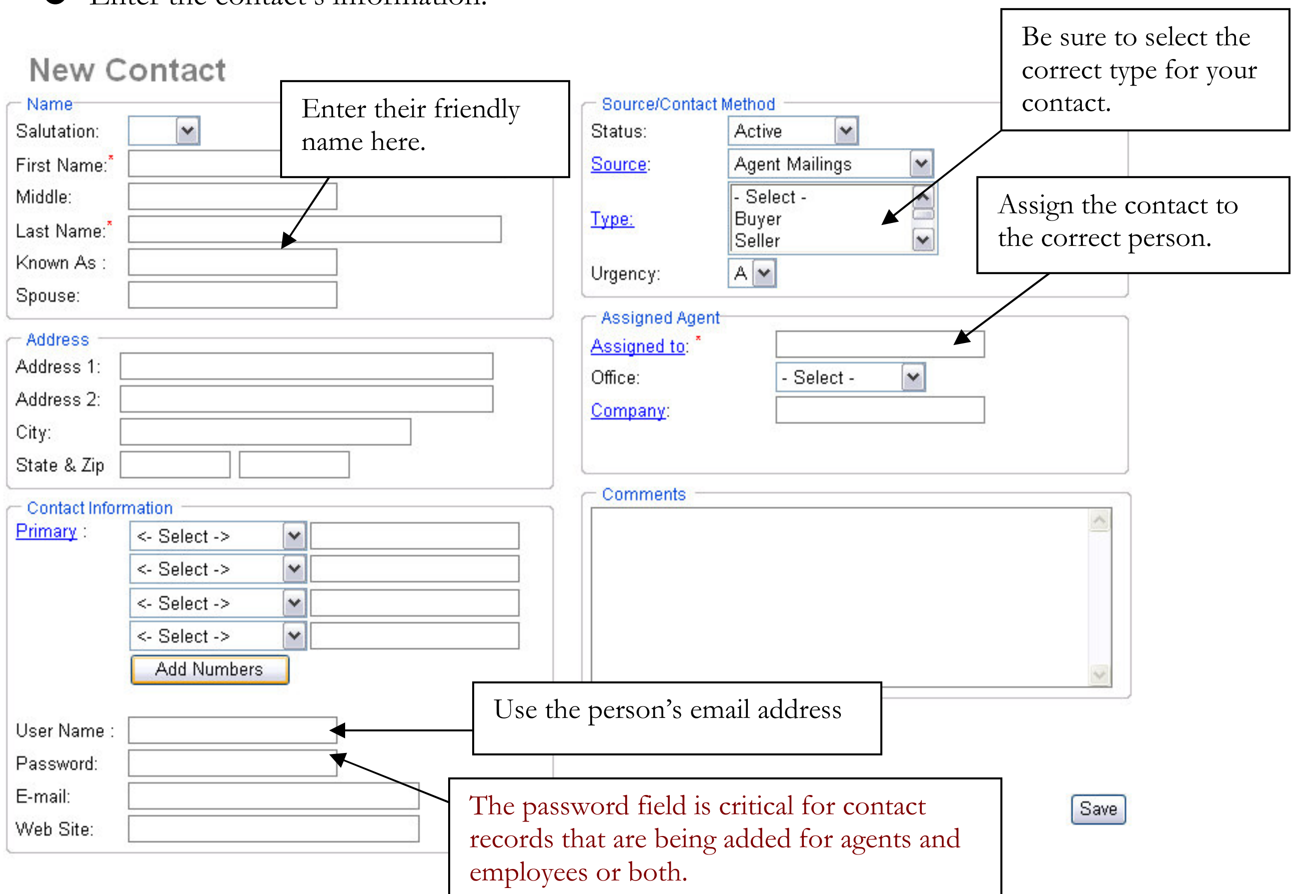
# Entering a New Contact through the Contact Module

You can add anyone to the system through the contact module, even if they are an in-house agent or employee. Before entering an in-house agent, be sure you are logged in with office admin, or company admin rights and refer to the instructions for *Entering a New Agent through the Contact Module.*

❶ Point to Contacts and click New.
❷ Enter the contact's information.

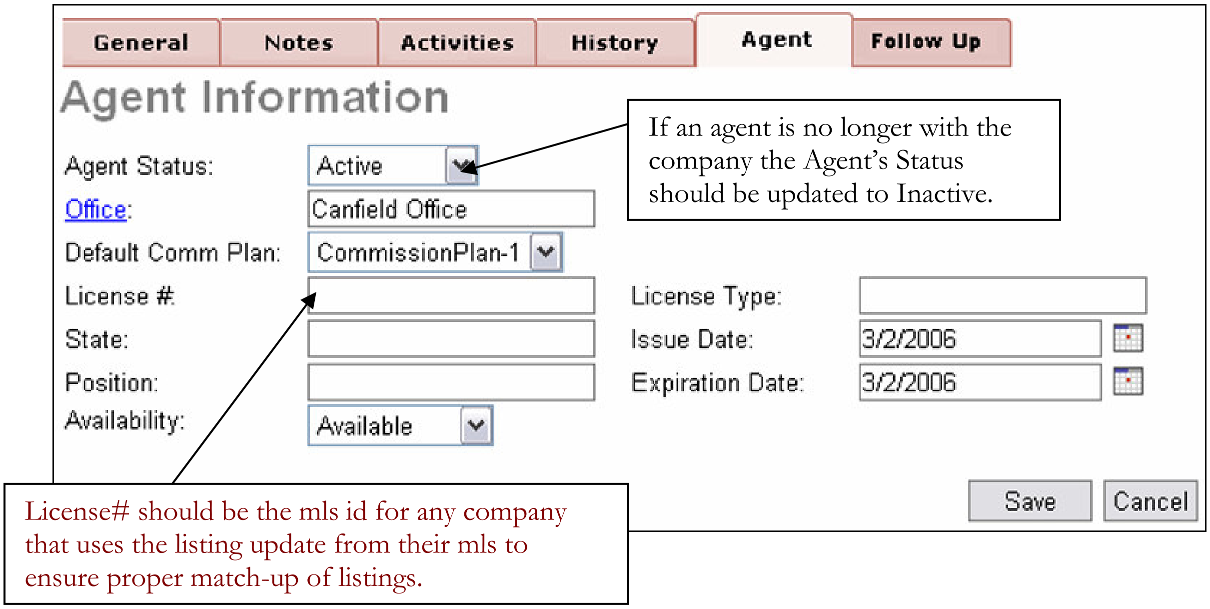



❸ Click Save, your contact has been entered into the ShowingPointe system and you can begin assigning activities to your new contact.

❹ For Contact records that are being added for agents and employees or both some permissions will also need to be checked and modified for proper security levels.

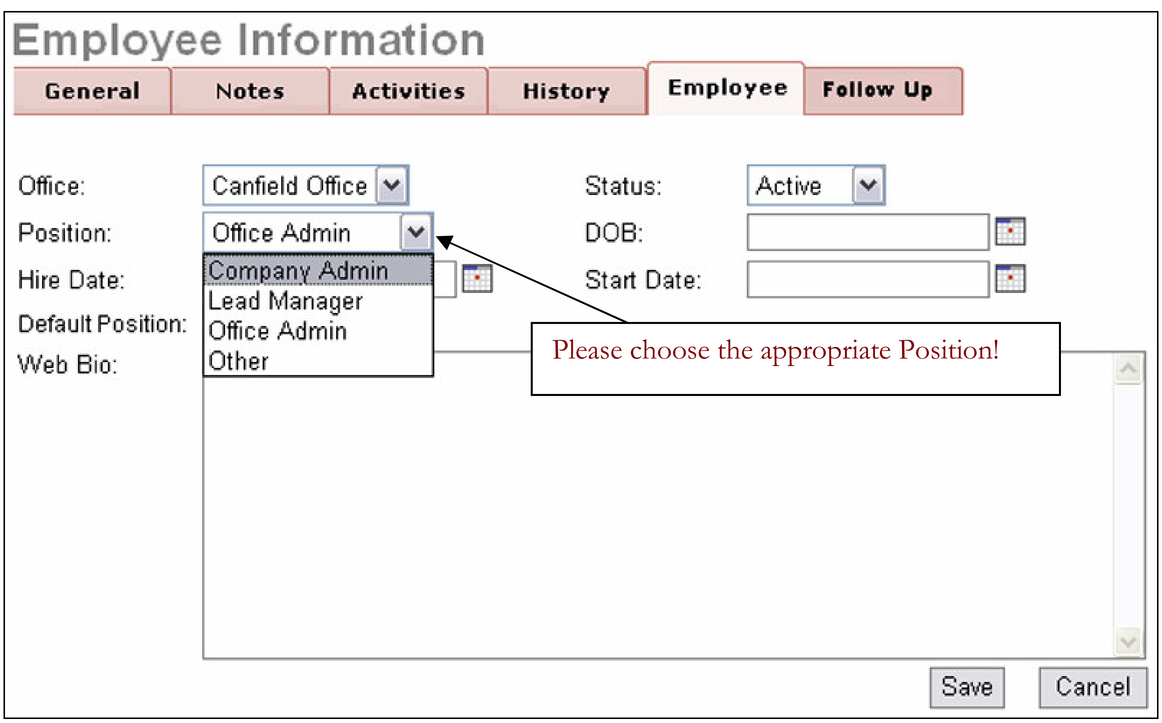
❺ For Contacts that are agents or employees (but not both – see instruction at step 9 for employees that are also agents), fill out the New Contact Record as shown above and click save.

❻ Once the record is saved a new tab will be created labeled Agent or Employee. For Agents, click on the tab and make note of some important fields to be filled out as indicated on the next screen shot.



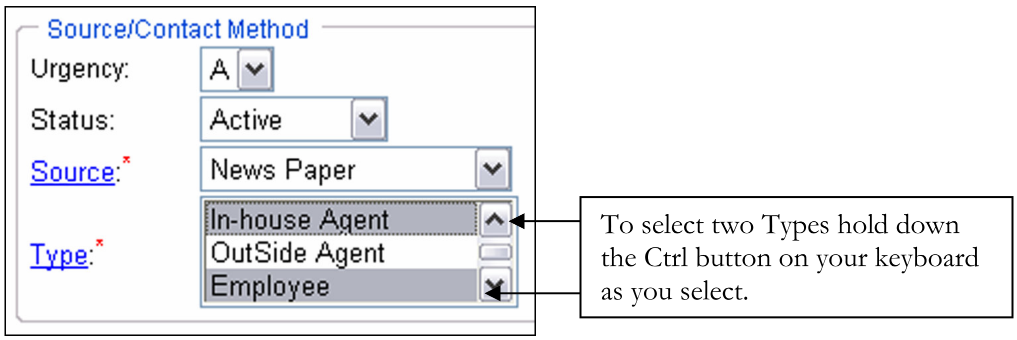

❼ Under this tab an agent's record can be modified in several useful ways which include Office assignment, Status, Availability, and License #. Once you are finished be sure to click Save to record your changes.

❽ Contacts that have been added for employees and saved will have an Employee tab that will need to be clicked on and reviewed for proper permissions. Office Admins only see activities for the office they are assigned too. Company Admins see everything in all offices. Choosing the correct position is critical to assigning the proper permissions. Save the record.

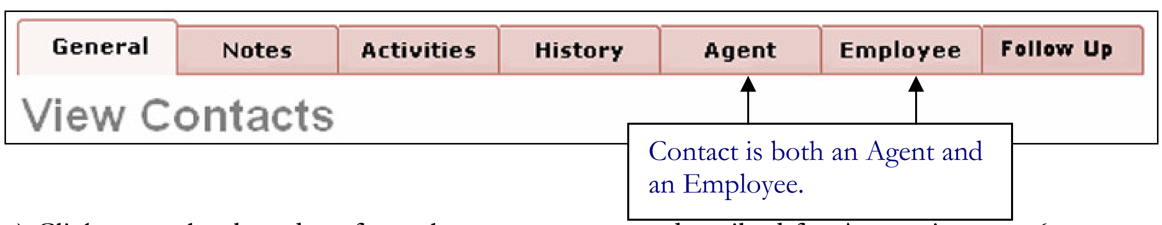


❾ Finally you will find it necessary to sometimes not only allow an employee to be able to see all the company or office activities but also need to search them as an agent and assign activities to them or leads from listings they may have. The following screen shots are examples of how to accomplish this.

a) When creating or editing the contact record find the Source/Contact Method entry area on the right hand side. In the type menu hold down the Ctrl button on your keyboard while selecting both In-House Agent and Employee. The Control button allows you to pick more then one type at once. Save the record.




b) Saving the record creates the Agent and Employee tabs as described in steps 5-8, but creates them both at the same time. For Example:




c) Click on each tab and perform the correct steps as described for Agents in steps 6-7, and Employees in step 8. Save your record and you are finished.