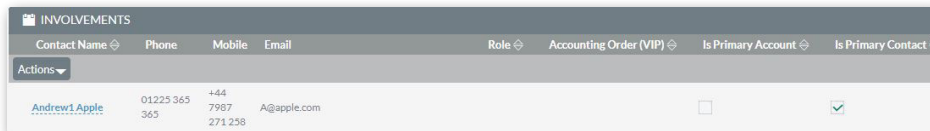


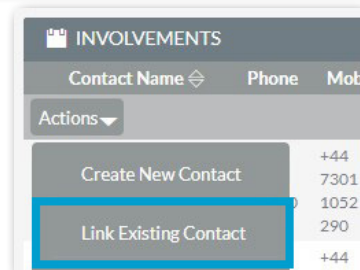
Visit support.fibrecrm.com for more info or contact your CRM Manager

Adding Involvements to an Organisation Record

1. To add an Involvement navigate to the Organisation record you'd like to add the Involvement to and scroll down the Involvements Subpanel



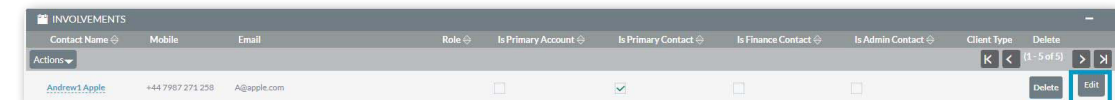
2. Using the Actions button select the **Link Existing Contact** to add a Person already in the CRM as an Involvement. This will take you to the Involvement form.



3. If the Person doesn't yet exist in the CRM, select the **Create New Contact** option. The **Create New Person** form will then appear. Fill in the form with the relevant information and then click **Save**. You'll then be taken to the Involvement form.

4. On the Involvement Form you can select the Person to be involved with using the **Select Arrow** in the **Contact Name** section. Fill in the form as required and use the tick boxes to best describe the involvement for example: **Is Primary Contact**. Click **Save** once done and the involvement will be created.

5. The Involvement can now be seen in the Involvement Subpanel on the Organisation record. To edit the involvement select the **Edit** button.



6. Make any changes to the Involvement you wish, when finished click **Save and Close**.

7. To remove the involvement click the **Delete** button in the involvement subpanel. This will remove the link between the Person and Organisation record but will not delete the records from the CRM.

