

REDTAIL: Adding Contacts

REDTAIL CRM Search Contacts...

Today | Accounts | Activities | Emails | **Contacts** | Market News | Notes | Opportunities | Reminders

Calendar

Contacts

Reports

Opportunities

Seminars

\$2,531,394.00 AUM

16 reminders REMINDERS

Things to do today (6)

WHEN	SUBJECT	TYPE	!	#
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Contact Favorites

new contact

NAME	STATUS	CATEGORY	SOURCE	TYPE	SERVICING ADVISOR	WRITING ADVISOR
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Showing 0 to 0 of 0 entries

ADD NEW CONTACT

- Individual** In most instances, these will be "Individual" >
- Business** >
- Association >
- Trust >
- Union >

Fields below that are highlighted **YELLOW** are mandatory

New Individual

Salutation: [dropdown] First: [text] Middle: [text] Last: [text] Suffix: [dropdown]

Preferred Pronouns: [text]

Nickname: [text] Pronunciation: [text] Designations: [text]

Job Title: [text]

Employer: [text]

Spouse

Only mandatory if married

Salutation: [dropdown] First: [text] Middle: [text] Last: [text] Suffix: [dropdown]

Nickname: [text] Designations: [text]

Job Title: [text]

Employer: [text]

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Addresses

Address Type

Home
Mailing
Other
Work

Country

United States

Address

Address Line 2

City

State/Province/Region

Postal Code

add another address...

Select if adding more than one address

Phones

Phone Type

Please select

Phone Number

(201) 555-0123

Is Primary?

Extension

Speed Dial

add another phone number...

Select if adding more than one Phone number

Emails

Email Type

Please select

Email Address

Is Primary?

add another email address...

Select if adding more than one e-mail

Contact Details

Status

Not Specified Choose appropriate status

Gender

Please select

Category

Choose appropriate category

Tax ID Number

000-00-0000

Source

Please select

Marital Status

Select option, if known

Marital Anniversary

Referred By

Client Since

Client Termination Date

Servicing Advisor

Choose yourself

Date of Birth

Date of Death

Writing Advisor

Choose yourself

Enable DOB Reminder?

Permissions & Roles

Permission To

Selected Team

Advisor

Please select choose yourself

Teams

Please select

Associate Advisor

Please select

Please select

Ference- Reyes

CSA

Please select

Feronti Ference

Choose yourself and Reyes

Feronti- Reyes

Recruiting

Reynolds- Reyes

Spicer- Reyes

Stephens- Reyes

Team 401K

Save Contact

Save & New