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

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 an Excel CSV 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
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.