Adding Contacts

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If you haven't checked out our main article for a Contacts Overview, we suggest you head over there first to become familiar with the entire Contacts feature and all it's capabilities before you start adding your contacts.

Your browser does not support HTML5 video.

Ready to add some contacts to your Farmbrite system? You might be adding customers, buyers, suppliers, vendors - or really anyone you interact with in your business. To add your first contact, navigate to the Contacts selection on the left menu, and then choose the New Contact button.

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🛱 Schedule		Contacts						
 Tasks Livestock 	~	New Contact			Search Contacts			Q
Y Crops	×	NAME 🗸	TYPE	COMPANY	EMAIL	PHONE	CITY	
😽 Resources	~	Worthington, Carie	Buyer	American Meats	carie@americanmeatsmfgcoinc.com	(303) 555-5473	Golden	×
Accounting	Ň	Wiggum, Clancy	Contractor	Alpine Contracting LLC	Cwiggum@alpinecontractors.com	(303) 555-8533	Westminster	×
🖬 Market	Ň	White, Walter	Wholesale Customer	Bison and Beef Company	walt@bisonandbeefforyou.com	(303) 555-7535	Broomfield	×
Contacts		Wallace, Greg	Customer		greg@mailinator.com	(303) 555-1030	Lafayette	×
Farm Map		Roberts, Anna	Employee	Copperdale Farms	anna@copperdalefarms.com	(303) 555-2531	Superior	×
C Reports		Marcus, Regina	Veterinarian	Happy Tails Animal Clinic	regina@happytailsforlife.net	(303) 555-3534	Niwot	×
		Mann, Otto	Certifier	Boulder County	Kearney@bococertifies.com	(303) 555-8427	Nederland	×

You'll see a new form pop up, asking for information about your contact. Most of these fields will be familiar to you - you obviously know what to supply for basic contact information like First or Last Name, Email, Phone, Address, and Company. Don't worry if you don't have all this information - none of these fields are required, so just supply what you have! You might simply supply a Company if you need to have an organizational record for a business you work with, but not a particular person to contact.

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🗄 Schedule	New Contact		
⊘ Tasks	First Name		
🛃 Livestock 🗸 🗸	Last Name		
🌱 Crops 🗸 🗸	Last marrie		
Resources ~	Email		
Accounting Y	Contact Type	· · ·	
Market Kontacts	Keywards	example: Vet, mechanic, etc	
D Farm Map	Primary Phone	(123) 867-5309	
Reports	Mobile Phone	(123) 867-5309	
	Fax	(123) 867-5309	
	Company		
	Address		
	City		
	Country	United States	
	State/Province	Alabama	
	Postal Code		
	Description		
			Cancel Save

You can also add other information to further keep track of your new contact. You can first add a Contact Type, allowing you to classify your relationship with this contact, and then easily search for all records of the same type later. You can also optionally mark the contact as Tax Exempt, so that they will not have taxes charged on their market orders. This might apply if they are a non-profit or reseller.

First Name	Maria	
Last Name	Nunez	
Email	maria@nunezconsulting.com	
Contact Type	Consultant 🗸	
Keywords	Auditor Buyer	
Primary Phone	Certifier Contact Consultant	
Mobile Phone	Contractor Customer	
Fax	Employee Purchaser Supplier	
Company	Vendor Veterinarian Wholesale Customer	
Address	742 Evelgicen fendee	
City	Golden	

You can also add Keywords to the contact, which are searchable as well. In our example below, we tagged Maria with "Western Stock Show", as we met her at the Denver Stock Show earlier this year.

First Name	Maria	
Last Name	Nunez	
Email	maria@nunezconsulting.com	
Contact Type	Consultant 🗸	
Keywords	Western Stock Show	

If you supply an address, see that Farmbrite will show you a handy map at the bottom of the record. You'll need at least the Address and City on the record to have the map displayed.

Company	Nunez Consulting	
Address	742 Evergreen Terrace	
City	Golden	
Country	United States	~
State/Province	Colorado	~
Postal Code	80403	
	Tagged Location Fridgewater Grill Understand Colorado Plus Ofference Offere Offere <td>ehortcute Map Data 50 m Terms of Use Report a map error. Longitude -105.2210997</td>	ehortcute Map Data 50 m Terms of Use Report a map error. Longitude -105.2210997

Finally, you can also add a short description. In our example, we've used this optional field to record some memorable points from our conversation at the Stock Show.

	Latitude	Longitude
	39.9199184	-105.3787529
Description	Family owned Hartsel Hay and Feed	d for 30+ years - Brother was in rodeo

Once you've added all the information you have for the contact, be sure to click Save in the bottom right.

fb a Search					© Account	• <u>&</u> Chris •	(® Help
Schedule	New Contact						
@ Tasks	First Narra	Maria					
🖨 Livestock 🗸	Last Name	Nunez					
Resources v	Email	maria@nuneeconsulting.com					
Accounting v	Contact Type		v				
🖬 Market 👻	Kewards	example: Vet. mechanic. esc					
2 Contacts	Driman Phone	3036665555					
Farm Map	Mobile Discos	mp. 907.520					
	Ev	072.007.5200					
		Norma Constitution					
	Company	Hule Columny					
	Address	Au overgreen remade					
	City	Colden					
	Country	United States	*				
	State/Province	Colorado	*				
	Postal Code	80403					
		Taper Lacion		13 + 			
		38/256543	-105.2210997				
	Description	Parmly owned Hartsel Hay and Feed for 30+ years - Brother was in rodeo					
						Cancel	Save

The contact will be added to your Farmbrite system. You'll then see two more choices on the contacts page - Notes and Orders.

f	b Q Sea	rch			
ä	Schedule		Details	Maria Nunez	
\oslash	Tasks		Notes	First Name	Maria
ø	Livestock	~	Orders		
Y	Crops	~		Last Name	Nunez
8	Resources	~		Email	maria@nunezconsulti
₽	Accounting	~		Contact Type	
	Market	~		Keywords	example: Vet. mechan
	Contacts				
网	Farm Map			Primary Phone	(303) 444-5555
Ġ	Reports			Mobile Phone	(123) 867-5309
				Fax	(123) 867-5309

You can check out these two articles to learn more about adding Notes or Orders to your new contact.

How do I find orders that are associated with contacts?

How do keep detailed contact notes?

You'll also see a few new features now that the contact is saved - you can easily email the contact (A), or get directions to their location and open Google Maps (B).

First Name	Maria	
Last Name	Nunez	
Email	maria@nunezconsulting.com	A
Contact Type	Consultant	~
Keywords	Western Stock Show	
Primary Phone	(303) 444-2258	
Mobile Phone	(123) 867-5309	
Fax	(123) 867-5309	
Company	Nunez Consulting	
Address	3245 Miners Street	
City	Golden	
Country	United States	~
State/Province	Colorado	~
Postal Code	80403	P
	Tagged Location	
	Vinty Coloredo Plus 40001dery & Pub Coloredo Plus 40001dery & Pub Coloredo Plus Coloredo Plus Colored	Ket Sinclair

Still have questions about your contacts? Browse through the other articles in this category, and reach out to us if you don't find your answer.