Contact Record View

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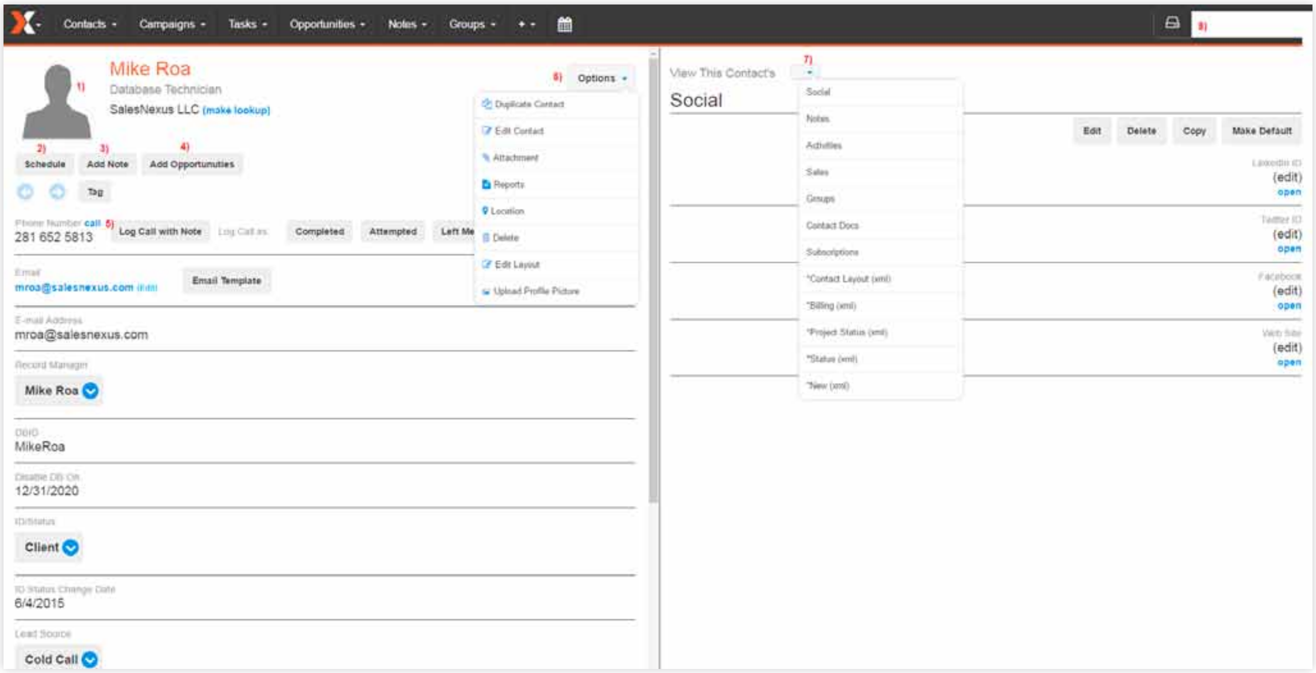

When viewing a contact record, you can set a headshot image or a "profile photo" for the record that is currently in view.

You can use the Schedule button to schedule tasks for this record, such as meetings, to-dos or calls.

You can add notes to the record.

You can add sales opportunities to the record.

To log a call transcript and make a note in regards to the conversation, you can use the Log Call with Note button.

Additional actions are available under the Options dropdown in relation to the record in view, such as editing, duplicating, uploading a profile photo or attaching a file to the record.

Under "View The Contact's" dropdown, you have the option to view other items in relation to this record, such as the record's notes, activities scheduled, sales opportunities and many more.

This is the quick search area where you can search for records using one field to search by; unlike the Look Up section, where you can search using several fields at one time, this area only offers searching against one field at a time.