Contacts and email marketing

The **Contacts** section is available in the top menu. The contact list displays all clients registered into your CRM.

Contacts settings

To customize the view of your contacts list, navigate to **Contacts** on the top of the page, click **Settings** on the left of the page, then go to the "Contact List" section. From this area you can delete what appears from the Contacts view by clicking on the red trash can beside fields. You can also click, on the left, new fields you would like to be displayed. For instance, you can choose to display other CRM information, such as city, zip code, country or any CRM field (either custom or built-in)
Note: you can have a maximum of 5 fields displayed at a time, if you would like to change fields

You can define custom fields for your CRM: these new fields will be available for each client, as well as in the scheduling widget fields to collect data from your clients as they book an appointment. For instance, you may want to collect their business identification number

Contact details page

Clicking on a contact from the list brings up the details page along with the *Activity* feed. It is a helpful tool that shows you everything about a particular contact. The *Activity* feed can show you information like bookings, messages, notes, and payments received online.

The details page enables you to:

- Edit contact information, update client background or context (what are your client's preferences or expectations), update marketing consent, edit customer reference, view language & timezone, assign tags, block the contact (blacklisting: preventing further appointments to be scheduled) and attach files (eg: PDF, JPEG) ;
- View contact history, including interactions along with collected consents, defined in your privacy policy settings ;
- Add notes, and mark when the client reaches out to your business, implying the personal data retention period can be extended.

Search your contacts

You can use filters to search clients across your contact list: you can search a name, a client reference number (*externalId*) or a tag.
You can use advanced search to filter by multiple criteria. For instance: all zip codes starting with 75 (* being the wildcard) by entering "75*".

You can look for a specific city or any other value in a CRM field, either built-in or custom, or even on a specific location.

Email-marketing

You can send a marketing communication by selecting clients or clicking on **Send Message**.
Only contacts with marketing opt-in can be addressed with email-marketing.

Importing and Exporting Contacts

To import existing customer information into the Agendize CRM contacts need to being formatted using a template in a spreadsheet. Once a spreadsheet has been properly formatted to the template, navigate to the **Contacts** section along the top of the page, select the gear icon on the right side of the page, click **Import Contacts**, then upload the spreadsheet containing contact information.

Exporting Contacts is a very similar process, but instead of creating a spreadsheet, you receive a spreadsheet with contact info in it. In order to export contact info navigate to the **Contacts** section along the top of the page, select the gear icon on the right side of the page, then click **Export all contacts as Excel (.XLS) file**.