

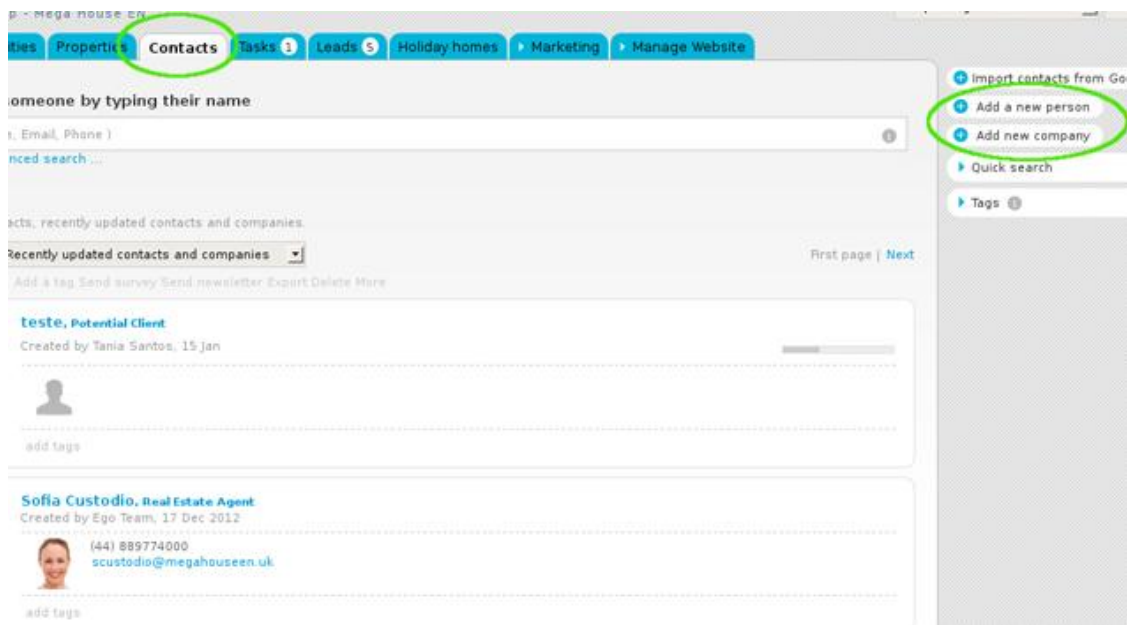
Step 8: How to manually add Contacts

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 the 'Add a new person' form in the EGO Real Estate system. The form is located under the 'Contacts' tab. It includes a 'Save person' button in the top right corner. The form fields are:

- First name:
- Last name:
- Title: (placeholder: Add title)
- Company: (placeholder: Add company)

Below the main form is a 'Details' section with the following fields:

- Gender: Male Female
- Phone: (placeholder: Add phone number)
- Email: (placeholder: Add email address)
- Marital Status: (placeholder: Choose one)
- Date of Birth: (placeholder: Add date)
- Nationality: (placeholder: Add nationality)
- Tax number:
- Identification:

3. Set permissions for who can see this contact;

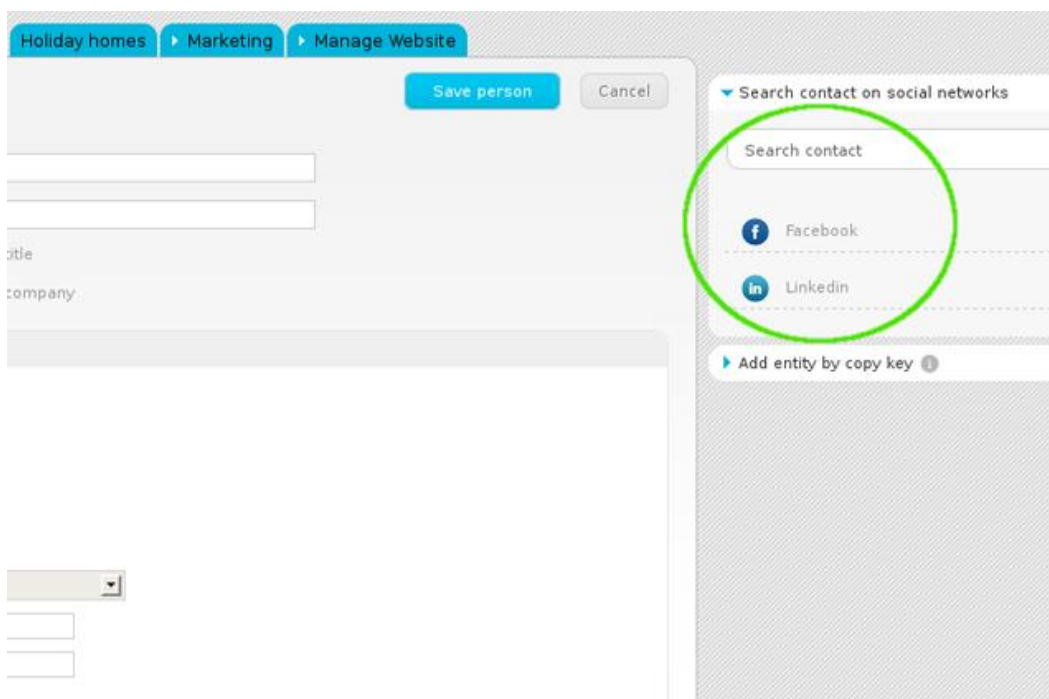
The screenshot shows the 'Who can see this person' permissions section in the EGO Real Estate system. The section is titled 'Who can see this person' and is circled in green. It includes the following options:

- Everyone
- Only me
- Me and plus...

Below the permissions section is the EGO Real Estate logo and footer information:

Settings | Users | Groups | Support | FAQ | Updates | 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 user management interface with a sidebar containing 'Holiday homes', 'Marketing', and 'Manage Website'. The main area has a 'Save person' button and a 'Cancel' button. A panel on the right is titled 'Search contact on social networks' and contains a 'Search contact' input field, a 'Facebook' button, and a 'LinkedIn' button, all of which are circled in green. Below these is an 'Add entity by copy key' button with an information icon. The main form area has several input fields, including one for 'title' and one for 'company'.

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



The screenshot shows a user management interface with a sidebar containing 'Holiday homes', 'Marketing', and 'Manage Website'. The main area has a 'Save person' button and a 'Cancel' button. A panel on the right is titled 'Search contact on social networks' and contains a 'Search contact' input field, a 'Facebook' button, and a 'LinkedIn' button, all of which are circled in green. Below these is an 'Add entity by copy key' button with an information icon. The main form area has several input fields, including one for 'title' and one for 'company'. At the bottom right, the 'Save person' button is circled in green.

Purchase of this property depends on another

Bank name

IBAN

BBAN

Exports to sites

Website

Who can see this person

Everyone

Only me

Me and plus...

Save person


EGO Real Estate Settings | Users | Groups | Support | FAQ | Updates |  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 photo, name, company (Accuracy Engineering), phone number, and email address. Below the profile is a section for adding notes and attaching files. A summary card at the bottom left lists contact details, and a related files section is on the right.

Opportunities Properties **Contacts** Tasks 1 Leads 5 Holiday homes Marketing Manage Website

 **Diane Evans** Profile completed: 100% edit
at Accuracy Engineering
Phone: (44) 887996223
Email: diane.evans@accuracyeng.com.uk

Adding note about

Attach files

No records to show.

add tags

Diane Evans edit | vcard
Mail: diane.evans@accuracy...
Telephone: (44) 887996223
Role: Salesman

Related files
Other files (0)

Learn more at: <http://academy.egorealestate.com>

Questions: support@egorealestate.com