

Contactually 101: Step 7..... Bucketing , searching and sorting your contacts

You can bucket your contacts by playing the bucket game. It is fun. You can access the Bucket Game under the Buckets tab, at the top. The bucket game lets you put each contact into one bucket.

I like my contacts to be in all appropriate buckets. If you are like me, you will want to bucket your contacts from the Contact page. If you go to the Contact tab, you will see a list of contacts. On the left, under the heading Buckets, you will see Unbucketed Contacts. If you check the box to the left of Unbucketed Contact, the list will display all of your unbucketed contacts. Now, on the list in the column Bucket, hover over the word None and all your buckets will show up. Check the boxes for all the buckets that contact should be in. Remember when we set up the buckets and I said I would put them in a particular order? Well, the buckets show up here in the order you put them in and you can easily see your first 10 buckets without scrolling down. If you want to change the order of your buckets, go to the Buckets tab and click Edit Buckets on the top. Use the + to drag the buckets into the order you want them in.

Back on the Contacts page, notice you can sort your contacts in lots of ways. You can sort by bucket (and unbucketed), by status, tag, company, deal, location, frequency of contact account. Status is determined by how often you are in touch with that contact. Tags are manually set by you. Companies and Locations are automatically generated based on the info contained in your contact records. Accounts are all of the different email accounts and social media account you have connected to Contactually. You can use multiple criteria to find the contact you are seeking.

Once you locate the contacts you want to work with, if you click the check box to the left of the name, you will see options appear above the contact list. Use these to add several contacts to a bucket or tab, remove several contacts from a bucket or tab, send a bulk email or merge duplicates.

You can search for a contact (or bucket, tag, company) using the search box at the top of every page. It will make suggestions as you type to make it easier for you to find what you are seeking.