

The Contacts page is your central hub for managing all customer and lead information in Pilot's CRM.

Features:

- Contact Records: Store contact details including name, email, phone, company, address, and custom fields
- Tags: Organize contacts with color-coded tags stored as JSON arrays. Filter contacts by tag for targeted actions
- Notes: Add notes to contact records to track important details and conversation history
- Search & Filter: Search contacts by name, email, company, or tags. Advanced filters for status, source, and date range
- Import/Export: Bulk import contacts from CSV files or export your contact list
- Contact Sources: Contacts can be created manually, from AirChat email captures, AirForms submissions, or Airmail subscriber imports
- Activity History: View all interactions and activities linked to each contact

Contacts integrate with:

- Airmail: Sync contacts as email subscribers
- AirChat: Visitor emails captured during chat sessions create contacts automatically with an "airchat" tag
- AirForms: Form submissions can auto-create contacts
- Quotes & Invoices: Link contacts to financial documents

Access: Available to CRM client users and above.