



Create and Manage Contacts

Help Guide

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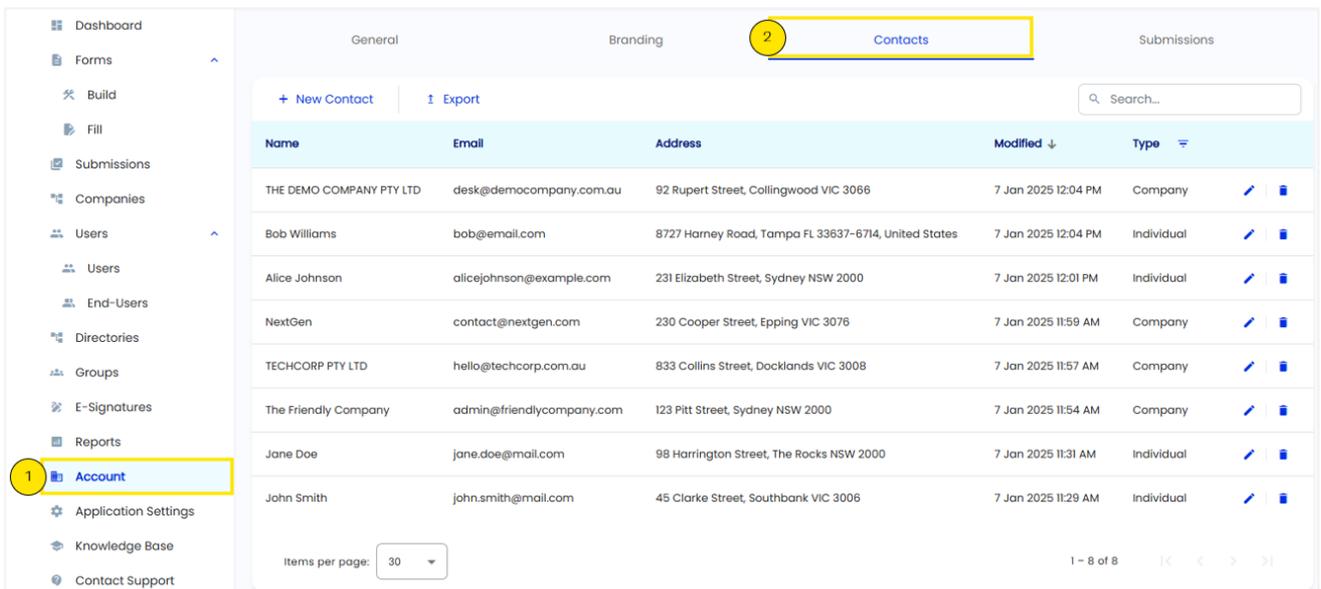
1. Contacts

Contacts are people outside of your organisation who interact with forms. They are generally people who have submitted forms or been named on forms.

1.1 Open the Contacts List

To view the contacts list:

1. Click **Account** in the navigation menu.
2. Click the **Contacts** tab.



1.2 Ways to Create Contacts

There are several ways a new contact is included in the list:

1. Their details may be added to a form when it is filled out.
2. Their details may be imported from a PMS integration.
3. You can add a contact manually by clicking the Add Contact button.

Dashboard	General		Branding		Contacts		Submissions	
Forms	+ New Contact		Export		Search...			
Build	Name	Email	Address	Modified ↓	Type			
Fill	THE DEMO COMPANY PTY LTD	desk@democompany.com.au	92 Rupert Street, Collingwood VIC 3066	7 Jan 2025 12:04 PM	Company			
Submissions	Bob Williams	bob@email.com	8727 Harney Road, Tampa FL 33637-6714, United States	7 Jan 2025 12:04 PM	Individual			
Companies	Alice Johnson	alicejohnson@example.com	231 Elizabeth Street, Sydney NSW 2000	7 Jan 2025 12:01 PM	Individual			
Users	NextGen	contact@nextgen.com	230 Cooper Street, Epping VIC 3076	7 Jan 2025 11:59 AM	Company			
Users	TECHCORP PTY LTD	hello@techcorp.com.au	833 Collins Street, Docklands VIC 3008	7 Jan 2025 11:57 AM	Company			
End-Users	The Friendly Company	admin@friendlycompany.com	123 Pitt Street, Sydney NSW 2000	7 Jan 2025 11:54 AM	Company			
Directories	Jane Doe	jane.doe@mail.com	98 Harrington Street, The Rocks NSW 2000	7 Jan 2025 11:31 AM	Individual			
Groups	John Smith	john.smith@mail.com	45 Clarke Street, Southbank VIC 3006	7 Jan 2025 11:29 AM	Individual			
E-Signatures	Items per page: 30		1 - 8 of 8					
Reports								
Account								
Application Settings								
Knowledge Base								
Contact Support								

1.3 Creating a New Contact

When the New Contact button is clicked, a New Contact form slides out. Fill in the form with the contact details. Click **Save**.

New Contact ✕

Contact Type *

Individual Company

Given Name(s) *

Surname *

Gender *

Male Female Non-binary

Date of Birth

✕ 📅

Is this contact acting as the trustee of a trust? *

Yes No

Email

Phone

1.4 Modify a Contact

The newly saved contact will appear in the list. If you need to modify the contact (for example, to add an address), use the **pencil shaped edit button**. This will reopen the contact details form.

Name	Email	Address	Modified ↓	Type	
Terry Sample	terrysampl@mail.com		8 Jan 2025 11:48 AM	Individual	 
THE DEMO COMPANY PTY LTD	desk@democompany.com.au	92 Rupert Street, Collingwood VIC 3066	7 Jan 2025 12:04 PM	Company	 
Bob Williams	bob@email.com	8727 Harney Road, Tampa FL 33637-6714, United States	7 Jan 2025 12:04 PM	Individual	 

1.5 Delete a Contact

To delete the contact, click the delete button.

Name	Email	Address	Modified ↓	Type	
Terry Sample	terrysampl@mail.com		8 Jan 2025 11:48 AM	Individual	 
THE DEMO COMPANY PTY LTD	desk@democompany.com.au	92 Rupert Street, Collingwood VIC 3066	7 Jan 2025 12:04 PM	Company	 

1.6 Export Filtered Contacts

To filter contacts, use the **Search** feature (1). To export the filtered list, click **Export** (2), and a CSV file will be downloaded.

Name	Email	Address	Modified ↓	Type	
NextGen	contact@nextgen.com	230 Cooper Street, Epping VIC 3076	7 Jan 2025 11:59 AM	Company	 