How to Use Contacts

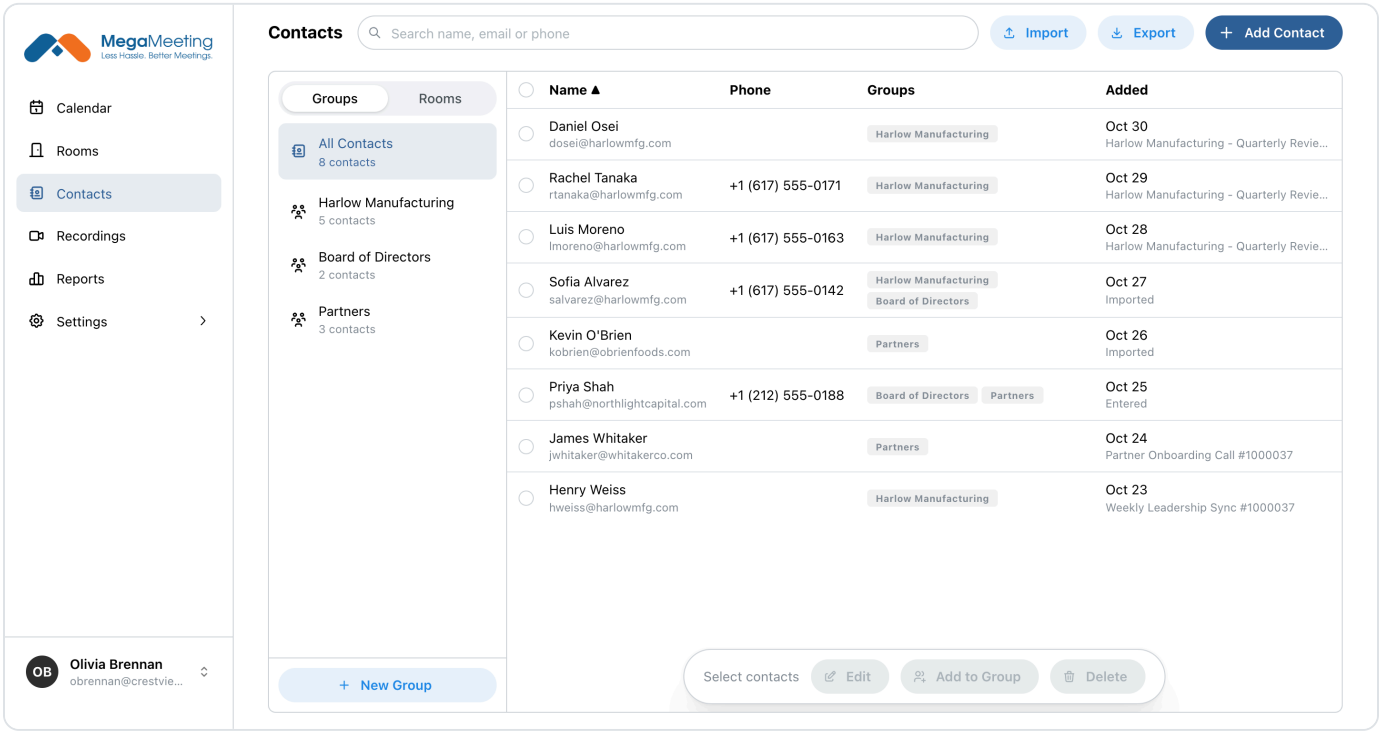
Keep the people you invite in one place, and add them to a meeting in a few keystrokes.

Contacts is your account's address book: the clients, colleagues and partners you invite, with their email and phone. It fills itself as you set up meetings, and from it you can add someone to a room without typing their details again.

Everyone who signs in to the account shares one list. A user who sees only their own rooms has their own Contacts instead.

1. Open Contacts

Click **Contacts** in the sidebar. The list shows each contact's name, email, phone and groups, and when and where they were added: a room, an import, or entered by hand. Search by name, email or phone with the box at the top.



2. How People Get Into Contacts

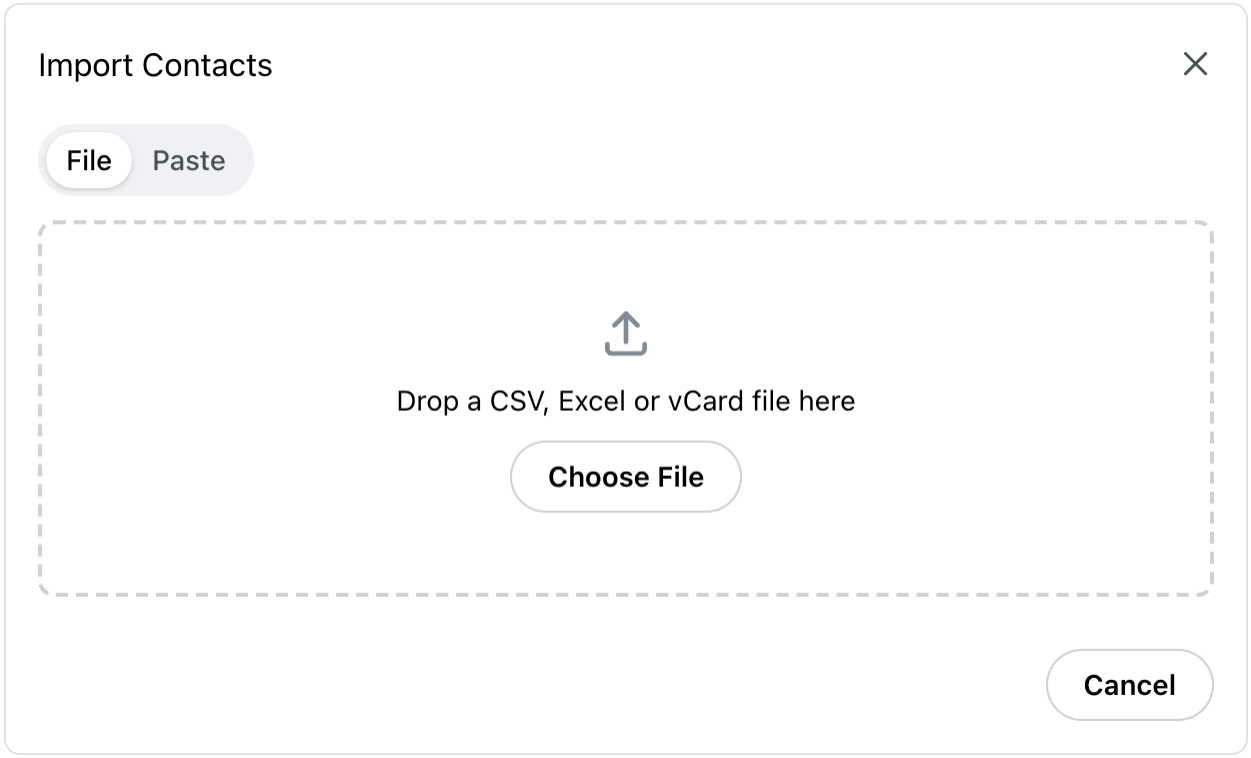
- **From your rooms:** when you save a room, everyone you added to its attendee list is added to Contacts. Someone already there keeps their entry, with any blank name or phone filled in.
- **By hand:** click **Add Contact** and enter a **Name**, **Email** and **Phone**.
- **From a file:** see step 3.

> **GOOD TO KNOW: One contact per email address**
> A phone number is kept only when it can receive a text. Deleting a contact is permanent: editing a room later does not bring them back.

3. Import and Export

Click **Import**. Under **File**, drop a CSV, Excel or vCard (.vcf) file on the window; under **Paste**, paste rows from a spreadsheet, vCards, or addresses from an email. Exports from iPhone and Mac Contacts, Google Contacts and Outlook work as they are, and a vCard's categories become groups. The columns are matched for you, and you can change which column is the **Name**, **Email**, **Phone** or **Groups**. Choose **Add to Group** to put everyone in the file in a group.

Before anything is saved, each row shows what will happen to it: **New**, **Fills blanks** (already in Contacts, with a blank name or phone to fill), **Already in Contacts**, or **Skipped** with the reason, such as a row listed twice in the file.



Export saves the contacts you are looking at (your search, or the group or room you have open) as a CSV file.

4. Groups and Rooms

The list on the left has two views, picked at its top.

- **Groups** are lists you make, such as a client or a board. Click **New Group** to start one. Click a group to see only its people; its menu has **Rename** and **Delete Group**. Deleting a group keeps its contacts.
- **Rooms** lists the rooms with contacts on their attendee list, newest first, with their dates. Find one by its name, room ID or date, and open it to see its people. This view cannot be edited.

To act on contacts, click their rows (or tick them) and use the bar at the bottom: **Add to Group**, **Remove from Group**, **Edit** or **Delete**.

5. Use Contacts in a Room

- In **Add Attendee**, **Contacts** lets you search for someone and fills in their name, email and phone. Their permissions are still set for each room.
- **Import** on the attendee list has a **Contacts** choice: tick people, or a whole group. People already in the room are left out.
- In the invitation window, typing in the email field suggests matching contacts.

For building the attendee list itself, see How to Create a Meeting Room.