field.
- Duplicates search when saving a record. When you save a contact, a [duplicates search](#) page might open. It means that this record might be already registered in the system. You can edit the new record or indicate that the records found are not duplicates of the newly saved record.

Add a new contact from an email

If an email is received from a contact that has not been registered in the system, the sender's data will be displayed as "unrecognized" in the emails. In this case, you can create a new contact record directly from the incoming email. To do this:


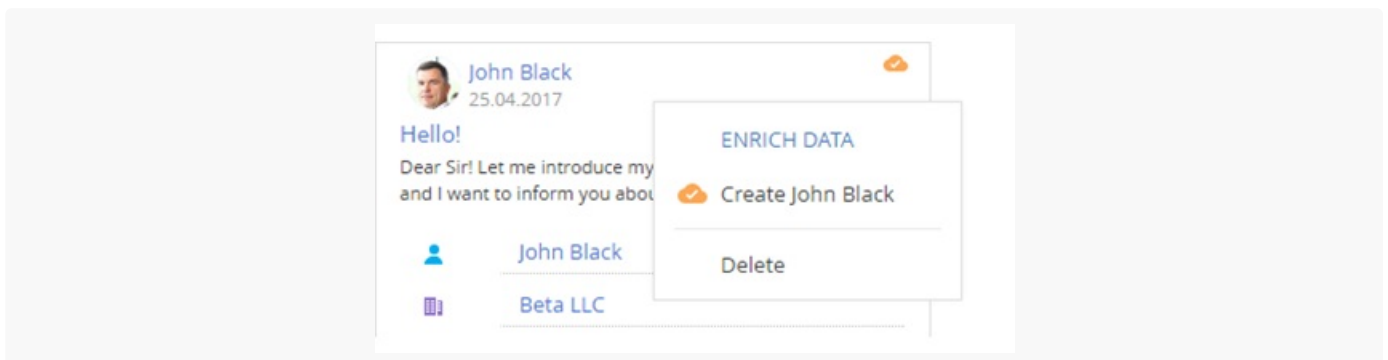
1. Open the email tab in the communication panel.
2. Select the author of the email for which you want to create a contact.
3. Click .
4. Select the [*Create "contact name"*] from the data enrichment menu ([Fig. 1](#)).

Fig. 1 – Creating a new contact from the email conversation



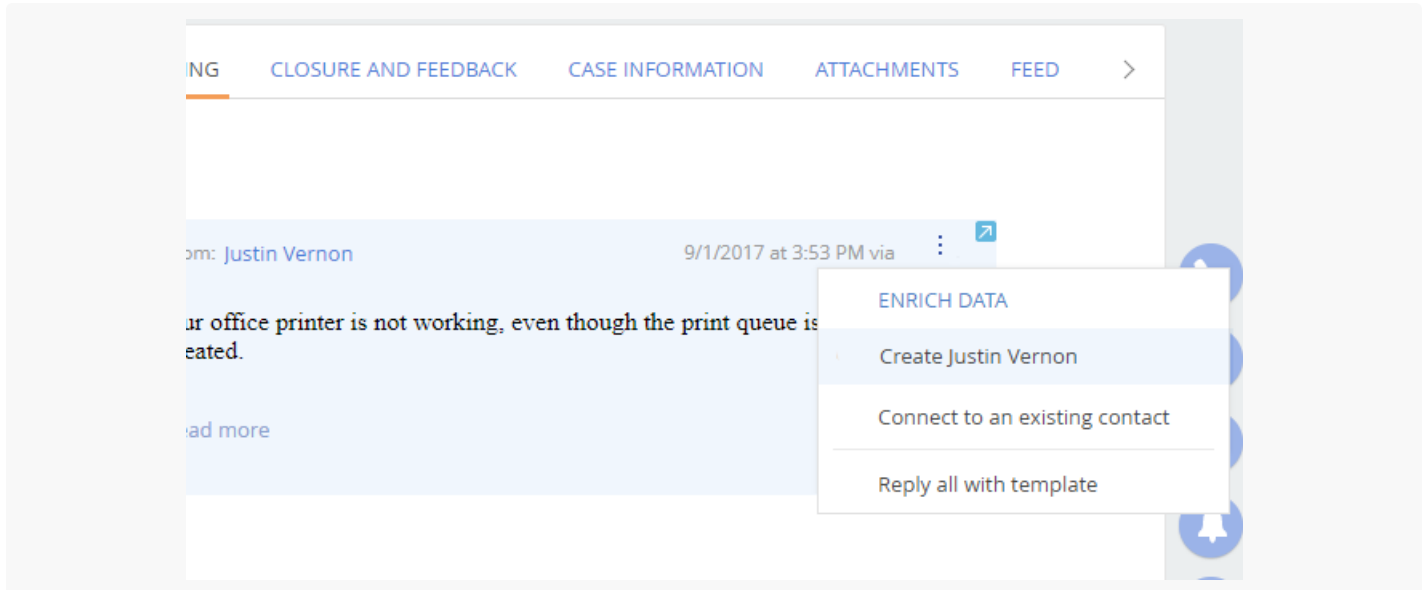
5. Select the contact data that you want to add in the opened window.
6. Save the changes.

As a result, a new contact will be added to the system. The [*History*] tab of the new contact page features all emails where the contact is either the sender or recipient over the last seven days. The email will be automatically linked to the new contact.

Create a contact from a case

Service Creatio products enable you to create a new contact from a case page if the case was created based on an email from unknown contact. Adding a new contact that way is similar to [adding a contact from an email](#) on the communication panel ([Fig. 2](#)). Creating a new contact only requires the name and the email address of the case contact, specified in the “From” field in the email (e.g., John Best, <john.best@gmail.com>).

Fig. 2 - Creating a contact from an email on the case page



The email used to create a contact will be displayed on the [*Email*] detail on the contact’s page. Creatio will prompt you to select the contact as the main contact in the case.