SOUTHLINE SOLUTIONS

WORK INSTRUCTION

CUSTOMER SERVICE
Training sample

Revision A

Create a contact in Google Contacts

Create a contact with a name, company, job title, email address and phone number.

Before you begin

Google Chrome open on a new tab
Signed in to the intended Google account
Contact details available

Example record: Jane Doe, ABC INC, Manager
Email: Jane@ABCINC.com
Phone: 1111111111 (demonstration value)

Open Google apps

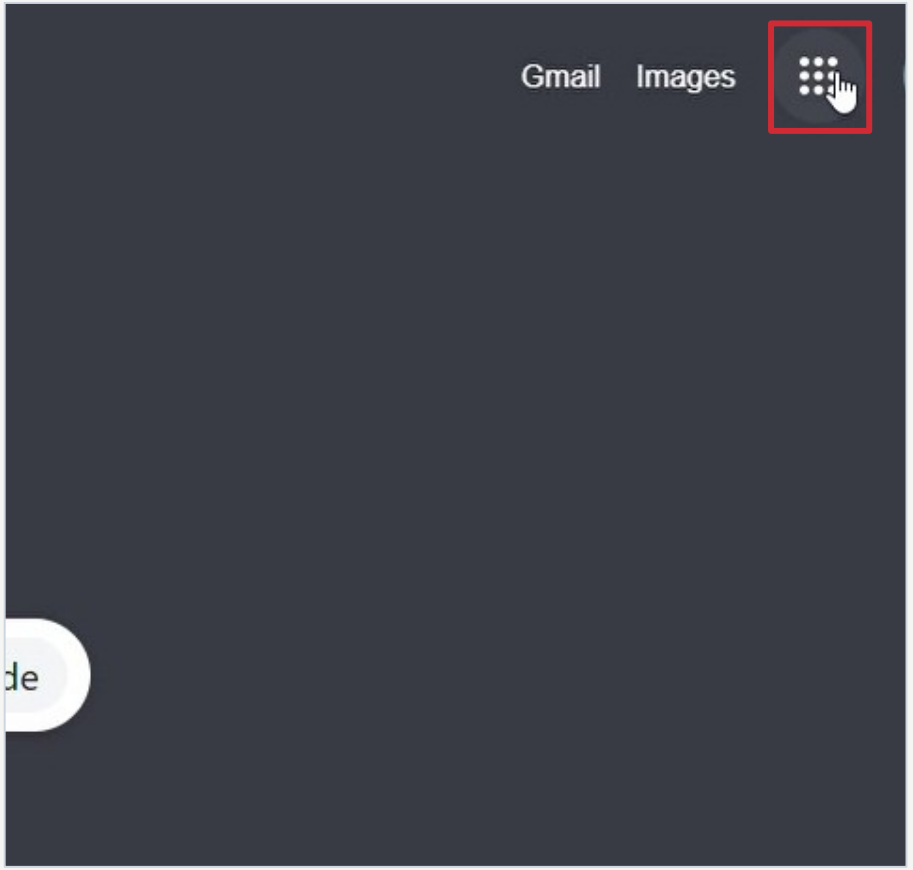
Google Contacts / Step 1

1 Open Google apps

Click Google apps in the upper-right corner of the Google new-tab page.

Expected result

The Google apps panel opens.



Google apps navigation

Google Contacts / Steps 2 and 3

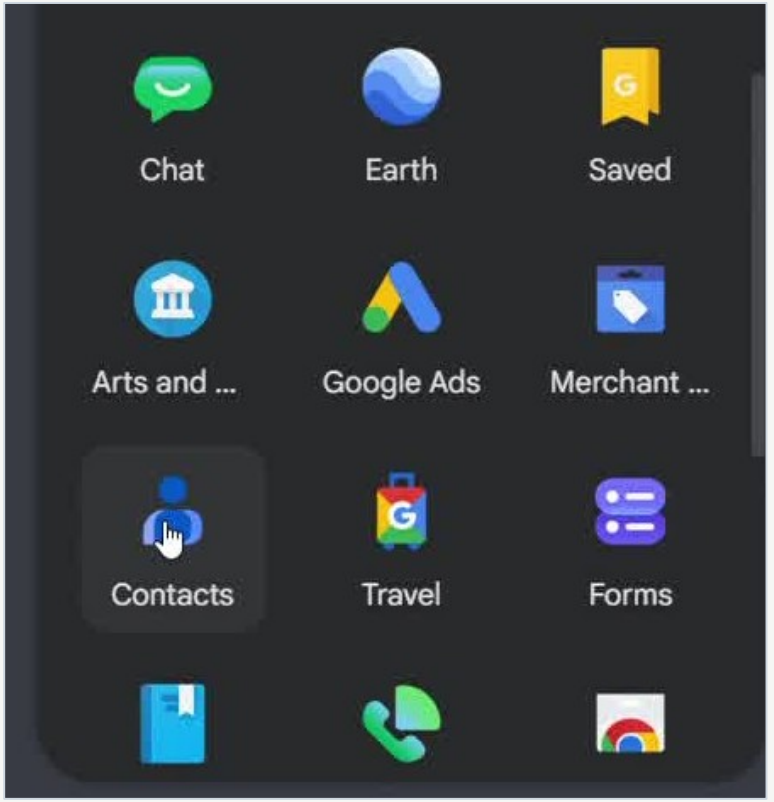
2 Find Contacts

Scroll down inside the Google apps panel until Contacts appears.

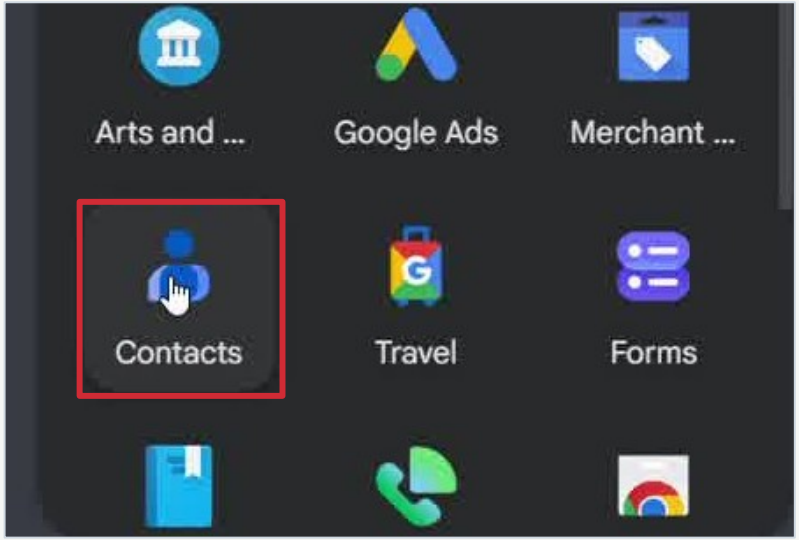
3 Open Contacts

Click Contacts in the Google apps panel.

STEP 2



STEP 3



New contact form

Google Contacts / Steps 4 and 5

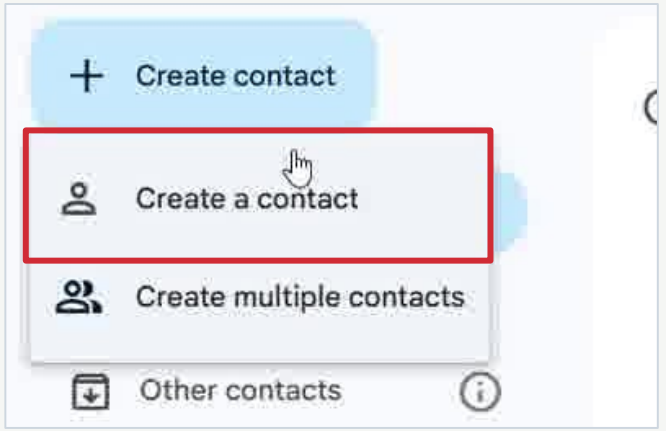
4 Start a new contact

Click Create contact in the upper-left corner.

5 Choose a single contact

Click Create a contact in the menu.





Contact name

Google Contacts / Steps 6 and 7

6 Enter the first name

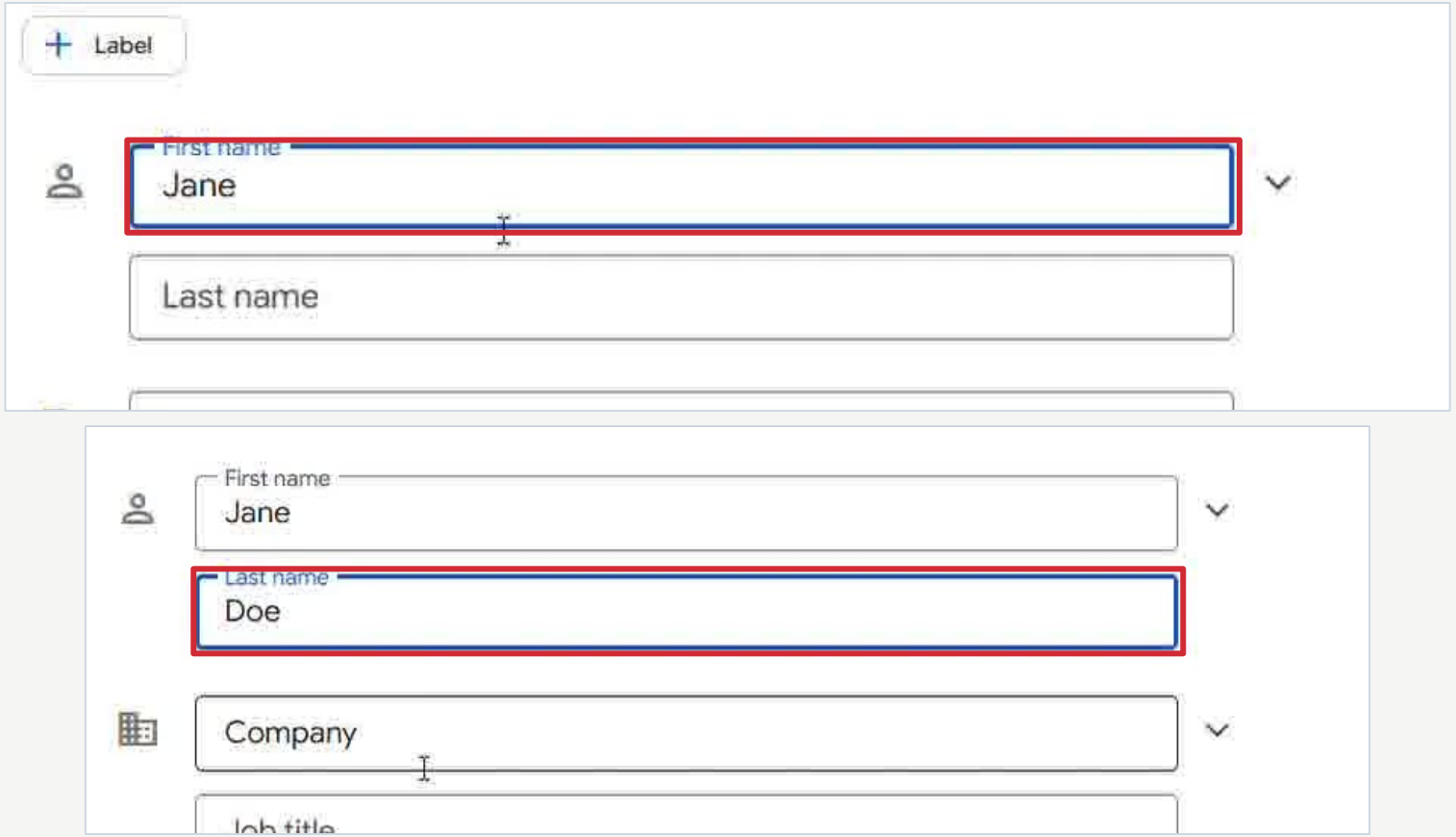
Click First name and enter the contact's first name.

Example: Jane

7 Enter the last name

Click Last name and enter the contact's last name.

Example: Doe



Company and role

Google Contacts / Steps 8 and 9

8 Enter the company

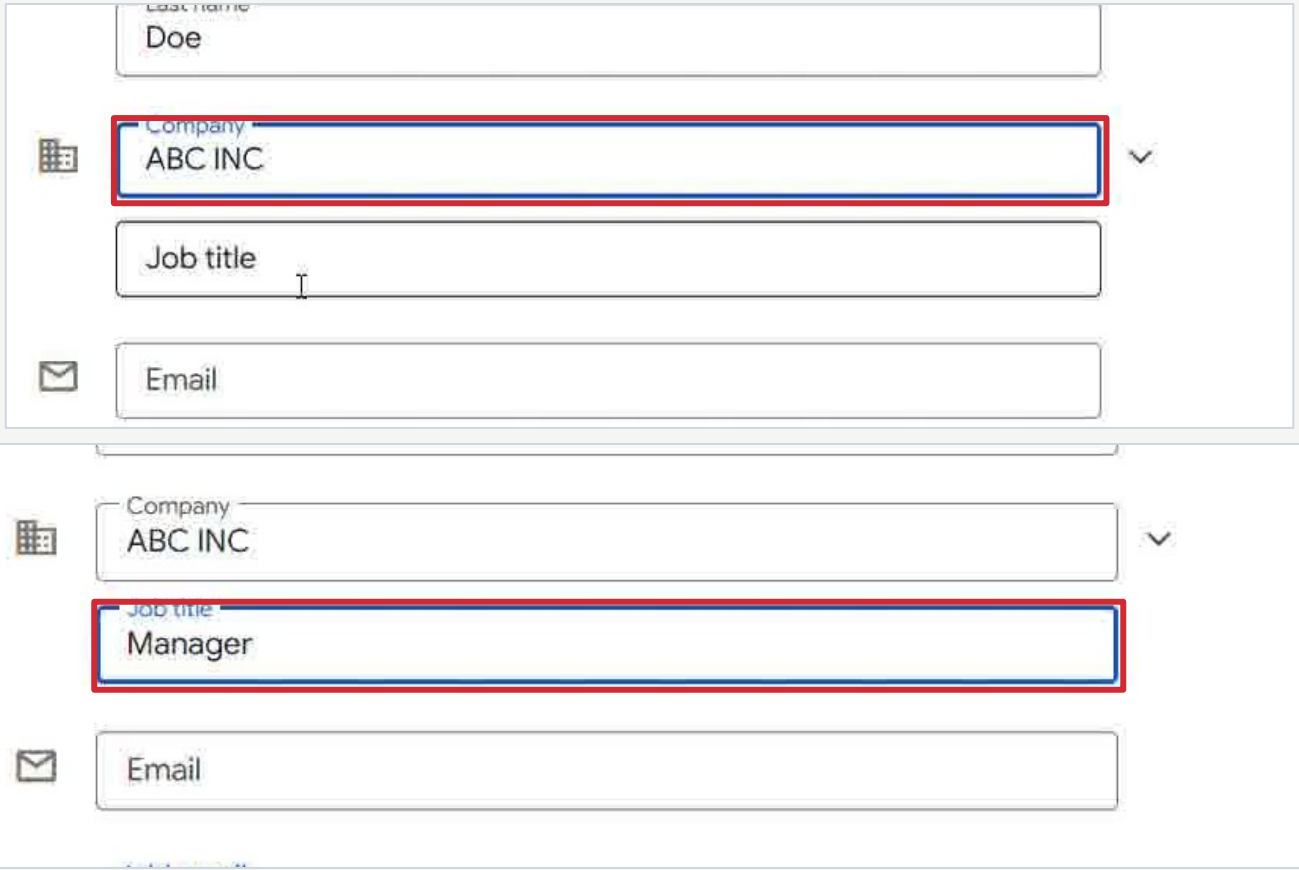
Click Company and enter the company name.

Example: ABC INC

9 Enter the job title

Click Job title and enter the contact's role.

Example: Manager



Show the contact fields

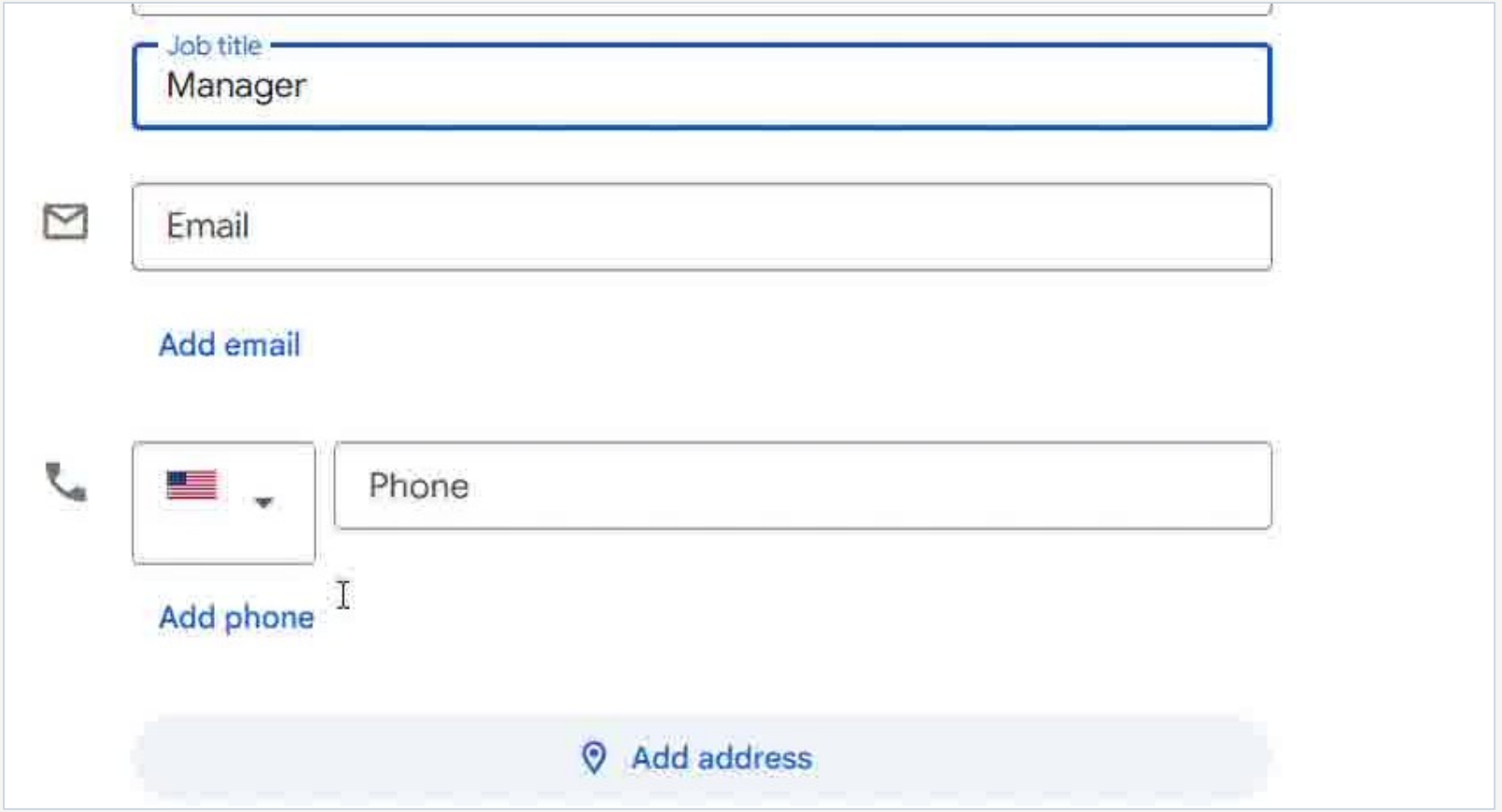
Google Contacts / Step 10

10 Show the contact fields

Scroll down in the form until Email and Phone are visible.

Expected result

Email and Phone appear below Job title.



Email and phone

Google Contacts / Steps 11 and 12

11 Enter the email address

Click Email and enter the contact's email address.

Example: Jane@ABCINC.com

12 Enter the phone number

Click Phone and enter the contact's phone number.

Example: 1111111111 (demonstration value)





Review the lower form

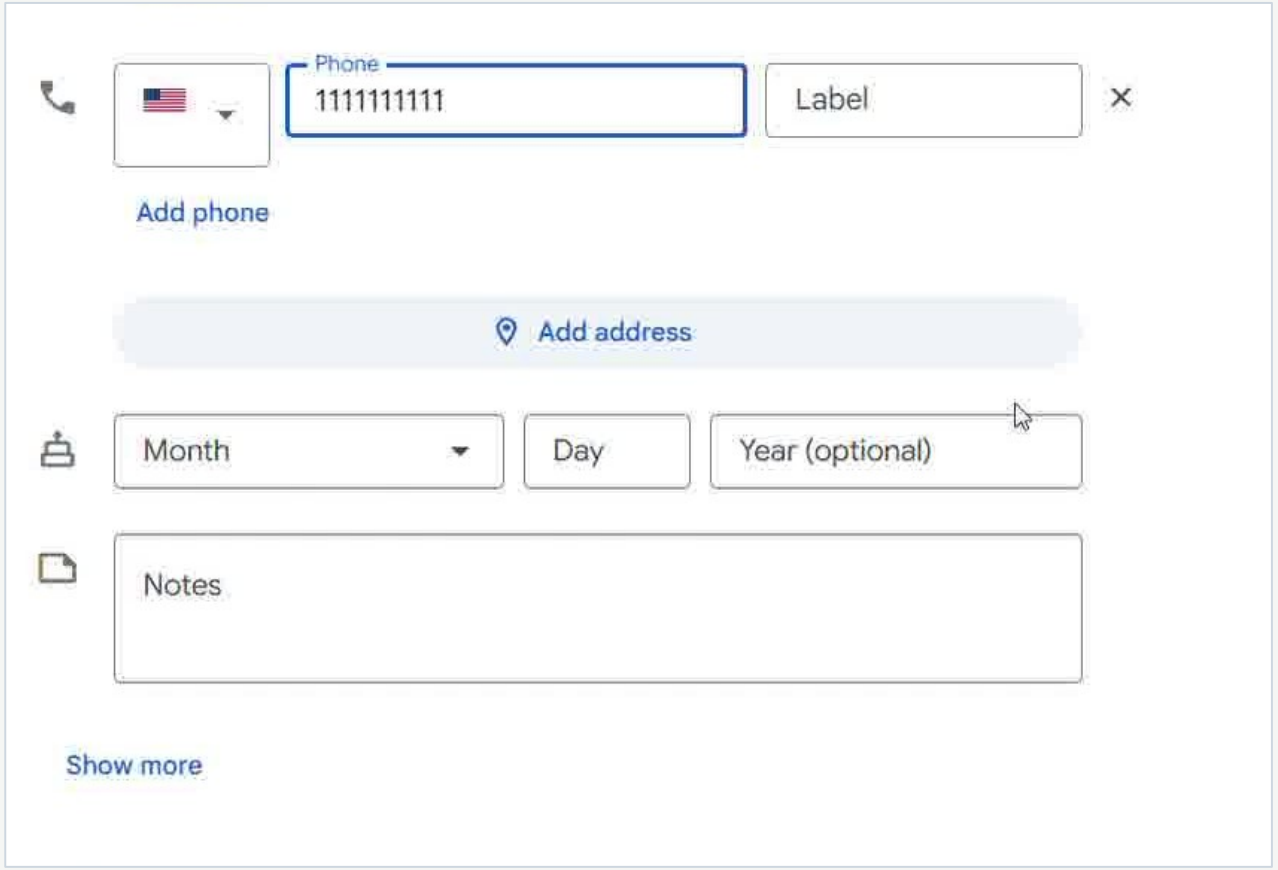
Google Contacts / Step 13

13 Review the lower form

Scroll down to the lower form section. Leave unused optional fields blank, as shown.

Expected result

The lower form shows optional birthday and Notes fields.



Save the contact

Google Contacts / Step 14

14 Save the contact

Click Save at the top of the form. Wait for saving to finish.

Expected result

The contact's details page opens.



Confirm the saved record

Google Contacts / Step 15

15 Confirm the saved record

Verify the saved name, company, role, email and phone. Look for New contact created.

Expected result

The saved record matches the details entered.

