Feature Guide: Contacts

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At a glance

Anyone you share Playlists with will *automatically* be added to your Contacts list, but you can also add Contacts manually.

Adding a single contact

- 1. From the left sidebar of your DISCO, under **Tools**, select **Contacts**.
- 2. On the Contacts page, in the top-right, click the **Add New Contact** button.
- 3. In the **Add new contact** window, enter their information. **Name** is required for all Contacts and **Email** is required for most* Contacts.

Add new contact

Need to add more than one contact at once? Import a contact list

	Email *	
Company	Phone	
Location	Tags	
	Add tags	~
	Cancel	Add contact
Email is not required if the	Contact is tagged as a Write	r.
* Email is not required if the Name *	<i>Contact is tagged as a Writer</i>	
* Email is not required if the Name *	Contact is tagged as a Writer	Writers
* Email is not required if the Name *	Contact is tagged as a Writer Email email is not required for	Writers
* Email is not required if the Name * Company	Contact is tagged as a Writer	Writers
* Email is not required if the Name * Company	Contact is tagged as a Writer	Writers
*Email is not required if the Name * Company Location	Contact is tagged as a Writer	Writers
Email is not required if the Name * Company Location	Contact is tagged as a Writer	Writers

- 4. Optional: Add Tags to your Contact. Visit this article for more information on Contact Tags.
- 5. Click the **Add contact** button.

Adding multiple Contacts at once

Searching and viewing Contacts

Searching Contacts

To search through your Contacts, use the search bar on the Contacts page. You can search using data from any of the Contact fields (**Name, Email, Company, Phone, Location, Tags**).

TOOLS 🗸	Contacts	
Contacts		
Email Creator	Q michael	
🗮 Mailing Lists		
II. Insights	NAME EMAIL	COMPANY
Watermarking	MS Michael Scott mscott@dm	n Dunder Miffli

Viewing individual Contact pages

To view an individual Contact Page, click on their name in the Contacts list.

Co	onta	acts			
	Q	Search contacts			
		NAME	EMAIL	COMPANY	PHONE
		David Wallace	dwallace@d	Dunder Miffl	6668885555

This will open their Contact page containing their **Details, Tags, Notes, Mailing Lists,** and **Activity**.

Details → view and edit basic Contact Information. If they are a Writer (as indicated by their Tags), their Publishers, Acts, and PROs will also be listed here.

Details	Conor Bridg cbridgers@g	jers gmail.com	Edit
	Company Phone Location Publishers Acts PRO	1112223333 Sony Publishing 🥑 Conor Bridgers and the Mystic Valley Band ASCAP 🥑	

• **Tags** → view and edit Tags

Tags			
•	Writer ×	Edit	

• **Notes** → view, edit, and add Notes added by anyone in your DISCO

Notes	Scheduled meeting in NY for April 5	Edit
	Add new note	Add a note

 Mailing Lists → view Mailing Lists this contact is currently on, and add them to or remove them from Mailing Lists

Mailing Lists	To add this contact to a mailing list, click 'Manage mailing lists'	Manage mailing lists
	Dunder Mifflin Paper Co.	

 Activity → view any Playlists you have shared with this contact, and their activity on those playlists (Page Views, Downloads, Streams)

r a ta view all		DAGE	DI AVI ICT	TRACK	
lew all	NAME	VIEWS	DOWNLOADS	DOWNLOADS	STREAMS
	Watermarked Playlist #3	1	0	1	0
	Mobile App Playlist	1	1	0	4
	My Super Awesome Playlist 🤘	6	1	0	15
	001 Queen Serene	4	0	0	3
	Stargazer	2	0	0	1
	U.S. Army Blues - EPK	3	0	0	4

Editing and deleting Contacts

Editing Contacts

You can edit contacts in a couple of different ways.

Single Contacts

From the individual contact page:

1. Click on their name in the Contact list.

Co	ntacts			
	Q Search contacts			
	NAME	EMAIL	COMPANY	PHONE
	David Wallace	dwallace@d	Dunder Miffl	6668885555

2. Click the **Edit** button next to the section you wish to edit.



From the main Contacts page:

1. Click the pencil in the **Edit** column for that Contact.



Multiple Contacts

1. From the main **Contacts** page, check the boxes for each Contact, then click **Edit selected** in the top right corner.

Contact	S						Add new contac	:t ••
Q Searc	ch contacts				3 sele	ected	Edit selected	~
	ИЕ	EMAIL	COMPANY	PHONE	LOCATION	Add to Unsub	/ remove from lis	sts
🕑 Cor	nor Bridgers	cbridgers@gmail.com		1112223333	Omaha, NE	Export	selected to CSV	
🖌 Dav	vid Wallace	dwallace@dmpc.com	Dunder Mifflin Pap	6668885555	New York, NY	Delete	selected	
🕑 Hol	ly Flax	hflax@dmpc.com	Dunder Mifflin Pap	7778889999	Nashua, NH	Publi	sher ×	/

2. From here you can select Add to / remove from lists or Unsubscribe users.

Note: To edit them in bulk, select **Export selected to CSV**. Visit this article for more information on exporting your Contacts and this article for editing Contacts in bulk.

Deleting Contacts

You can delete contacts in a couple of different ways.

Single Contacts

From the individual contact page:

1. Click on their name in the Contact list.

Contacts

Q	Search contacts			
	NAME	EMAIL	COMPANY	PHONE
	David Wallace	dwallace@d	Dunder Miffl	6668885555

2. From the individual contact page, click the **Actions** drop-down and select **Delete**.

K Back to contacts			
👓 David Wallace			Actions 🗸
		Add or re	move from lists
Details	Name *	Delete	
	David Wallace		

From the main Contacts page:

1. Hover your cursor over the Contact name, then check the box that appears.

Cont	tacts	
Q	Search contacts	
) NAME	EMAIL
Ę	Conor Bridgers	cbridgers@gmail.com
DV	David Wallace	dwallace@dmpc.com

2. Open the Edit selected drop-down and select Delete selected.



Multiple Contacts

- 1. From the main **Contacts** page, check the boxes for each Contact.
- 2. Click **Edit selected** in the top right corner.

ontacts					Add new contact
Q Search contacts				3 sele	ected Edit selected
NAME	EMAIL	COMPANY	PHONE	LOCATION	Add to / remove from lists Unsubscribe users
Conor Bridgers	cbridgers@gmail.com		1112223333	Omaha, NE	Export selected to CSV
David Wallace	dwallace@dmpc.com	Dunder Mifflin Pap	6668885555	New York, NY	Delete selected
✓ Holly Flax	hflax@dmpc.com	Dunder Mifflin Pap	77788899999	Nashua, NH	Publisher ×

3. Select **Delete selected**.

Using Contact Tags

Contact Tags are useful for quickly labeling, searching, and filtering your Contacts within Contact Lists, Mailing Lists, and when choosing recipients to send campaigns to via our Email Creator.

At a glance

When adding Contact Tags, you can either select pre-set tags from the drop-down or type in the field to create your own:

- Label
- Other
- Publisher
- Supervisor
- Writer -- Additional fields will appear so you can add their Publisher, Acts, and Performing Rights Organization, also known as PRO. For more information on managing Writers, refer to our article on managing writers.

Tags	
Add tags	~
Label	
Other	
Publisher	
Supervisor	
Writer	

You can add Contact tags to existing Contacts, or when adding a new Contact.

Adding Tags to existing Contacts

Single Contacts

- 1. From the left sidebar of your DISCO, under **Tools**, select **Contacts**.
- 2. Hover your cursor over the Contact name and click the Tag icon that appears to Add contact

tags.



3. Select a Tag from the dropdown or type to create one.

TAGS	EDIT
Ad Agency	
Create tag "Ad Ag	ency"

Multiple Contacts

- $1. \$ Hover over the Contact names, then check the boxes that appear.
- 2. Click the Tag icon that appears to Add contact tags.

NAME	EMAIL	COMPANY	PHONE	LOCATION	TAGS EDIT
David Wallace	dwallace@dmpc.com	Dunder Mifflin Pap	6668885555	New York, NY	Č.
Holly Flax	hflax@dmpc.com	Dunder Mifflin Pap	77788899999	Nashua, NH	Publisher Add contact tags
Jane Doe	janedoe@email.com				Ad Agency ×
Jim Halpert	jhalpert@dmpc.com	Dunder Mifflin Pap		Scranton, PA	Writer ×

3. Type in the field to create your own Tag, or choose from the available pre-set Tags.

Notes:

- If you see a minus symbol (—) next to a Contact tag, that means the tag is present on some of the Contacts you've selected, but not at all. If you click this tag, it will be added it to all the selected Contacts.
- If you see a checkmark (<) next to a Contact tag, that means the tag is present on all the contacts you've selected. If you click this tag, it will be removed from all the selected contacts.

Find tag or type to add new tag
Label
Manager
Other
Publisher
Supervisor
Writer
✓ <u>DMPC</u>

Adding Tags to new Contacts

Single Contacts

 In the Add new contact window, under Tags, type in the field to create your own Tag, or choose from the available pre-set Tags.

Add new contact

Name *	Email *
Company	Phone
Location	Tags
	Add tags 🗸 🗸
	Cancel Add contact

Need to add more than one contact at once? Import a contact list

2. Click the **Add contact** button.

Multiple Contacts

You can add Contact Tags for multiple Contacts along with other Contact data when you add new Contacts via a CSV import. When adding tags via CSV, make sure your file:

- has a **Tags** column
- has all Tags for each Contact contained within a single cell separated by commas

A	В	С	D	E	F
email	name	phone	company	territory	tags
dwallace@dmpc.com	David Wallace	6668885555	Dunder Mifflin Pa	New York, NY	Supervisor, VIP, DMPC, Manager, NYC
tflenderson@dmpc.com	Toby Flenderson	9998887777	Dunder Mifflin Pa	Scranton, PA 🏼	Supervisor, VIP, DMPC, HR, PA
	-				×/

Removing Contact Tags

There are two ways to do this:

Method 1: In the **Tags** column for the Contact, click the **X** on the tag you wish to remove.



Method 2:

1. Hover over the Contact name and click the Tag icon that says **Add contact tags**.

TAGS			EDIT
Supervise	or X		/
Publishe	Add c	ontac	t tags

2. Click on the Tag that shows a check mark to unselect it.

TAGS EDIT	
Supervisor ×	
Find tag or type to add new ta	ag
Label	
Manager Other	
Publisher	- 1
Writer	

Exporting your Contacts list to a CSV

Exporting your Contacts makes it easier to edit them in bulk and re-import them.

At a glance

Contacts from your DISCO can be exported by *Admins only*. Non-admins will see this message if they attempt an export:



Exporting all Contacts

Click the three-dot menu (…) in the top right corner of the Contacts page, and select **Export all contacts to CSV**.



Exporting select Contacts

1. Hover over the Contact names, then check the boxes that appear.

Contacts	
Q Search contacts	
NAME	EMAIL
Conor Bridgers	cbridgers@gmail.com
David Wallace	dwallace@dmpc.com

2. Open the Edit selected drop-down and select Export selected to CSV.

ntact	S						Add new contact
Q Sear	ch contacts				3 sele	ected	Edit selected
	ИЕ	EMAIL	COMPANY	PHONE	LOCATION	Add to Unsul	o / remove from lists
Co	nor Bridgers	cbridgers@gmail.com	com 1112223333 (Omaha, NE	a, NE Export selected to CSV	
🖌 Dav	vid Wallace	dwallace@dmpc.com	Dunder Mifflin Pap	6668885555	New York, NY	Delete	a selected
✓ Hol	ly Flax	hflax@dmpc.com	Dunder Mifflin Pap	77788899999	Nashua, NH	Publ	lisher ×

Fditing your Contacts in bulk via CSV

Earting your contacts in pairs the cor

After exporting your Contacts list from DISCO, you have the option to edit them in bulk using a third-party spreadsheet program. You can then save the new file as a CSV and re-import it into your DISCO.

At a glance

You can use any spreadsheet program for this. Below you will find instructions for a few of the most common ones: **Google Sheets**, **Excel**, and **Apple Numbers**.

Using Google Sheets

- 1. Open a new Google Sheet.
- 2. From the File menu, select Import.

	Unti	itled s	spread	dsheet	☆			
-	File	Edit	View	Insert	Format	Data	Тоо	ls
٩	ŧ	New					►	oq
A1		Open				ŝ	ЖO	
AI)	Import	t					F

3. Click the **Upload** tab and select your file generated from DISCO.

	rt file						
My Drive	Shared with me	Recent U	lpload				
				Documents	0	Search (
			Name	Date	Modified		
			> Documents	🛆 Aug	6, 2024 at 1:39 P	м	
			Music DISCO Contact Export.csv	Aug	6, 2024 at 1:39 P av at 7:10 PM	м	 3 KB
			Show Options		•	Cancel 🥂	Open
			Brov	wse			
			or drag a	file here			

4. Click the Import data button. Your Contacts data should then populate the sheet.



5. Make the necessary edits to your Contacts.

Important: Email addresses *cannot* be updated when re-importing your Contacts list, as they are the key identifiers for the Contacts. Also, if there are any email addresses in your file that don't already exist in your Contacts, a new Contact will be created.

- 6. Prepare your file to be re-imported into your DISCO.
- 7. From the File menu, select Download, then select Comma-separated values (.csv,

	My DIS	SCO Cor	ntacts	☆ 🗗	\odot									
-	File Ed	lit View	Insert	Format	Data To	ools Ex	xtensio	ns Help						
٩	🚹 Ne	N			Þ	0 <u>0</u> 1	23 [Defaul 🔻	- 10) +	B I	÷	A \$.	
41	🗅 Open ೫೦													
AI	→] Import		D		E		F		G	н				
1 ji	🗋 Ma	ke a copy				ne		company	territor	y	acts	_	deleted	
2	-					com								
3	≗+ Sha	are			•	11122	23333		Omaha	a, NE				
4	2 011					6688	85555	Dunder Miffl	in PaNew Y	ork, NY				
5	🗹 Em	ail			•			Music Prom	oter Trainin	g, DISCO	DAM, D	ISCO N	/larketing, S	School of
6 7	± Do	wnload			Þ	Mie	crosoft	Excel (.xls:	x)					
8	🔏 Ap	orovals			New	Op	enDoci	ument (.ods	3)					
9									,					
10	0 🖉 Rename		PD	PDF (.pdf)										
11				We	eb Page	(.html)								
12	🗊 Mo	ve					the rage (intrin)							
13	🙈 Ad	d shortcut	to Drive	o Drive Comma Separated Values (.csv)										

8. When you're ready to re-import your Contacts list, check out this article.

Using Microsoft Excel

1. Open a new **Excel** sheet.

current sheet).

- 2. Import your file generated from DISCO. Your Contacts data should then populate the sheet.
- 3. Make the necessary edits to your Contacts.

Important: Email addresses *cannot* be updated when re-importing your Contacts list, as they are the key identifiers for the Contacts. Also, if there are any email addresses in your file that don't already exist in your Contacts, a new Contact will be created.

- 4. Prepare your file to be re-imported into your DISCO.
- To export, from the File menu, select Export, then select Download this sheet as CSV (.csv).

			(Alt +	Q)											٢	v
Close	Expo	ort	Desig	In							💭 Comme	nts •••	Catch up	Ø Editing	× 88	Share 🗸
Home	PDF	Download as PDF Download a copy of this document to your computer as a PDF file.		~			₽ ₩	a	♣ ₱	Σ	AutoSum ~	27	a [в		
New	X	Download this sheet as CSV (.csv)	,	o ^{0.} o ^{0.}	Conditi Formatt	onal Forma ing ~ Table	at As Cell e ~ Styles ~	Insert (Delete Format		Clear ~	Sort & Fi Filter ~ Se	nd & Ad lect ~	d-ins		
D Open	-	Download a copy of the selected sheet to your computer as a CSV file.	umber	rs.		Styles			Cells		Ed	ting	Ac	ld-ins		
🔠 Get Add-ins				M	40	4.0	10	40	40	47	411	81/	6147	AV	AV	×
Info			μ	N	AU	AP	AQ	AR	AS	AI	AU	AV	AVV	AA	AT	AL
Save As																
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About																
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			: PP	T Issues	Word	ssues e	enums +	_				_		•		•
			-	1 1550(55												

6. When you're ready to re-import your Contacts list, check out this article.

Using Apple Numbers

- 1. Open the **Numbers** app.
- 2. A Finder window will open on your desktop. Select your file generated from DISCO and click **Open**.

	Name	Date Modified	Size
iCloud Drive	> 🔁 Music	Aug 6, 2024 at 1:39 PM	
Documents	DISCO Contact Export.csv	Today at 7:10 PM	3 KB
Desktop	> Documents	Today at 7:29 PM	
🖿 Shared			
	Now Document	Canac	

- 3. A new sheet will open with your Contacts data populated.
- 4. Make the necessary edits to your Contacts.

Important: Email addresses *cannot* be updated when re-importing your Contacts list, as they are the key identifiers for the Contacts. Also, if there are any email addresses in your file that don't already exist in your Contacts, a new Contact will be created.

5. Prepare your file to be re-imported into your DISCO.

- Numbers File Edit Insert Table Organize Format Arrange View Window Help DISCO Conta New... Open... Open Recent Close Duplicate id company phone 386 os@gmail.com 400 Share... gmail.com 1112223333 400 6668885555 Dunder Mifflin Paper Co. dmpc.com 379 Music Promoter Training, DISCO DAM, DISCO Marketing, School of DISCO - Managers, 362 Excel... Save as Template... 400 778889999 Dunder Mifflin Paper Co. TSV... Reduce File Size... 364 Advanced 381 Dunder Mifflin Paper Co. 381 mail.com 4443335555 Dunder Mifflin Paper Co. 40 mpc.com
- 6. From the File menu, select Export To, then select CSV.

7. Click Save.

Export Your Spreadsheet						
PDF	Excel	CSV	TSV	Numbers '09		
	Include tabl	e names				
> Advanced Options						
?			Cancel Se	end a Copy 🗸 Save		

8. Select a destination from the Where dropdown and click Export.

Save	As: DISCO Contact Export
	ags:
Wh	ere: 🔁 Documents 📀 🗸
	Cancel

9. When you're ready to re-import your Contacts list, check out this article.

Importing and re-importing your Contacts list

via CSV

You can easily add new Contacts to your DISCO via a CSV import. You can also export your existing Contacts from your DISCO to a CSV, edit them in bulk using a third-party spreadsheet program, and re-import the file into your DISCO.

At a glance

The **Import** option can be found from the menu (...) on the **Contacts** page in your DISCO.

Contacts	Add new contact
	Export all contacts to CSV
Q Search contacts	Import contacts from CSV

Preparing your CSV file for import

Before importing your Contacts list, ensure that your CSV file meets the following requirements:

- ☐ the file *must* be in CSV format
- [] there *must* be a *unique* email address for *every* Contact (*no blanks*!)
- [] there *must* be a name for *every* Contact (*no blanks*!)

Optional fields

These fields are optional, meaning you can choose to remove these columns from your file before the import if you prefer.

- Tags
- Company
- Phone
- Location

Best practices

- Keep the column headers the same as they appear on your Export file, with one exception:
 - Combine the First and Last Names into a single **Name** field to avoid errors when importing your contacts.
- Place the email column in Column A (you can click and drag the entire column to the left).

	My DISCO Contacts ☆ ⊡ ⊘ File Edit View Insert Format Data Tools Extensions Help						
C	Q 5 ♂ 🗗 📅 100% ▼ 💲 % .º 123 Defaul ▼ - 10 + B I -						
C:C	C:C ▼ fx email						
	A en		с	D	E	F	
1	id name	email		phone	company	territory	
2	3810756 Pam Bee	sley pbeesley	@dmpc.com		Dunder Mifflin Pa	Scranton, PA	
3	4002301 Toby Fler	<mark>iderson</mark> tflenderso	on@dmpc.com	9998887777	Dunder Mifflin Pa	Scranton, PA	
4	4002304 David Wa	Illace dwallace	@dmpc.com	6668885555	Dunder Mifflin Pa	New York, NY	
5	3810736 Michael S	Scott mscott@d	dmpc.com		Dunder Mifflin Pa	aper Co.	
6	4002303 Karen Fila	apelli kfilapelli@	dmpc.com	4443335555	Dunder Mifflin PaUtica, NY		
7	4002302 Holly Flax	4002302 Holly Flax hflax@dmpc.com			Dunder Mifflin Pa	Nashua, NH	
8	8 3810755 Jim Halpert jhalpert@dmpc.com Dunder Mifflin Pε Scranton, F				Scranton, PA		
	My DISCO Contac File Edit View Ins 오 ㅎ ㄹ 믑 두 10	cts ☆ ⊡ sert Format I 00% → \$	ک Data Tools E % .٥ ِ .٥٩ ·	xtensions Heli 123 Defaul	▼ - <u>10</u>	+ B <i>I</i> -	
A:A	✓ f _x email						
	A b	В	С	D	E	F	
1	email	id	name	phone	company	territory	
2	pbeesley@dmpc.com	3810756	Pam Beesley		Dunder Mifflin Pa	Scranton, PA	
3	tflenderson@dmpc.com	4002301	Toby Flenderson	9998887777	Dunder Mifflin Pa	Scranton, PA	
4	dwallace@dmpc.com	4002304	David Wallace	6668885555	Dunder Mifflin Pa	New York, NY	
5	mscott@dmpc.com	3810736	Michael Scott		Dunder Mifflin Pa	aper Co.	
6	kfilapelli@dmpc.com	4002303	Karen Filapelli	4443335555	Dunder Mifflin Pa	Utica, NY	
7	hflax@dmpc.com	4002302	Holly Flax	7778889999	Dunder Mifflin Pa	Nashua, NH	
8	jhalpert@dmpc.com	3810755	Jim Halpert		Dunder Mifflin Pa	Scranton, PA	

Importing your CSV file

- 1. In your DISCO, on the left sidebar, select **Contacts**.
- 2. In the top-right corner of the Contacts page, open the menu (...), and select Import

contacts from CSV.

3. Drag the file into the box or click to browse your computer.

Import contacts from CSV

Upload your contacts from a .csv file. In the next step, we'll map the columns in your spreadsheet to the fields we support: Name, email, phone number, company, territory, and type.

Note: Every contact must have a name and a unique email.

Drag file here, or click to browse		
	Cancel	Next

4. Click the **Next** button.

5. Map each Column from your spreadsheet to a DISCO Contact field using the drop-downs.

Map the fields from your spreadsheet to the fields DISCO's Contacts feature supports: name, email, etc.						
Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	
email	name	phone	company	territory	tags	
Which column should we map this to?	Which column should we map this to?	Which column should we map this to?	Which column should we map this to?	Which column should we map this to?	Which column should we map this to?	
Email	Name	Phone 👻	Company/Organization	Location	Tags 🛫	
pbeesley@dmpc.com	Pam Beesley	-	Dunder Mifflin Paper Co.	Scranton, PA	Artist	
tflenderson@dmpc.com	Toby Flenderson	9998887777	Dunder Mifflin Paper Co.	Scranton, PA	Supervisor	
dwallace@dmpc.com	David Wallace	6668885555	Dunder Mifflin Paper Co.	New York, NY	Supervisor	
		Import	Cancel			

6. Click the **Import** button.

Errors when importing

Specific error messages

This **Import failed** message will appear if you are missing any required information, such as a **Name** or **Email**.

Imj	port failed. Please correct the following errors in your .csv file:
 Row #11(Row #16(,	, , , ,): Name is invalid: This field may not be blank. , , , , , ,): Email is invalid: This field may not be blank.
	Import Cancel

Other issues

If you encounter any other issues during the import process, we suggest importing your Contacts in smaller chunks. The exact number of Contacts you can import at once varies (based on DISCO's peak usage times*); but as a general rule, we recommend importing up to 1K contacts at a time to bypass any delays.

*You may encounter this message during peak times: This import will take us a little time to process. If the contacts don't show up in 10 minutes, please contact us.' If you see this, you will not see any errors associated with your import.