

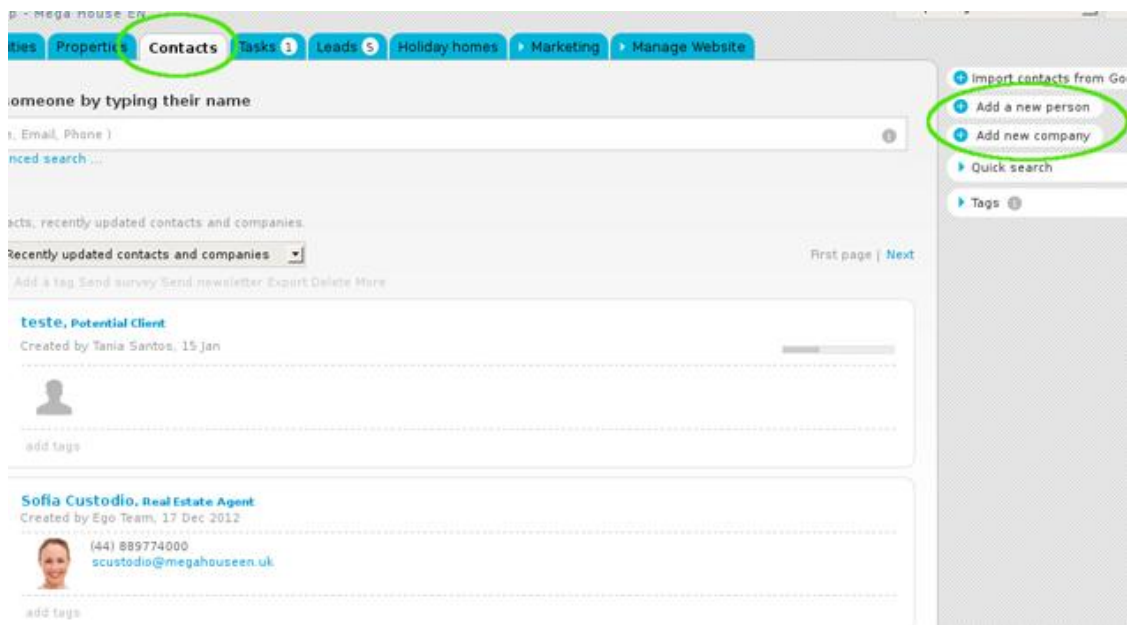
## How to manually add Contacts

Contacts are basically a record of an individual or company. Contacts can be a lead, a customer, a partner, a staff member, etc.

Contacts can be added in one of two ways: manually or from leads.

To manually add a contact, take the following steps:

1. Click the '**Contacts**' tab. Then on the right sidebar, click '**Add new person**' or '**Add new company**';



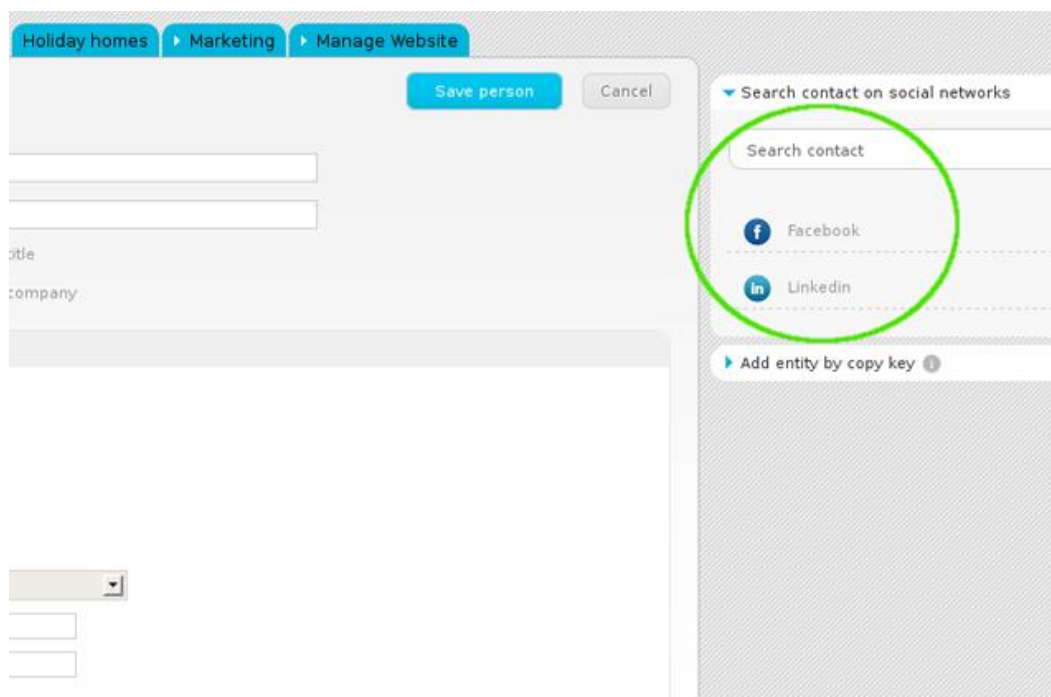
2. Complete the new contact form with all information details (first and last name, phone, email, date of birth, etc.);

The screenshot shows a web interface for adding a new person. At the top, there are navigation tabs: Opportunities, Properties, Contacts, Tasks (1), Leads (5), Holiday homes, Marketing, and Manage Website. A 'Save person' button is located in the top right corner. The main form is titled 'Add a new person' and includes a placeholder for a profile picture with a 'Change photo' link. The form fields are: First name, Last name, Title (with 'Add title' text), and Company (with 'Add company' text). Below these is a 'Details' section with a dropdown arrow. The details fields include: Gender (radio buttons for Male and Female), Phone (with 'Add phone number' text), Email (with 'Add email address' text), Marital Status (with a 'Choose one' dropdown), Date of Birth (with a date picker), Nationality (with a dropdown), Tax number, and Identification.

3. Set permissions for who can see this contact;

The screenshot shows the 'Who can see this person' permissions section. It features a 'BBAN' field at the top. Below it is a section titled 'Exports to sites' with a dropdown arrow and a checkbox labeled 'Website' next to a site icon. The 'Who can see this person' section is circled in green and contains three radio button options: 'Everyone' (selected), 'Only me', and 'Me and plus...'. At the bottom, there is a footer with the 'eGO Real Estate' logo and navigation links: Settings | Users | Groups | Support | FAQ | Updates | [Flags] | EGO is a service by Janela Digital. Privacy policy | Terms of service.

4. Another option available is **'Search contact on social networks'** (For a detailed explanation, see 'View profile on Social Media');



The screenshot shows a web interface for managing a user profile. At the top, there are navigation tabs: 'Holiday homes', 'Marketing', and 'Manage Website'. Below these, there are buttons for 'Save person' and 'Cancel'. The main form area contains several input fields, including one for 'title' and another for 'company'. On the right side, there is a section titled 'Search contact on social networks' which is circled in green. This section includes a 'Search contact' input field, two radio button options for 'Facebook' and 'LinkedIn', and a link for 'Add entity by copy key'.

5. Finally, click the **'Save'** button.



The screenshot shows a web interface for managing a user profile. It features a section for 'Purchase of this property depends on another' with a checkbox. Below this are input fields for 'Bank name', 'IBAN', and 'BBAN'. There is also a section for 'Exports to sites' with a checkbox for 'Website'. The 'Who can see this person' section has three radio button options: 'Everyone' (selected), 'Only me', and 'Me and plus...'. At the bottom right, there is a blue 'Save person' button circled in green. The footer contains the 'eGO Real Estate' logo and navigation links: 'Settings | Users | Groups | Support | FAQ | Updates |' followed by flags for Spain, Portugal, Brazil, Italy, France, and Germany. Below the flags, it says 'EGO is a service by Janela Digital. Privacy policy | Terms of service'.

6. After completing these steps, the application manager is redirected to the form of the contact recently added. Other actions can be done to fully complete each contact, such as:

- Add notes, files and/or tags;
- Send surveys, add tasks, view properties associated;
- View notifications created and received, etc.

The screenshot shows a CRM interface with a navigation bar at the top containing tabs for Opportunities, Properties, Contacts, Tasks (1), Leads (5), Holiday homes, Marketing, and Manage Website. The main content area displays the profile for Diane Evans, including a profile picture, name, company (Accuracy Engineering), phone number, and email address. Below the profile is a section for adding notes and attaching files. A 'Show entries' button is visible on the right. At the bottom, there is a 'Related files' section showing 'Other files (0)'. A dotted line is present below the screenshot.

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