



## YOUR PEOPLE

# A contact's timeline

Open a contact and you've got their whole history in one scroll — every meeting, task and note ready before you call.

*Covers /dashboard/contacts/[id] · for rep, dmc*

## The steps

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### 01 Open a contact

The contact page gathers everything about one partner — details, relationship and history in a single view.

### 02 Reach out from the top

The action row lets you Call, WhatsApp, Email or Log an interaction without leaving the page.

### 03 Read the timeline

Scroll to the activity history: your logged meetings, linked tasks and emails for review, newest first.

### 04 See linked tasks

Open tasks tied to this contact (and their company) surface here, so nothing follow-up slips.

### 05 Check the linked company

The Company field links Aria to Northwind Voyages — pick an existing company or type a new one to re-link.

### 06 Edit any field inline

Click a field to edit it — job title, status, where you met or personal notes — and it saves on the spot.

### 07 Set the relationship

Set Relationship type and Rep status so your book stays organised and your reporting is accurate.

## 08 Prep before a meeting

A quick scroll of the timeline and notes is your meeting prep — you walk in knowing exactly where you left off.

**Next: Meeting prep briefs**

### Questions

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#### Where do the items in the timeline come from?

It merges your logged interactions, tasks linked to the contact, and emails waiting for review into one feed, newest first.

#### How do I edit a contact's details?

Click any field — name, job title, email, status or notes — edit it inline and it saves straight away. No separate edit mode.

#### How do I fix the company on a contact?

Click the Company field and pick an existing company or type a new one. Re-linking keeps the contact and the company record in step.

#### Can I use this page to prepare for a meeting?

Yes. Scrolling the timeline and the personal notes gives you the history at a glance. It's designed to assist, not replace your professional judgement, so read the context before you decide your approach.