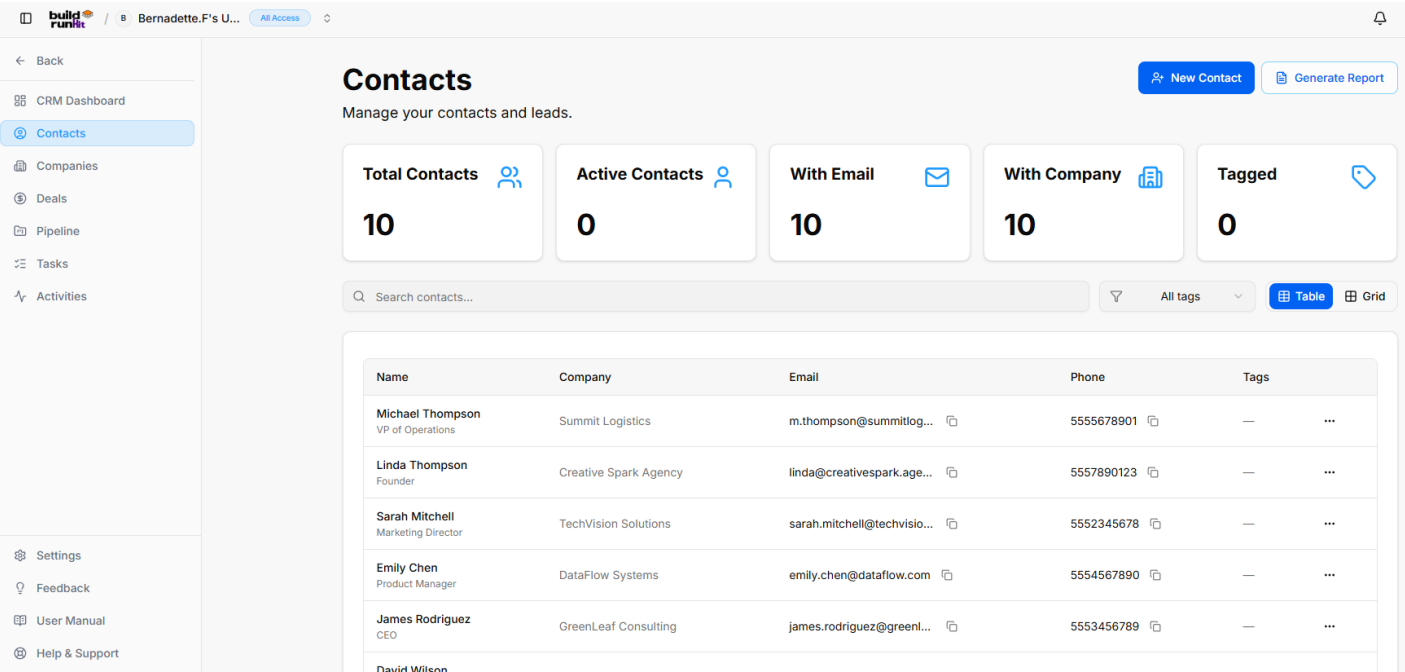


BuildRunKit CRM: Contacts Sub-Section

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The **Contacts** sub-section provides central directory management for tracking leads, individual client representatives, and account contacts.

Header & Action Buttons

- **New Contact:** Direct action button to open the contact registration modal.
- **Generate Report:** Launches the **CRM Contacts Report** modal to export contact dataset snapshots:
 - **Export Count:** Displays total active records targeted for download (e.g., *Exporting 10 records*).
 - **Export Options:** Download file as **Export as PDF** or **Export as CSV**.

 CRM Contacts Report

Generate a report for the CRM Contacts data.

Exporting 10 records

Export format

 Export as PDF

 Export as CSV

Contact Summary Metrics

Top KPI cards display real-time audience breakdowns:

- **Total Contacts:** Displays total registered contacts (e.g., 10).
- **Active Contacts:** Tracks currently active lead interactions.
- **With Email:** Displays total records with valid email addresses attached.
- **With Company:** Counts records linked to parent organization profiles.
- **Tagged:** Displays total contacts assigned custom organizational tags.

Directory Controls & Search Bar

- **Search contacts...**: Input field for searching contacts by name, email, or company.
- **Filter Toggle:** Filter icon button to refine visible contacts.
- **All Tags Dropdown:** Dropdown menu to filter records based on specific tags.
- **View Switches:** Toggle between **Table** (list view) and **Grid** (card view).

Contacts Table Data Columns

- **Name:** Primary contact name alongside job title (e.g., *Michael Thompson - VP of Operations*).
- **Company:** Associated client or partner business.
- **Email:** Direct email address with quick **Copy** button.
- **Phone:** Direct contact phone number with quick **Copy** button.
- **Tags:** Applied status or categorization tags.
- **Row Actions (...):** Action menu for editing, viewing, or deleting individual contact records.

Contacts Table Row Actions Menu

Clicking the **three dots icon** () on the far right of any contact row opens a quick-action context menu:

- **View:** Opens the complete contact record profile to review all details, communication history, linked deals, and notes.
- **Edit:** Launches the contact editor modal to update profile details, contact information, custom fields, or assigned tags.
- **Delete:** Removes the contact record from your CRM directory.

BuildRunKit CRM: Adding a New Contact

Clicking the **+ New Contact** button launches the creation modal organized into four main tabs:

1. Details Tab

New Contact

Details

Contact

Custom Fields

Tags

First Name *

Last Name *

Email

Company

Position

Website

Owner

Billing Info

Notes

Cancel

Save

Captures core profile and organization assignment data:

- **First Name *** & **Last Name ***: Required fields for contact identification.
- **Email**: Primary electronic address.
- **Company**: Searchable dropdown to select existing organizations, or click + to add a new company instantly.
- **Position**: Title or role within their company.
- **Website**: Personal or company web address.
- **Owner**: Select an internal account manager or sales representative.
- **Billing Info**: Free-text field for invoice context, tax IDs, or payment notes.
- **Notes**: Additional background context regarding the contact.

2. Contact Tab

The screenshot shows a 'New Contact' form with a title bar containing a close button (X). Below the title bar are four tabs: 'Details', 'Contact' (which is active and highlighted in blue), 'Custom Fields', and 'Tags'. The 'Contact' tab contains the following sections:

- Address:** A single-line text input field.
- Phone:** A single-line text input field.
- Mobile Phone:** A single-line text input field.
- Other Phone:** A single-line text input field.
- Additional Contact Methods:** A section with a header and a single-line text input field containing a plus icon and the text 'Add Contact Method'.
- Social & External Links:** A section with a header and a single-line text input field containing a plus icon and the text 'Add Social / External Link'.

At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

Captures physical location and additional reachability channels:

- **Address:** Multi-line physical mailing or billing address block.
- **Phone Numbers:** Dedicated inputs for primary **Phone**, **Mobile Phone**, and **Other Phone**.
- **Additional Contact Methods:** Expandable section to add non-standard communication channels (e.g., Skype, WhatsApp).
- **Social & External Links:** Expandable section to attach web profiles (e.g., LinkedIn, X, personal portfolio).

3. Custom Fields Tab

The image shows a 'New Contact' dialog box with a close button (X) in the top right corner. Below the title bar, there are four tabs: 'Details', 'Contact', 'Custom Fields' (which is highlighted in blue), and 'Tags'. Under the 'Custom Fields' tab, the word 'Manual' is displayed above a large, empty, light gray rectangular input field. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Save' (highlighted in blue).

Displays tailored data fields configured specifically for your business operations:

- **Business-Specific Inputs:** Pulls directly from user-defined properties configured in **Settings > Custom Fields**.
- **Dynamic Loading:** Any custom fields added via system settings automatically populate in this tab during contact creation.

4. Tags Tab

New Contact

×

Details

Contact

Custom Fields

Tags

Tags

Select existing tags or create new tags on the fly.

Type a new tag name...

+ Add Tag

☐ Hot Lead

☐ Cold Lead

☐ Customer

☐ Prospect

☐ Partner

☐ Vendor

☐ Lead

☐ Investor

☐ VIP

Cancel

Save

Categorizes contacts for audience segmentation and quick filtering:

- **Create New Tag:** Input box to type custom tag names and click **+ Add Tag** to create them on the fly.
- **Pre-Defined Tags:** Checkbox selection for standard stages and categories, including:
 - **Status Tags:** *Hot Lead, Cold Lead, Lead, Prospect*
 - **Relationship Tags:** *Customer, Partner, Vendor, Investor, VIP*

Revision #4

Created 2026-05-14 12:26:42 UTC by Bernadette F

Updated 2026-09-09 09:48:57 UTC by Bernadette F