

# Enterprise - Contact Record Must Haves

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The contact record is more than just a place to save a hiring manager's name and phone number. It is one of the best tools in Enterprise for relationship management and tracking sales activity. This help document will cover the "must haves" in getting the most out of your contact records.

*Looking to create a contact?* Check out [Enterprise - How to Add a Contact](#).

## In this article:

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2. [Messages](#)
3. [Documents](#)
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## Interest Codes

Traditionally, interest codes are used on employee and order records to help match up work experience, etc. but you can utilize interest codes on contact records for many different purposes. Interest codes can be used as a way to group contacts or locate contacts based on specific information. Your only limit is your imagination.

### Locating Interest Codes

Interest codes are located on the visifile of a contact record:

**Teddy Newton**  
Buy N Large (Primary),...  
123 Main St.  
Cokato, MN 55321

(123) 123-4560  
ID: 11137  
Branch: New Brighton

Lunch Today  
Pay update confirm

Currently viewing 2 of 315044 tasks. View more...

tasks appointments social email

**contact snapshot**

Title: Design Director | Status: Active  
Company Name: Buy N Large | Branch: New Brighton  
Email: teddy@bnl.xom | Date: 6/5/2018 3:55:00 PM

**phone/email**

teddy@bnl.xom  
(123) 123-4560

**messages**

Date	Action	Message	Rep	Contact	Due
5/1/2020	Placed	Placed -- Buy N Large	amelia.stout	Newton, Teddy (B...	
5/1/2020	Placed	Placed -- Buy N Large	amelia.stout	Newton, Teddy (B...	
5/1/2020	Order Candidate	Candidate -- Buy N Large	amelia.stout	Newton, Teddy (B...	
5/1/2020	Order Candidate	Candidate -- Buy N Large	amelia.stout	Newton, Teddy (B...	
5/1/2020	Order Candidate	Candidate -- Buy N Large	amelia.stout	Newton, Teddy (B...	
3/27/2020	Email	Invoices Dated Friday, March 27, 2020	tamara.czapiew...	Newton, Teddy (B...	

**personal call list**

No Records Found

**contact groups**

- Basketball group
- Bears games
- Theme Park Contacts

**interest codes**

- Enjoys Starbucks
- Industrial Staffing
- Interested in Employee Onboard...
- Looking for Temp Employees
- Uses Staffing Services Currently

### Example Interest Codes on Contacts:

1. Type of Staffing
  - What kind of workers are they looking for? (ex. Customer Service, Light Industrial, etc.)
  - Staffing Terms (Temp, Part Time, Full Time, Temp to Hire)
2. Personal Interests
  - Things they love that you can get them gift cards for (coffee, donuts, etc.)
  - Events they attend or are interested in hearing about (marketing, networking, social hour, etc.)
3. Client Tiers or Ranking
  - Relationship or amount of business you do with them (ex. Tier 1-3 or Rank A, B, or C)
4. Sales Information
  - Services you offer that they are most interested in (Payroll, Temp to Hire, New Hire Training, etc.)
  - Competitors that they currently use

Check out [Enterprise - Creating Interest Codes](#) & [Enterprise - How to Manage Interest Codes on the Customer](#) for more information

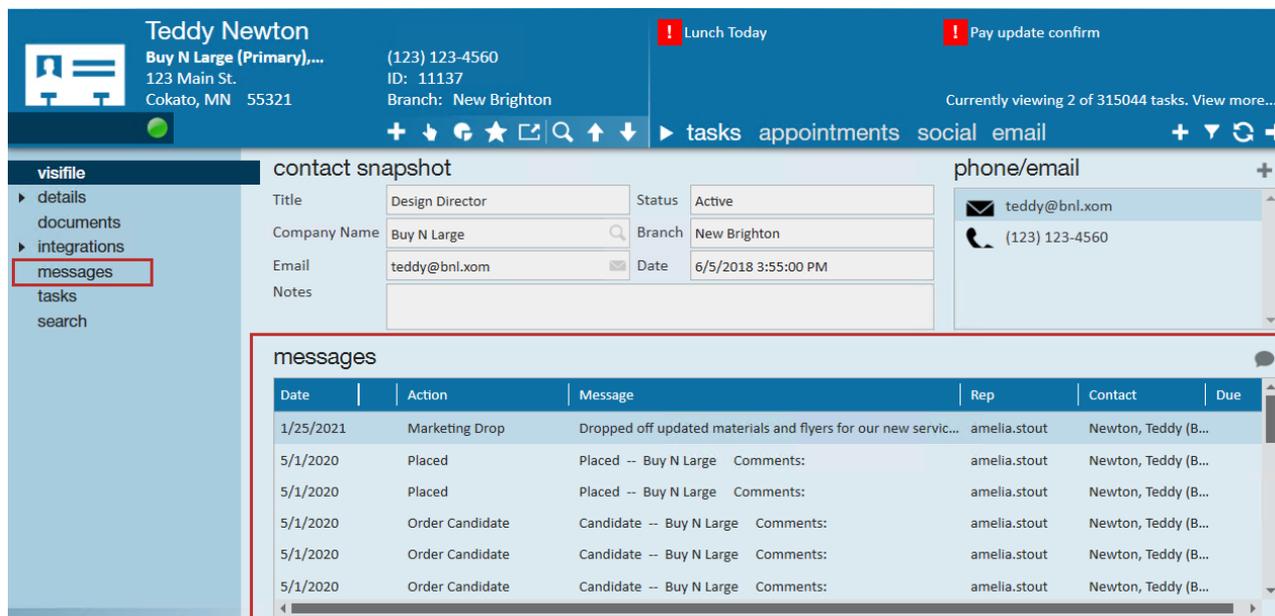
## Messages

You can log messages on any record, but logging messages on contact records can be extremely helpful for your

entire staff.

## Locating Messages

Messages can be logged directly from the visifile or under the messages section on the contact record:



The screenshot shows a CRM interface for a contact named Teddy Newton. The contact details include: Buy N Large (Primary), 123 Main St., Cokato, MN 55321, (123) 123-4560, ID: 11137, Branch: New Brighton. The interface has a navigation menu on the left with 'messages' highlighted. The main content area shows a 'contact snapshot' with fields for Title (Design Director), Status (Active), Company Name (Buy N Large), Branch (New Brighton), Email (teddy@bnl.xom), and Date (6/5/2018 3:55:00 PM). A 'phone/email' section shows the contact's email and phone number. Below this, a 'messages' table is displayed with the following data:

Date	Action	Message	Rep	Contact	Due
1/25/2021	Marketing Drop	Dropped off updated materials and flyers for our new servic...	amelia.stout	Newton, Teddy (B...	
5/1/2020	Placed	Placed -- Buy N Large Comments:	amelia.stout	Newton, Teddy (B...	
5/1/2020	Placed	Placed -- Buy N Large Comments:	amelia.stout	Newton, Teddy (B...	
5/1/2020	Order Candidate	Candidate -- Buy N Large Comments:	amelia.stout	Newton, Teddy (B...	
5/1/2020	Order Candidate	Candidate -- Buy N Large Comments:	amelia.stout	Newton, Teddy (B...	
5/1/2020	Order Candidate	Candidate -- Buy N Large Comments:	amelia.stout	Newton, Teddy (B...	

## Reasons to Log Messages

Message logging can be extremely powerful if everyone on your team utilizes it. Here are some reasons to consider utilizing messages:

1. Transparency
  - Your whole team will never need to guess if anyone has reached out to this person yet because all the conversations will be logged in one place
2. Tracking Productivity
  - Managers can pull the [Message Productivity Report](#) to see how many emails, phone calls, etc. your sales or staffing specialists are logging
3. Keeping Track of Marketing Campaigns
  - If you utilize message action codes for each email or phone campaign you conduct, you can run searches or pull [reports](#) to see how many people were contacted, etc.

## Utilizing Message Action Codes

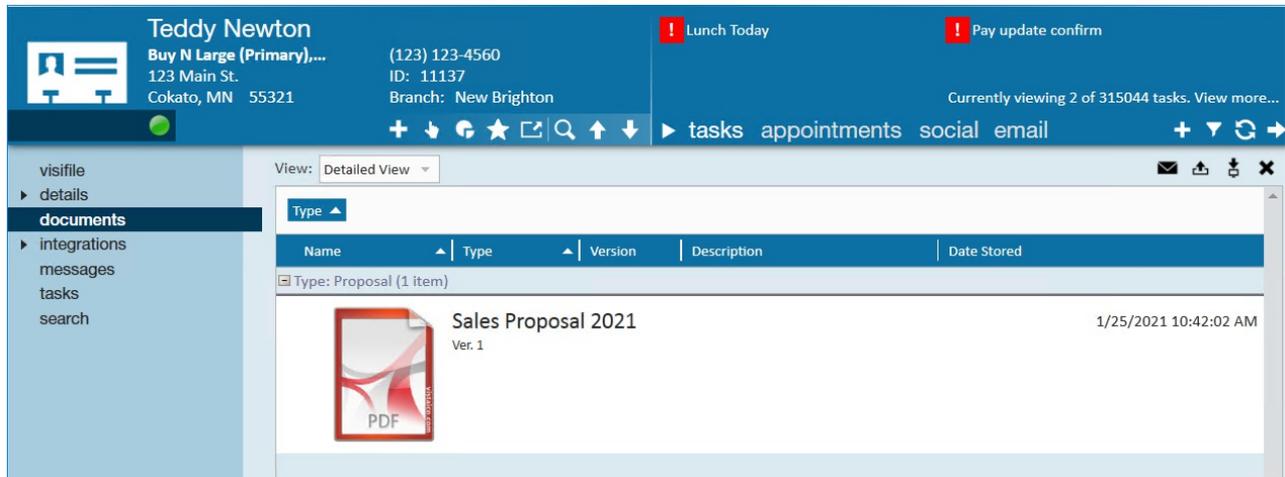
Consider having contact specific message action codes to track different information. You could track each marketing campaign with a different message action code or track successful sales calls showing the sales process and more.

Check out [Enterprise - How to Create Message Action Codes](#) for more information on how to customize your system.

## Documents

Keep track of what documents you receive or send to a customer contact directly on their record. This can help stop your reps from being unsure or having to look through their computer files or email to find what was sent. This can include quotes, contracts, and more.

Documents can be found under the documents tab on the contact record:



The screenshot shows a CRM interface for a contact named Teddy Newton. The contact's details include: Buy N Large (Primary), 123 Main St., Cokato, MN 55321, phone (123) 123-4560, ID: 11137, and Branch: New Brighton. There are two notification banners: 'Lunch Today' and 'Pay update confirm'. The interface shows a navigation menu with 'visifile', 'details', 'documents', 'integrations', 'messages', 'tasks', and 'search'. The 'documents' tab is active, displaying a table with one document: 'Sales Proposal 2021' (Ver. 1), stored on 1/25/2021 at 10:42:02 AM. The document icon is a PDF file.

Name	Type	Version	Description	Date Stored
Type: Proposal (1 item)				
 Sales Proposal 2021		Ver. 1		1/25/2021 10:42:02 AM

Check out [Enterprise - Saving Customer Contracts and Important Customer Documents](#) for document information on the customer record.

## Contact Groups

Adding contacts to contact groups will help make sure they are on the right email lists, etc. This can help you quickly email, set up a call list, etc. with contacts looking for related information.

Contact groups are located on the visifile of the contact record:

**Teddy Newton**

Buy N Large (Primary),...

123 Main St.  
Cokato, MN 55321

(123) 123-4560

ID: 11137

Branch: New Brighton

! Lunch Today

! Pay update

Currently view

tasks appointments social ema

**visifile**

- ▶ details
- ▶ documents
- ▶ integrations
- messages
- tasks
- search

### contact snapshot

Title: Design Director

Company Name: Buy N Large

Email: teddy@bnl.xom

Notes:

Status: Active

Branch: New Brighton

Date: 6/5/2018 3:55:00 PM

phone/e

tedd

(123)

### messages

Date	Action	Message	Rep
1/25/2021	Marketing Drop	Dropped off updated materials and flyers for our new servic...	amelia.sto
5/1/2020	Placed	Placed -- Buy N Large Comments:	amelia.sto
5/1/2020	Placed	Placed -- Buy N Large Comments:	amelia.sto
5/1/2020	Order Candidate	Candidate -- Buy N Large Comments:	amelia.sto
5/1/2020	Order Candidate	Candidate -- Buy N Large Comments:	amelia.sto
5/1/2020	Order Candidate	Candidate -- Buy N Large Comments:	amelia.sto

### personal call list

No Records Found

### contact groups + x

- Name
- Basketball group
- Bears games
- Theme Park Contacts

employee

customer

order

assignment

**contact**

pay / bill

Check out [Enterprise - How to Create Contact Groups](#) for more information.

## Additional Details

Here is a list of fields under the Contact > Details section that may be worth filling out for each contact:

personal information		customer information	
First Name	Teddy	Customer	Buy N Large
Last Name	Newton	Customer Name	Buy N Large
Title	Design Director	Department Name	Primary
Nickname		Address	Warehouse 121 RIVER AVE NEW YORK, NY 10001
Honorific			
Birthday			
ID	11137	Employee	

contact information		other information	
Street	123 Main St.	Status	A Active
Street 2		Rep	amelia.stout Amelia Stout
City	Cokato	Branch	New Brighton
State	MN	Vendor	N/A
Zip	55321-____	How Heard of	Billboard
Country	United States of America	Details	

## Birthday

If you know the contact's birthday, you can add it to their file and pull the [Contact Birthday List Report](#) to remember to send them a card.

## Address

If you keep the contact address up to date, you can run searches to pull up contacts that you could visit in one area.

Last Name	Contact ID	Customer ID	Rep Name	All Reps	Search	Clear Criteria
First Name	Status	Customer	Branch	All Branche:		

Enhance Search	Saved Searches
<ul style="list-style-type: none"> <li>Details</li> <li><b>Location</b></li> <li>Messages</li> <li>Document</li> <li>Personal Call</li> <li>Related Vendor Info</li> <li>Custom Data</li> </ul>	<p>Country</p> <p>Zip Code <span>Show in Results</span></p> <p>Like 55121</p> <p>+Add</p> <p>Distance in Miles</p> <p>Street 1</p> <p>Street 2</p> <p>City</p> <p>State</p>

## How Heard Of

If you track how heard of information, you can search by it to track which marketing campaigns are effective

overtime.

## Related Articles