Contact overview

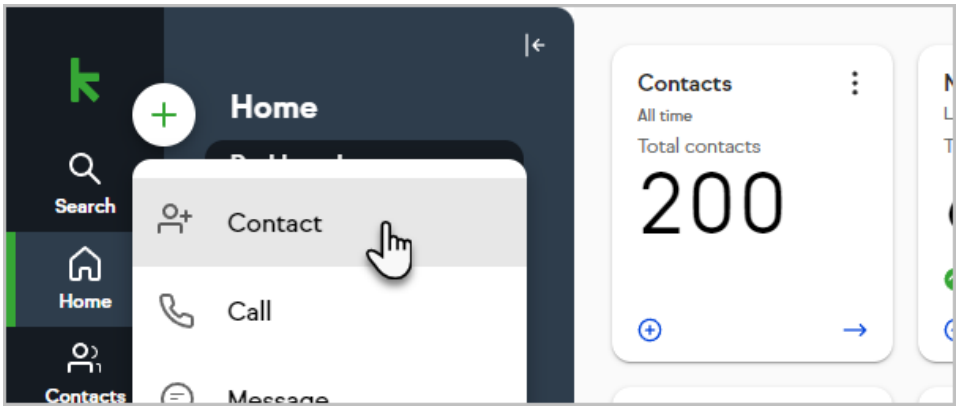
This article applies to:

Pro
Max

1. Add contacts
2. Follow up with customers
3. Filter contacts
4. Import contacts
5. Bulk actions
6. Contact record and activity feed
7. View advanced automation in the contact history

Add contacts

Click the Add button at the top-left of the page and choose **Contact**.



- For more information for adding a contact **click here**
- For more information regarding the "Contact Type" **click here**

Follow up with customers

Promptly follow up with your new contacts with an email sent directly from their contact record. Select an email template, customize it if you'd like, and schedule it to send immediately or the next business day. For more information, **click here**

Filter contacts

You can filter your contacts based on specific criteria or create a Group with that specific criteria, which will allow you to quickly take action (i.e. "Potential leads" - follow up , sending email, etc.) For more information, **click here**

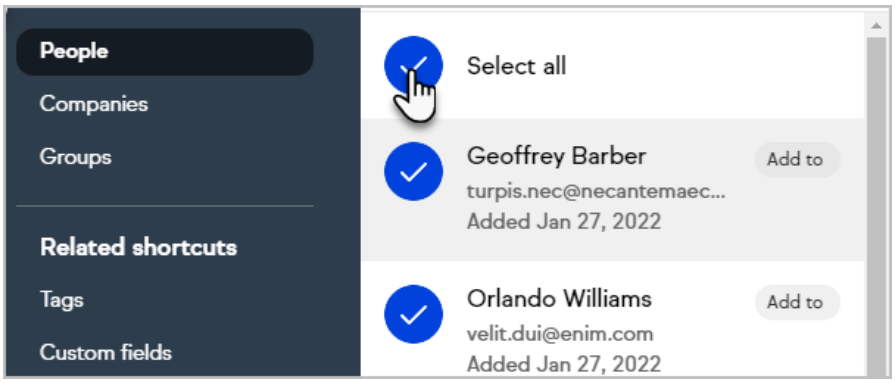
Import contacts

Import multiple contacts and contact fields using a Excel CVS file. For more information, click here

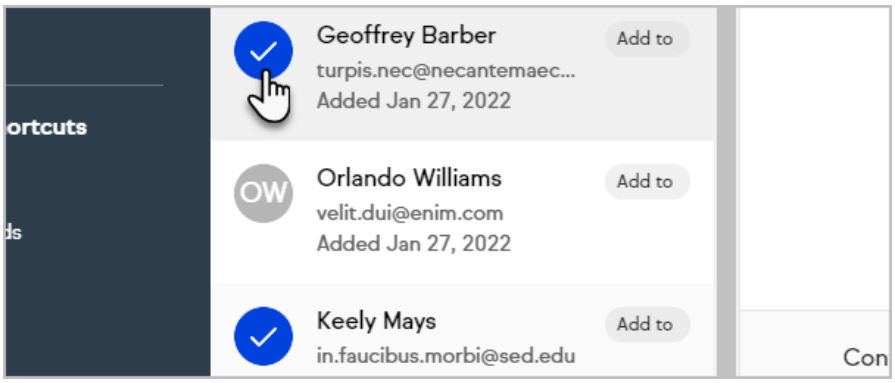
Bulk actions

You can select multiple contacts to take action on them all simultaneously. You can select multiple contacts in a variety of ways:

- Click **Select all** to select all the contacts in your current list

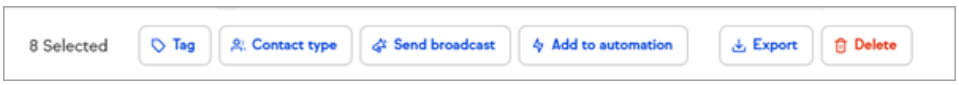


- Select specific contacts by clicking the circle containing their initials or avatar



- Select a group of specific contacts from your list:
  1. Click the avatar of the first contact in the group you want to select
  2. Hold your Shift key
  3. Click the avatar of the last contact you want to select
  4. All contacts between your first and last contact clicked will be selected.
  5. Repeat steps 1-3 as needed to select additional groups of contacts

After selecting multiple contacts, the following actions will be available at the bottom of the page:

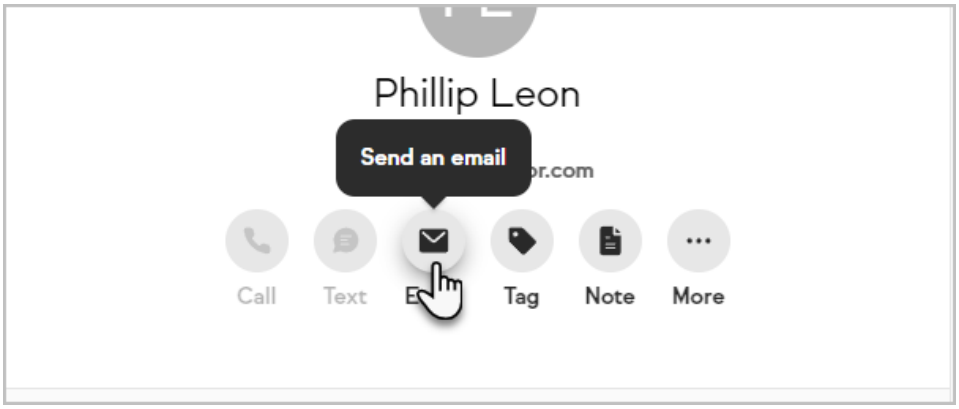


- Tag
- Contact type
- Send a broadcast
- Add to automation

- Export
- Delete

Contact record and activity feed

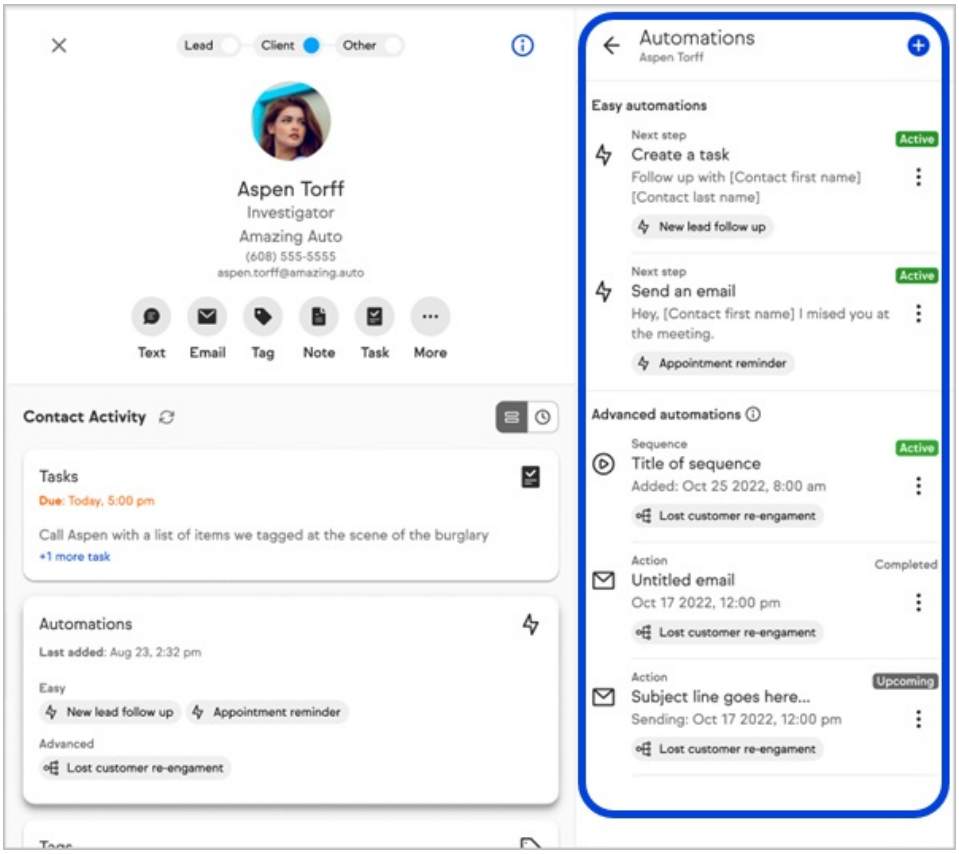
The contact record includes quick action buttons for common interactions with contacts, such as sending an email or creating a task. Beneath these buttons is the activity feed which shows all of the events related to a contact that have taken place recently. For more information, click here.



View advanced automation in the contact history

You can view and manage individual actions that are part of an advanced automation on the contact record.

The Advanced automation activity feed card will only be present for contacts that have started in an automation in the last 30 days. To see automation details for a contact longer than 30 days ago, please visit Campaign reports https://help.keap.com/help/campaign-reports


Lead
Client
Other
Aspen Torff
Investigator
Amazing Auto
(608) 555-5555
aspen.torff@amazing.auto
Text
Email
Tag
Note
Task
More
Contact Activity
Tasks
Due: Today, 5:00 pm
Call Aspen with a list of items we tagged at the scene of the burglary
+1 more task
Automations
Last added: Aug 23, 2:32 pm
Easy
New lead follow up
Appointment reminder
Advanced
Lost customer re-engament
Automations
Aspen Torff
Easy automations
Next step
Create a task
Follow up with [Contact first name] [Contact last name]
New lead follow up
Active
Next step
Send an email
Hey, [Contact first name] I mised you at the meeting.
Appointment reminder
Active
Advanced automations
Sequence
Title of sequence
Added: Oct 25 2022, 8:00 am
Lost customer re-engament
Active
Action
Untitled email
Oct 17 2022, 12:00 pm
Lost customer re-engament
Completed
Action
Subject line goes here...
Sending: Oct 17 2022, 12:00 pm
Lost customer re-engament
Upcoming