How to Add a Contact Type

TI version 10.8

TRIAL INTERACTIVE

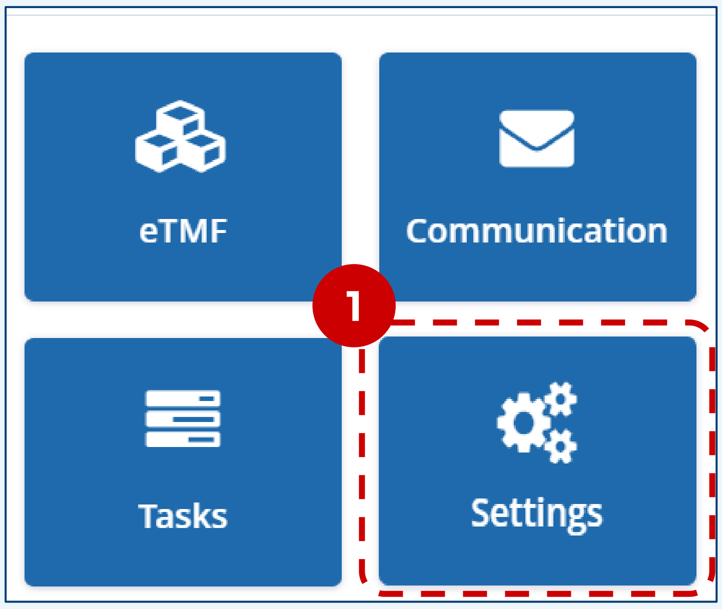
APPLICABLE TO:

- ● Admin
- ● Manager
- ○ Editor
- ○ Reader

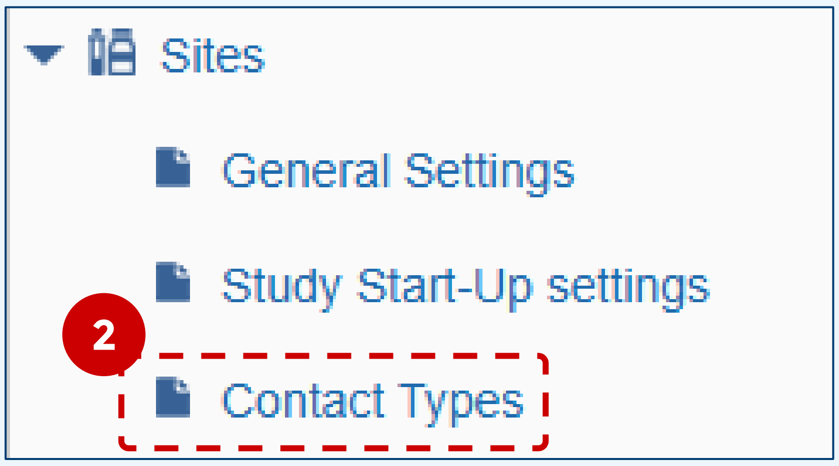
- ● eTMF
- ● SSU

Contact Types allow users to classify each contact according to the needs of the current project, which helps identify the right personnel and can support document collection via the Require Documents function.

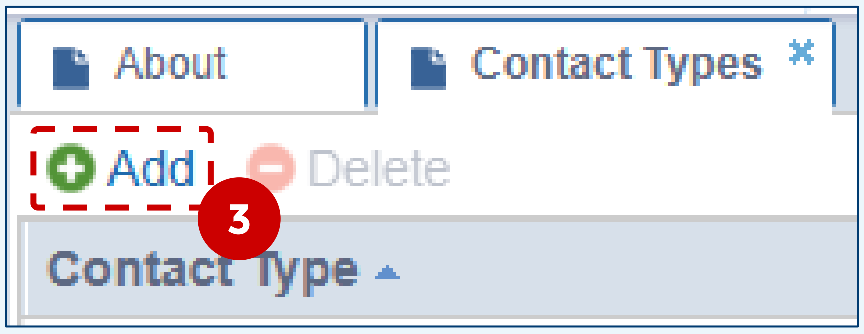
1 Log in to a room and enter the **Settings** area.



2 Open the **Contact Types** submenu within Sites.



3 Click on **Add** at the top of the menu.



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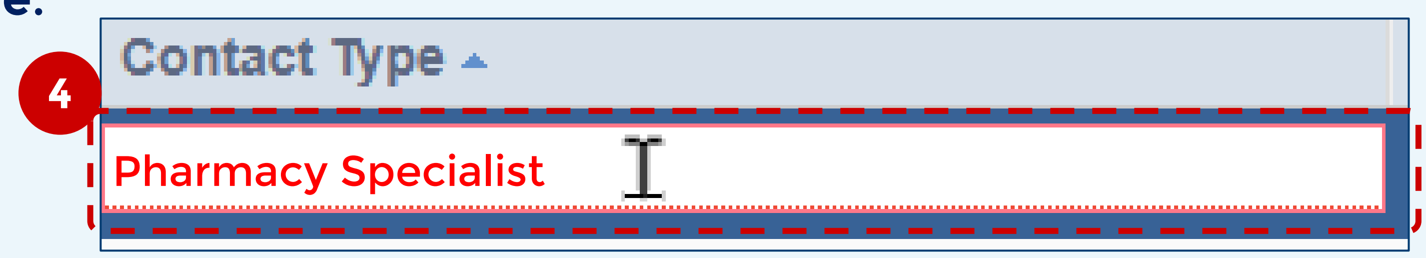
4 Enter the new **Contact Type**.



5 **[optional]** To associate requirements to the Contact Type:

a. Go to the **Required Documents** menu;

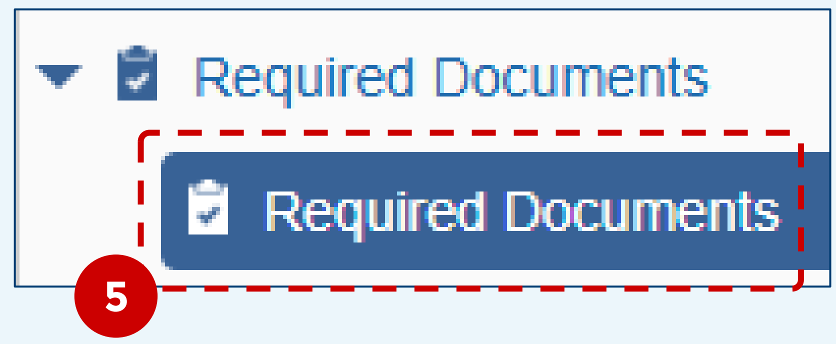
b. Select the Entity Type for collection (sites, Country, etc.);

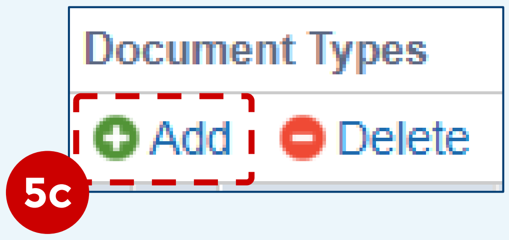
c. Click **Add;**

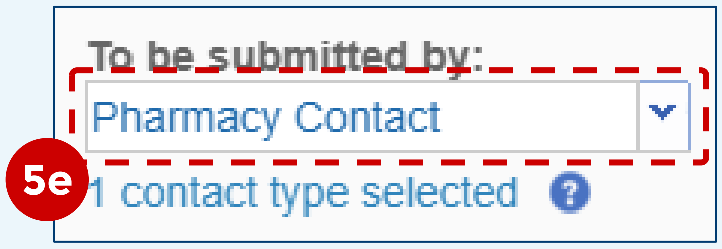
d. Select relevant DocTypes;

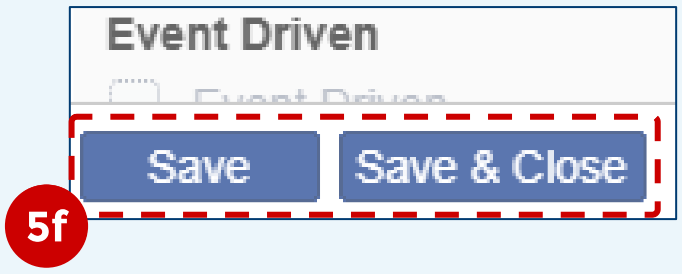
e. Select Contact Type(s) from the selector under **To be Submitted By;**

f. **Save** changes.









You can add/edit Contact Types for existing requirements by double-clicking on the corresponding line in the **Contact** column.