

Enterprise - Contact Statuses


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Contact statuses are used to indicate how involved and relevant a particular contact is to the overall sales and/or staffing process; they are particularly useful for filtering which contacts are buying influences, versus those who are not involved in day to interactions, or considered "decision makers". A contact will be visible or hidden from the customer record they are affiliated with based off of the contact status assigned to them.

The status area of a contact record is found on the details page, under other information. A contact's status is assigned by making a selection from the dropdown menu:

The screenshot shows the contact details page for Missy Smyth, Director of HR at Stanley Inc. The page is divided into several sections: personal information, customer information, contact information, and other information. The 'other information' section is highlighted with a red box and contains a dropdown menu for 'Status' with the following options:

Status	Description
A	Active
D	Bid
C	Credit Check in Progress
D	Do Not Service
H	Hold for Credit Check
I	Inactive
L	Lost
N	No longer valid
P	Prospect
S1	Sourcing - Great
T	Target
W	Cash on Delivery
X	Deleted/Mistakenly entered

The contact status of "Active" should be given to individuals you are currently doing business with; this includes discussions on open order requests, invoice details and assignments. Within the contact avatar the green light icon  indicates the contact is currently active.

If a contact is no longer working with your organization and should not be visible on the customer record, select the "Inactive" status to deactivate their record. The contact avatar area will display a  icon to indicate this contact is deactivated. The contact will still appear in search results if a status of Inactive is chosen.

Note A message will automatically be logged on the contact record's visifile once they are deactivated.

In the event a contact has been added into the system in error, select the Deleted/Mistakenly entered status to ensure they do not populate in your Active search results.

Missy Smyth
Stanley Inc. (Human Resources), Director of HR
765 Circle Pines (523) 236-5562
Daisy, KY 41731 ID: 6329

No tasks to display for your current filter settings

tasks appointments social email

visifile

details

contact methods

documents

integrations

messages

tasks

search

employee

customer

order

assignment

contact

personal information

First Name Missy

Last Name Smyth

Title Director of HR

Nickname

Honorific

Birthdate

ID 6329 Employee

customer information

Customer Stanley Inc.

Customer Name Stanley Inc.

Department Name Human Resources

Address Primary
765 Circle Pines
Daisy, KY 41731

contact information

Street 765 Circle Pines

Street 2

City Daisy

State KY Zip 41731-____

Country United States of America

other information

Status X Deleted/Mistakenly entere

Rep lindsey.schneider Lindsey Schneider

Branch Memphis SE

Vendor N/A

How Heard of N/A

Details

If you are currently in process of earning a contact's business, you may need to run a credit check prior to working with them; designate this by selecting the "Hold for Credit Check" status. As the credit check is processing, you may keep track of progress by selecting the "Credit Check in Progress" status.

When new business is being developed, adding contacts in with a status of "Prospect" can be a helpful in being able to identify who should be connected with more frequently. If a contact is a key prospect worth extra attention, or has been chosen as a main focus, selecting "Target" will help to set them apart.

Statuses on the contact record are searchable, allowing users to narrow in to find contact information with ease.

Navigate to the contact (1.) search (2.) , enhance search (3.) , details (4.) , status (5.).

Last Name First Name Contact ID Status Customer ID Customer Branch Rep Name

All Statuses

All Reps

All Branche

Search

Clear Criteria

3. Enhance Search

4. Details

2. search

1. contact

Location

Messages

Document

Personal Call

Related Vendor Info

Custom Data

Date Created

Title

Department

Branch

How Heard Of

Customer Name

Birthdate

Contact Repname

Interest Code

Active 5.

Status

Show in Results

Like

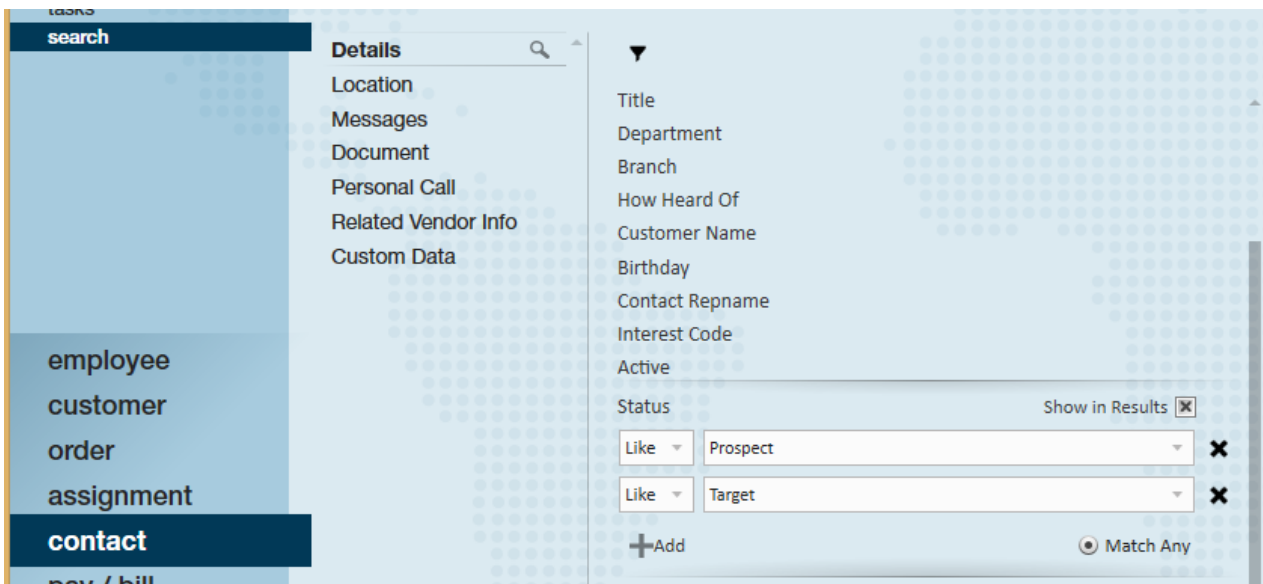
+Add

Email

Office Phone

Cell Phone

In the following example, we are looking for contacts who have a status of prospect OR target. Select the "Show in Results" option to add it in as a column within the search results.



Once results are returned, users may work off of the list accordingly.

Your search returned 10 results.

Drag a column header here to group by that column.

Conta...	Last Name	First Name	Customer...	Department	Title	Active	Office Phone	Branch	Status
762	Simpster	Jan	CA De Inc	depa Dept		<input checked="" type="checkbox"/>	(651) 129-5129	Memphis SE	T
1278	Sanders	Sam	Progr Inc	CC#PWF IP		<input checked="" type="checkbox"/>	(651) 354-5354	Memphis SE	T
3015	Kennedy	John	Best Buy	Primary		<input checked="" type="checkbox"/>		Memphis SE	P
6329	Smyth	Missy	Stanley Inc.	Human Reso...	Director of HR	<input checked="" type="checkbox"/>	(523) 236-5562	Memphis SE	P
6393	Stark	Anthony	Stark Co.	Primary	CEO	<input checked="" type="checkbox"/>		Memphis NE	P
8614	Brown	Sue	Ideal Incorp...	Clerical Dep...	Clerical Supervisor	<input checked="" type="checkbox"/>	(321) 465-5678	Memphis SE	P
8638	Bradberry	Gene	Aladdin Inco...	Corporate	Owner	<input checked="" type="checkbox"/>	(321) 345-3455	Memphis SE	P
8731	Warehouse	Willie	Colgate Inc.	Warehouse	Warehouse Super...	<input checked="" type="checkbox"/>	(321) 456-4566	Memphis SE	P
9008	Smith	Fredrick	PWR Manuf...	Corporate	Owner	<input checked="" type="checkbox"/>	(321) 345-3456	Memphis SE	P
8542	Smith	Eva	Best Buy	Primary		<input checked="" type="checkbox"/>		Memphis NE	P

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