APPROVED 2 9 JUN 2016

Click on 'Take Telephone Call' which could be located in either of these places.
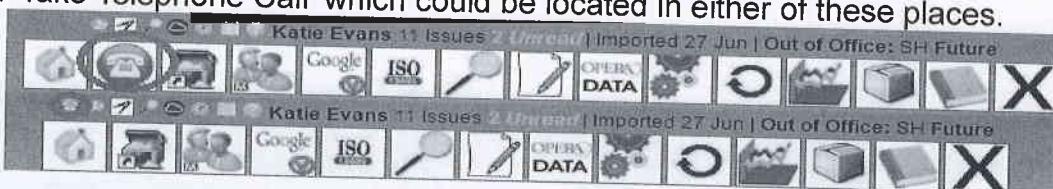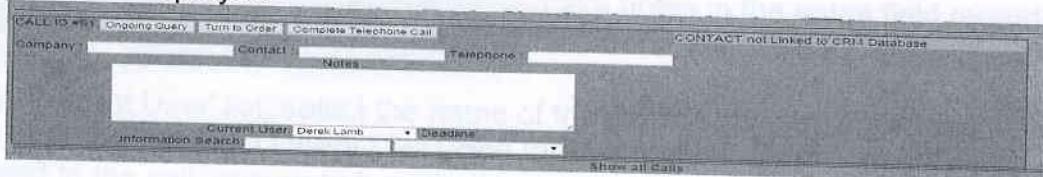

Then click the 'Take New Call' link.
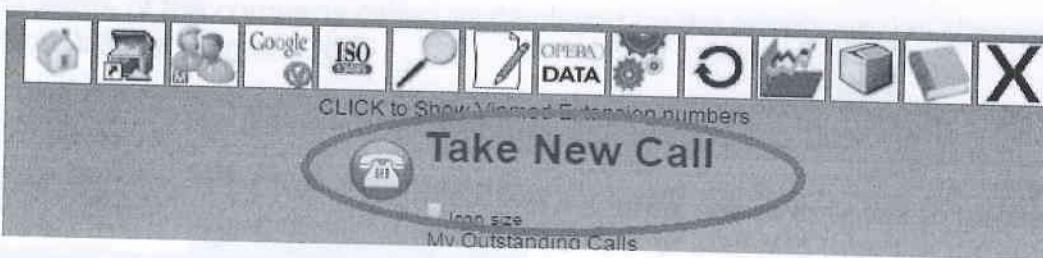
This page will be displayed:

Start by entering the Company and/or Contact name, as you do so a list will appear on the right. The more information you include in the company and contact details, the more the list will decrease in size, only showing known company and contact details relevant to your search.

If the contact details are not included in the CRM database you will receive the following RED bar stating "Contact Not linked to CRM database". You can utilise the buttons `ADD to CRM' or 'Link to CRM` to link your call to the database.
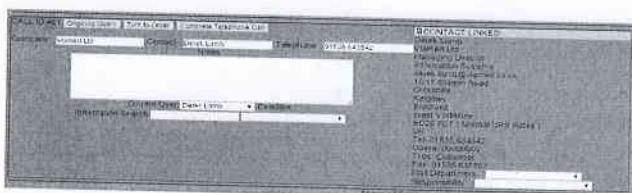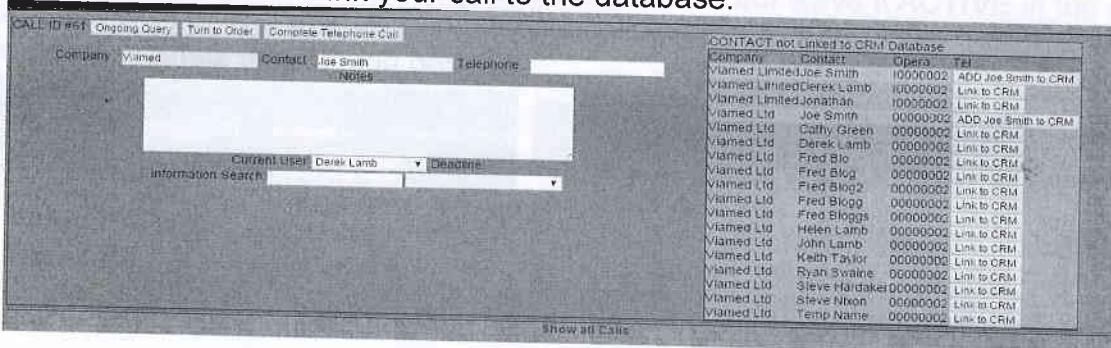
'Add...to CRM' will add a new contact to an existing organisation, 'Link to CRM' will link the listed Contact to the current telephone call. The GREEN bar at the top right-hand side saying, CONTACT LINKED shows when a contact is selected and linked correctly.