

## How to add contact into Insightly

### Pages:

#### Step 1: Create new organization

Organizations

Search Organizations

New Organization

Click Here

		#	IMPORT
<input type="checkbox"/>	ABB Nigeria	A	<a href="#">Impo</a>
<input type="checkbox"/>	ABB Nigeria	B	<a href="#">Expo</a>
<input type="checkbox"/>	Adcock Ingram Holding	C	ORGANIZ
<input type="checkbox"/>	Addax Petroleum	D	<a href="#">No T</a>
<input type="checkbox"/>	Addax Petroleum	E	
<input type="checkbox"/>	Addax Petroleum	F	
<input type="checkbox"/>	Addax Petroleum	G	
<input type="checkbox"/>	Addax Petroleum	H	
<input type="checkbox"/>	Addax Petroleum	I	
<input type="checkbox"/>	Addax Petroleum	J	
<input type="checkbox"/>	Addax Petroleum	K	
<input type="checkbox"/>	Advans Ghana Saving & Loans Limited	L	
<input type="checkbox"/>		M	

#### Step 2: Input necessary information about Organization Name, Work Phone/ or company General Line, Company website address

Add New Organization

Save Discard

ORGANIZATION NAME

Organization Name

CONTACT DETAILS

Work Phone Phone Number

Add Phone Number

Add Email

Add Email Domain

Work URL Website URL

Add Website

Add Address

Add Twitter ID

Input details here all beginning letter must be capitalized

Contacts Organizations Opportunities Projects Emails Reports

Work URL Website URL x

Add Website  
Add Address  
Add Twitter ID

DATES TO REMEMBER  
Add Date To Remember

ADDITIONAL INFORMATION  
Background

CUSTOM FIELDS  
Business Sector Banking & Finance  
Country Algeria

PERMISSIONS  
Visible to: ☐ Everyone  
☒ Only the record creator  
☐ Select A Team  
☐ Select Individual People

Input details here all beginning letter must be capitalized

### Step 3: Select Contacts to add

Home Tasks Contacts Organizations Opportunities Projects

Search all data....

Contacts

Click Here to move to Contact

Click here to add contact information

New Contact

Filter

<input type="checkbox"/>	engr a adegbenru	PHCN	#	IMPORT
<input type="checkbox"/>	Ms Abdhia Moosa abdhia.moosa@airports.co.za (WORK)	Airports Company Of South Africa	A	Imp
<input type="checkbox"/>	mr abdul wahab-adam abdul-wahab@bsic.com (Work)	Sahel Sahara	B	Exp
<input type="checkbox"/>	Mr. Abed Kofori askofori@gcb.com.gh (Work)	Ghana Commercial Bank	C	CONTA
			D	No
			E	
			F	
			G	

## Step 4: Input Contact details

The screenshot shows a web application interface for adding contact details. On the left is a sidebar with navigation icons for Contacts, Organizations, Opportunities, Projects, Emails, and Reports. The main form is titled 'NAME AND OCCUPATION' and includes fields for Name (Prefix, First Name, Last Name) and Occupation (Role). Below this is a dropdown menu for 'CONTACT DETAILS' with a search bar containing 'BW Offshore Nigeria Limited'. Further down are sections for 'Work Email' (Email Address), 'Work Phone' (Phone Number), and 'DATES TO REMEMBER' (Occasion Name, Date, Reminder, Repeat yearly). A red oval labeled 'Important Fields to be filled' points to the 'Role' field, the 'CONTACT DETAILS' dropdown, the 'Email Address' field, the 'Phone Number' field, and the 'Occasion Name' field.

1. Must make sure Name, Occupation are correct.
2. Company name: must key in few words to search if the company name is already in the system. Ex: BW Offshore Nigeria Limited as in the above picture

If the Company Name does not exist in the system, do come back to Organization Tab to search/ re create the organization names and details

3. Work email and Work phone must not be blank
4. Date to Remember

Date: Date of Pitch/ Date of follow up 1, Date of follow up 2, etc

Occasion Name : Pitch/ Follow 1/ Follow 2/ etc

5. Additional Information: Information you would like to highlight about the contact; personal characteristics, responsive, etc
6. Permission : Select Only the record Creator