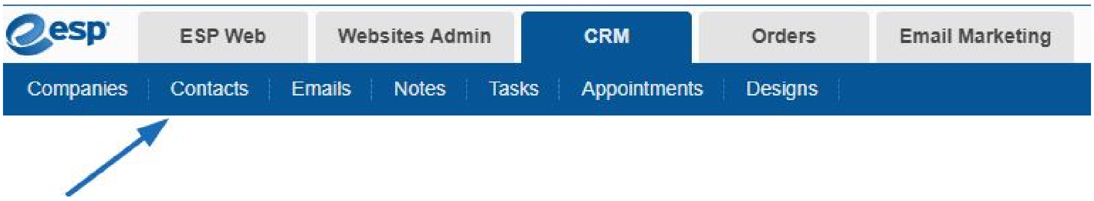
Knowledgebase > CRM > Contacts In CRM

Contacts In CRM

Matt G - 2022-10-19 - CRM

Contacts are the individuals with whom you conduct business. To add, manage, or remove contacts within CRM, click on the Contacts tab.

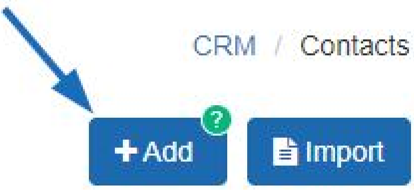


What would you like to do?

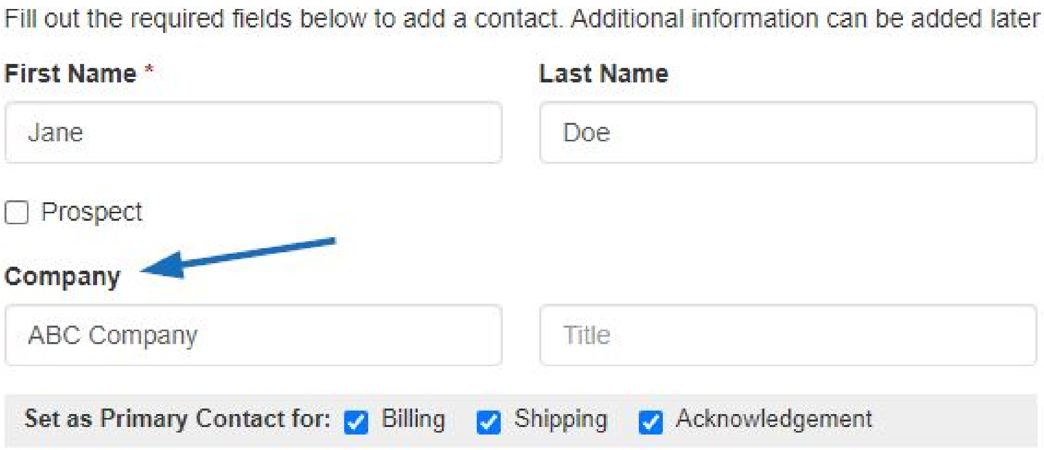
Add a Contact

Contacts can be added individually or imported. Before adding a contact in CRM, it is recommended that the company to which they belong has already been added to CRM. For more information on how to add a company in CRM, please review the Create a Company article.

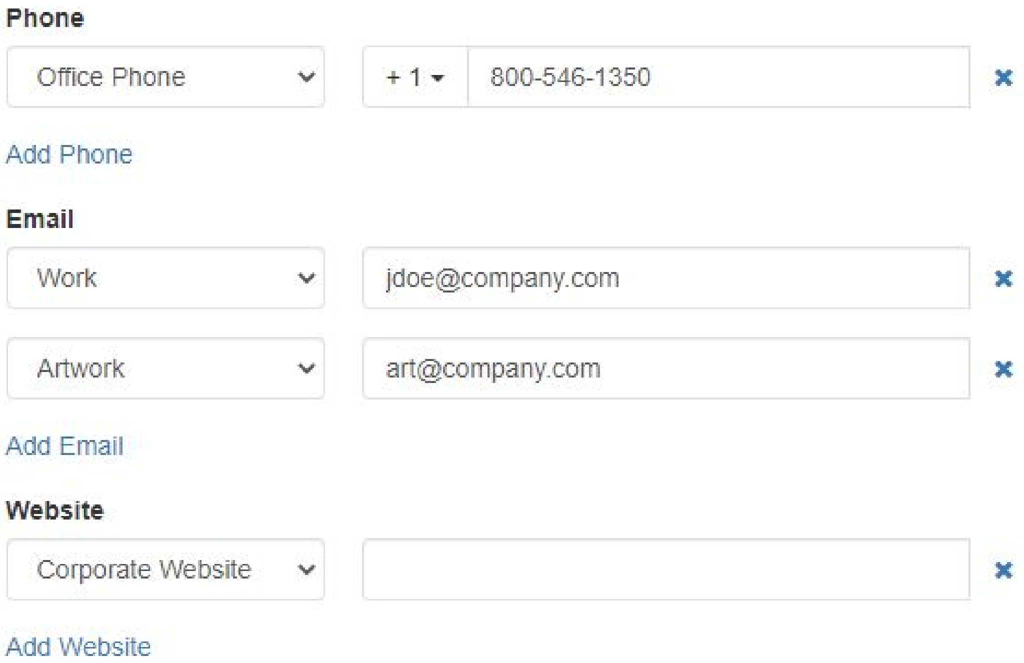
Once the company record existing in CRM, go to the Contacts page and click on the "+Add" button.



Enter the first and last names of the contact. Then, use the company dropdown and select the company to which this contact should be linked. While this is not a required field, it is highly recommended link to the contact to a company. Use the checkboxes to establish this contact as the primary for Billing, Shipping, and/or Acknowledgements if applicable. Please review the Automatically Display Primary Contacts article.



Fill in as much as information as possible in the remaining fields including the contact's phone number(s), email(s), and website.

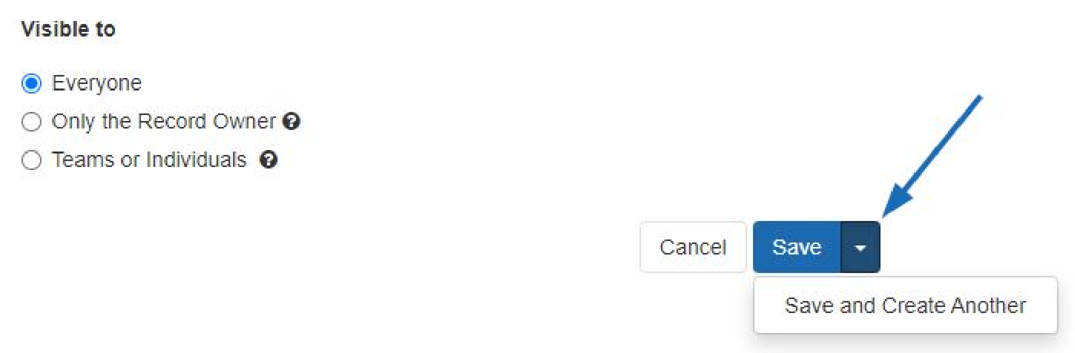


Use the Tag dropdown to enter or select a tag for this contact. A tag is used to quickly locate contacts when sorting and filtering.

Lastly, select the which users will be able to view this contact:

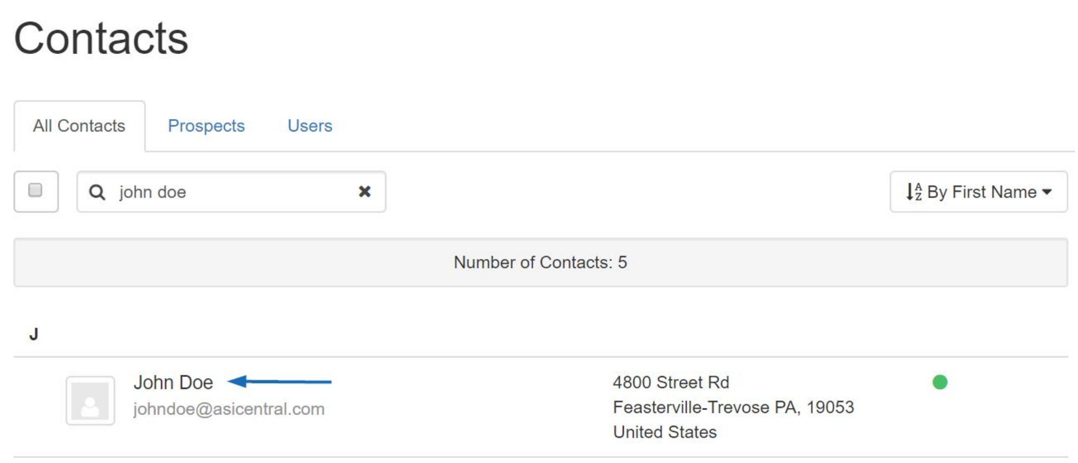
- Everyone: All users within your organization.
- Only the Record Creator: Only you will be able to view and search for this contact.
- Teams or Individuals: You select the team of users or individual users that will be able to view this contact's information.

Once you have finished, click on the Save button. If you need to add more than one contact, use the arrow next to the Save button to select "Save and Create Another".

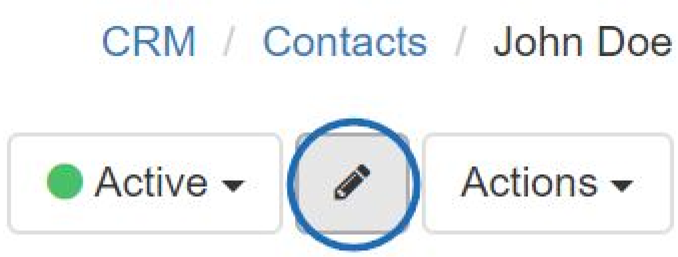


Edit an Existing Contact

To edit a contact, locate the contact record in your CRM. Click on the contact's name to open the record.



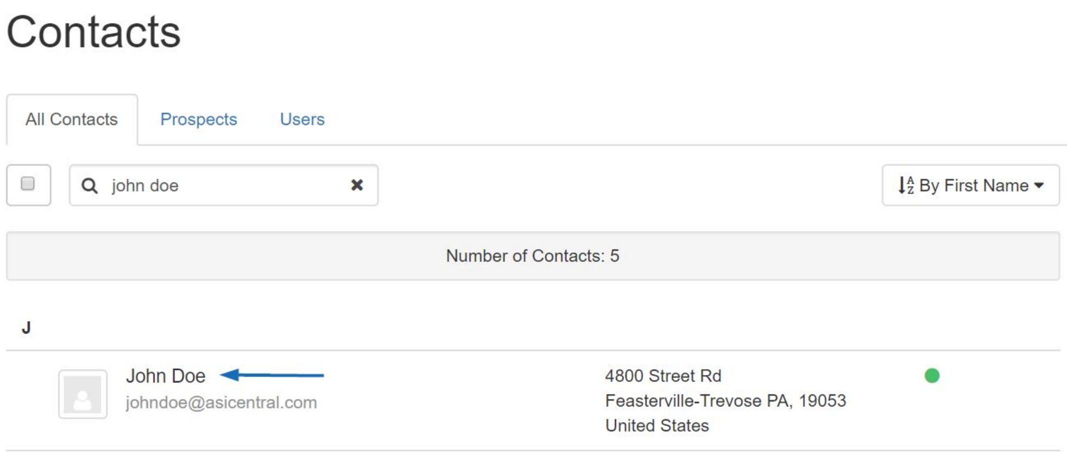
Next, click on the pencil icon in the upper right.



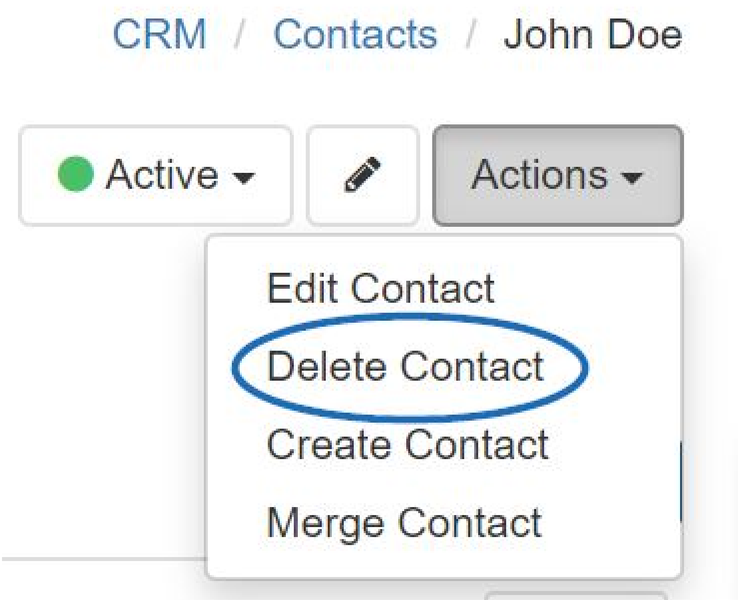
You will then be able to edit the information for the contact. Click on the Save button when you are finished with your updates.

Delete a Contact

To delete a contact, locate the contact record in your CRM. Click on the contact's name to open the record.



Next, click on the Actions button and select Delete Contact from the dropdown.

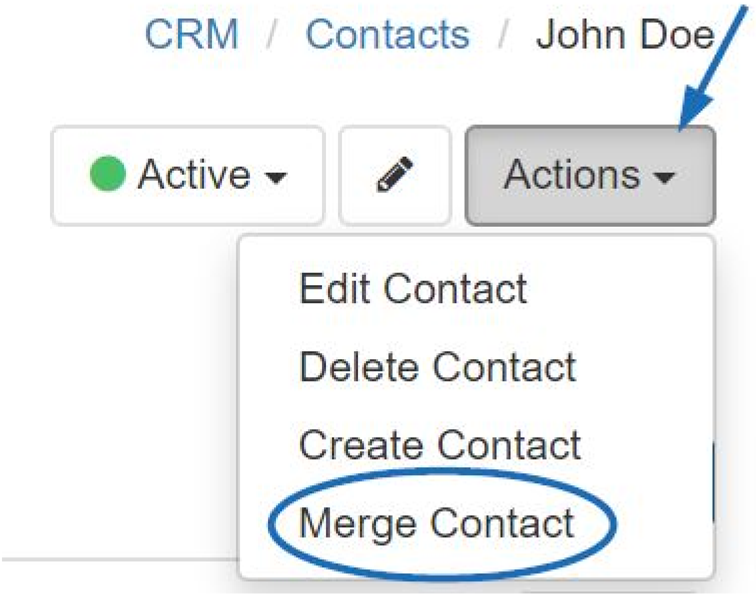


Merge Duplicate Contacts

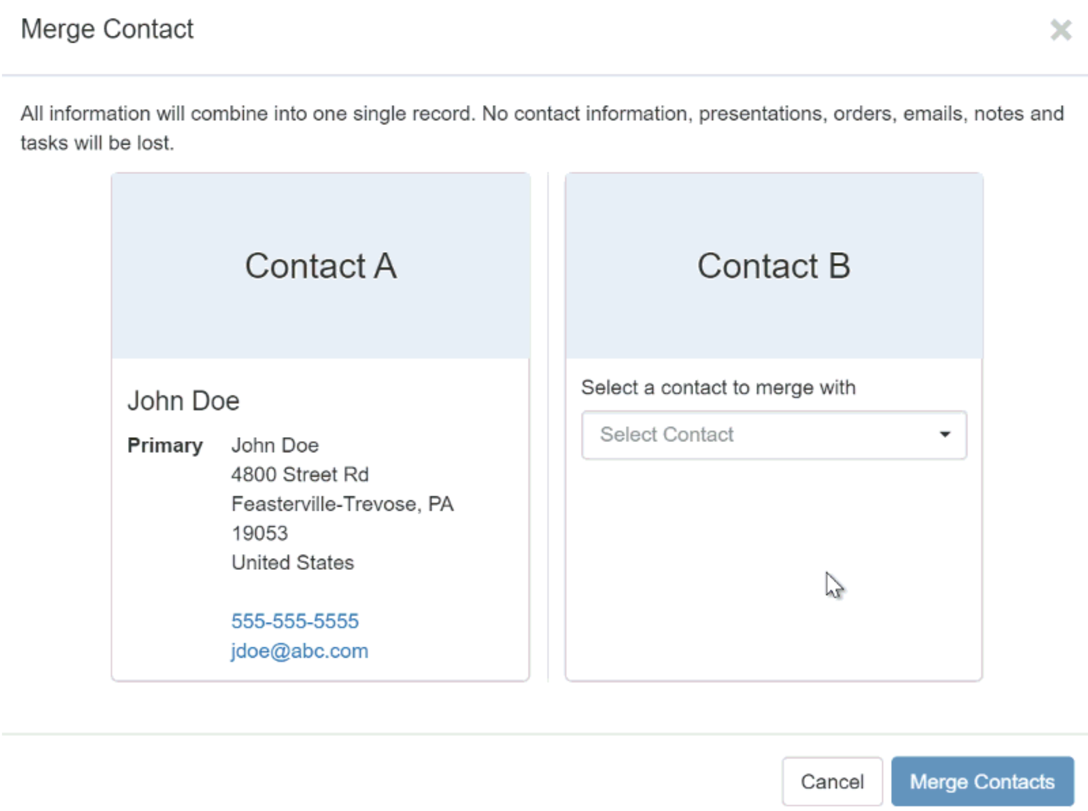
When merging contacts, there are three key aspects to keep in mind prior to taking this action:

- This is a permanent action and cannot be undone.
- By choosing to merge into a contact, if information exists for the same field in both contacts, only the information from the main contact will remain after the merge. In other words, let's say both contacts contained address information, but the user has selected to merge Contact A into Contact B. After the merge is complete, the address information will reflect what had been entered for Contact B.
- If one contact contains information that the other did not have, then it will be added during the merging process.

To combine two contact records within CRM, locatevone record and click on the customer's name to open it. Use the Actions to select Merge Contact from the dropdown.



Next, in the Merge Contacts window, use the Contact B field to locate the second, duplicate contact. After reviewing the information for each contact, select which contact (A or B) should be the main contact.



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