# [Image result for liverpool john moores university logo](https://www.google.co.uk/url?sa=i&rct=j&q=&esrc=s&source=images&cd=&cad=rja&uact=8&ved=0ahUKEwjZuerSu4nXAhWGchQKHbT9CwIQjRwIBw&url=https://www.eventbrite.co.uk/o/liverpool-john-moores-university-roscoe-lectures-3233158788&psig=AOvVaw2rEDE_dQz3fMXV7J1A9n9g&ust=1508941556822069)

# Process Document

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**CRM – Centre for Entrepreneurship**

Liverpool John Moores University

**CFE:**

**Creating a Contact**

Version 0.1, November 2020

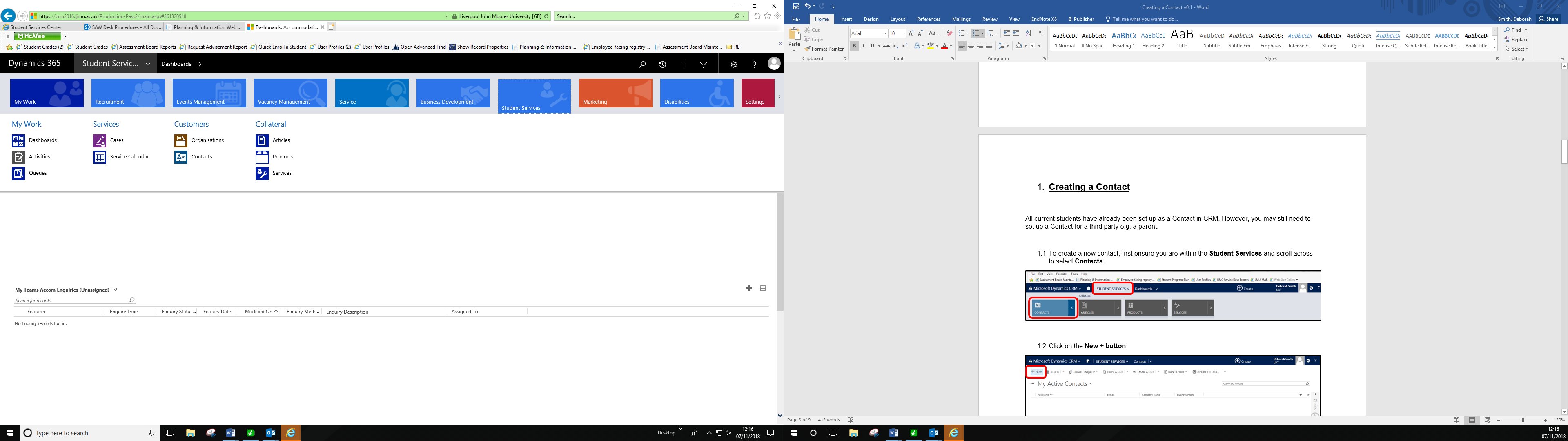
Author: SL Business Support Team

**Contents**

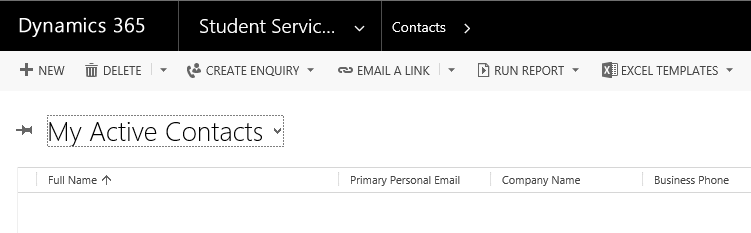
1. **Creating a Contact**
2. **Creating a Contact**

All current students/alumni have already been set up as a Contact in CRM. However, there may be occasions where you may still need to set up a Contact

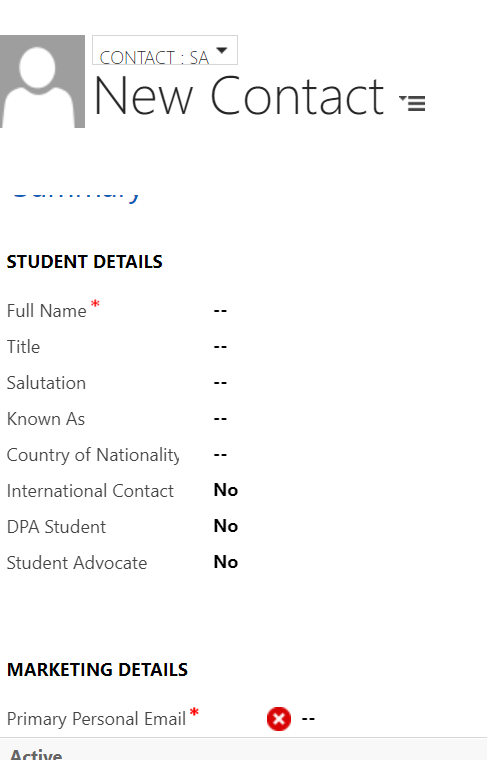
To create a new contact, first ensure you are within the **Student Services** and select **Contacts** from the **Customers** menu.



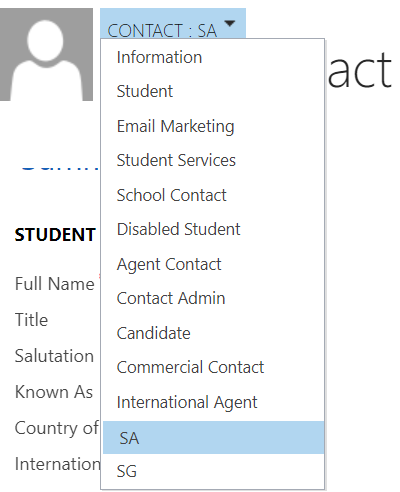
Click on the **New + button**



This will take you to the **New Contact** form.



Note that you can change the type of Contact by clicking on the drop down above **‘New Contact’**.



**Note: Please ensure you have the form set to SA Contact type.**

* Depending on the type of Contact, there will be different Mandatory fields, but you will always need to enter **Name and Email address**.
* Click **Save.**

**Note: Remember that Notes can be left against the Contact record, but for auditing purposes and that so a full picture can be given, all notes should be held against a Case.**