Raising the Bar for Business in New Mexico

ABQ LEAP
IDSP Business Academy
Enterprise Mastery

League of Enterprise Accredited Professionals
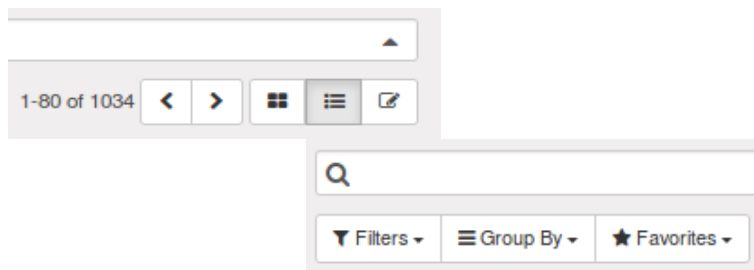
16-Week Program

- Contacts Management

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

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.