# Dynamics 365 - Contacts Quick Guide

Last Modified on 18/11/2024 3:40 pm GMT

## Contacts Quick Guide

1. Check the contact/account doesn’t already exist

2. Navigate to Contacts on the left side of the screen

3. Create ‘New’ in the top tool bar

4. Complete all information within the Summary and Details tab.

5. Save

6. Add any communication with the client in the timeline area.

7. View/Add opportunities and cases on the right side of the screen

8. Navigate to the Account at any time through Account link

Dynamics 365 - Contacts Quick Guide.pptx

**Important Notes:**

**Suggested Fields**

Dynamics includes a smart feature that suggests options for regularly completed fields. However, these suggestions must be confirmed before saving. Suggested options appear in blue. Review and confirm or discard these suggestions before saving the record.