MANAGING CONTACT INFORMATION

What is a contact?

A contact is a unique email address. You can create a contact with only an email address (no other information is needed). You cannot create a contact without an email address.

An email address counts as a single contact no matter how many lists the contact is subscribed to.

What is the Contacts Overview?

This is the page you see after clicking "Contacts" in the top menu. It displays a sortable, searchable list of your contacts.

From here, you can sort and search your contacts, and open up individual contact records. You can filter the contacts by the list they are on, the tags they have, and their status (confirmed, unconfirmed, unsubscribed, or bounced).

You are able to display additional columns by clicking the gear icon in the upper right-hand corner of the contact list:

Clicking a contact's name or email address will open their Contact Record.

What is a Contact Record?

The Contact Record aggregates and organises all the information you've collected about a contact. From the Contact Record you can edit and add information. You can subscribe and unsubscribe from lists, start and stop automations, and add and remove tags. From the contact record you can also see a stream of the contact's recent activity, create tasks, and add notes.
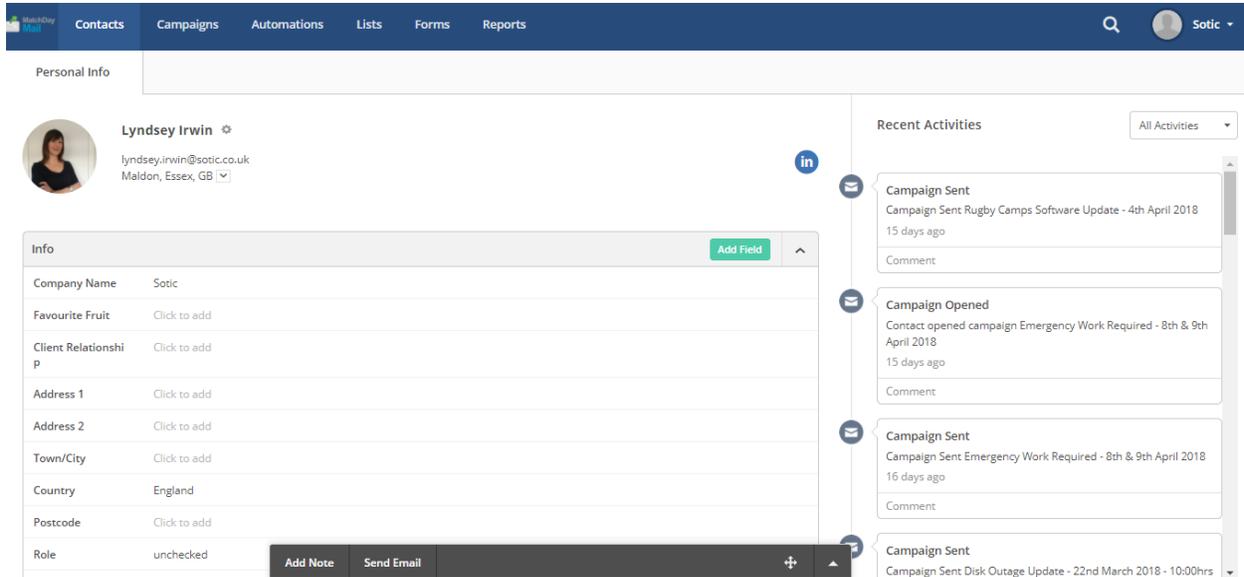
Search

You may need to find a single contact so that you can add information to their contact record, remove them from a list, or add them to an automation.

To find a single contact, **click into the search field** that appears in the upper right-hand corner of the contact list. You can search for them by their name or email address.

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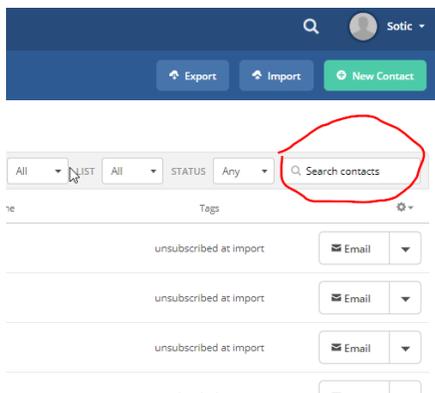
Tags

Tags can be added to your contacts as a way to quickly organise and group them. Tags can also add information to your contact (in addition to the use of default and custom fields).

The Manage Tags feature allows you to create and edit your tags. You can merge duplicate tags and also describe a tags purpose (so that you don't forget why a tag was created or what it indicates).

To access the Tag Manager, click the down arrow next to "Manage Scoring" from the Contact Overview page.

Custom fields

Custom fields are used to store additional information about your contacts. You create them as they are particular to you and your business.
Custom fields are very flexible and you can create an unlimited amount of fields. You can create a variety of field types to store many types of data:

Manage Exclusions

With the exclusion feature, you can block those email addresses so that no emails get sent to them. You can access exclusions by click the down arrow next to "Manage Scoring"