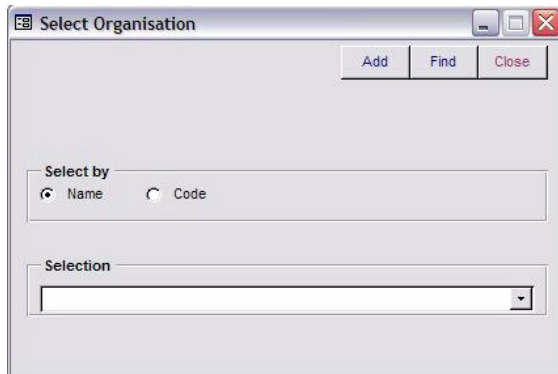


Tip Sheet No.14

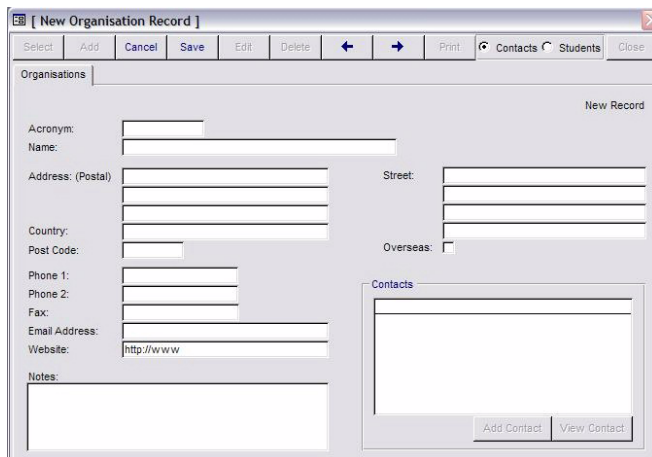
Add an Organisation and Contact Records

1. Click on the **Administration** button.
2. Click on the **Organisations** button.
3. Click on the **Add** button.



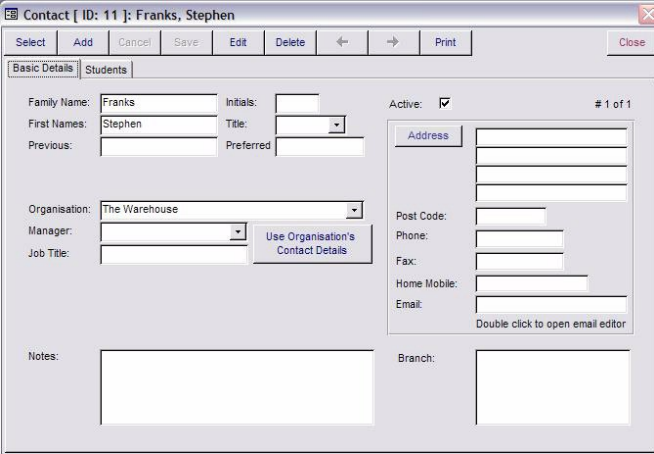
The screenshot shows a dialog box titled "Select Organisation". At the top right, there are three buttons: "Add", "Find", and "Close". Below the buttons, there is a "Select by" section with two radio buttons: "Name" (which is selected) and "Code". Underneath, there is a "Selection" section with a dropdown menu that is currently empty.

4. Type in the details of the organisation.
5. Click on the **Save** button.



The screenshot shows a form titled "New Organisation Record". The form has a menu bar with "Select", "Add", "Cancel", "Save", "Edit", "Delete", "Print", "Contacts", "Students", and "Close". Below the menu bar, there are several input fields for organisation details: "Acronym:", "Name:", "Address: (Postal)", "Country:", "Post Code:", "Phone 1:", "Phone 2:", "Fax:", "Email Address:", "Website:" (with "http://www" pre-filled), and "Notes:". There are also fields for "Street:" and "Overseas:". A "Contacts" section is visible at the bottom right, containing an empty text area and two buttons: "Add Contact" and "View Contact".

6. To add a contact to the current organisation click on the **Add Contact** button.



7. Type in the details of the contact
8. Click on the **Save** button.

If the Contact's Address Details are exactly the same as the Organisation they belong to click the **Use Organisation's Contact Details** button. This will copy the details across for you without having to re-type them.



The **Organisation** and a **Contact** have been created.