Navigating the Contacts Tab

Overview

The main screen of the Contacts Tab presents a list of every Contact record in your <system> with basic information about each Contact with the option of selecting the contact to view their contact profile for more information

- By selecting **Contacts** in the Main Menu, you will be directed to the Contacts Tab.
- The main screen of the Contacts Tab presents a list of every Contact record in your <system> with basic information about each Contact.
- Contacts are sorted alphabetically by the first name (or organization name) of each Contact.
- To access a Contact Profile, click anywhere on the row of the name of the Contact.
- You can also add a Contact from this Tab by selecting **Add Contact** in the top right corner.

Contacts List Columns

Column Header	Description
Contact Display Name	- First and Last name of an individual Ex, John Doe - Name of the Organization ex, CanadaHelps - Household name ex, The Does

Column Header	Description
City	Primary city of the address added
Province	Primary province of the address added
Email	Primary email added for the contact
Phone Number	Primary phone number listed for the contact
Contact Type	Individual, Group or Organization

Rows

Default number of Rows

- The default number of Rows displayed on the Contacts Tab is set to 10.
- To adjust the number of Rows of Contacts displayed in the list view, scroll to the bottom of the page and click the dropdown next to *Show*.
- To the right of the box labelled *Show* are the number of pages of rows and the ability to navigate to the next page list view.
- To navigate to the next page of Contacts, click the arrow pointing right on the far right side of the page. Click on the arrow pointing left to go back to the previous page.
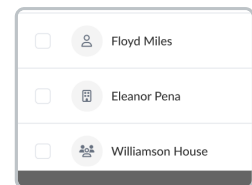
Contact Types

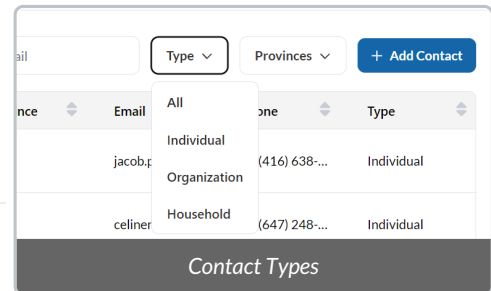There are three default types of Contacts in the <system>:

- Individuals
- Organizations
- Households

Contact types

- To the left of the Contact Name, you'll see 3 icons representing the different Contact Types.

- To filter your list view by Contact Type, select *All Contacts* on the top right corner of the screen, and then select your desired Contact Type.

Contact Types

Actions

- There are **Actions** you can perform from the Contacts Tab to one or more Contacts.
- The available Actions include:
  - Exporting
  - Deleting

Performing an Action

1. To perform an Action, select specific Contacts (by checking the boxes on the left) or select all listed Contacts on the page (top checkbox)

2. Once you have selected the Contact(s), press the *Bulk Actions* button on the top left corner of the page

3. Pressing the **Bulk Actions** button will display a dropdown menu of available Actions. If there is a particular Action you wish to take, you can find it by scrolling the list.

Select Contacts and Actions

Common Actions

- Export (.csv): exports selected Contacts to a .csv format
- Delete: Delete the contact