

Creating a New Contact ^[1]



February 10, 2023 by [jennifer.mortensen](#) ^[2]

IMPORTANT The following wiki is **not** intended for eComm users. eComm users should follow a different process outlined here ([expand the 'New Contacts' section](#)) ^[3].

When you need to add a lead or contact to the Integrated Online Services (org), you can do 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](#) ^[4])
- Source Channel (see valid values [HERE](#) ^[4])
- 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

Source URL: <https://www.cu.edu/blog/integrated-online-services/creating-new-contact>

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/ecommerce/wiki/manage-campaign-members> [4] <https://www.cu.edu/blog/integrated-online-services/ios-lead-attributions>