

Air4media Pilot v10 BETA
ACME Creative Agency OWNER
ACME Creative Agency
Laurent P Groult

- Dashboard
- Documentation
- CLIENTS**
- Pipeline
- Projects
- Budget
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- Accounts
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- Appointments
- Calendar
- Invoices
- Quotes
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- Automations
- DIGITAL ASSETS**
- FLYING LICENSE**
- WEBSITE**
- AI**
- SETTINGS**
- PLATFORM**
- Settings
- Logout

Contacts

Import CSV
+ New Contact

1023
Total Contacts

139
New Leads

609
Newsletter

1
Portal Access

675
Customers

	Name	Email	Phone	Tags	Added	Actions
<input type="checkbox"/>	BA Benjamin Adams <small>NovaPay Solutions</small>	benjamin.adams302@novapaysolutions.com	📞 (930) 555-7223	press los-angeles	8/15/2024	✉ 📧 🗑
<input type="checkbox"/>	CA Carol Adams <small>Beacon Marketing</small>	carol.adams138@beaconmarketing.com	📞 (897) 555-7483	partner los-angeles	11/10/2025	✉ 📧 🗑
<input type="checkbox"/>	CA Cynthia Adams <small>Atlas Ventures</small>	cynthia.adams749@atlasventures.com	📞 (269) 555-9293	press enterprise	8/6/2024	✉ 📧 🗑
<input type="checkbox"/>	DA Donna Adams <small>Prism Media</small>	donna.adams550@prismmedia.com	📞 (943) 555-2417	press enterprise	9/13/2024	✉ 📧 🗑
<input type="checkbox"/>	DA Dorothy Adams <small>Polaris Labs</small>	dorothy.adams400@polarislabs.com	📞 (670) 555-7334	partner startup	11/5/2024	✉ 📧 🗑
<input type="checkbox"/>	EA Emily Adams <small>Onyx Studios</small>	emily.adams95@onyxstudios.com	📞 (623) 555-9486	prospect tech	10/2/2024	✉ 📧 🗑
<input type="checkbox"/>	GA Gregory Adams <small>Meridian Analytics</small>	gregory.adams89@meridiananalytics.com	📞 (577) 555-5566	partner startup	4/29/2025	✉ 📧 🗑 💬
<input type="checkbox"/>	GA Gregory Adams <small>Catalyst Brands</small>	gregory.adams776@catalystbrands.com	📞 (556) 555-3253	press enterprise	10/2/2024	✉ 📧 🗑
<input type="checkbox"/>	JA Jason Adams <small>Atlas Ventures</small>	jason.adams860@atlasventures.com	📞 (894) 555-7928	client startup	12/2/2025	✉ 📧 🗑
<input type="checkbox"/>	MA Mark Adams <small>Forge Tech</small>	mark.adams778@forgetech.com	📞 (711) 555-8852	press tech	6/3/2024	✉ 📧 🗑
<input type="checkbox"/>	MA Matthew Adams <small>Redwood Digital</small>	matthew.adams973@redwooddigital.com	📞 (266) 555-7229	press startup	2/4/2026	✉ 📧 🗑
<input type="checkbox"/>	NA Nancy Adams <small>Prism Media</small>	nancy.adams958@prismmedia.com	📞 (961) 555-3900	client startup	6/22/2024	✉ 📧 🗑
<input type="checkbox"/>	PA Patrick Adams <small>Cedar Studios</small>	patrick.adams598@cedarstudios.com	📞 (937) 555-2600	press enterprise	8/16/2024	✉ 📧 🗑
<input type="checkbox"/>	SA Paul Adams <small>Summit Consulting</small>	paul.adams909@summitconsulting.com	📞 (761) 555-5686	prospect enterprise	12/6/2025	✉ 📧 🗑
<input type="checkbox"/>	SA Stephanie Adams <small>Vanguard Systems</small>	stephanie.adams23@vanguardsystems.com	📞 (839) 555-2262	press startup	11/27/2025	✉ 📧 🗑
<input type="checkbox"/>	SA Stephanie Adams <small>Meridian Analytics</small>	stephanie.adams226@meridiananalytics.com	📞 (863) 555-6332	prospect startup	7/23/2024	✉ 📧 🗑
<input type="checkbox"/>	AA Amanda Allen <small>Redwood Digital</small>	amanda.allen59@redwooddigital.com	📞 (400) 555-7562	partner creative	5/3/2025	✉ 📧 🗑
<input type="checkbox"/>	AA Anthony Allen <small>Beacon Marketing</small>	anthony.allen698@beaconmarketing.com	📞 (828) 555-9643	client los-angeles	9/15/2025	✉ 📧 🗑
<input type="checkbox"/>	LA Laura Allen <small>Ironclad Systems</small>	laura.allen710@ironcladsystems.com	📞 (703) 555-5718	partner startup	2/19/2026	✉ 📧 🗑
<input type="checkbox"/>	LA Lisa Allen <small>Azure Creative</small>	lisa.allen327@azurecreative.com	📞 (297) 555-6587	prospect enterprise	11/12/2025	✉ 📧 🗑

Showing 1 to 20 of 1023 entries

Previous
1
2
3
...
52
Next

Contacts

Manage your CRM contact list — add, edit, search, and organize the people and businesses you work with, all in one place.

Key Features

- **Stats Dashboard:** Five live counters at the top — Total Contacts, New Leads, Newsletter, Portal Access, and Customers — click any card to instantly filter the list to that segment, click again to clear
- **Contact List:** Sortable, paginated table showing name with avatar initials and company, email, phone/mobile, tags, and date added
- **Search:** Find contacts instantly by name, email, company, or notes
- **Tags:** Organize contacts with custom tags; the dropdown filter shows how many contacts share each tag
- **Add & Edit:** Create or update contacts using a full-featured modal form
- **Account Auto-Linking:** When you enter an email address, the system checks the domain and automatically links the contact to a matching company account — for example, adding someone at acme-creative.com links them to ACME Creative Agency
- **Bulk Delete:** Select multiple contacts and delete them all at once
- **Quick Email:** Click the email icon on any contact row to open a new message to that person
- **CSV Import:** Upload a spreadsheet with a three-step wizard — upload, map columns, and review results

How to Use

Adding a Contact

1. Click **New Contact** in the top-right corner
2. Enter the contact's first and last name (required)
3. Fill in any details — email, mobile, phone, company, job title, address, city, state, ZIP, website, or notes
4. Add tags by typing a name and pressing **Enter**, or click a suggestion from the "Popular tags" shown below the input
5. Click **Save Contact** — if you entered a business email, the contact is automatically linked to a matching account

Editing a Contact

1. Click the **Edit** button on any contact row
2. Update any fields in the form
3. Click **Save Contact**

Searching and Filtering

- Type in the search box to find contacts by name, email, company, or notes
- Use the **Tags** dropdown to filter to contacts with a specific tag
- Click any **stat card** at the top to filter by segment (e.g. click **New Leads** to see ACME Creative Agency's new pipeline contacts) — click again to clear
- Click any column header to sort the list

Deleting Contacts

- To delete one contact, click **Delete** on their row and confirm
- To delete multiple, check the boxes next to each, then choose **Delete Selected**

Importing from CSV

1. Click **Import CSV** and drag & drop your file, or click **Browse Files**
2. Review the column mapping — common headers like `telephone`, `organisation`, and `full_name` are auto-detected; adjust any columns as needed and preview your data before committing
3. Optionally enable **Update existing contacts** to merge records matched by email, and add default tags to apply to all imported rows
4. Click **Import Contacts** — a summary shows how many were imported, updated, skipped, or had errors

Tips

- Stat cards double as quick filters — click **Customers** to see just your customers, click again to return to the full list
- Your top 10 most-used tags appear automatically as suggestions when creating or editing a contact
- The email icon only appears on contacts that have an email address on file
- Account auto-linking skips personal email providers (Gmail, Outlook, Yahoo, etc.) — only business domains are matched

- Use **Update existing contacts** on import to keep your data in sync without creating duplicates
- Contacts are shared across your company — all team members see and manage the same list