Flexx.Suite

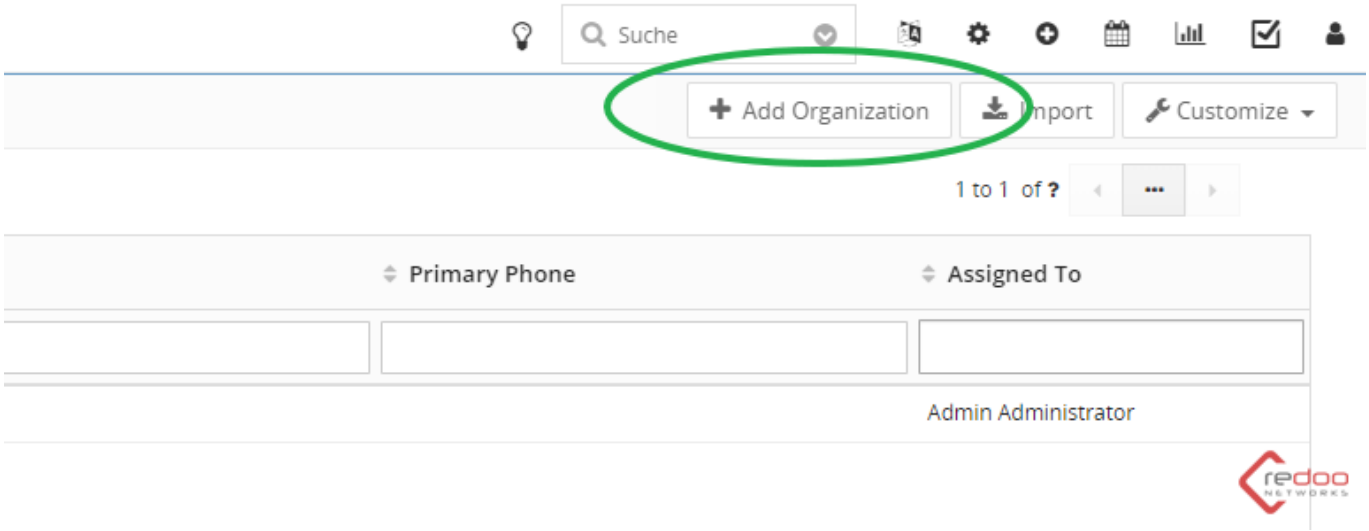
4.Records in CRM

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This is the instruction on how to add records in Flex Suite

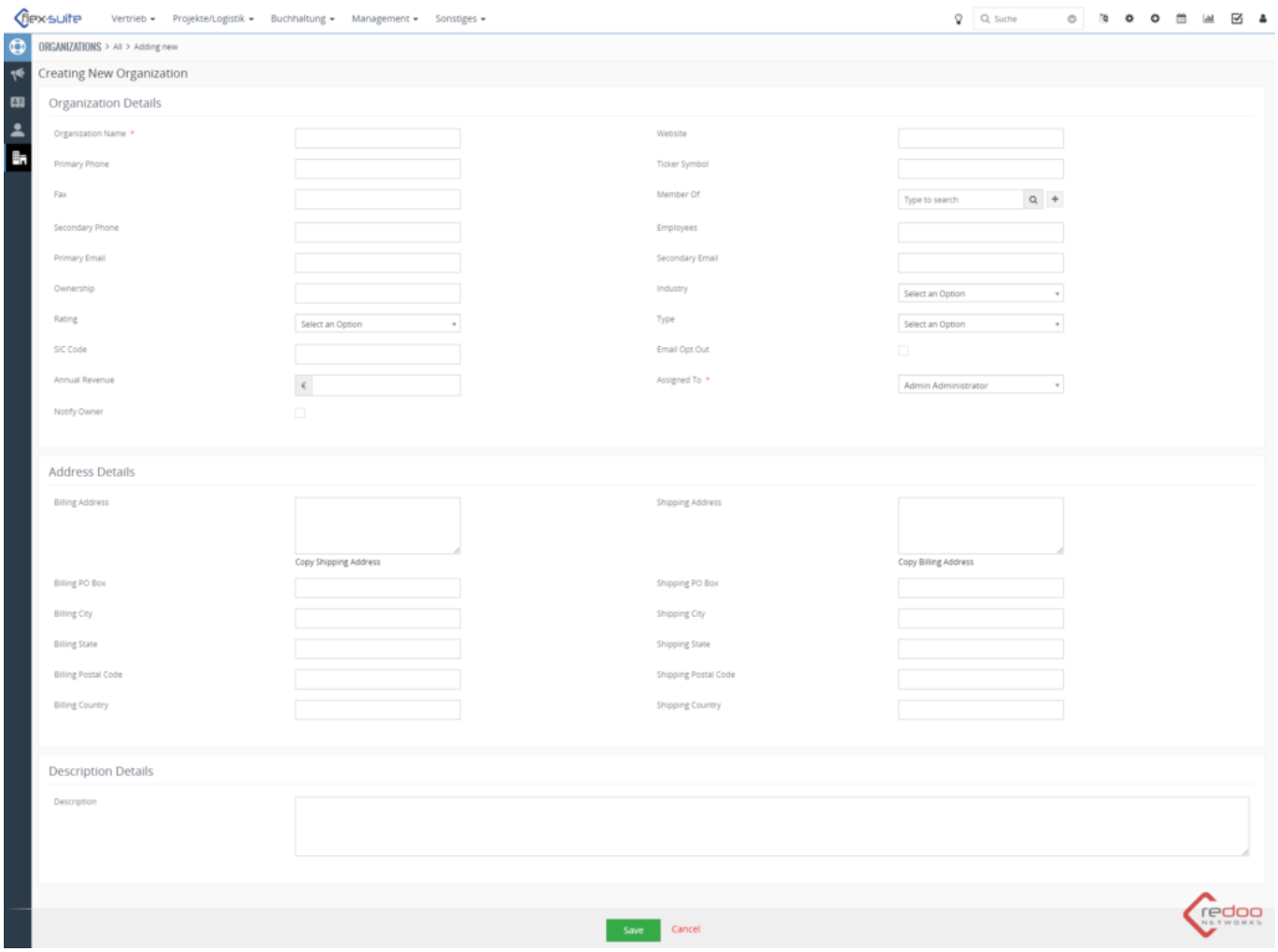
In this example we will show how to add an Organization

To add new record press the “Add Record” button in the top right corner like shown in the image



You can enter all useful information in this form

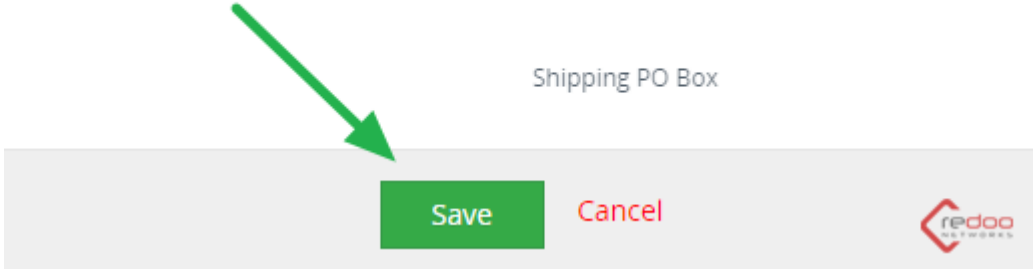
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In the upper area you enter the general information and in fields bellow you can add additional data.

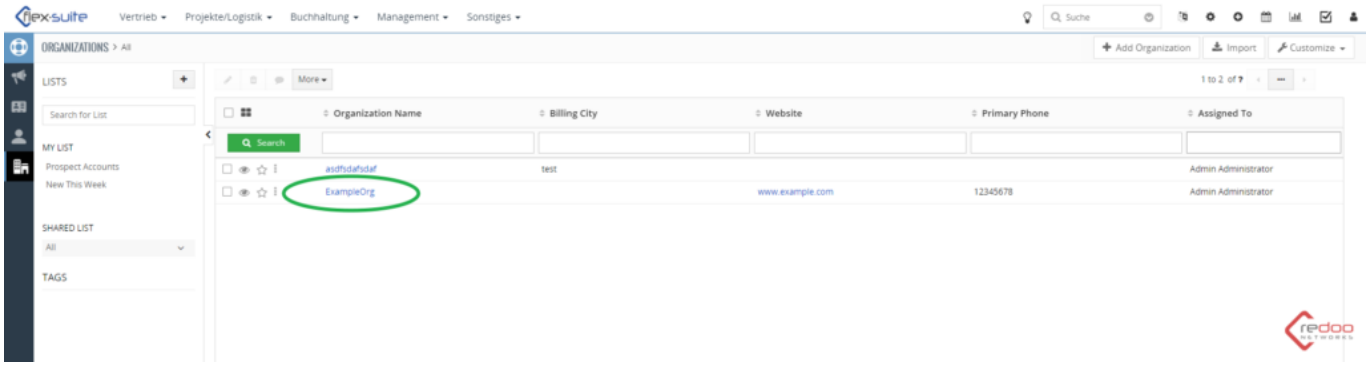
Fields with red stars are obligatory

When you finish press the Save button below to

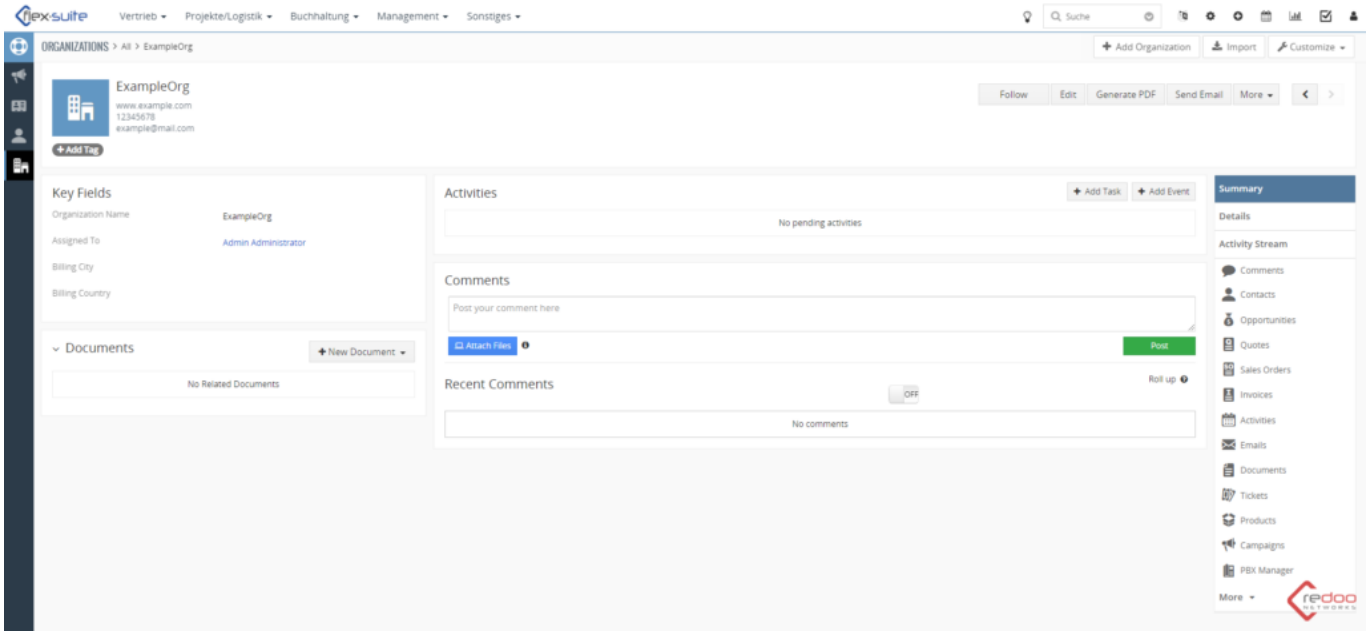


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When the Records is saved you can see it listed with other records



When you open a record you will see this Summary page



Here you can see the list of basic information about the record:

- Key Fields
- Documents
- Activities
- Comments

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