

xoopah

Contact Hub Section Guide



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Contact Hub

Why does my business need Contact Hub?

Contact Hub simplifies your business functions and customer information. Contact Hub specifically allows you to store contacts in bulk, assign groups to customers, and manage them easily. It is a place where all your contacts will be dropping in, acquired from different modules. You can import your clients' contact data from sources like Excel file with .CSV extension, as well as Gmail account.

I am uploading my excel file but it's not working, why?

You need to upload an excel with .CSV extension. Make sure if you are not trying to upload some other extension of excel file like .xlsx.

How can Contact Hub benefit my business?

With Contact Hub you can:

- Organize, track, and know your customers
- Increase operating efficiencies
- Increase customer retention and reduce marketing expense
- All in one solution to communicate with customers as well as collect payments from them for services provided

If I run a small business and I don't have that many customers, why do I need Contact Hub to manage them?

Contact Hub can benefit your small business by consolidating customer data into a single system. As your business grows, keeping a record of all contacts can become overwhelming. Contact Hub allows you to manage your customer interactions more efficiently, so you have more time to focus on your service or product.

Even if you don't have a customer base, Xoopah will be helping you in acquiring that too. From your own data of Bookings and Interactions, all the new clients will be saved as Customers or Leads in Contact Hub.

How to keep data safe in Contact Hub?

Here's a set of rules you can implement in your business across all units to ensure data remains secured.

- Audit security regulations on a regular basis.
- Encourage users to create complex passwords or set up defaults that require complicated password patterns and change the password every 3 to 6 months.
- Track all user logins based on the browser, IP address, or API.

How Safe is my data with Xoopah?

At Xoopah, we make sure that your data is secure & confidential. We understand that we have a high duty of care to protect customer's data, and our internal policies and procedures reflect this.

How can I add a new contact in Contact Hub?

- Log in to Xoopah.
- Click “Contact Hub” on the top left.
- In the top right corner, click “Create New Contact”.
- Fill out all necessary fields of the Add Contact form. You can also import your contacts from excel (.csv) file, or Gmail.
- Once you have completed the contact information, click “Add”.
- A new contact will be added to your list.

How can I create a new group in contact Hub?

- Select “Groups” from the drop-down menu of contact hub.
- Click “Create New Group” from the top right.
- Fill up the “Name” of the new group and click “Add”.

Can I import my current contact list to Xoopah's platform?

Sure can. With Contact Hub you can import existing contact lists from Google, or via CSV file. You can also manually add contacts.

How can I import contacts from a CSV File?

- Log in to Xoopah.
- Click “Contact Hub” on the top left.
- On the top right corner, click “Import”.
- Click on "Download sample file" to download the template to your computer.
- On the template, delete the sample contacts and replace them with your own.
- Save the file to your computer and give it a name you can easily find so the following step will be simplified.
- Now go back to “Import Contacts” and press "Click here to upload". The file must be in CSV format. Select your saved file and all your contacts will be imported.

After how many days contacts marked as archived will be removed from system?

Contacts that you mark as “Archived” will automatically be removed from the system after fifteen days. If you want to keep them, restore them before they vanish out.

How to restore a contact from Archives?

Go to the Archived Contacts grid, and hover on a contact. You will see three dots on left of the contact, click them, and “Restore” option will appear. Click on Restore, your contact will be restored in Contact Hub and won't be automatically removed from the system now.