

Contactually 101: Step 8..... Adding, importing and exporting contacts

Most of your contacts will automatically be added from your linked email and social media accounts; however, you can add contacts manually one at a time using the Add Contact link at the top of the Contacts page.

If you have groups of contacts in another program or place that can be exported into a CSV file, you can import the whole list using the Import Contacts link at the top of the Contacts page.

Tip: When importing a list, if you make a column called Bucket, Contactually will put the contacts into whatever bucket is in that column. If you make a column called Tag, it will tag the contacts with what is contained there.

To export contact, use the Export Contacts link at the top of the Contacts page. You can export everything including your notes or just the data without the notes. You can use an exported CSV to do mailing labels or mail merge letters.

To edit a contact, click on that contact in the Contact list and use the Edit Contact link in the top right corner.

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.