

Raising the Bar for Business in New Mexico



League of Enterprise Accredited Professionals

IDSP Business Academy

Enterprise Mastery

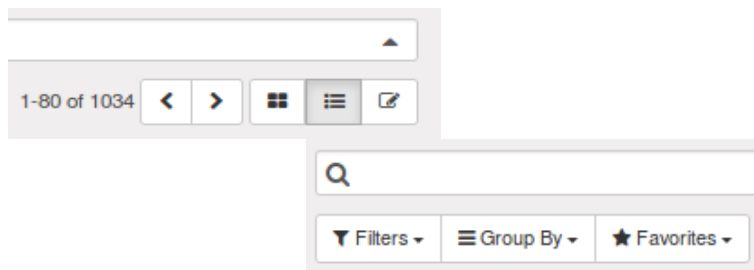
16-Week Program

• Contacts Management

For the XpanZion
Enterprise Platform

Worksheet 1 of 16

- 1) Select Contacts from Back Office
- 2) Click Create and enter contact name, phone, email & any other info + **Tags**
Note: To add a Tag, type tag name into Tag box and click Create Tag at the top of the pull-down – when selecting an existing tag, enter the name & choose from menu
Also Note: City can be a filter if entered; Consider tags for filtering, categories and future mailing & communication
- 3) Click Save
- 4) Enter several contacts – If you can export contacts from your email, the Space-Port-Pros can help you with your import.



- 4) From upper right menu, select List View.
- 5) In the upper right search box, click the down arrow on the right side.
- 6) Now you see the Filter, Group by and Favorites buttons show up top center.
- 7) The Filter button allows filtering of contacts by select criteria.
- 8) Select Add Custom Filter
- 9) In the top pull-down box, select Tags; In the middle pull-down box, select contains and In the bottom type in your tag
- 12) Click Apply
- 13) Use Favorites to save your search filter
- 13) For Mass Editing menu, go to Settings in the back office and select Mass Editing
- 13) For Mass Editing training, visit the [IDSP Academy Training on Youtube](https://theidsp.net/page/youtube)

Use Tags to sort contacts into categories for more specific communication

Use List View for Import/Export and Mass Editing

Contact the Space-Port-Pros for help with Imports.
505-265-9190

Visit the IDSP Academy Youtube page for Mass Editing Training.
theidsp.net/page/youtube

For Tags Menu, activate Developer Mode – upper right under profile, select About and Activate Developer Mode

For editing and creating Tags, go to Sales in the back office. Under Configuration, select Contacts and Contact Tags.