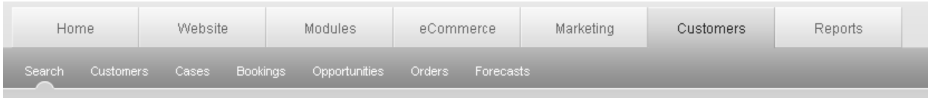
Contact Management

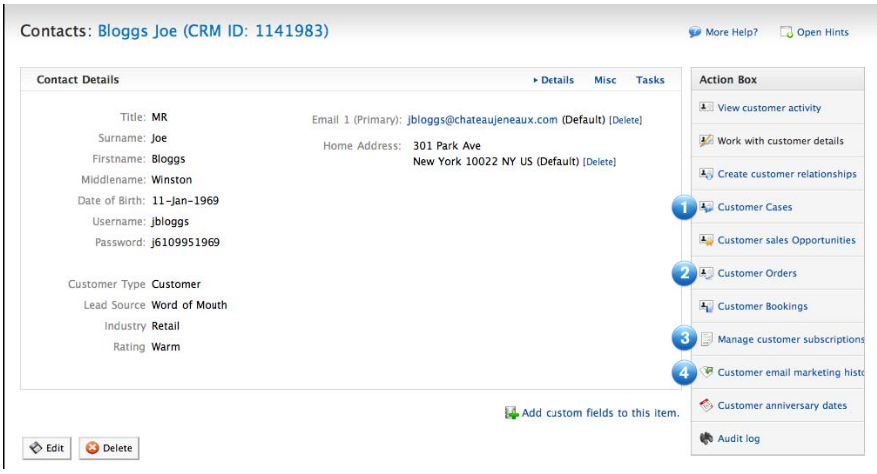
The *Customers* tab gives us access to our complete customer database which is automatically growing as your customers interact with your website



Customers tab

Why not add yourself to your database to see how it works? Simply 'create a new contact' via the action box on the right hand side and fill in the required fields.

NOTE – Once you have entered contact and address type you will need to save before using the drop down menu to add further details



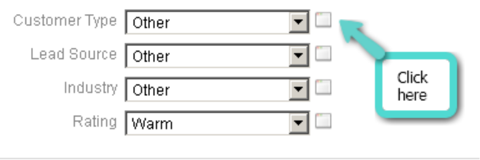
1. You can see all past web form enquiries, called *Cases*
2. Previous orders are linked to the customer record too.
3. *Subscriptions.* Tells you what the customer is subscribed to and allows you to subscribe them to other campaigns
4. *Email Marketing History.* To see what campaigns have been read and actioned.

You can drill down to see the customers email marketing history and see what newsletters have received and how the customer has reacted to them

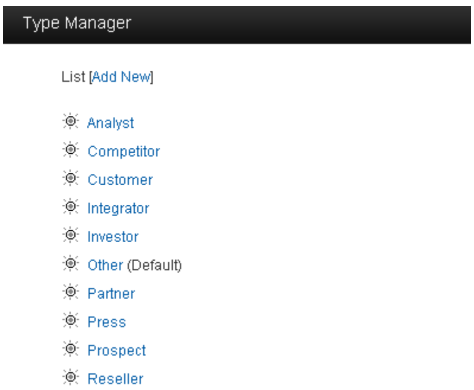
To edit customer details once record has been saved, you need to 'work with customer details' (action box). To view any relationships you have created between contacts you will need to 'view customer activity'

Filters

You are able to define customers by type, lead source, industry and rating. Your online Business Console has some pre-set filters in place however if you would like to add more or remove any that do not suit your business you can do so when editing any record.



The below screen will open in a new window



You have the option to 'add new' at the top of the page.
You can click on any value to edit/delete.

You can filter records by any values back on the *customers tab*

A list of customers who match the filter requirements will then appear below for you to view.