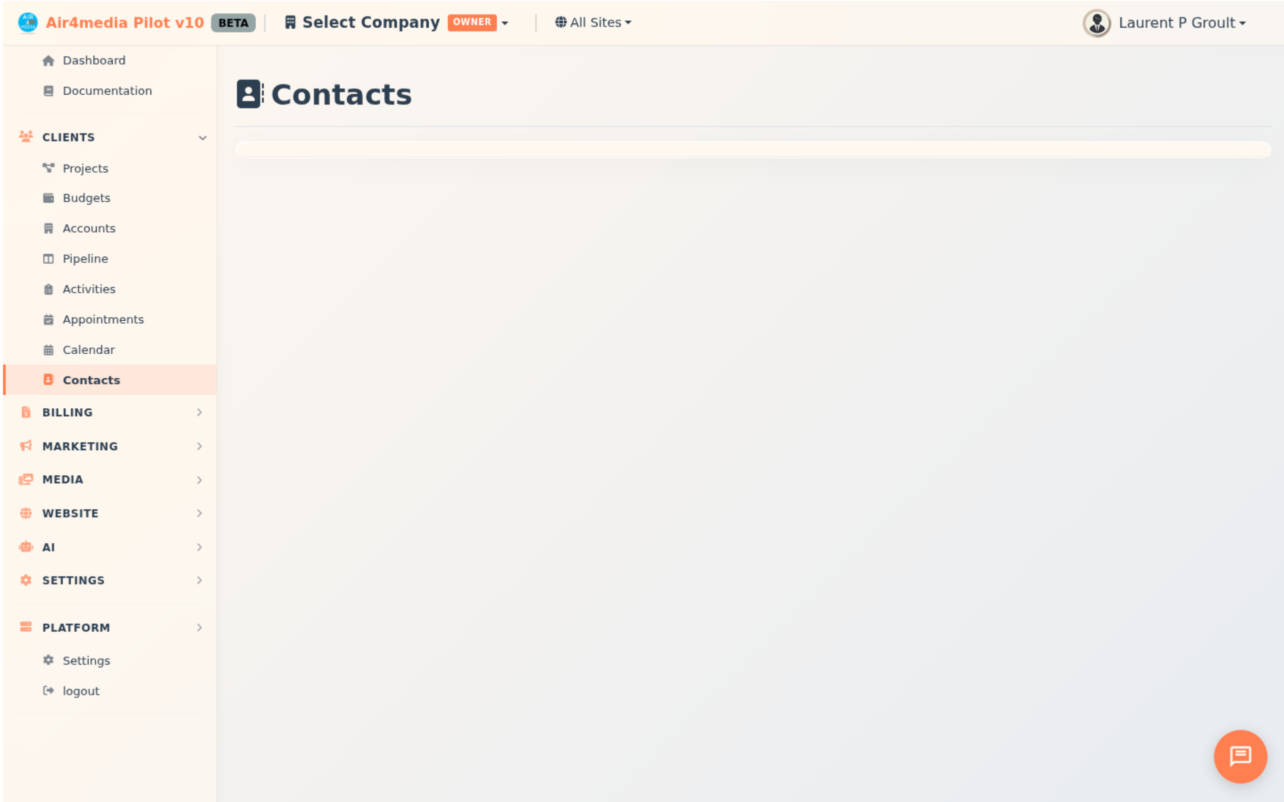

Contacts

Manage your CRM contact list — add, edit, search, and organize people and businesses in one place.

Key Features

- **Contact List**: View all contacts in a sortable, paginated table showing name (with avatar), email, phone, tags, and date added
- **Search**: Find contacts instantly by name, email, company, or notes
- **Tags**: Organize contacts with custom tags and filter the list by tag
- **Add & Edit**: Create or update contacts using a simple form
- **Bulk Delete**: Select multiple contacts and delete them all at once
- **Quick Email**: Click the email button on any contact with an address to open your mail client
- **CSV Import**: Upload a spreadsheet to import contacts in bulk

How to Use

Adding a Contact

1. Click **Add Contact** in the top-right corner
2. Enter the contact's first and last name (required)
3. Fill in any additional details — email, phone, mobile, company, job title, address, or notes
4. Add tags by typing a tag name and pressing **Enter** or clicking the **+** button, or click any tag shown under "Popular tags"
5. Click **Save Contact**

Editing a Contact

1. Find the contact in the list
2. Click the **Edit** button on their row
3. Update any fields in the form
4. Click **Save Contact**

Searching and Filtering

- Type in the search box to find contacts by name, email, company, or notes
- Use the **Tags** dropdown to filter to contacts with a specific tag (shows usage count per tag)
- Click any column header to sort the list

Deleting Contacts

- To delete one contact, click the **Delete** button on their row and confirm
- To delete multiple contacts, check the boxes next to each one, then choose **Delete Selected**

Importing from CSV

1. Use the import option to upload a CSV file with a header row
2. Review the column mapping — the system auto-detects common column names
3. Optionally enable **Update existing contacts** to merge data for contacts already in the system (matched by email)
4. Optionally assign default tags to apply to all imported contacts
5. Confirm to run the import — a summary shows how many were imported, updated, skipped, or had errors

Tips

- Tags are great for segmenting your list — use them for status (e.g., "lead", "client"), campaigns, or source
- Popular tags appear automatically when adding or editing a contact, making it easy to reuse existing tags
- Contacts are shared across your company — all team members see and manage the same contact list
- CSV files support common column name variations (e.g., `telephone`, `organisation`, `postcode`, `full_name`) and the system recognizes them automatically
- When importing, existing contacts matched by email can be updated rather than skipped — use the update option to keep your data in sync