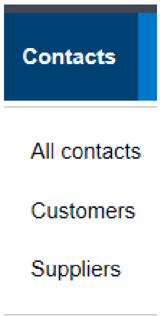
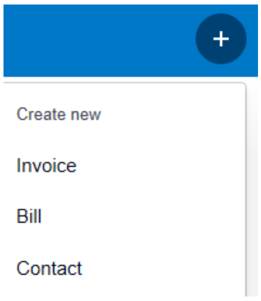
Contacts

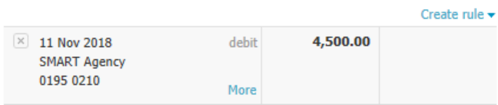
1. Click on the *Contacts* tab then *All Contacts*. This will take you to the Contacts Dashboard which shows key information about each contact, for example, name, email address, bank account information and how much money is owed/owing. It is a good idea to keep the contacts list up to date with relevant information. To add a new contact, click on add contact and then complete the relevant fields.

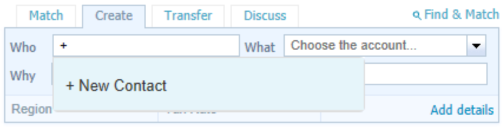


2. To add a new contact click on A*dd Contact* and then complete the relevant fields. You can also go to the plus sign on the top bar and choose *Contact*.

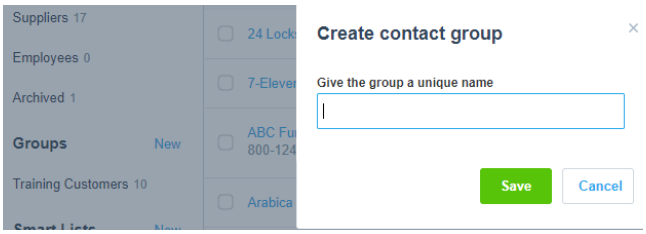


3. A new contact can also be created when reconciling the bank account or entering invoices/bills. Simply start typing the new contacts name or hit the + key and This will create a new contact name but no other information will be included. In order to update the information you will need to go to Contacts > All contacts. You can then search via the search bar or scroll down to the contact. Choose Edit and then fill in the necessary codes.





4. Contacts can be sorted into groups. On the left-hand side in the contacts tab click on new. Give the group a name and save.



5. To add an existing contact to a group:
   a. Tick the contact you wish to add (or multiple contacts)
   b. Click options
   c. Add to group
   d. Select the group you want and click add