

# Quick Guide to Setting up a New Contact

Contacts on Insight can be used for any type of person or organisation that the company may contact (ie. Third party solicitor, Barrister, Witness, Land Registry, Local Courts, Police stations etc etc). They can be used time and time again on various cases so need to be kept generic (ie Name of Firm, Address of Firm, General Phone for Firm, General Email for Firm).

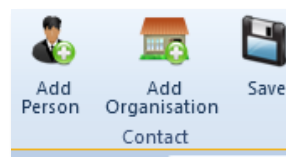
It can be used like your mobile phone directory which holds telephone number for specific companies or people.

I need to setup a police station.

Cases > Contacts



Good practice is to Search for the contact to ensure we have not already set them up on the system. If we are sure they are a new contact, click Add:



Select if we are adding a Person or an Organisation:

**General** x

Name:

VAT Reg. No.:

Add as much as possible. As there are many PSNI stations, the location would be helpful when selecting a contact to add to a case.

**Addresses** x

Correspondence

Correspondence

PSNI

3 Belfast Road

Town:

County:

Post Code:

Country:

Has DX:

In the Address Box, Right click anywhere and add an address. You can put up to 4 addresses in.

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## Communication Methods

Email ▾	NewryMourneandDown@psni.pnn.police.uk	<input type="checkbox"/> Default
Work ▾	0845 600 8000	<input type="checkbox"/> Default

Add a Communication Method to the contact, right click in the Communication Methods box and click Add. Again, keep this generic, so use the central number and central email for the contact.

Click Save.

NB: To add a Contact to a Case.

Cases > Case Enquiry

- Call up the case. Top right hand side there is a Contacts tab.
- Click the New Button >
- Search for the contact, Click on the List.
- Select the Relationship (ie. Local police station).
- Save