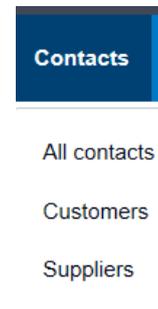
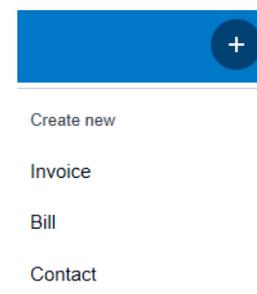


Contacts

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 *Add 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.

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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

