

Understanding the All Contacts page

The All Contacts page, which you can find when you go to *Contacts -> View Contacts*, gives you the data of all the contacts. You can alter the view by setting different filter criteria. You can also perform some <u>bulk operations</u> on contacts.

| Dashboard | Contacts | | | | | |
|--------------------|----------------------------|--------|------------|-----------|------------|--------------|
| 🛎 Contacts 🗸 🗸 | ALL CONTACTS | | | | | Add contacts |
| Contacts Dashboard | CONTACTS CONTACTS BY STAGE | | | | | |
| View Contacts | | | | | | |
| Lists | View Iotal Count | | | | V | |
| Segments | CONTACT EMAIL | MOBILE | FIRST NAME | LAST NAME | LEAD SCORE | LEAD STAGE |
| Topics | yungmail@zylker.com | | Neung | Olung | 0 | Raw leads |
| Lead Qualification | britemail@zylker.com | | Julie | Mendoza | 0 | Raw leads |
| Lead Attribution | oldmail@zylker.com | | Jane | Does | 0 | Raw leads |
| Creat Generation > | | | | | | |

How to customize the fields displayed?

You can select what data fields you wish to see when you land on the All Contacts screen

1. From the *Navigation Toolbar* to the left, choose **Contacts** and click on **View Contacts**. By default, all the contacts will be displayed.

| | ∑ = C [] |
|------------|------------|
| LEAD STAGE | LEAD SCORE |
| Raw leads | 0 |
| | |

2. Click on the **Customize field display** button.

| | Contacts | | | | | Add Contacts × |
|---------------------|----------------------------|--------|------------|-----------|------------|----------------|
| ළි Contacts ~ | | | | | | Add contacts |
| Contacts Dashboard | CONTACTS CONTACTS BY STAGE | | | | | |
| View Contacts | | | | | | |
| Lists | View Total Count | | | | | |
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| Topics | yungmail@zylker.com | - | Neung | Olung | 0 | Raw leads |
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| Lead Attribution | oldmail@zylker.com | | Jane | Does | 0 | Raw leads |
| 🔆 Lead Generation > | | | | | | |

3. Choose the data fields you wish to see on the page.

| | C [] |
|---|------|
| Search | |
| (i) The first two fields are default and can't be customized or hidden. | |
| 🗄 🗸 Contact Email | |
| 🗄 🗸 Mobile | |
| 🗄 🖌 First Name | |
| 🗄 🖌 Last Name | |
| 🗄 🖌 Lead score | |
| Save | |
| | |

4. Click Save.

Note:

- Other than the Contact Email and Mobile fields, you can remove and rearrange rest of the fields as per your requirements. For removing a field, simply click on it. And for rearranging the fields, you need to drag the field at the place where 6 dots are displayed and place it in the desired place. Once done, you can Save changes.
- You can sort the contacts in ascending or descending order of any field. For example, if you want to sort your contacts in the descending order of First Name, simply click on the First Name column in the All Contacts page.

How to view contacts by stage?

Follow the steps given below to know the concentration of contacts in each stage.

- 1. From the *Navigation Toolbar* to the left, choose **Contacts** and click on **View Contacts**. By default, all the contacts will be displayed.
- 2. Click on **Contacts by Stage** tab at the top. Contacts will be displayed stage wise along with their Contact Score and email address.

| Dashboard | Contacts | | | | | | Add Contacts ~ |
|--|------------------------------|------------------|-------------------------------|------------------|--------------------------------|------------------|---------------------|
| ර් Contacts ~ | ALL CONTACTS | | | | | | • |
| Contacts Dashboard | CONTACTS BY STAGE | | | | | | |
| View Contacts | | | | | | | |
| Lists | 115,843 Contacts in this li | st | | | | All Contacts | Y Li |
| Segments | Raw leads | 21,599 | Marketing ready | 19,026 | Marketing engaged | 17,634 | Marketing qualified |
| Topics | | | | | | | |
| Lead Qualification | Email ID jshannon@exampl | 30 Lead score | Email ID sschwartz@exampl | 30 Lead score | Email ID aravind.jaishankar | 59 Lead score | Email ID |
| Lead Attribution | | | | | | | |
| Signal Contraction Signal Contra | Email ID grantwaller@exam | 30 Lead score | Email ID barnesgabriella@e | 30 Lead score | Email ID | 34 Lead score | Email ID |
| 品 Journeys > | | | | | | | |

3. You can drag a contact from one stage to another stage if you want to manually change their stage.

| Bashboard | Contacts | | | | | |
|---------------------|---------------------------------|------------------|--------------------------------|------------------|-----------------------------|------------------|
| ් Contacts ~ | | | | | | |
| Contacts Dashboard | CONTACTS CONTAC | TS BY STAGE | | | | |
| View Contacts | | | | | | |
| 1545 | 65,345 Contacts in t | nis list | | | | All Contacts |
| LISTS | | | | | | |
| Segments | Raw leads | 9,709 | Marketing ready | 15,479 | Marketing engaged | 15,437 |
| Topics | | | | | | |
| Lead Qualification | Email ID hunterkevin@exa | 10 Lead score | Email ID sschwartz@exampl | 30 Lead score | Email ID allen92@example | 20 Lead score |
| Lead Attribution | | | | | | |
| ☆ Lead Generation > | Email ID 💠 javierwatkins@exa | Lead score | Email ID uestes@example.net | 30 Lead score | Email ID mcgrathstephen@ | 30 Lead score |
| 品 Journeys > | | | | | | |

Searching contacts

In Zoho Marketing Automation, you can quickly search for a particular contact out of thousands to access it, view its details, and make changes to it.

To search for contact(s):

- From the *Navigation Toolbar* to the left, click **Contacts** and click **View Contacts**.
- In this page, at the top, you can see the search bar.

| Marketing Automation | | | | | + c | |
|----------------------|----------------------------|--------|-----------|--------------------|------------|----------------|
| Dashboard | Contacts | | | | | Add Contacts X |
| 🛎 Contacts 🗸 🗸 | All Active Contacts | | | | | Add Contacts |
| Contacts Dashboard | CONTACTS CONTACTS BY STAGE | | | | | |
| View Contacts | | | | 7 | | |
| Lists | View Total Count | | | Q. Search contacts | 7 | ≅ () [] |
| Segments | CONTACT EMAIL | MOBILE | LAST NAME | FIRST NAME | LEAD STAGE | LEAD SCORE |
| Topics | | - | Mix | | Raw leads | 40 |
| Lead Qualification | .com | | Jane | | Raw leads | 10 |

- Click inside this bar and type the search keyword. Press the enter key to start the search. The contacts will be listed based on what you searched for.
- You can search for contacts if you know their **Contact Email**, **Phone**, **Mobile**, **First Name**, or **Last Name**.
- For example, you have a contact whose email address is <u>john@zylker.com</u> and their first name is Jonny. If you type 'jonny' and initiate the search, this contact will be listed.
- The search option is also available in the Contacts tab present inside a <u>Segment</u>, <u>List</u>, and <u>Tags</u> module.