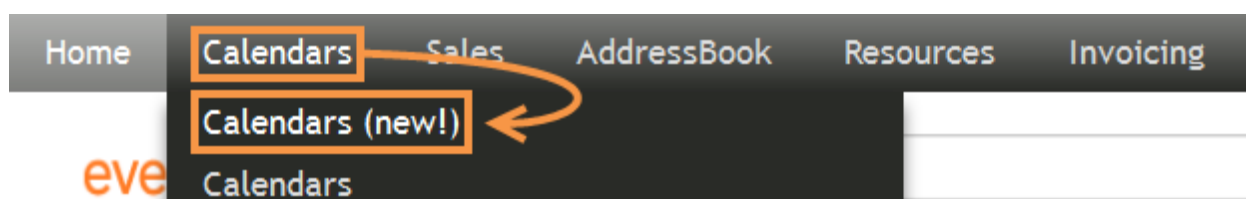


Add Contacts from the Quick Add

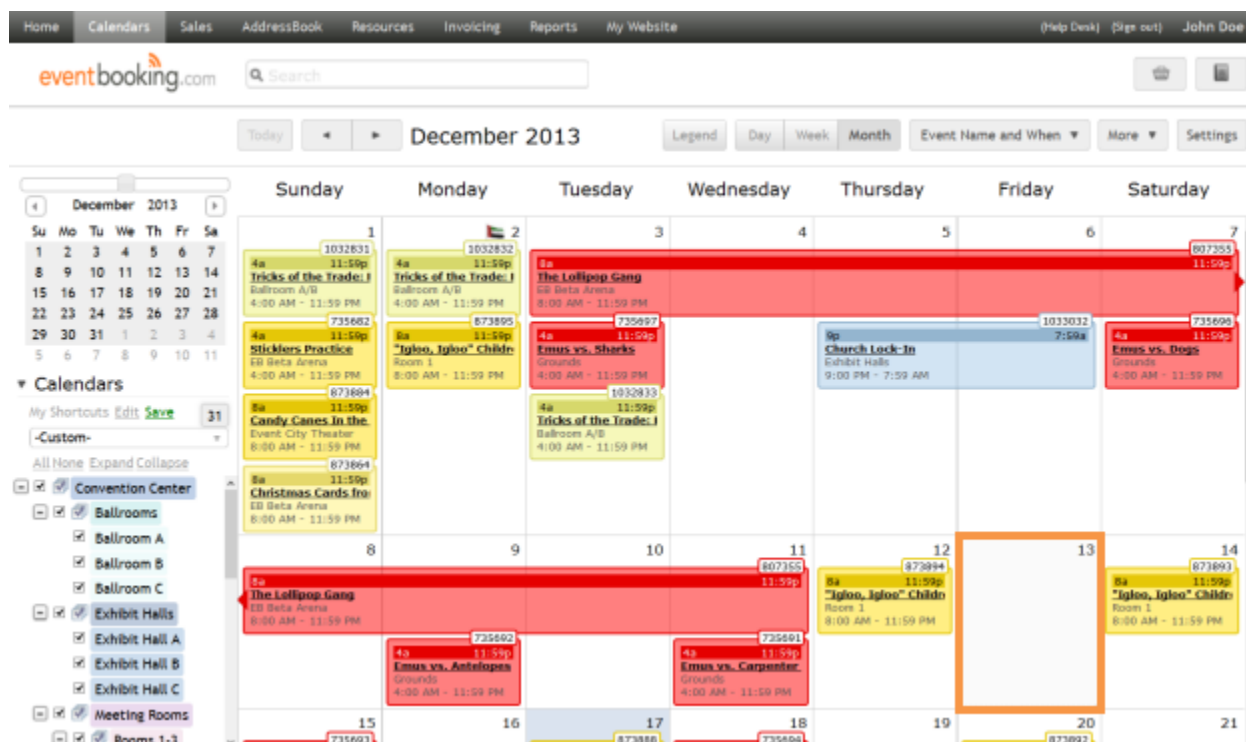
Updated: December 18, 2013

If you use the quick add from your calendar view, you can save even more time by attaching contacts to an event right when you are adding it. To do so:

1. Hover over **Calendars**.
2. Click **Calendars (new!)**.



3. Click the date(s) on your calendar on which you would like to book an event.



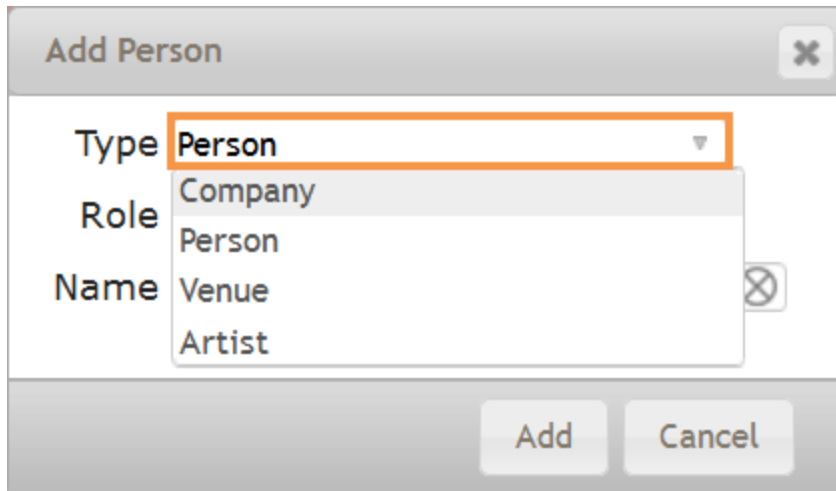
- Click **+Add** under the *Address Book* heading.

You can now attach an existing address book item to the event or create a new one.

- [Add an Existing Address Book Item](#)
- [Create a New Address Book Item](#)

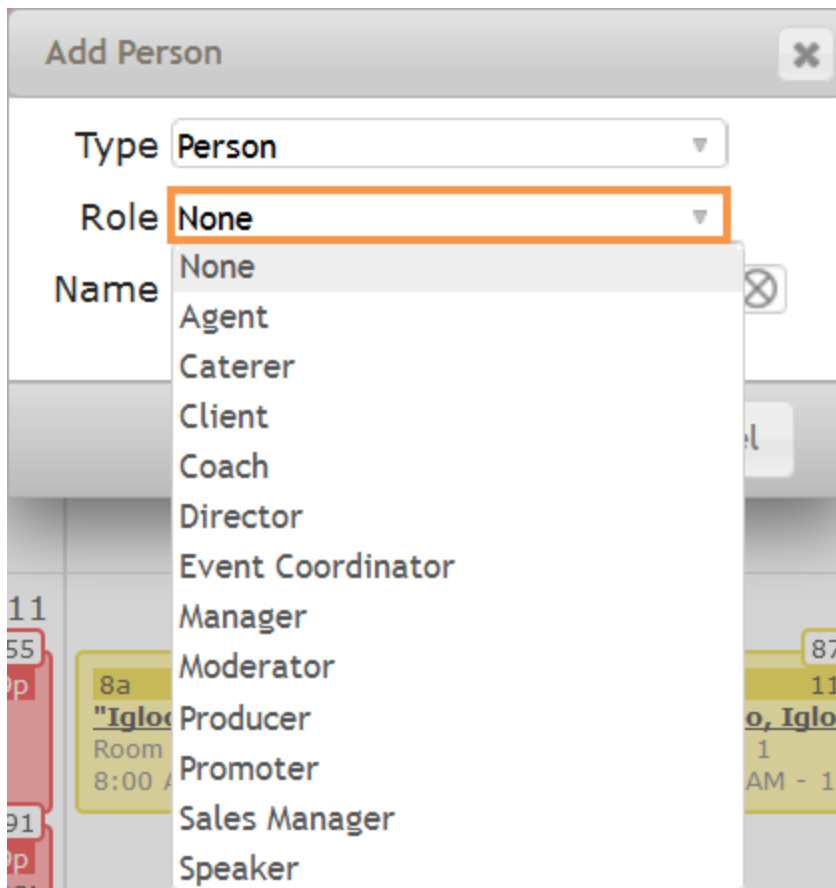
Add an Existing Address Book Item

5. Select the type of address book item from the drop-down.



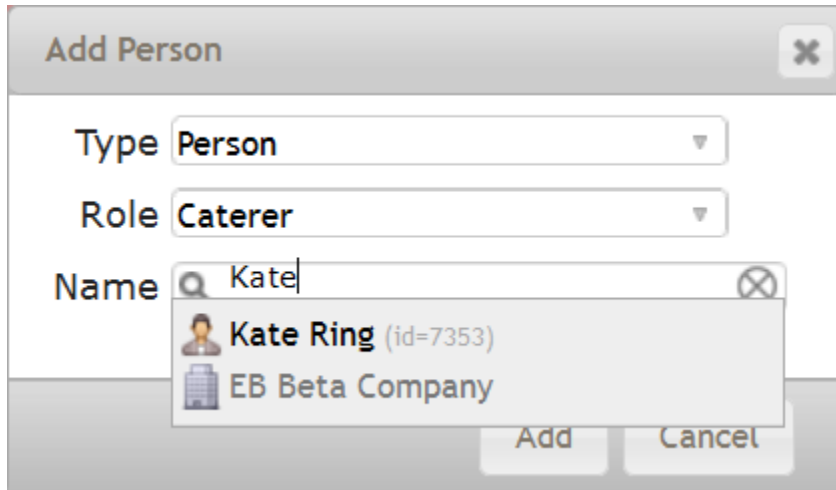
The screenshot shows a dialog box titled "Add Person" with a close button (X) in the top right corner. Inside the dialog, there are three labels: "Type", "Role", and "Name". The "Type" dropdown menu is open, showing a list of options: "Person", "Company", "Person", "Venue", and "Artist". The "Person" option is highlighted with an orange border. Below the dropdowns are two buttons: "Add" and "Cancel".

6. Select the role from the drop-down.



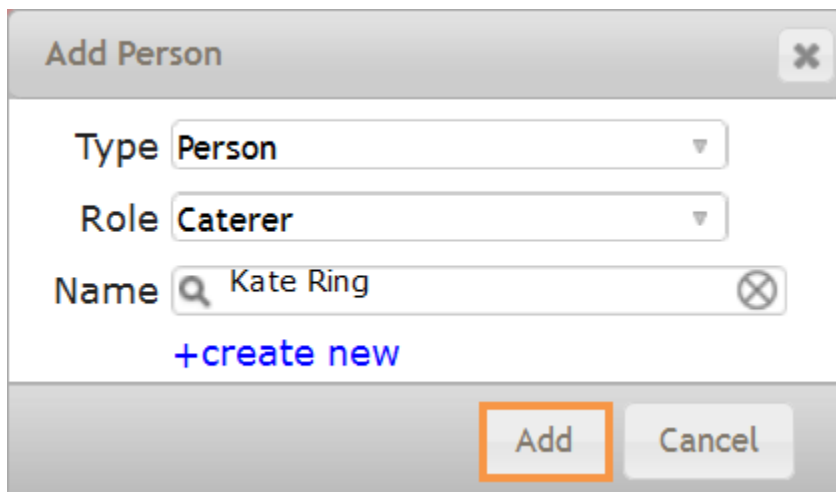
The screenshot shows the same "Add Person" dialog box. The "Type" dropdown is now closed and shows "Person". The "Role" dropdown menu is open, showing a list of roles: "None", "Agent", "Caterer", "Client", "Coach", "Director", "Event Coordinator", "Manager", "Moderator", "Producer", "Promoter", "Sales Manager", and "Speaker". The "None" option is highlighted with an orange border. The "Name" label is visible next to the "Role" dropdown. The "Add" and "Cancel" buttons are still at the bottom.

7. Search for the address book item in the *Name* field.
8. Click on the appropriate search result.



The screenshot shows a dialog box titled "Add Person" with a close button (X) in the top right corner. It contains three input fields: "Type" with a dropdown menu showing "Person", "Role" with a dropdown menu showing "Caterer", and "Name" with a search icon and the text "Kate". Below the "Name" field, a search results dropdown is visible, showing two entries: "Kate Ring (id=7353)" with a person icon and "EB Beta Company" with a building icon. At the bottom right of the dialog are two buttons: "Add" and "Cancel".

9. Click **Add**.



The screenshot shows the same "Add Person" dialog box. The "Name" field now contains the text "Kate Ring". Below the "Name" field, there is a blue link that says "+create new". The "Add" button at the bottom right is highlighted with an orange border.

Finish adding the event using the quick add, and your contact will be assigned to the event.

Thursday

Friday

Saturday

5

6

7

807355

11:59p

1033032

7:59a

735696

11:59p

9p

Church Lock-In

Exhibit Halls

9:00 PM - 7:59 AM

4a

Emus vs. Dogs

Grounds

4:00 AM - 11:59

12

13

14

873894

11:59p

873893

11:59p

8a

"Igloo, Igloo" Cl

Room 1

8:00 AM - 11:59

8a

"Igloo, Igloo" Cl

Room 1

8:00 AM - 11:59

19

20

21

873892

Event

Note

Event

Event Name

Event

Next Available Tentative

-Event Type-

Space(s)

Applied Calendars: Selected (1)

Applied Calendars

12/13/2013 8:00 AM

12/13/2013 11:59 PM

Address Book

+Add

Kate Ring

Caterer

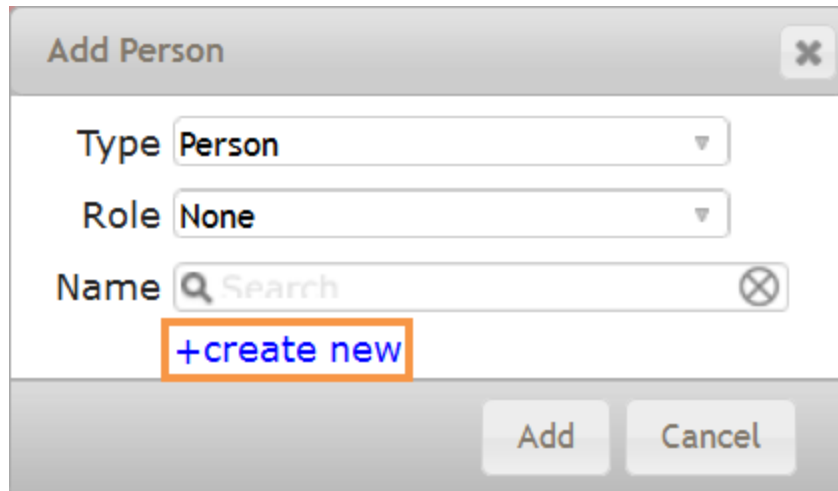
Settings

Add

Cancel

Create a New Address Book Item

5. Click **+create new**.



The image shows a dialog box titled "Add Person" with a close button (X) in the top right corner. Inside the dialog, there are three dropdown menus: "Type" with "Person" selected, "Role" with "None" selected, and "Name" with a search icon and the text "Search". Below the "Name" field, there is a blue link "+create new" which is highlighted with an orange rectangle. At the bottom of the dialog, there are two buttons: "Add" and "Cancel".

6. Fill out the information for the new address book object, including:

- **Type:** Select whether this address book item is a person, company, venue or artist from the drop-down.
- **Role:** Pick the role you would like to assign to this contact for the event to which it is being added.
- **Name:** Enter the name of the address book item.
- **Company:** You can optionally search for a company to assign as the parent of this address book item. If you do so, the phone number and address will be automatically pulled from this company's entry.
Note: This field will be labeled **Parent** if you are adding a company.
- **Email:** Enter the address book item's primary email address.
- **Group:** You can optionally assign a company-wide address book tag to apply to your new address book item.

7. Click **Add**.

Add Person

Type

Person

Role

Client

Name

Neal Lin

Company

EB Beta Company

Phone

(123) 456-7891

Email

neal.lin@example.com

Address

123 Event St.

Address2

Address2

Address3

Address3

Address4

Address4

Event City

ST

12345

Country

USA

Group

Favorite People

<< back

Add

Cancel

Finish adding the event using the quick add, and your contact will be assigned to the event.

The screenshot displays a calendar interface with a weekly view from Thursday to Saturday. The calendar shows several events: a red event on Thursday (807355, 11:59p), a blue event on Friday (1033032, 7:59a, "Church Lock-In"), a red event on Saturday (735696, 4a 11:59p, "Emus vs. Dogs"), and yellow events on Sunday (873894, 8a 11:59p, "Igloo, Igloo" Cl) and Monday (873893, 8a 11:59p, "Igloo, Igloo" Cl). A right-hand panel is open, showing the "Event" form with fields for Event Name, Event, Next Available Tentative, and Event Type. Below this is the "Space(s)" section with "Applied Calendars: Selected (1)". The "Address Book" section shows a contact "Neal Lin" with the role "Client" highlighted. At the bottom are buttons for Settings, Add, and Cancel.