



Zoho Corporation

Z O H O

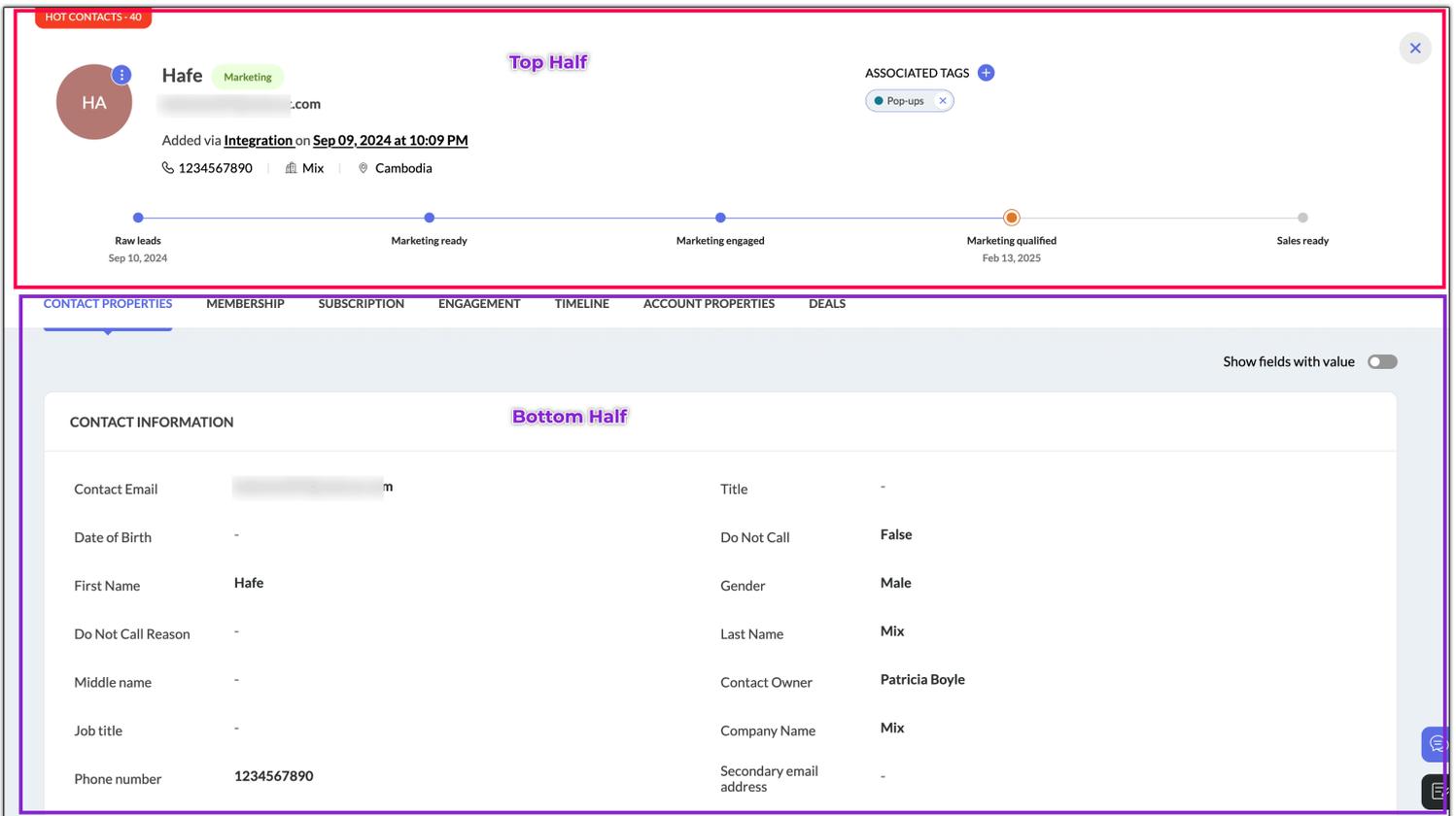
Understanding the Contact Profile Page

Clicking on a contact card will open a page that has detailed insights on the contact.

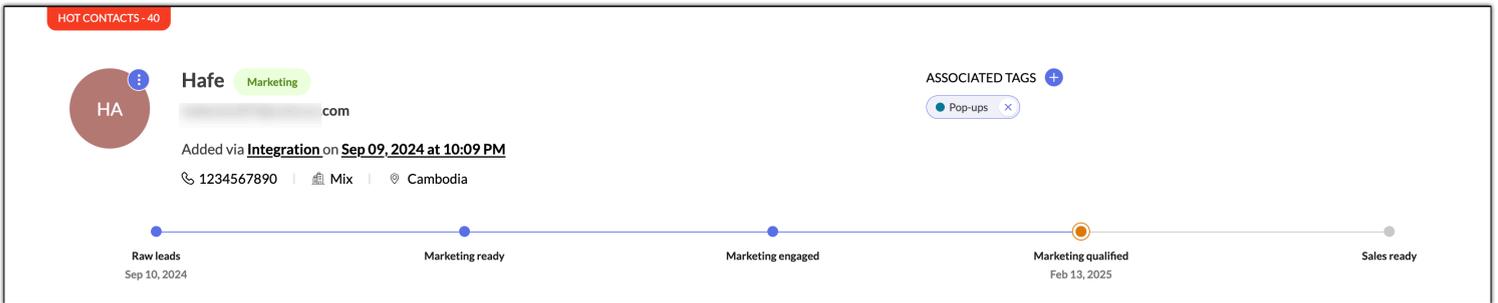
The screenshot shows a Zoho CRM Contact Profile page for a contact named Hafe. The page includes a header with the contact's name, email, and phone number, along with a timeline of their journey through various stages: Raw leads, Marketing ready, Marketing engaged, Marketing qualified, and Sales ready. Below the timeline is a navigation menu with tabs for CONTACT PROPERTIES, MEMBERSHIP, SUBSCRIPTION, ENGAGEMENT, TIMELINE, ACCOUNT PROPERTIES, and DEALS. The main content area displays CONTACT INFORMATION in a table format.

CONTACT INFORMATION			
Contact Email	[Redacted]	Title	-
Date of Birth	-	Do Not Call	False
First Name	Hafe	Gender	Male
Do Not Call Reason	-	Last Name	Mix
Middle name	-	Contact Owner	Patricia Boyle
Job title	-	Company Name	Mix
Phone number	1234567890	Secondary email address	-

We can divide this page into two halves.



The top half of this page comprises the following details:



At the extreme top-left, you can see the type of contact based on their Lead Score and [Lead Classification](#).

There are three types – **Cold**, **Warm**, and **Hot** – depending on the score range in which the lead score of a contact falls under. In the above image, the contact is classified as a Hot contact. Cold is colored **Blue**, Warm is colored **Yellow**, and Hot is colored **Red**.

Contact Profile

This section shows the important details of a contact along with a profile card.

Beside the contact name is the [subscription type](#) of the contact. Subscription type can be *Marketing*, *Non-marketing*, or *Unsubscribed*.

Below the contact name is the email address of the contact.

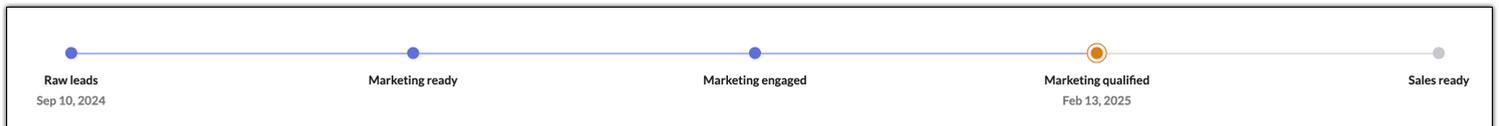
Added via & on: Added via displays how the contact was added. You can see Manual, Import, and Integration as the values. Added on displays the date and time on which the contact was added.

- *Manual* - indicates that the contact was added manually using the Add Contacts button.
- *Import* - indicates that the contact was [imported](#) via a .csv or .xls file.
- *Integration* - indicates that the contact was synced to Zoho Marketing Automation via an [integration](#) with a Zoho app or other third-party apps.



Next, we have the **Phone**, **Company**, and **Country** icons, respectively. If data is specified for a contact in these fields under the Contact Properties tab, it will be displayed beside these icons.

Below these icons, we have the [Lead Stage](#) progress timeline of the contact.



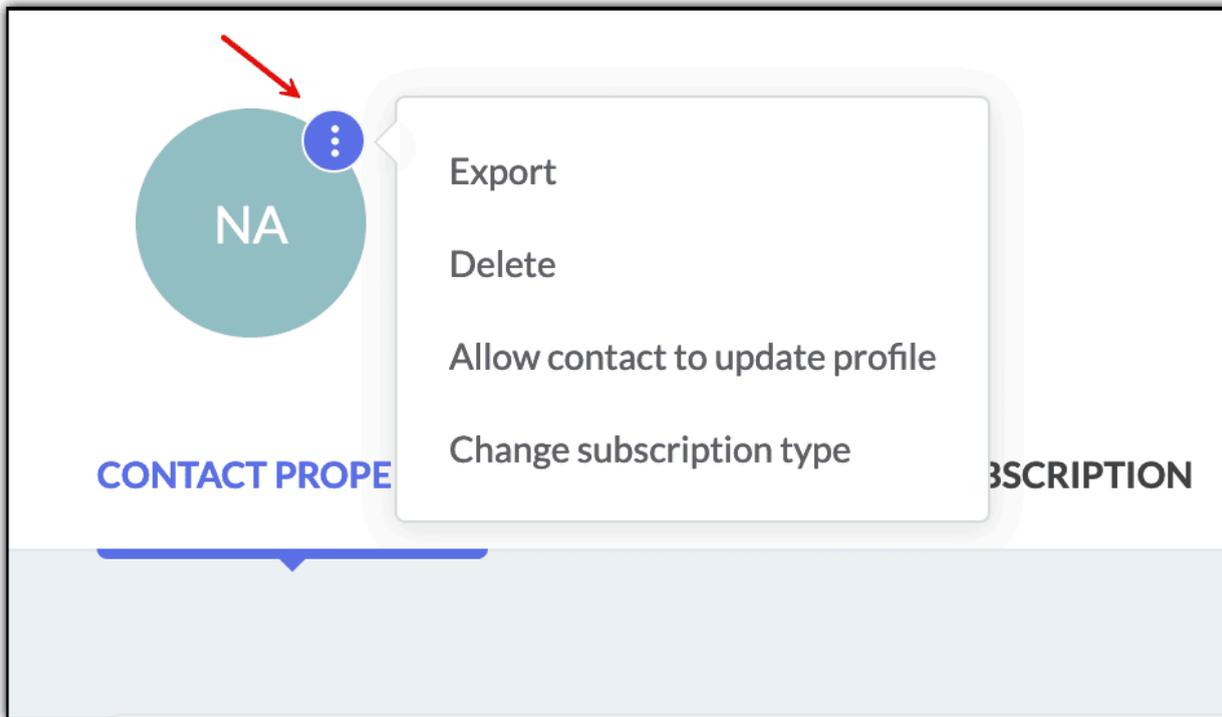
This shows the progress that a contact has made across different lead stages along with the date on which the lead stage changed.

Finally, we have the **Associated Tags** section, which shows the [tags](#) (if any) associated to a contact.

Deleting a Contact

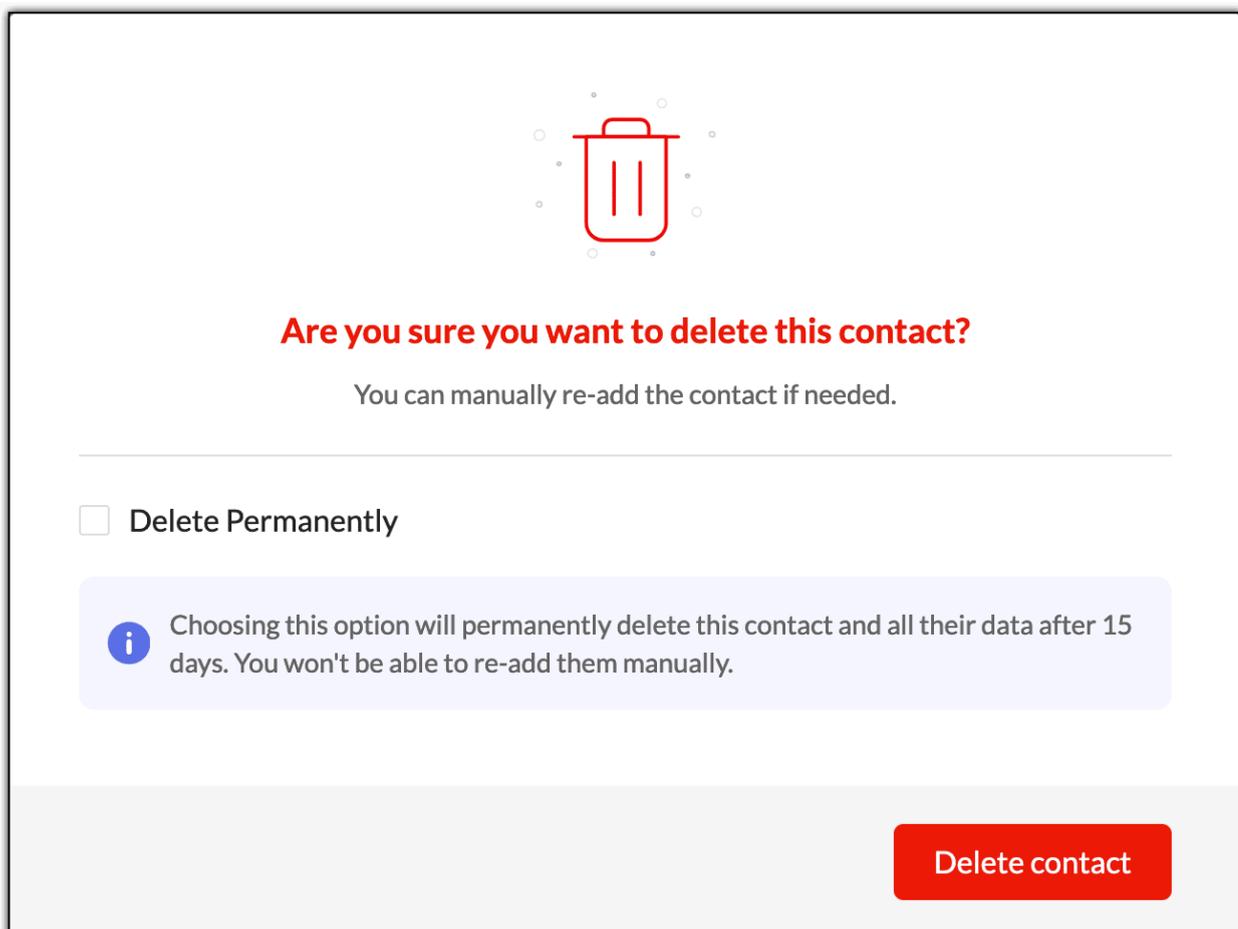
It is possible to delete a single contact from its detail page. To delete a particular contact from the contact details page:

1. Click on **Contacts** from the *Navigation Toolbar* to the left. Select **View Contacts**.
2. Click on a particular contact to view its details.
3. Click on the **More Actions** button at the top-right of the contact's profile picture.



4. Choose **Delete**.

5. In the pop-up that appears, you can click on **Delete Contact**.



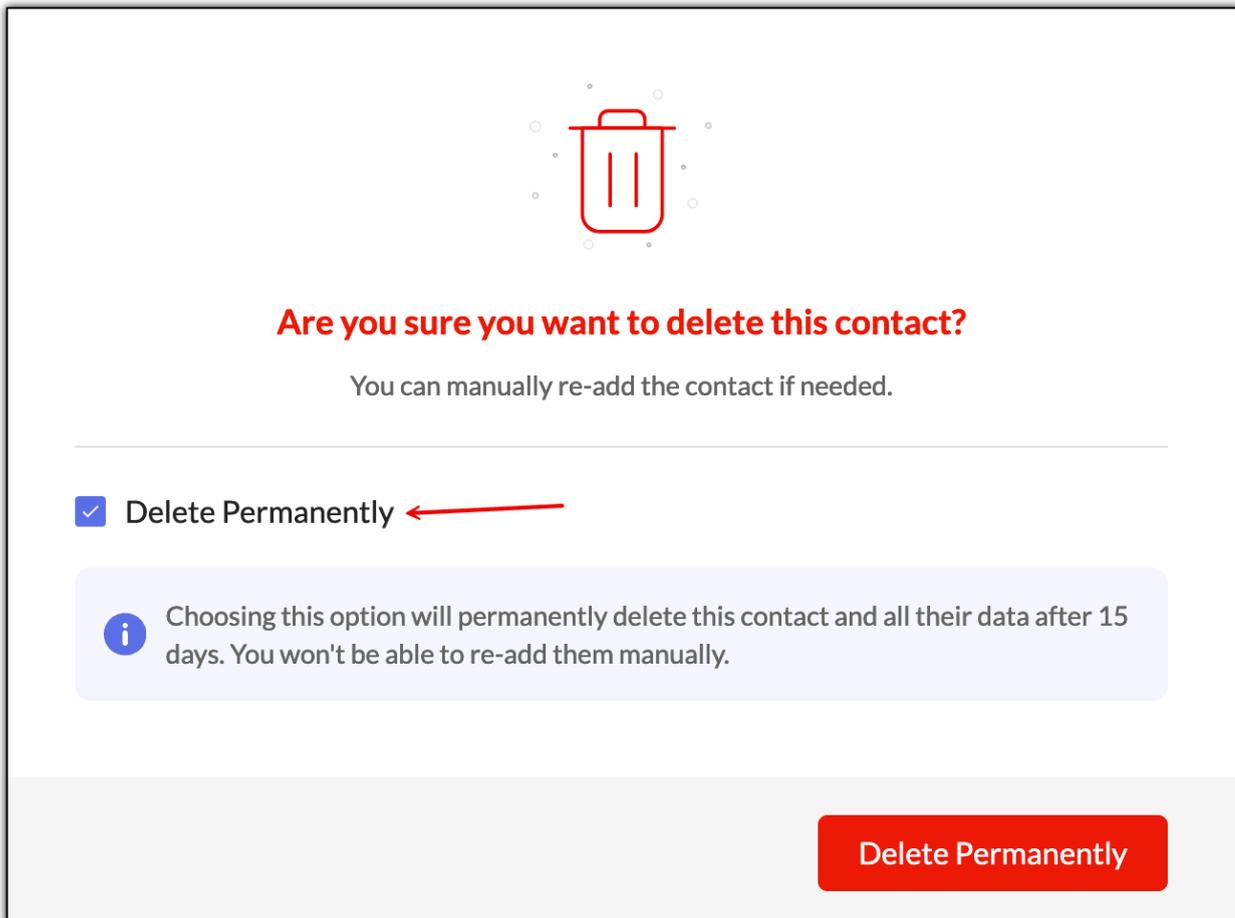
6. In this pop-up, you'll see that you can still manually re-add the contacts. Here's how it works:

If you are deleting a contact without enabling the **Delete Permanently** checkbox, it will get deleted from

your Zoho Marketing Automation account. But it won't be permanently deleted. Data related to this deleted contact will still be available from our end. So, if you manually re-add this contact either individually or via import, as soon as it gets added to Zoho Marketing Automation, its data will be automatically populated.

For example, say you've deleted a contact for whom the First Name and Date of Birth were filled. If you manually re-add this contact without filling data in these two fields, those fields will get auto populated with data that was present at the time of deletion.

7. If you wish to delete a contact permanently and its associated data from your Zoho Marketing Automation organization, enable the **Delete Permanently** checkbox and click on the **Delete Permanently** button.



The screenshot shows a confirmation dialog box with a red trash can icon at the top center. Below the icon, the text reads: "Are you sure you want to delete this contact?" in red, followed by "You can manually re-add the contact if needed." in grey. A horizontal line separates this from the options section. There is a checked checkbox labeled "Delete Permanently" with a red arrow pointing to it from the right. Below this is a light blue information box with an 'i' icon and the text: "Choosing this option will permanently delete this contact and all their data after 15 days. You won't be able to re-add them manually." At the bottom right, there is a red button labeled "Delete Permanently".

8. Once a contact is permanently deleted, you can't manually re-add it from your end. If you still wish to re-add that particular contact, they have to add their details via a signup form, a pop-up, etc.

 **Note:** Under the More Actions button, in addition to deleting an individual contact, you can also export this contact and change its subscription type.

In the bottom half of this page, you'll see seven tabs which can be used to add, edit, and view details for the contact. They are:

1. Contact Properties
2. Membership
3. Subscription
4. Engagement
5. Timeline
6. Account Properties
7. Deals

Contact Properties

Coming to the bottom half of the contact profile page, we have the Contact Properties tab.

When you click on a contact, this is the first tab that you'll see. This tab shows all the field information of the contact, including [custom fields](#).

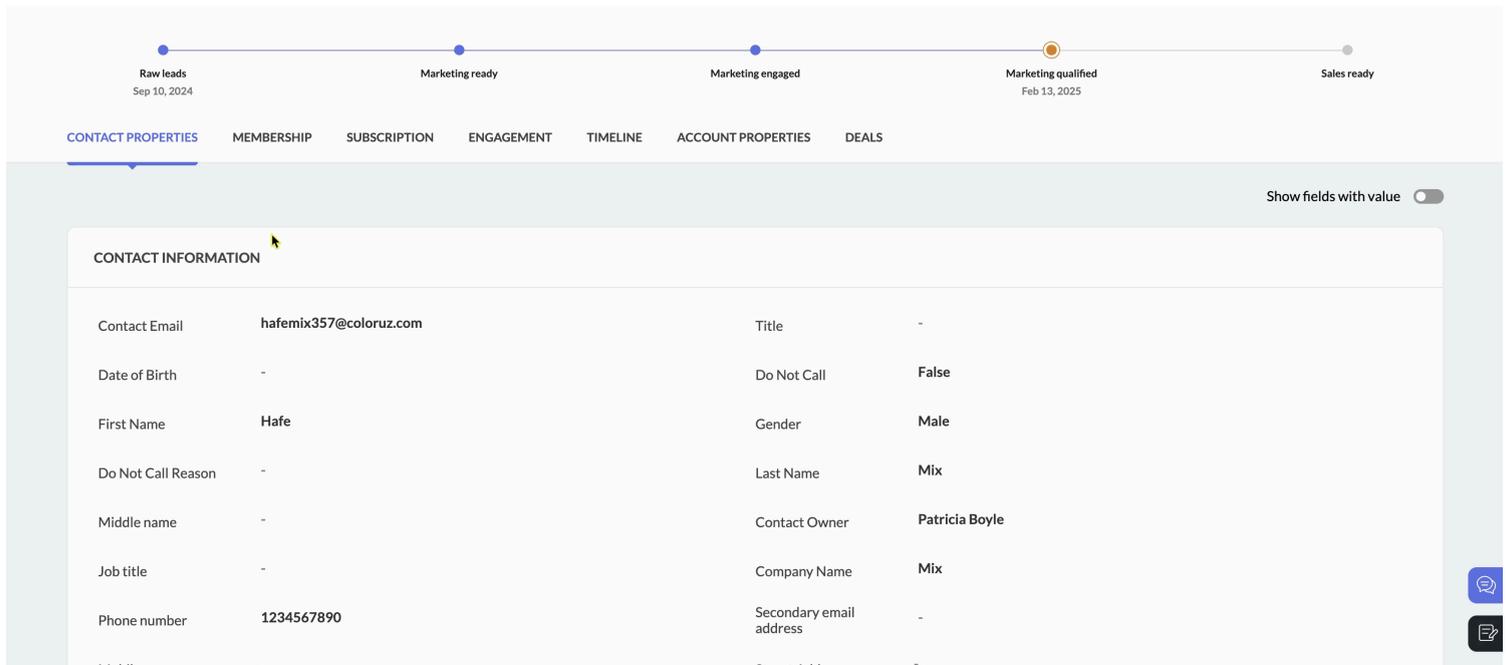
CONTACT PROPERTIES MEMBERSHIP SUBSCRIPTION ENGAGEMENT TIMELINE ACCOUNT PROPERTIES DEALS

Show fields with value

CONTACT INFORMATION

Contact Email	[REDACTED].com	Title	-
Date of Birth	-	Do Not Call	False
First Name	Hafe	Gender	Male
Do Not Call Reason	-	Last Name	Mix
Middle name	-	Contact Owner	Patricia Boyle
Job title	-	Company Name	Mix
Phone number	1234567890	Secondary email address	-
Mobile	-	Street Address	-
City	-	State	-
School	-	Role	-
Postal Code	-	Degree	-
Seniority	-	Country	Cambodia
Graduation Date	-	Team	-
Website URL	-	Field Of Study	-
Department	-	Marital Status	-
Persona	-	Military Status	-
Preferred Language	-	Relationship Status	-
Total Sales Activity	-	Work Email	-
Lead stage	Marketing qualified	Lead Source	-
New Field	-	X handle	-
Facebook handle	-	Linkedin Handle	-

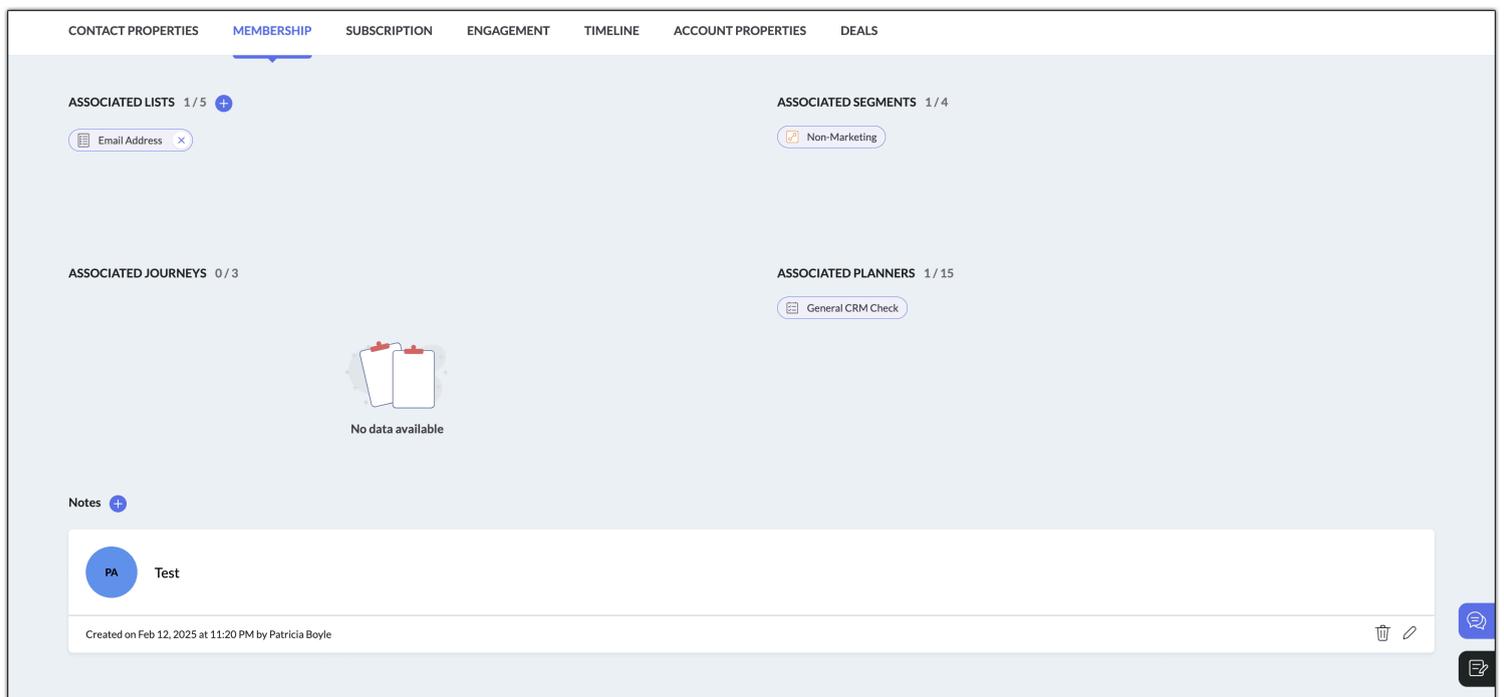
You may have noticed that when you're creating a contact manually using the Add Contact button, only limited information can be provided for the contact. For example, if you want to specify the Date of Birth of the contact, you can't do so when adding a contact manually. Instead, you need to do that after saving the contact and inside the Contact Properties tab.



Similarly, you can also edit existing data in the fields or remove the data as well.

Membership

This tab displays all the membership details of the contact, such as the associated [lists](#), [segments](#), [journeys](#), [planners](#), and any notes that have been added.



By clicking on the + icon beside the Associated Lists and Notes sections, you can associate lists and create new notes for the contact.

When you're associating a list, you can also create a new list and associate it to the contact. If you'd like to edit or delete the notes, at the bottom right of each note, you can use the edit and delete buttons.

Clicking on a list, segment, journey, or planner will take you to that particular membership.

Subscription

This tab comprises of three sections.

Manage Channel Subscription: You can toggle on/off the Email and/or SMS communication.

Topics: Here, you can view and edit the topic subscription for the contact.

The screenshot displays the contact profile for 'Hafe' (Marketing) with the following details:

- Contact Information:** Email: hafemix357@coloruz.com, Phone: 1234567890, Location: Cambodia.
- Timeline:** Raw leads (Sep 10, 2024), Marketing ready, Marketing engaged, Marketing qualified (Feb 13, 2025), Sales ready.
- Manage Channel Subscription:** Email (checked), SMS (checked).
- Topics:** Zylker (Newsletter).
- Subscription History:** Subscribed to Newsletter topic of Zylker product - Consented on Feb 13, 2025 by Patricia Boyle.

Subscription History: You can see the entire history of change in subscription type, topics, or communications for this contact here along with the date on which each change occurred.

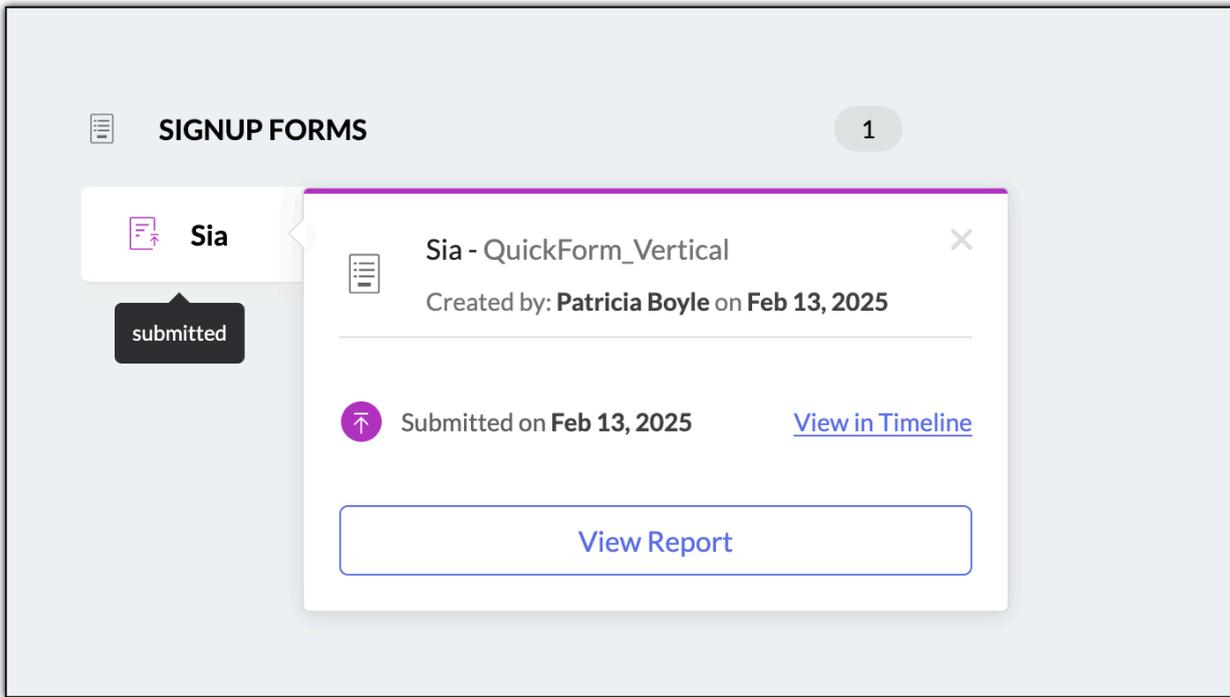
Engagement

Engagement activities of the contact are captured in this tab.

The screenshot displays the contact profile for 'Hafe' (Marketing) with the following details:

- Engagement Section:** SIGNUP FORMS (1) - Sia.

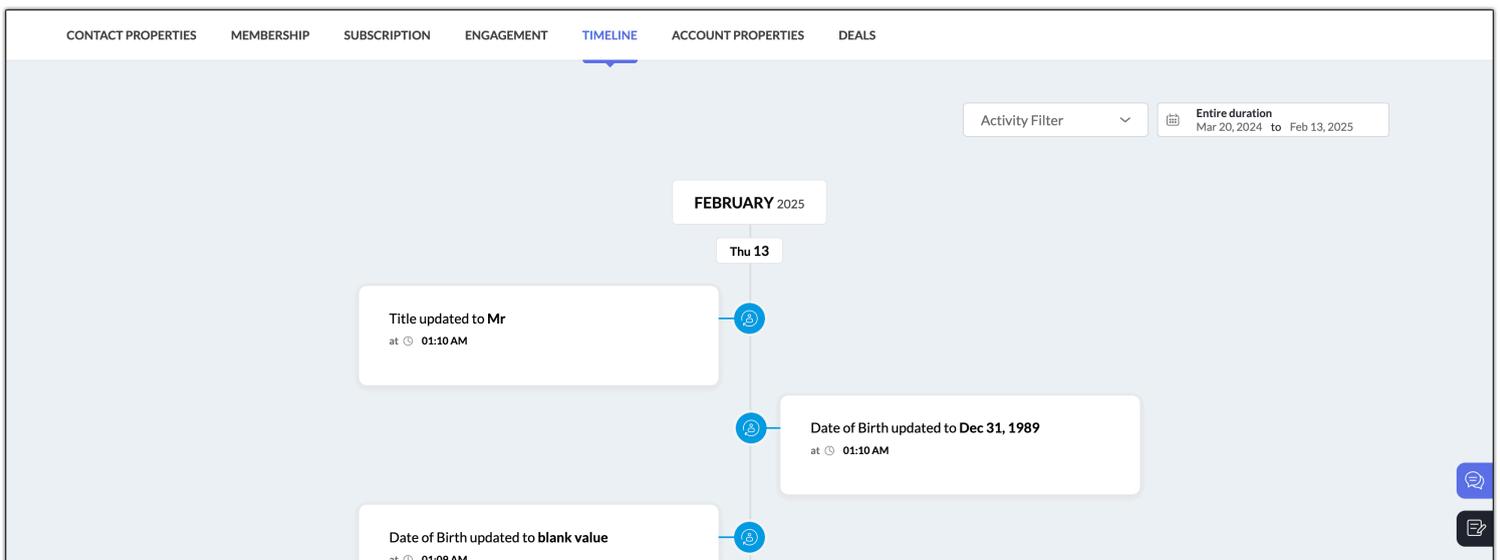
If they have interacted with any campaigns or forms sent to them, those campaigns and forms will be listed here.



If you click on a form or a campaign, you'll be able to view additional details. You can also view this activity in the Timeline tab by clicking **View in Timeline** option. Clicking the **View Report** option will take you to the Reports tab of that particular form or campaign.

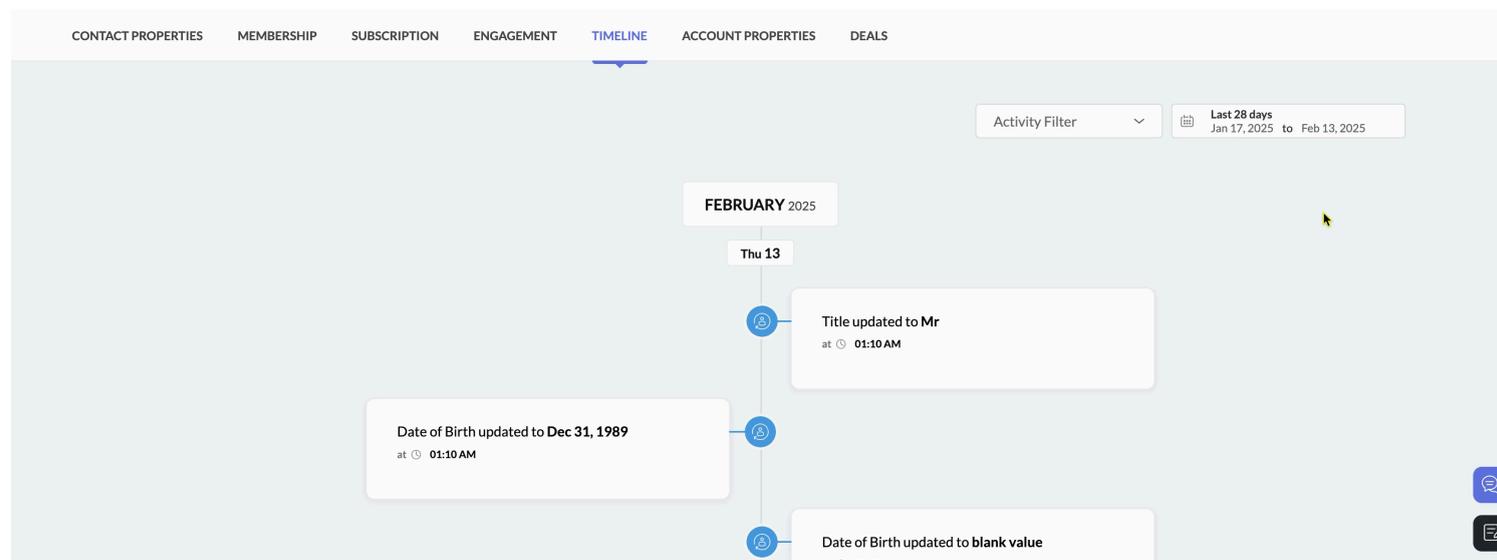
Timeline

All the details about the contact ever since they subscribed to your organization will be recorded along with the timeline and displayed here.



This also shows the campaigns sent to them, fields updated, when they are added to journeys or removed from them, and the changes in their lead stage.

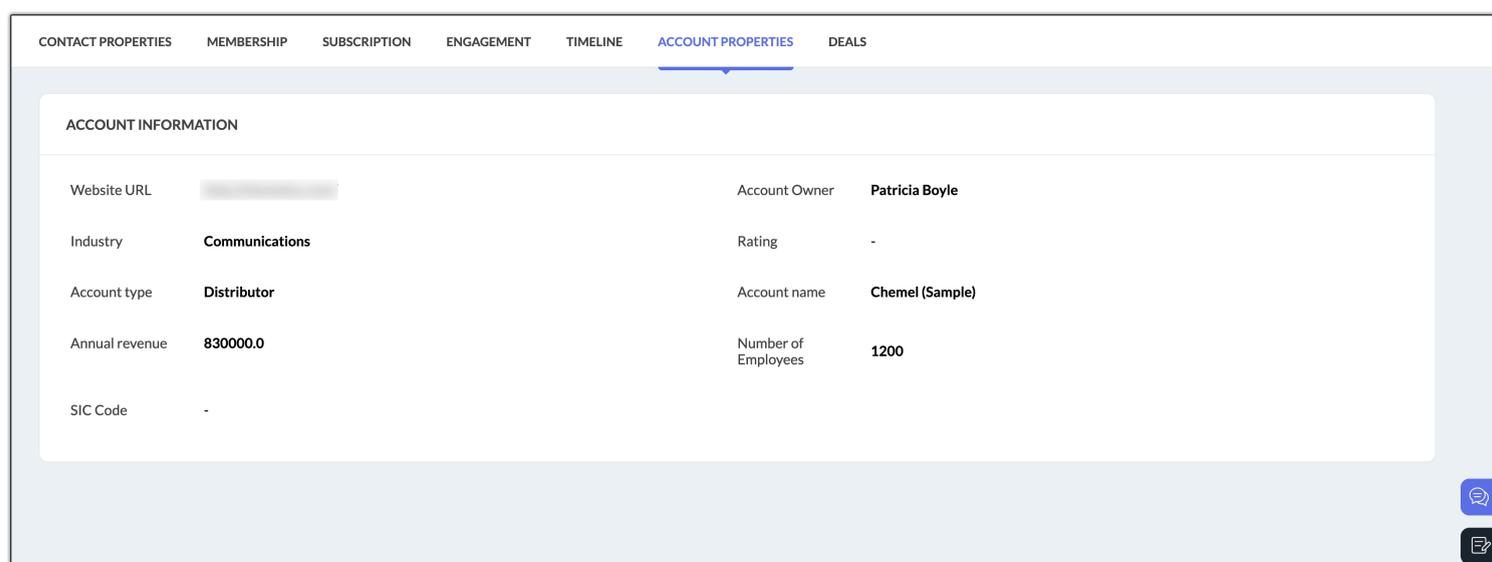
In the far right of the Timeline tab, you can change the date range to view the activities of the contact for a particular period. You can use the **Custom range** option to view the activity for a particular date range other than the pre-defined options available. You can use the **Entire duration** option to view the activity of the contact right from when they were added to your organization till the present date.



The **Activity Filter** option present beside the date filter allows you to filter for a particular type of activity. For example, if you would like to view only the updates made to the fields of the contact over the past three months, you can click on Activity Filter and select **Field Update**; choose **Last 3 months** option in the date filter.

Account Properties

This tab comes into play when you've integrated Zoho CRM with Zoho Marketing Automation. The Contacts or Accounts data from Zoho CRM can be viewed in this tab.



Deals

Similar to the Account Properties tab, the details of the Deals that you've created in Zoho CRM for a contact can be viewed in the Deals tab.

The screenshot displays the 'DEALS' tab in Zoho CRM. At the top, a navigation bar includes 'CONTACT PROPERTIES', 'MEMBERSHIP', 'SUBSCRIPTION', 'ENGAGEMENT', 'TIMELINE', 'ACCOUNT PROPERTIES', and 'DEALS'. Below this, four summary cards are shown: 'Total Revenue USD 700', 'Total Expected Revenue USD 700', 'Avg days to close a deal 0 Days', and 'No of Associated Deals 2'. The main area features two deal cards. The first, 'CRM Planner Deal', is 'Created On 10 Sep 2024' with a value of 'USD 200'. It has a 'Deal Stage' of 'Closed Won', 'Days to Close' of '0 Days', 'Expected Revenue' of 'USD 200', and 'Closing Probability' of '100%'. The second, 'New CRM Planner', is also 'Created On 10 Sep 2024' with a value of 'USD 500'. It has a 'Deal Stage' of 'Closed Won', 'Days to Close' of '0 Days', 'Expected Revenue' of 'USD 500', and 'Closing Probability' of '100%'. Both deals are associated with 'Patricia Boyle' and have a 'Deal Type: None'. A chat icon and a document icon are visible in the bottom right corner.

Deal Name	Created On	Deal Stage	Days to Close	Expected Revenue	Closing Probability	Deal Type
CRM Planner Deal	10 Sep 2024	Closed Won	0 Days	USD 200	100%	None
New CRM Planner	10 Sep 2024	Closed Won	0 Days	USD 500	100%	None