

How to add a new contact in the Less Annoying CRM

This guide covers the Less Annoying CRM manual, and creating a new contact



1 Go to the Login Page



Account Required

Please make sure to contact your IT department before starting this tutorial

Open the login page and fill in the Login form with:

- 1) You email
- 2) Your password





2 Click Login button

Title
 Description

Click Log in button





3 Select "New Contact"

After you log in, select the "New Contact" in the left menu

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? Help				
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4 Creating Contact form

Proceed with filling in the form with

- 1) **Name**
- 2) Email
- 3) Company name

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Create contact		

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5 Adding Notes



Additional funcionality

The following steps show how to add Notes, and Tasks. Scroll down to learn how to add a Lead

Click "Note" button to add a new note

Name Required				
Prest User				Name details
Email			Company Name	
test@user.com	Work	× ×	Company	
	Add another ema	ail address		
Phone			Job Title	
	Work	► ×		
Address	Add another pho	ne number	Deckersund Info	
Address			Background Into	
	VVOrk	× ×		
Birthday	Add anoth	er address	Website	
mm/dd/www.or.mm/dd		<u>1-1-1</u>	Website	
mm, dd, yyyy or mm, dd				Add another website
Buy Date			License type	<u>Add another website</u>
mm/dd/yyyy				~
ttach an item				
E Note Z Task	🎊 Group	🕎 Sale	s Lead 🔗 Customer Iss	ue
Create contact	<u>Cancel</u>		Fe Fe	olge.me



5.1 Add text



IMPORTANT

Notes are visible to all of your teammates.

Fill in the notes.

Email			Company Name		
test@user.com	Work	× ×	Company		
	Add another emai	il address			
Phone			Job Title		
	Work	××			
Address	Add another phon	<u>e number</u>	Background Info		
Audress	Work	¥ ×	Background Into		
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Attach a note to this contact				Remove this n	iote
Note					
This is a test user	F		G		
Attach an item					
F Note 🗹 Task	& Group	Sales	Lead	Folge.me	
Create contact	<u>Cancel</u>			-	



6 Adding a task

Click the "Task"

Phone			Job Title	
	Work	× ×		
	Add another phone	number		
Address			Background Info	
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Birthday			Website	
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Create contact	ancel			



6.1 Add Task details

- 1) Task name
- 2) Due date
- 3) Task description

mm/dd/yyyy or mm/dd			
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Buy Date	1 - La	License type	
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Follow up with Test User			
Due date	0		
03/01/2023			
Description			
Enter a description or any	about this task.		
		FO	ige.me
Create contact	Cancel		



7 Confirm the new contact

Click "Create contact" to confirm the new account creation

Note	
This is a test user	
Attach a task	Remove this task
Task name	
Follow up with Test User	
Due date 03/01/2023	
Description	
Enter a description or any notes about this task.	
Attach an item	
📄 Note 🗹 Task 🎄 Group 🔤 Sales Lead	Security Customer Issue
Create contact Cancel	Folge.me



8 Adding a new Lead

Continue with creating a new lead









9 Creating the sales lead

Move user to a corresponding Sales status

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9.1 Add Optional notes

•••	Test User's Profile - Less Anno 🗙		~
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Settings	Cre	te Sales Lead <u>Cancel</u>	npany info View Edit
			Company Name
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9.2 Finish creating a sales lead

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