How to Create a Contact

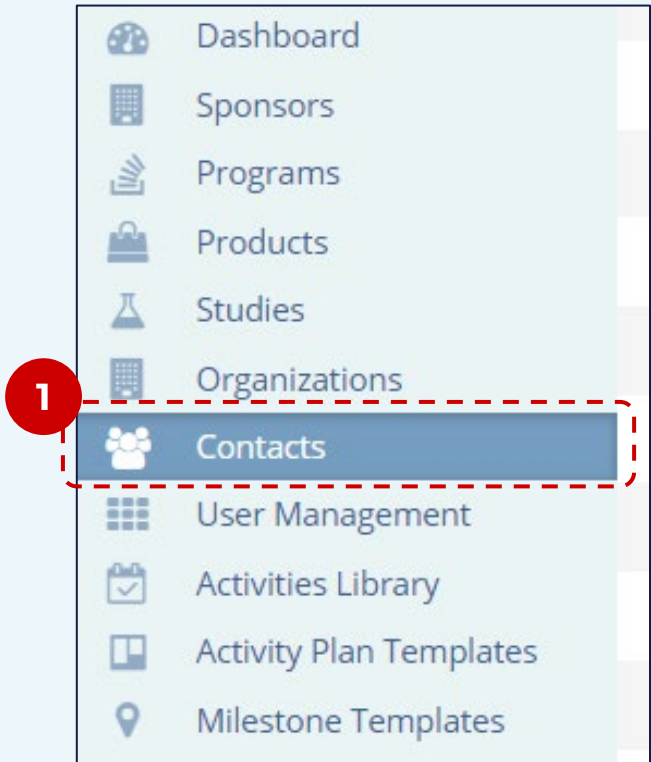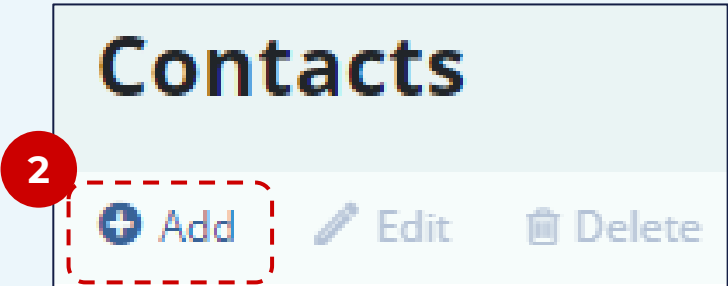**CTMS version 3.1**

TRIAL INTERACTIVE

APPLICABLE TO:
- ● Company Admin
- ● Study Manager
- ● CRA

Note: This process may be carried out from multiple locations (Global Contacts, Organization Contacts, Study Contacts, etc.) but the process remains the same.

1 Log into the CTMS and click on **Contacts** from the menu on the left.

Navigation menu:
- Dashboard
- Sponsors
- Programs
- Products
- Studies
- Organizations
- **1** Contacts
- User Management
- Activities Library
- Activity Plan Templates
- Milestone Templates

2 Click **Add.**

Contacts

2 ⊕ Add   ✏ Edit   🗑 Delete

3 Enter the Contact's details, then click **Create** when finished, or **Create and Add Another** to add an additional contact.

** Taking the time to ensure that your contacts are correctly entered into the system at the Global level will help to ensure that other users will not have to spend time re-entering data that has already been entered. It will also help to mitigate the risk of variances in information associated with repeated manual entry of the same information (i.e. typos, abbreviations, etc.).

Create Contact

General Information

Prefix   First Name*   Middle Name

Last Name*   Suffix

Job Title

Email Address*   Status*

Active

Phone Numbers
⊕ Add

Include Address

3   Cancel   Create and Add Another   Create