Creating a New Contact [1]

February 10, 2023 by jennifer.mortensen [2]

When you need to add a lead or contact to the Integrated Online Services (org), you can so in a few quick and easy steps.

1. Start on the **Contacts** tab in Salesforce. You'll notice a page component titled "**New**." The information you'll be need to provide before proceeding is included below. Click **Next** when finished.

- First Name and Last Name
- Mobile Phone
- Email Address (Required)
- Program of Interest (Required)
- Specialization (if applicable)
- Lead Source (see valid values HERE [3])
- Source Channel (see valid values HERE [3])
- Pronouns

2. After clicking **Save**, a new Salesforce contact will be created based on the information you entered. **Salesforce will load, showing you the new contact.** If you have multiple contacts, you can click **'Save & New'** to be presented with a fresh contact creation form.

Display Title:
Creating a New Contact
Send email when Published:
Yes

Links
[1] https://www.cu.edu/blog/integrated-online-services/creating-new-contact
[2] https://www.cu.edu/blog/integrated-online-services/author/13789 [3] https://www.cu.edu/blog/integrated-online-services/ios-lead-attributions