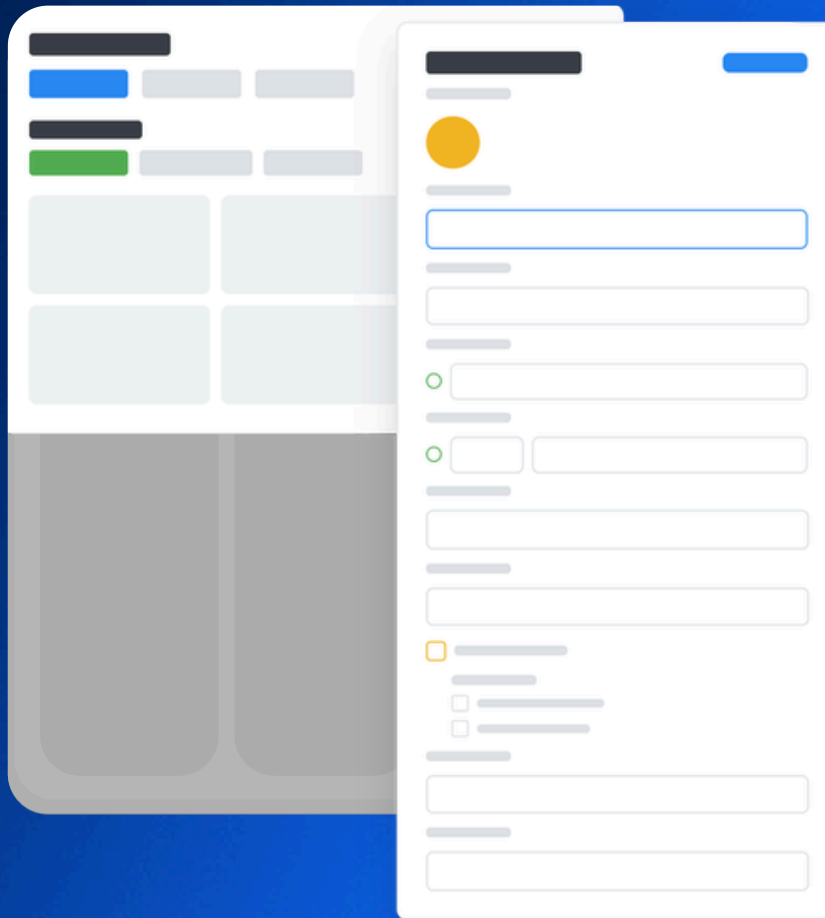


REFERENCE GUIDE

Contacts

Your Complete Guide To Organizing, Enriching, And Acting On Every Contact



A general companion to the Contacts feature: what it is, how it works, and how to get the most out of it as your database grows.

Contacts Basics

What Is A Contact Record?

A contact is a record for one person your business talks to: a lead, a customer, or anyone you'd want to reach again. Think of your CRM's Contacts area as a digital address book that also remembers every conversation, note, and interaction you've ever had with that person, all attached to their record automatically.

Why Keeping Contacts Organized Matters

- A contact record is the single source of truth for a relationship. Instead of a name in your phone, an email in your inbox, and a note on a sticky pad, everything about that person lives in one place.
- Organized contacts mean faster, more personal follow-up. When you open a record and instantly see who they are, how they found you, and what's already happened, you never start a conversation from zero.
- A messy or duplicated contact list costs you real opportunities: a lead who gets missed, a customer contacted twice with conflicting information, or a follow-up that never happens because nobody owned it.
- This is true no matter what kind of business you run. A CRM (Customer Relationship Management system) exists to solve one basic problem: keeping track of people at scale, without relying on memory.
- The good news is you don't need to master everything on day one. Learn the basic anatomy of a contact record, get your first few contacts in, and build from there.

The Anatomy Of A Contact Record

Every contact record is built from the same basic building blocks. Once you recognize these five parts, any contact record in your software will make sense at a glance.

Name & Contact Info

The basics: first and last name, plus at least an email or a phone number so your software can identify and reach that person. This is the minimum every contact needs.

Tags

Short labels you attach to a contact to describe them, like "new lead" or "active customer." Tags are what let you find and group contacts fast, and what let your software know who should get a message or enter a workflow.

Custom Fields

Any piece of information about a contact beyond the basics, like a birthday, a membership type, or a preferred appointment day. Custom fields let your contact record hold exactly what your business needs to know.

Owner & Followers

The Owner is the team member responsible for that contact. Followers are teammates who want visibility without being responsible. Together they answer the question: who's minding this relationship?

Activity

The running history of everything tied to that contact: conversations, notes, appointments, tasks, and how they first came in. This is what turns a static record into a living relationship.

Your Getting Started Checklist

New to Contacts in your software? Work through these steps in order and you'll have a working, organized foundation before you move into the details ahead.

- 1** Open the Contacts area and get familiar with the list view before changing anything.
- 2** Add or import your first contacts, making sure each one has a name and either an email or a phone number.
- 3** Decide on 5 to 10 starter tags that describe the contacts you actually work with, and apply them.
- 4** Assign an Owner to any contact someone on your team is actively responsible for.
- 5** Open one contact record and click through its sections until the layout feels familiar.
- 6** Bookmark or revisit this guide as you move into tags, custom fields, and Smart Lists in the pages ahead.

This basics section is your on-ramp. Everything after this page goes deeper into each part of Contacts, feature by feature.

The Contact List View

What It Is

Contacts is the heart of your CRM. It's the list view where every contact you have is stored, organized into three working sections so you always know how to find, filter, and open the record you need.

How It Works For Your Business

- The list view breaks into three sections: the row of features (Contacts, Smart List, Bulk Actions, Task, Companies, Settings), the all-contacts row with filters and search, and the table itself.
- Every contact record is organized into three columns once you open it: contact details, conversations, and activity and associations.
- Use the flash button in your software, or on mobile, to add a contact instantly from anywhere in your software.
- Selecting Customize from search takes you straight into Manage Fields, where you control which columns show and which fields appear on the Add a Contact form.
- A saved filter and sort combination becomes a Smart List, ready to reuse with one click instead of rebuilt from scratch every time.
- Bulk Actions let you export, tag, email, or automate for many contacts at once, using Select All when a list spans more than one page.

You get out of it what you put into it, so make sure you put your contacts into your software.

The Contact List View – Tips & Guidelines

Tips

- Coming from another CRM or a spreadsheet? Get your import formatted cleanly before you bring contacts in.
- Use the flash button whenever you need to add a contact fast, on desktop or mobile.
- Save any filter and sort combination you use often as a Smart List instead of rebuilding it every login.
- Search for Objects to customize the Add a Contact form so your team always captures the fields you actually care about.
- When running a bulk action like email marketing, use Select All so every matching contact is included, not just the ones on your current page.

DO

- Learn the list view's three sections before diving into filters
- Save a filter combination the moment you find yourself rebuilding it
- Customize your Add a Contact form to match your business
- Use Select All for any bulk action meant to reach your full list

DON'T

- Scroll through an unsorted list when a filter would find who you need in seconds
- Leave every contact using default fields that don't match your business
- Assume a bulk action only reached the contacts visible on your screen
- Ignore the three-column structure inside a contact record

Adding & Customizing Contacts

What It Is

Adding a contact is fast by design, and customizing the form behind it means your team captures exactly the information your business needs every single time, while Owner and Follower make it clear who's responsible and who's watching.

How It Works For Your Business

- Every contact needs a first and last name, plus either an email or a phone number, so your software can keep track of that contact's data.
- If two forms come in with the same email but different phone numbers, your software associates them as the same contact automatically.
- Manage Fields (search for Objects) is where you choose which fields appear on your contact form, drag them into order, and mark which are required.
- Owner is the team member responsible for a contact, limited to people who actually have access to your CRM.
- Followers give other teammates visibility into a contact's activity without making them the owner, and their conversations show up under Followed By Me.
- Audit Logs (search for Audit Logs) track every change made to a contact, including what changed, who changed it, and when.

The goal is always the same: capture, nurture, and close more sales by managing your contact data well.

Adding & Customizing Contacts – Tips & Guidelines

Tips

- If an administrator already set up your contact fields, follow what's provided rather than changing it yourself.
- Only turn on DND for a contact if they specifically ask not to be reached, or an inbound number keeps calling unwantedly.
- Use the sort arrow next to Created or Last Activity to decide whether newest or oldest contacts show first.
- Assign an Owner for accountability and add Followers for visibility. They serve two different purposes on the same contact.
- Check Audit Logs any time you need to see what changed on a contact, who changed it, and when.

DO

- Require an email or phone on every contact so records stay usable
- Assign an Owner the moment responsibility for a contact is clear
- Add Followers when a teammate needs visibility without ownership
- Review Audit Logs when a contact's data looks off

DON'T

- Turn on DND as a default for every new contact
- Leave a contact unassigned when someone should clearly own it
- Let two duplicate emails slip in without checking for an existing match
- Skip customizing the contact form and rely on generic defaults

Tags

What It Is

A tag is a label you put on a contact. Tags help you group contacts so you can find them fast and take action, whether that's sending a message, building a Smart List, or starting a workflow.

How It Works For Your Business

- Add a tag right from a contact record using the plus sign labeled Add a Tag, or add tags to many contacts at once with a bulk action.
- Use Smart Lists with a Tag Is filter to pull up every contact carrying a specific tag instantly, and save it for next time.
- Search for Tags to manage every tag. Deleting a tag removes it from every contact that has it, while renaming a tag updates it everywhere automatically.
- The interactive Tag Builder organizes a full tag system across six categories: Follow-Up Status, Communication Preference, Engagement and Activity, Lead and Client Status, Products and Services, and Source and Advertising.
- A Follow-Up Status Tag answers what needs to happen next with a contact, while a Source Tag answers where that contact came from.
- Combine tags to spot upsell and cross-sell opportunities, like contacts tagged for one service but not a related one.

Tags are not just labels. They're instructions that tell your software what to do next.

Tags – Tips & Guidelines

Tips

- Start simple. Pick 10 to 20 tags from your tag plan and add those first, you can always add more later.
- Follow the one rule of tags: if a tag doesn't help you send a better message, start or stop a workflow, or build a Smart List, you probably don't need it.
- If you just want different wording, rename a tag instead of deleting it, since deleting removes it from every contact that has it.
- Combine tags to upsell and cross-sell, like finding contacts tagged for one service but not a related one.
- Keep a clean tag list and share it with your team so everyone tags contacts the same way.

DO

- Build your tag system around the six Tag Builder categories
- Rename a tag when only the wording needs to change
- Use Smart Lists to turn a tag into a reusable, one-click filter
- Share your tag list with the team so tagging stays consistent

DON'T

- Create a new tag for something that already has one, just worded differently
- Delete a tag without checking how many contacts rely on it
- Let every team member invent their own tagging language
- Add a tag that doesn't drive a message, workflow, or Smart List

Custom Fields & Folders

What It Is

A custom field stores information about a contact beyond the defaults, like first name or email. Folders, also called groups, keep related custom fields organized so they show up as one labeled section on a contact record.

How It Works For Your Business

- Every custom field attaches to an object, such as the contact, the opportunity, or the company.
- Add A Field lets you choose an input type (text, number, dropdown, date picker, file upload, and more), name it, and assign it to an object and, optionally, straight to a folder.
- Add A Folder groups related fields together. Use the bulk action Move To A Group to add existing fields into a new folder.
- Drag and drop reorders fields within a folder, or moves a whole folder up or down on the contact record, and it saves automatically.
- A Custom Value pulls a custom field's data into an email, text, or campaign so it fills in automatically instead of being typed by hand every time.
- The Unique Key generated for every field makes it easy to copy and paste into emails, texts, or internal notes.

When you start using lots of custom fields, organize them into folders that make sense for your business.

Custom Fields & Folders – Tips & Guidelines

Tips

- Organize custom fields into folders as you create them. It's easier than cleaning up a long, unsorted list later.
- Use the search bar on the All Fields tab to find a field fast instead of scrolling through everything.
- Refresh your browser after adding or moving a field to confirm your changes actually saved.
- Check Audit Logs any time you need to see what happened to a field that was edited or deleted.
- Add a new field to a folder right away so it's easy to find and reference later.

DO

- Assign every new field to a folder the moment it's created
- Name folders in a way your whole team will understand
- Use Custom Values to personalize emails and texts automatically
- Reorder folders so your most-used information appears first

DON'T

- Let custom fields pile up unsorted outside any folder
- Create a duplicate field instead of searching for an existing one
- Type a contact's custom data by hand when a Custom Value could fill it in
- Delete a field without checking Audit Logs or who's using it

Export & Import

What It Is

Export and Import are how your contact data moves in and out of your CRM. Export pulls a copy of selected contacts out as a file, and Import brings a file of contacts in, mapping its columns to fields in your software.

How It Works For Your Business

- Export is a bulk action: select your contacts, choose Export, and track the download under Bulk Actions.
- An Import file must be a CSV with the first row as titles, and it helps to download the sample file first to see the expected format.
- Create any custom fields your spreadsheet needs, like gender or a special interest, before you import, not after.
- During Field Mapping, each spreadsheet column lines up with a CRM field. Anything showing Pending didn't match automatically and needs to be mapped or skipped.
- The verify step lets you create a Smart List for incoming contacts, add them to a workflow, and add tags to the whole batch before you confirm consent and start the import.
- After importing, wait for Completed status, then check the statistics for success and error counts, common errors include mismatched headers, missing required fields, and invalid phone formats.

You get out of it what you put into it, so get those contacts imported cleanly and completely.

Export & Import – Tips & Guidelines

Tips

- Create any custom fields you need, like gender or a special interest, before you start your import, not after.
- Download the sample file and use it as your format guide so your columns line up cleanly the first time.
- Tag every import with something simple, like the source and date, so you always know where a contact came from.
- Always create a Smart List for your import so you can see exactly who came in and double-check the count.
- If you get import errors, check the phone number format first. Most numbers need a country code.

DO

- Prepare custom fields and column headers before uploading a file
- Tag and note every import for future reference
- Create a Smart List for each import batch
- Use Create and Update Contacts to fill in gaps instead of duplicating

DON'T

- Import a spreadsheet without checking the sample file's format first
- Skip the verify step and its consent confirmation
- Ignore Pending fields during mapping
- Assume an import succeeded without checking its statistics

Duplicate Contacts & Merging

What It Is

Contact Duplication Preferences control whether your CRM allows the same person to exist as two records, and Merge is the bulk action that combines two duplicate contacts into one clean record.

How It Works For Your Business

- Duplicates commonly happen when a contact fills out one form with a personal email and phone, then another with a business email or phone.
- Contact Duplication Preferences (search for Business Profile, under general settings) control whether duplicates are allowed and whether email or phone is checked first.
- Turning Allow Duplicate Contacts off is the best way to keep a clean database, and checking the method your customers actually use to reach you first works best.
- To merge, check the box next to two duplicate records, open More from bulk actions, and select Merge.
- On the merge screen, review Fields With Different Values first, choose the correct Master Record, then check All Fields before confirming.
- A merge keeps the correct primary phone and email while storing the other number or address as an additional entry instead of losing it.

A cluttered database is avoidable. Turn off duplicate contacts and check the way you actually communicate with people first.

Duplicate Contacts & Merging – Tips & Guidelines

Tips

- Set your Contact Duplication Preferences early, before your list grows to pages and pages of contacts.
- Choose email first or phone first based on how your customers actually reach you, not just by default.
- When you spot a duplicate, confirm with the contact which phone number or email they want to be reached on before you merge, if you can ask.
- Always double-check which record you've set as the Master Record before confirming a merge.
- Clean up duplicates especially after importing a list of contacts, since imports are a common source of duplicate records.

DO

- Turn off Allow Duplicate Contacts as soon as your account is set up
- Pick the Master Record with the most accurate, complete information
- Review Fields With Different Values before finalizing any merge
- Check for duplicates right after every import

DON'T

- Leave Allow Duplicate Contacts turned on by default
- Merge two records without confirming which one should be the master
- Assume a merge deletes the losing contact's unique details
- Ignore a growing duplicate problem until the database is unmanageable

Delete & Restore

What It Is

Deleting a contact removes it and everything tied to it, but it isn't necessarily permanent. Restore brings a deleted or merged contact back within a 60 day recovery window, along with everything that came with it.

How It Works For Your Business

- Deleting a contact also removes its conversations, notes, opportunities, tasks, and manual actions, and requires typing the word "delete" to confirm.
- Restoring a contact brings back everything that was tied to it, the same way it was removed.
- Find the Restore Contacts list from Smart List, All, the three dots, then Restore. It shows every contact deleted or merged and still within its recovery window.
- A merged contact isn't deleted, it's combined into another record, but it still shows up in the same Restore Contacts list in case you ever need it back.
- Bulk deletes and bulk restores work the same way as single ones, and a whole bulk action can be undone with one click from its progress screen.
- Audit Logs (search for Audit Logs) show every deletion, restoration, and update, along with who took the action and when.

Even though you typed delete, you didn't necessarily mean it, and you can still restore it.

Delete & Restore – Tips & Guidelines

Tips

- You have 60 days, about two months, from the moment of deletion to restore a contact. After that, it's gone for good.
- Deleting or restoring a contact always brings its conversations, notes, opportunities, tasks, and manual actions along in either direction.
- Both single and bulk deletes require typing the word "delete" to confirm, so an accidental click alone can't remove a contact.
- Merged contacts show up in the same Restore Contacts list as deleted ones, so merging is still reversible from the same place.
- Get comfortable with Smart List, All, the three dots, and Restore. That's your go-to path for recovering anything.

DO

- Check the Restore Contacts list right away after an accidental delete
- Review a bulk action's progress before assuming everything was removed correctly
- Check Audit Logs weekly if you manage contacts for a team
- Restore a merged contact if you ever need to separate it again

DON'T

- Wait past the 60 day window before trying to restore a contact
- Assume a bulk delete can't be undone
- Skip the delete confirmation step without reading what it removes
- Ignore Audit Logs when a contact's history looks incomplete

Smart Lists

What It Is

A Smart List is a dynamic contact list that updates automatically based on filters and conditions you set. Unlike a static list, contacts are added or removed on their own as they start or stop meeting the criteria.

How It Works For Your Business

- Build one by selecting Advanced Filters, choosing your criteria, and applying it, then saving the Unsaved Changes as a new Smart List with its own name.
- Advanced Filters cover a long list of fields: tags, source, city, email activity, pipeline stage, group access, and more, and Tag is the most commonly used one.
- A Nested Filter requires a contact to match more than one condition at once, like a specific tag and a specific source.
- Manage Smart List, from the three dots, lets you reorder, copy, share as a Global List, rename, or delete any Smart List you've built.
- A Global List is shared so every teammate can see it, while a list left off that setting stays visible only to you.
- Send an email campaign straight to a Smart List, or let a workflow action automatically place a contact into the matching list as they move through it.

Smart Lists are the best way to manage your contacts and keep clean data, so you're never sending people things they don't need or want.

Smart Lists – Tips & Guidelines

Tips

- Tag is the most commonly used filter, so it's a great starting point for your first Smart Lists.
- Use a Nested Filter when you need a contact to match more than one condition at once, rather than either on its own.
- Always check for the Unsaved Changes banner before navigating away, and choose to save, save as new, or discard.
- Only mark a Smart List as global if you want your whole team to see it.
- Reuse your Smart Lists in email campaigns and workflows instead of rebuilding a segment from scratch each time.

DO

- Save a filter combination as a Smart List the moment it's useful
- Use Nested Filters for precise, multi-condition targeting
- Mark a list global only when the whole team should see it
- Plug Smart Lists directly into campaigns and workflows

DON'T

- Rebuild the same filter by hand every time you need it
- Leave an Unsaved Changes banner unresolved
- Make every personal working list global by default
- Send a broad email campaign when a Smart List would target it better

Bulk Actions & Statistics

What It Is

A Bulk Action is any operation you run against more than one selected contact at once, from a bulk SMS or email to adding tags or triggering an automation, all tracked from a central Bulk Actions page.

How It Works For Your Business

- Select contacts individually, by page, or select all contacts matching a list, even across thousands of records beyond the current page.
- Every bulk action needs an Action Name before it will run, and that name is how you'll find it later on the Bulk Actions page.
- Choose to send all at once, on a schedule, or in Drip Mode, sending in batches over set days, hours, or minutes so you don't overwhelm your sending reputation.
- Beyond messaging, bulk actions can add or remove tags, move contacts into a pipeline stage, update custom fields, merge duplicates, or delete contacts entirely.
- Trigger An Automation sends every selected contact into a chosen workflow, all at once, scheduled, or in a drip.
- The Bulk Actions page tracks every job's status, statistics, and details, and can be filtered by date, status, or action type.

Creating a bulk action starts with who you're selecting, then what action you're taking on them.

Bulk Actions & Statistics – Tips & Guidelines

Tips

- Always name your bulk action clearly before running it, that name is how you'll find and verify it later.
- If a message includes texts or emails going out to contacts, choose Drip Mode instead of sending all at once.
- Before sending any bulk SMS or email, confirm contacts have consented and haven't come from a third party.
- Send yourself a test email before sending any bulk email campaign.
- If bulk action options aren't showing up, check that you've actually selected one or more contacts first.

DO

- Name every bulk action clearly before it runs
- Use Drip Mode for any large messaging send
- Confirm consent before sending bulk SMS or email
- Check the Bulk Actions page to confirm a job's results

DON'T

- Send a large batch of messages all at once without a drip
- Run a bulk send without confirming contact consent first
- Skip a test send before a bulk email campaign
- Leave a bulk action unnamed and hard to find later

Tasks

What It Is

A task is a to-do for you or your team, not an appointment or a calendar event. It's a simple reminder of something that needs to get done, connected to a contact, opportunity, or company so nothing falls through the cracks.

How It Works For Your Business

- Search for Tasks to find every task, split into Due Today, Overdue, and Upcoming based on the due date.
- Add a task with a title, a description, an optional recurring setting, a due date, and an Assignee, the person responsible for completing it.
- Associate a task with a contact, opportunity, company, or custom object, and even connect one task to several contacts at once.
- Checking a task complete shows a green checkmark and a mark-through line, and can be undone by clicking the checkmark again.
- Search, filter, and sort your task list by title, status, due date, or Assignee to focus on exactly what matters.
- Add a task automatically with a workflow action, for example right after someone fills out your website form, as long as the contact has an assigned user.

A task is more like a to-do. The goal is always to get it done and mark it off your checklist.

Tasks – Tips & Guidelines

Tips

- Check Overdue often. That's the column that tells you what's slipped past its due date and needs attention.
- Use the Settings gear on your task table to show only the fields you actually use.
- Avoid deleting tasks you've already completed. Keeping the record lets you look back at what was done and when.
- Sort by due date, newest first, if you want to always see your latest due date rather than when a task was created.
- When assigning a task through a workflow, make sure the contact has an assigned user, or add an Assign To User step first.

DO

- Check your Overdue list at the start of every work session
- Connect every task to the right contact or opportunity
- Assign a clear owner to every task, automated or manual
- Keep completed tasks in the record instead of deleting them

DON'T

- Let overdue tasks pile up unaddressed
- Create a task with no due date or assignee
- Automate a task without confirming who it will notify
- Delete a completed task's history just to tidy the list

Contact Activity

What It Is

The third column on a contact record is where everything about that relationship lives: how a contact came in, notes you've added, associations, appointments, documents, and payments, all in one place.

How It Works For Your Business

- Activity, also called attribution, shows how a contact came in, whether that's a form, a page visit, a social source, or direct traffic, with both a first and a last attribution.
- Associations connect a contact to other records, like opportunities or custom objects, so everything linked to that contact is visible in one view.
- Add a Note to leave a written entry on a contact's record, with formatting like highlighting, bullet points, and links, and remember to save it.
- Appointments made through your calendar for this contact show up here automatically once a calendar is set up.
- Add Document stores a file directly on a contact's record, including contracts or anything sent or received by email.
- Payments shows transactions, subscriptions, invoices, and estimates, with quick actions to charge a card or create a new invoice, once a payment provider is connected (search for Payments Integrations).

Watch the activity as it comes in, check associations, add tasks, check appointments, manage documents, and review payments made with that contact.

Contact Activity – Tips & Guidelines

Tips

- Always select Save after adding a note. It's an easy step to skip, and the note won't be kept without it.
- Check the activity feed before reaching out to a contact so you know how they came in and what they've already done.
- Set up your calendar first if you haven't, so appointments made with this contact start showing up automatically.
- Search for Payments Integrations to connect your payment provider before trying to charge a card or create an invoice.
- Look for the shortcuts icon in the bottom right of your desktop display for keyboard shortcuts to navigate faster.

DO

- Review activity and attribution before your first outreach to a contact
- Save every note the moment you finish writing it
- Connect a payment provider before attempting to charge a card
- Check associations to see everything linked to a contact

DON'T

- Write a note and forget to save it
- Try to charge a card before a payment provider is connected
- Reach out to a contact without checking their activity first
- Overlook documents or contracts already stored on the record

Go Further With Contacts

What It Is

Once the basics and the core features feel comfortable, your software has more built in. These are additional Contacts capabilities worth knowing about as your database and your business grow.

How It Works For Your Business

- The Company object lets you group every contact who works for the same business under one company record, so you can see that organization's contacts and activity together instead of piecing it together contact by contact.
- Add more than one phone number to a single contact, each with its own label like Mobile, Work, or Home, and mark one Primary so your software knows which number to use for outgoing calls and texts.
- Advanced Filters support two kinds of logic: Add Nested Filter requires a contact to match every condition at once, while Add Filter adds an alternative condition, so a contact matching any one of several conditions still qualifies.
- Create a subscription or invoice directly from a contact's Payments tab, with their details already filled in, so you can bill a customer without ever leaving their profile.
- Contact associations let you link two contacts, or a contact and another record, and label how they relate, like Referral Partner or Manager and Employee, and that relationship shows up on both records automatically.
- A bulk action can add tags to many contacts at once or remove them just as easily, and a single CSV import can bring in contacts and opportunities together when both are listed on the same row, matched by email or phone.

Documents added to a contact's record can be shared as public, private, passcode, or password-protected links, with expiration and download controls, so sensitive client files stay secure.

Go Further – Tips & Guidelines

Tips

- Set up a Company record for any business you work with more than one contact from, so their combined activity is easy to review in one place.
- Label each phone number as you add it and confirm which one is marked Primary before your team starts calling or texting that contact.
- Use Add Nested Filter when a contact needs to match several conditions at once, and Add Filter when matching any one of several conditions is enough.
- Create an invoice or subscription straight from a contact's Payments tab during a live call instead of switching screens and losing your place.
- When you import a CSV with both contacts and opportunities, keep them on the same row so your software links them automatically instead of leaving orphaned records.

DO

- Group related contacts under a shared Company record
- Mark one phone number Primary on every contact that has more than one
- Set up a contact association whenever two records have a real, ongoing relationship
- Choose a document link type that matches how sensitive that file actually is

DON'T

- Leave multiple contacts from the same business unlinked and hard to track together
- Assume the first phone number added is automatically the right one to call
- Bulk remove tags without confirming which contacts actually need them removed
- Share a sensitive document with a public link when a password-protected one is available

Key Terms Glossary

Contact

An individual record for a customer, client, or lead, holding their details, conversations, and activity in one place.

Smart List

A saved, self-updating filter and sort combination you can return to anytime instead of rebuilding a search.

Manage Fields

The setting for choosing and reordering which fields appear on a contact form or table.

Owner

The team member assigned responsibility for a contact.

Contact Type

A field marking whether someone is a lead or a current customer.

Audit Log

A log tracking what changed on a contact, who changed it, and when.

Tag Builder

An interactive tool for building a full tag system across six categories.

Source Tag

A tag that answers where a contact came from, like a referral or an ad.

Folder (Group)

A way to organize related custom fields into one labeled section on a record.

Export

A bulk action that downloads selected contacts as a file.

CSV File

The file format an import requires, with column titles in the first row.

Duplicate Contact

Two or more records that actually represent the same person.

List View

The main contacts screen, where every contact is listed in a table you can sort, filter, and customize.

Advanced Filters

Filtering options that narrow contacts by specific fields, like tags, email, source, or activity.

Bulk Action

An operation, like exporting, tagging, or messaging, applied to several selected contacts at once.

Follower

A teammate given visibility into a contact's activity without being the owner.

DND (Do Not Disturb)

A setting that stops outreach to a contact across a channel.

Tag

A label on a contact that helps you group contacts and take action, like messaging or building a Smart List.

Follow-Up Status Tag

A tag that answers what needs to happen next with a contact.

Custom Field

A field you create to store information beyond the default fields.

Custom Value

A placeholder that automatically pulls a custom field's data into a message.

Import

The process of uploading a file of contacts and mapping it into your CRM.

Field Mapping

Matching each spreadsheet column to the correct field in your CRM.

Contact Duplication Preferences

The setting controlling whether duplicate contacts are allowed and which field is checked first.

Key Terms Glossary (Continued)

Merge

The bulk action that combines two selected contacts into one record.

Merged Contact

A contact combined into another one rather than deleted, still recoverable.

Restore

Bringing a deleted or merged contact back within its 60 day window.

Global List

A Smart List shared so every team member can see it.

Bulk SMS / Email / Review Request

Sending a text, email, or review request to every selected contact at once.

Trigger An Automation

A bulk action that puts every selected contact into a chosen workflow.

Due Date

The date a task needs to be completed by.

Activity

The feed showing how a contact came in and what they've done since, also called attribution.

Note

A written, formattable entry added to a contact's record.

Document

A file, like a contract, stored on a contact's record.

Company

A record grouping every contact who works for the same business, so their combined activity is easy to review.

Primary Phone Number

The one number, out of several saved on a contact, used by default for outgoing calls and texts.

Master Record

The contact chosen to keep as the primary version during a merge.

Delete

Removing a contact and everything tied to it from your account.

Nested Filter

A second filter joined with a first so a contact must match both conditions.

Bulk Actions Page

A dashboard listing every bulk job's action, status, and statistics.

Drip Mode

Sending a bulk action out gradually in batches instead of all at once.

Task

A to-do for you or your team, not an appointment or calendar event.

Assignee

The person responsible for completing a task.

Associations

Other records connected to a contact, like opportunities or custom objects.

Appointment

A scheduled meeting tied to a contact, created through your calendar.

Payment Record

The transactions, subscriptions, invoices, and estimates tracked for a contact.

Contact Association

A link between two contacts, or a contact and another record, labeled to explain how they relate.

Document Access Link

A shareable link to a document, set as public, private, passcode, or password protected.

Getting The Most From Contacts

1

Keep One Clean Record Per Person

Set your Contact Duplication Preferences early and merge duplicates as soon as you spot them, so every contact stays a single source of truth.

2

Organize With Tags, Fields & Folders

Build a tag system across your key categories, add the custom fields your business actually needs, and keep them organized into folders.

3

Let Smart Lists & Bulk Actions Do The Work

Save filters as Smart Lists instead of rebuilding them, and use bulk actions to message, tag, or automate for a whole segment at once.

4

Track Every Relationship In One Place

Use tasks, notes, and the activity column so nothing about a contact, and nothing you owe them, ever falls through the cracks.

Contacts works best as one habit: clean data in, smart organization on top, and automation covering the rest.

Getting Help

- Keep this guide close as you set up tags, custom fields, Smart Lists, and bulk actions.
- Come back to it any time a new team member needs to get oriented on Contacts.
- Reach out to your support team if you have a question this guide does not answer.