



# 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

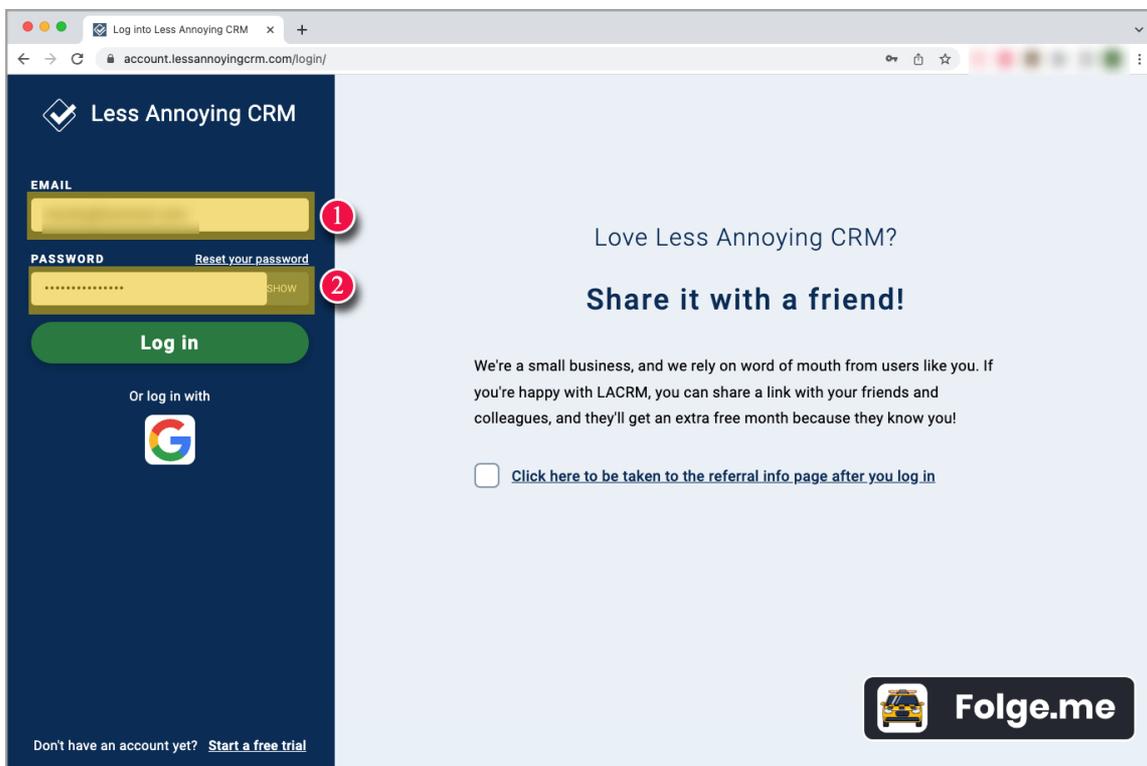


## Account Required

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

Open the [login page](#) and fill in the Login form with:

- 1) Your email
- 2) Your password



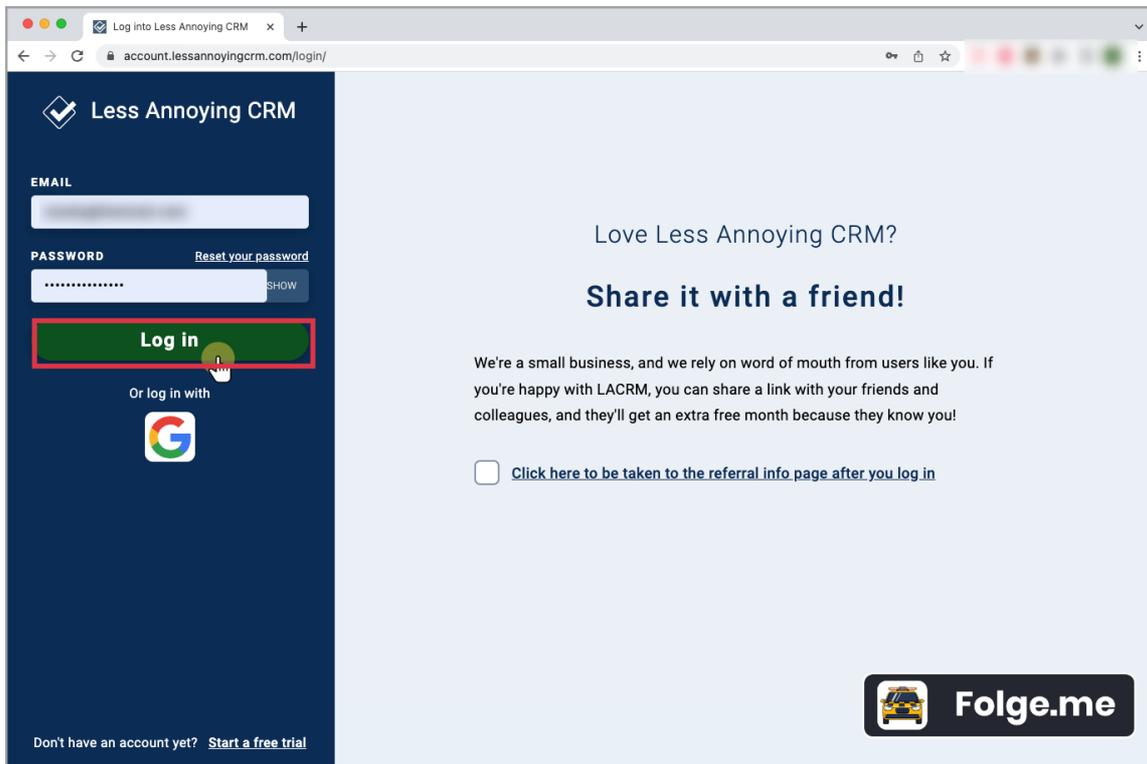
## 2 Click Login button



Title

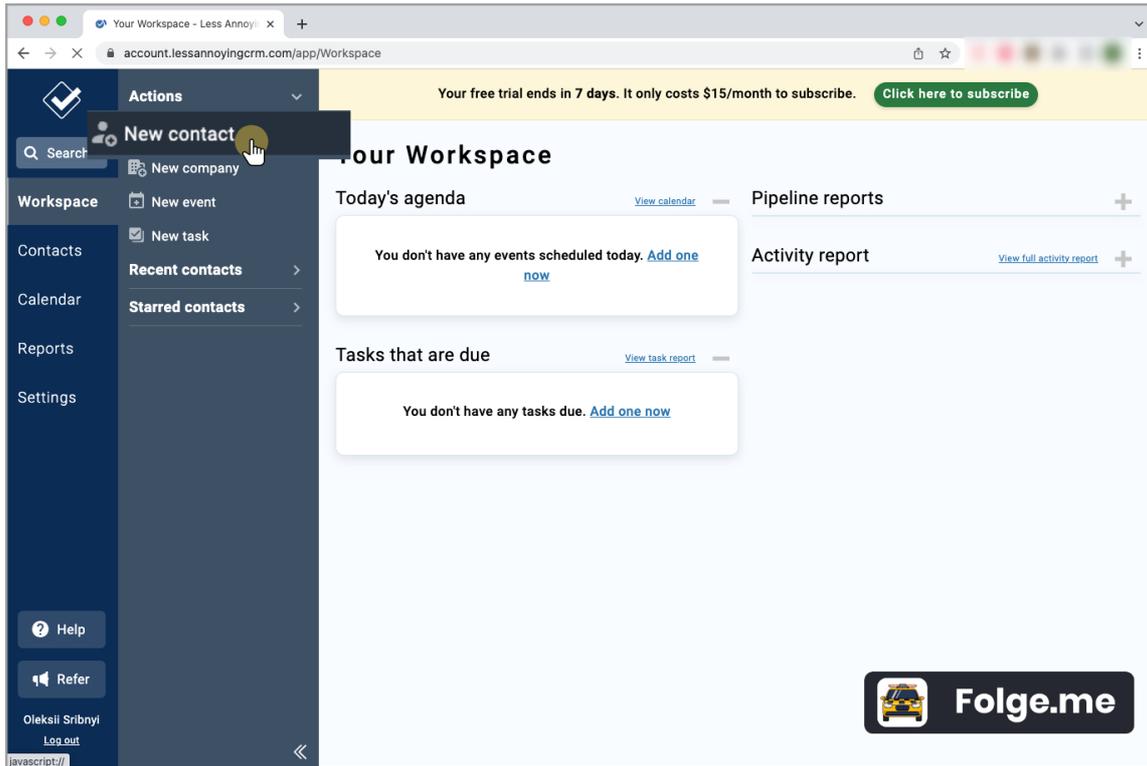
Description

Click **Log in** button



### 3 Select "New Contact"

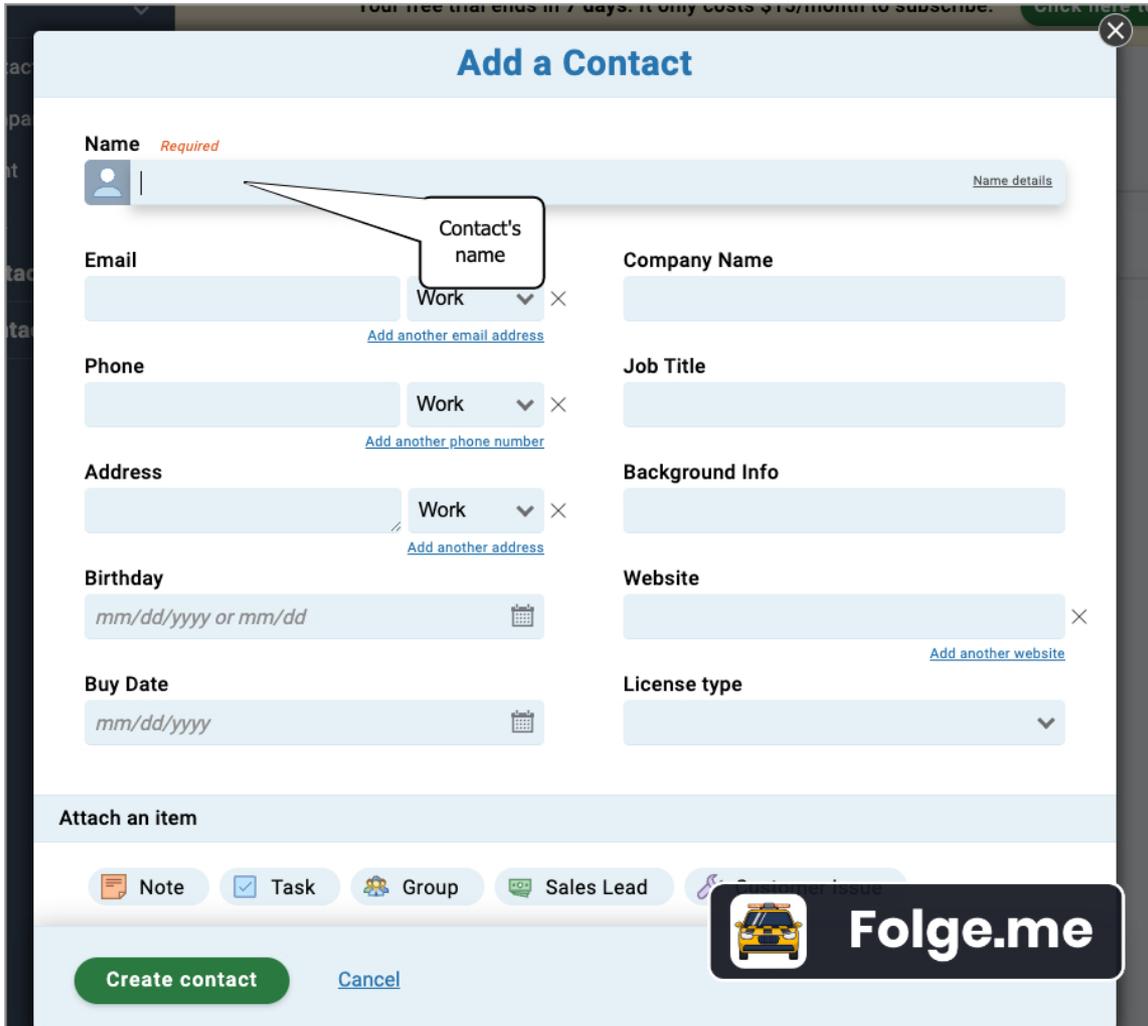
After you log in, select the "New Contact" in the left menu



## 4 Creating Contact form

Proceed with filling in the form with

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



**Add Contact**

**Name** *Required*

**Email** Work × [Add another email address](#)

**Phone** Work × [Add another phone number](#)

**Address** Work × [Add another address](#)

**Birthday** *mm/dd/yyyy or mm/dd* 

**Buy Date** *mm/dd/yyyy* 

**Company Name**

**Job Title**

**Background Info**

**Website** × [Add another website](#)

**License type** ▼

**Attach an item**

 Note  Task  Group  Sales Lead

**Create contact** [Cancel](#)



### Add a Contact

**Name** *Required*

[Name details](#)

**Email**  **Work**  [Add another email address](#)

**Phone**  **Work**  [Add another phone number](#)

**Address**  **Work**  [Add another address](#)

**Birthday**

**Buy Date**

**Company Name**

**Job Title**

**Background Info**

**Website**   [Add another website](#)

**License type**

**Attach an item**

[Cancel](#)



### Add a Contact

**Name** *Required*

 Test User [Name details](#)

**Email**  Work ⌵ ×  
[Add another email address](#)

**Phone**  Email Work ⌵ ×  
[Add another phone number](#)

**Address**  Work ⌵ ×  
[Add another address](#)

**Company Name**

**Job Title**

**Background Info**

**Website**  ×  
[Add another website](#)

**License type**  ⌵

**Birthdate**  

**Buy Date**  

**Attach an item**

Note  Task  Group  Sales Lead



[Cancel](#)

### Add a Contact

**Name** *Required*  
Test User [Name details](#)

**Email**  
test@user.com | Work ×  
[Add another email address](#)

**Phone**  
  
Work ×  
[Add another phone number](#)

**Address**  
  
Work ×  
[Add another address](#)

**Company Name**  
  
**Job Title**  
  
**Background Info**  
  
**Website**  
  
[Add another website](#)

**Birthdate**  
mm/dd/yyyy or mm/dd 📅

**Buy Date**  
mm/dd/yyyy 📅

**License type**  
  
⌵

**Attach an item**

Note Task Group Sales Lead ...

🚗 Folge.me

Create contact Cancel

## 5 Adding Notes



### Additional functionality

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

The screenshot shows a contact form with the following fields:

- Name** *Required*: Test User (with Name details link)
- Email**: test@user.com (with Work dropdown and Add another email address link)
- Phone**: (with Work dropdown and Add another phone number link)
- Address**: (with Work dropdown and Add another address link)
- Birthday**: mm/dd/yyyy or mm/dd (with calendar icon)
- Buy Date**: mm/dd/yyyy (with calendar icon)
- Company Name**: Company
- Job Title**: (empty)
- Background Info**: (empty)
- Website**: (with Add another website link)
- License type**: (with dropdown arrow)

**Attach an item** section:

- Note (highlighted with a hand cursor)
- Task
- Group
- Sales Lead
- Customer Issue

Buttons: Create contact, Cancel

**Folge.me** logo

## 5.1 Add text



### IMPORTANT

Notes are visible to all of your teammates.

Fill in the notes.

**Email**  
test@user.com Work  [Add another email address](#)

**Phone**  
 Work  [Add another phone number](#)

**Address**  
 Work  [Add another address](#)

**Birthday**  
 

**Buy Date**  
 

**Company Name**

**Job Title**

**Background Info**

**Website**  
  [Add another website](#)

**License type**

**Attach a note to this contact** [Remove this note](#)

**Note**  
This is a test user  

**Attach an item**

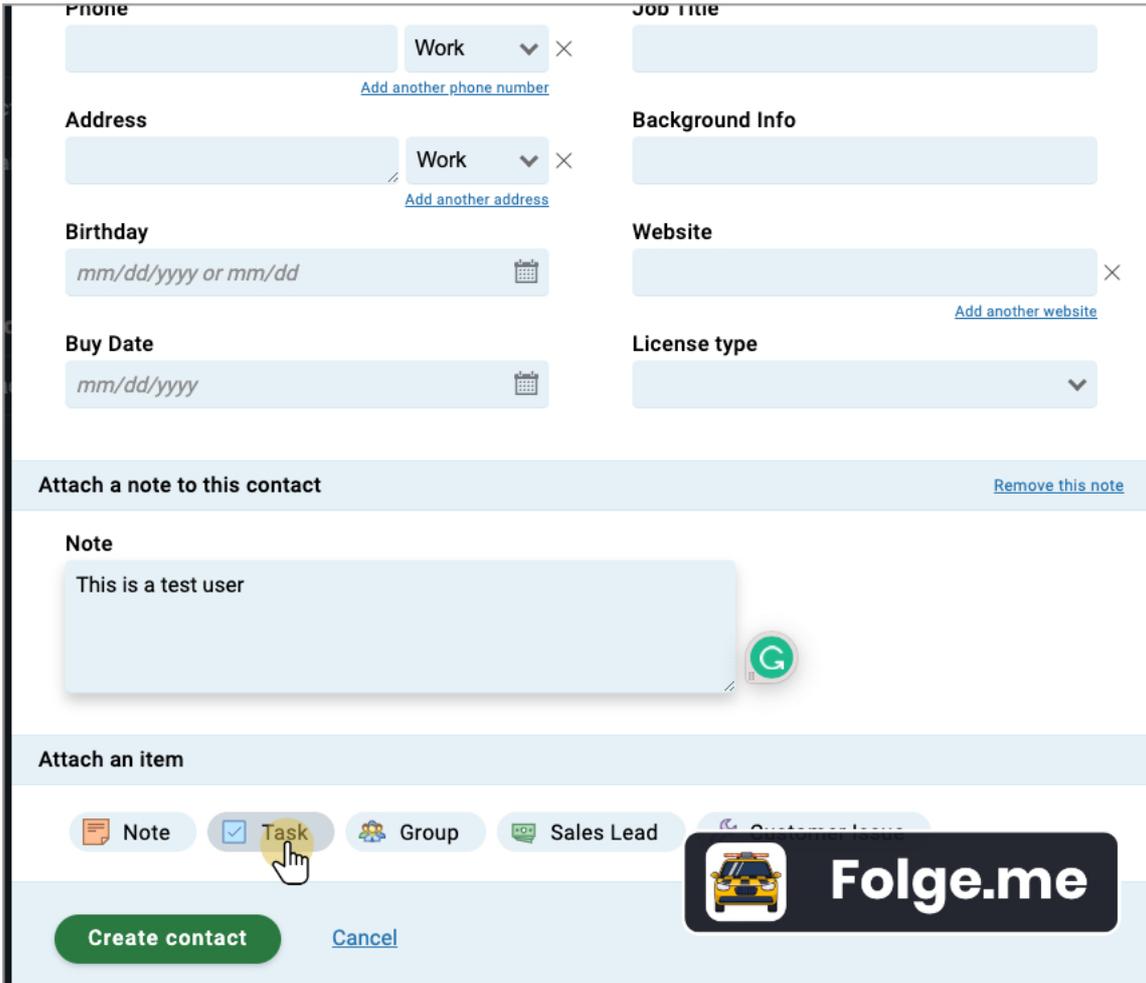
Note  Task  Group  Sales Lead



[Cancel](#)

# 6 Adding a task

Click the "Task"



**Phone**  
[Input field] Work [Dropdown] [Close] [Add another phone number](#)

**Address**  
[Input field] Work [Dropdown] [Close] [Add another address](#)

**Birthday**  
[Input field: mm/dd/yyyy or mm/dd] [Calendar icon]

**Buy Date**  
[Input field: mm/dd/yyyy] [Calendar icon]

**JOB TITLE**  
[Input field]

**Background Info**  
[Input field]

**Website**  
[Input field] [Close] [Add another website](#)

**License type**  
[Dropdown menu]

**Attach a note to this contact** [Remove this note](#)

**Note**  
This is a test user [Green circular icon]

**Attach an item**

Note [Checked] **Task** [Hand cursor] Group Sales Lead Customer

**Create contact** [Cancel](#)



## 6.1 Add Task details

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

*mm/dd/yyyy or mm/dd* 

  
[Add another website](#)

**Buy Date**  
*mm/dd/yyyy* 

**License type**

**Attach a note to this contact** [Remove this note](#)

**Note**  
This is a test user

**Attach a task** [Remove this task](#)

**Task name**  
Follow up with Test User **1**

**Due date**  
03/01/2023  **2**

**Description**  
*Enter a description or any notes about this task.* **3**

**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**

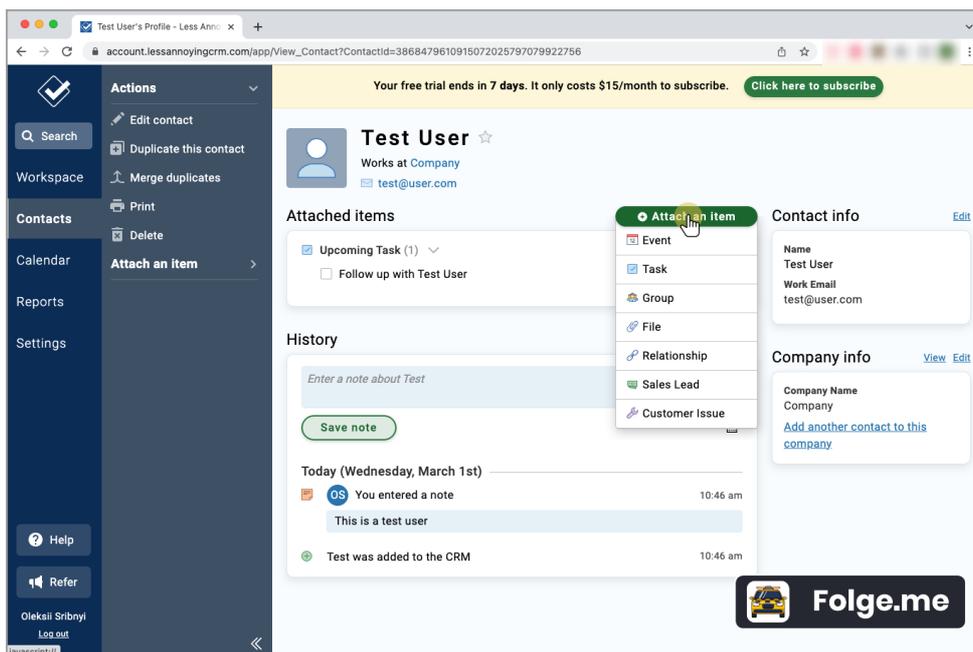
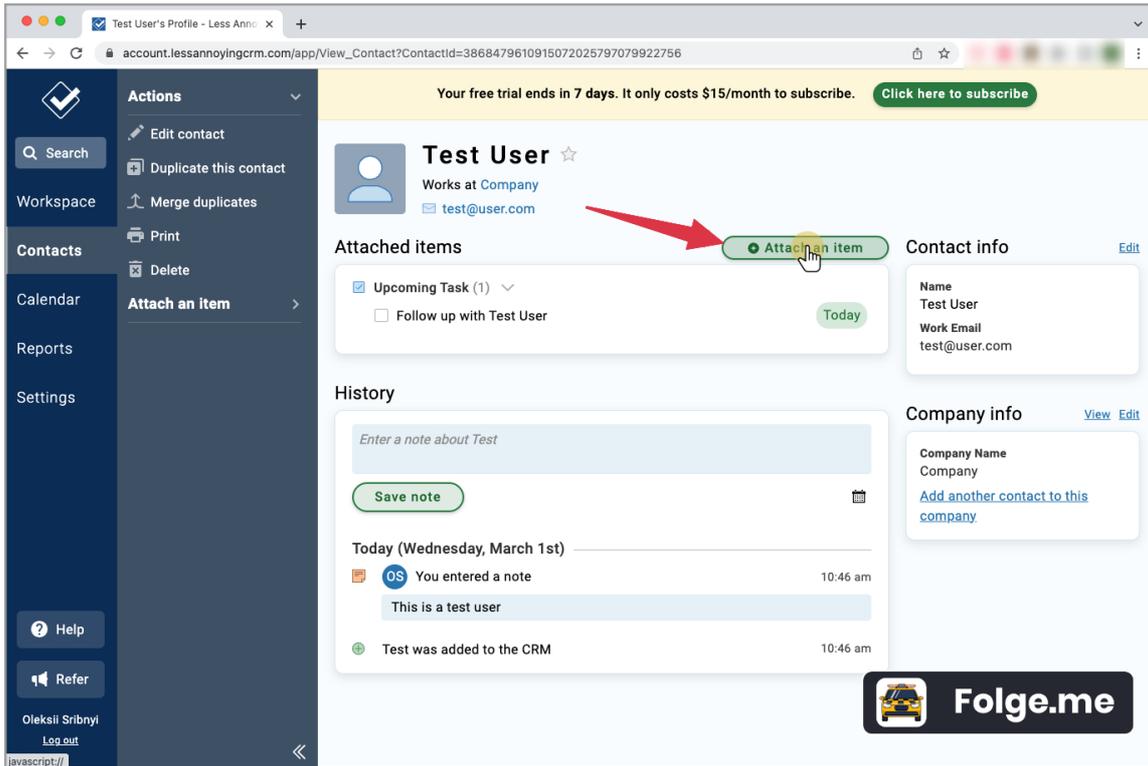
 Note  Task  Group  Sales Lead  Customer Issue

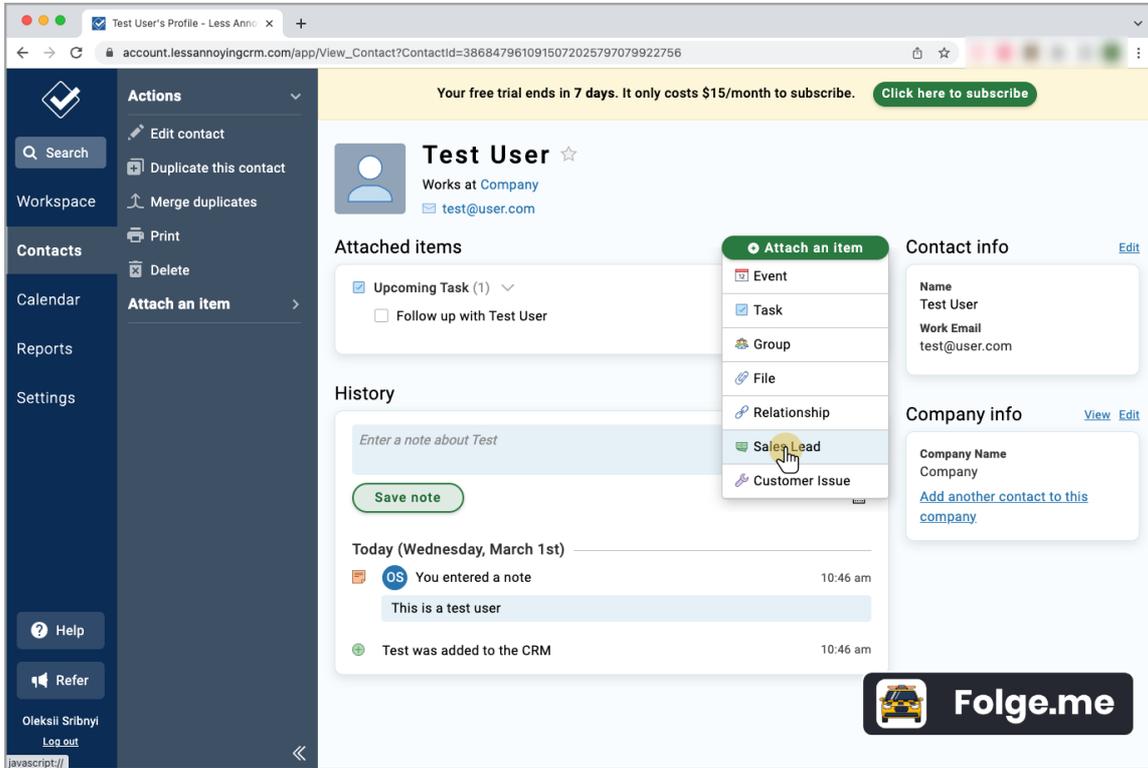
 [Cancel](#)



# 8 Adding a new Lead

Continue with creating a new lead

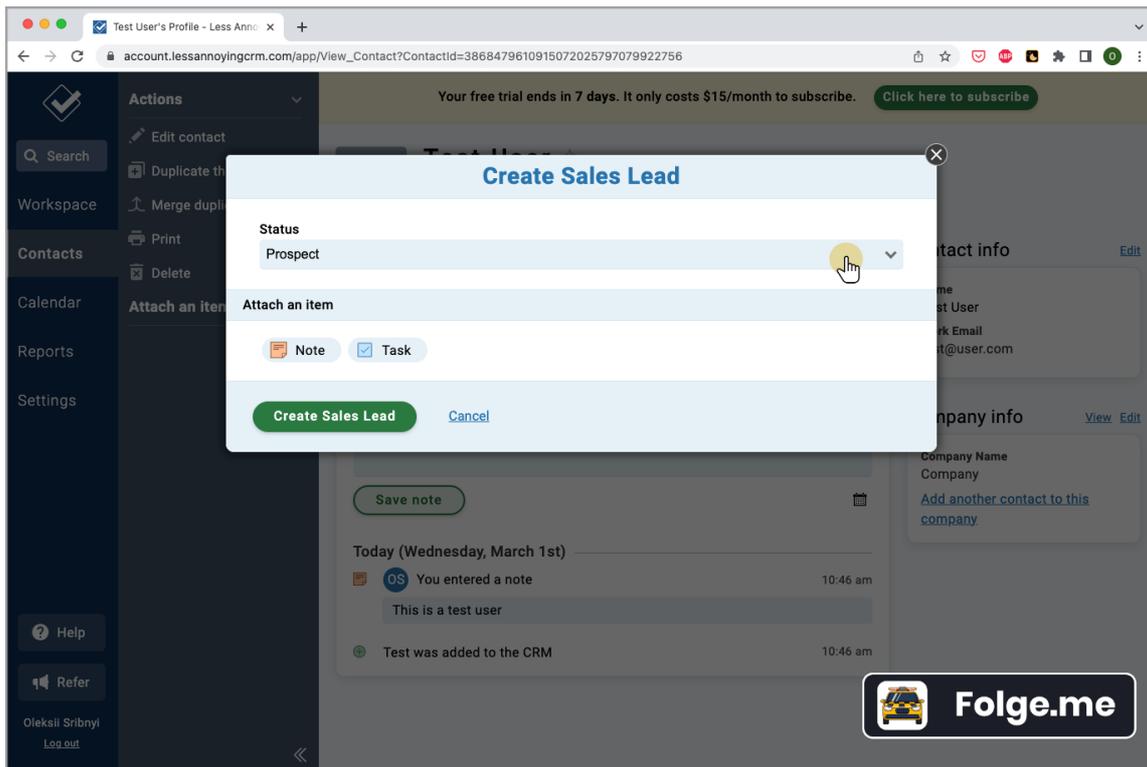




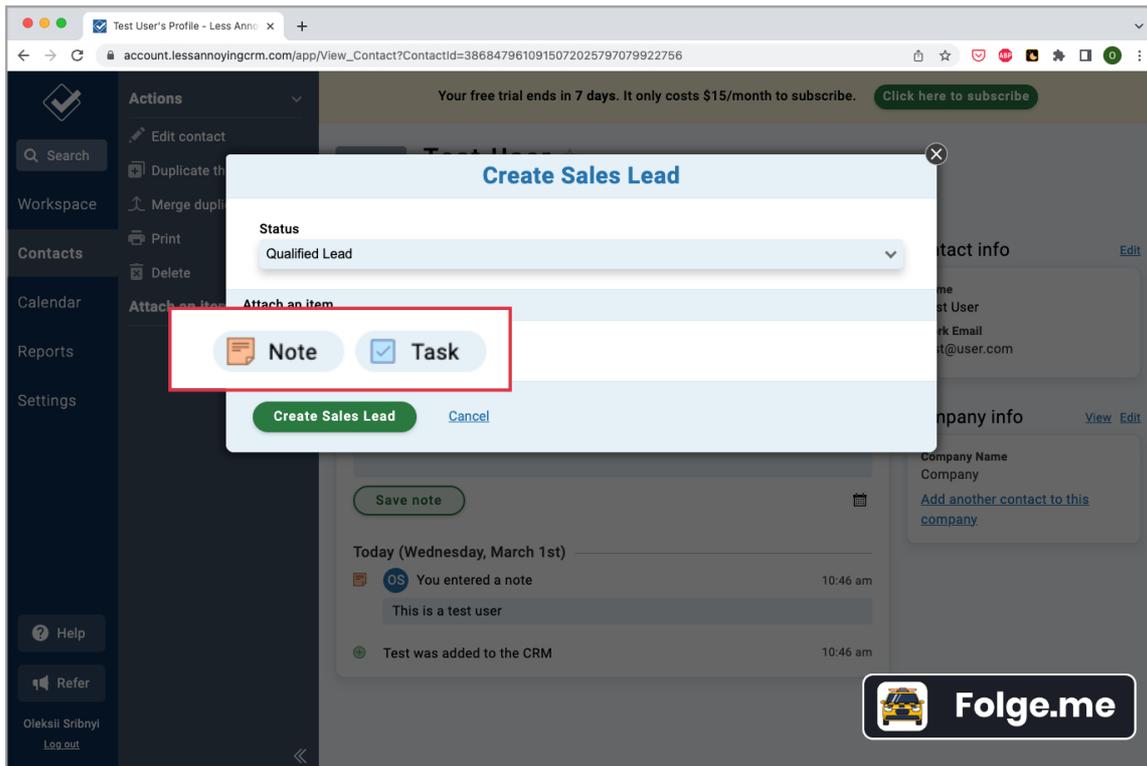
The screenshot shows the 'Test User' profile page in the Less Annoying CRM. The page includes a sidebar with navigation options like Search, Workspace, Contacts, Calendar, Reports, and Settings. The main content area displays the user's profile information, including their name, company, and email. A yellow banner at the top indicates a 7-day free trial ending. The 'Attach an item' dropdown menu is open, showing options such as Event, Task, Group, File, Relationship, Sales Lead (highlighted), and Customer Issue. The 'History' section shows a note entered about the user and a message indicating the user was added to the CRM. The 'Contact info' and 'Company info' sections are also visible.

## 9 Creating the sales lead

Move user to a corresponding Sales status



## 9.1 Add Optional notes



## 9.2 Finish creating a sales lead

