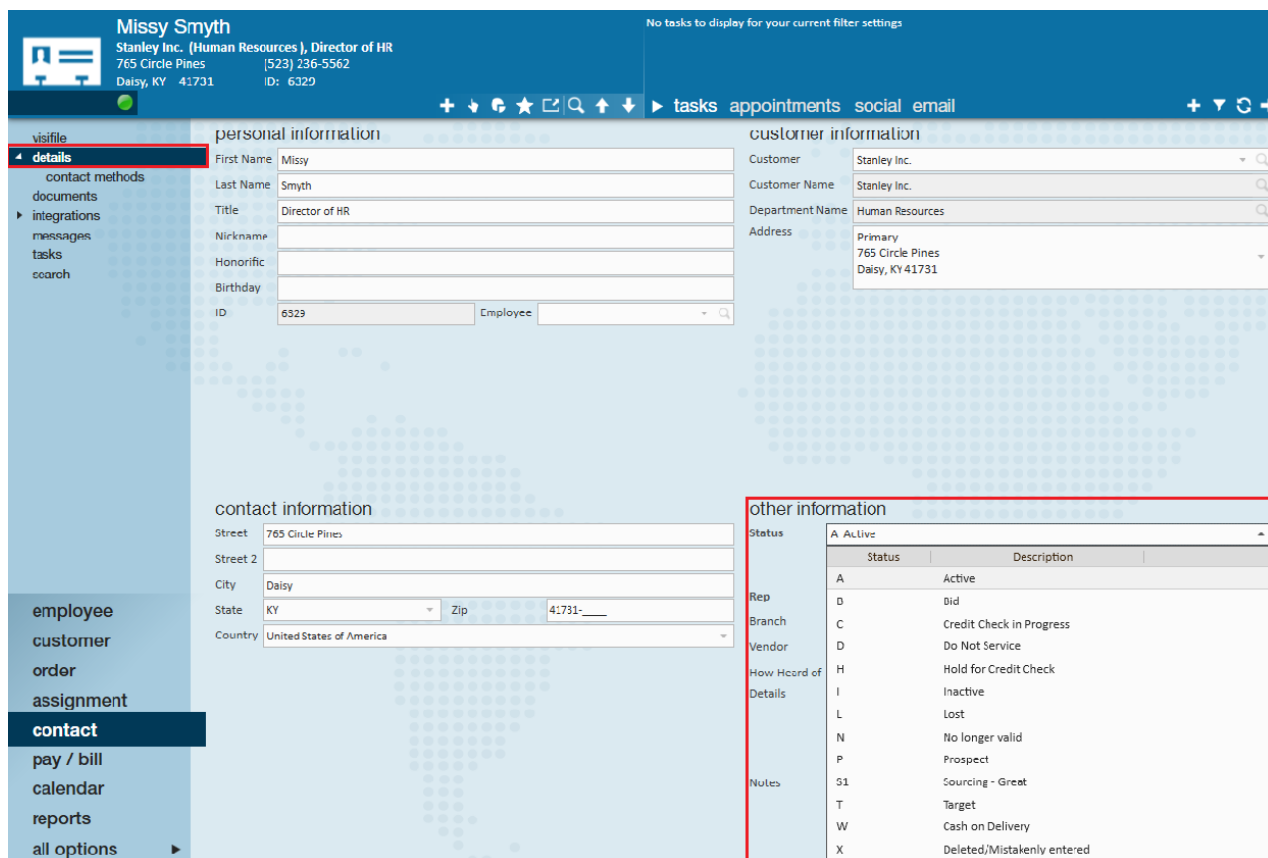



# Contact Statuses

Last Modified on 04/21/2020 8:47 am CDT


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:



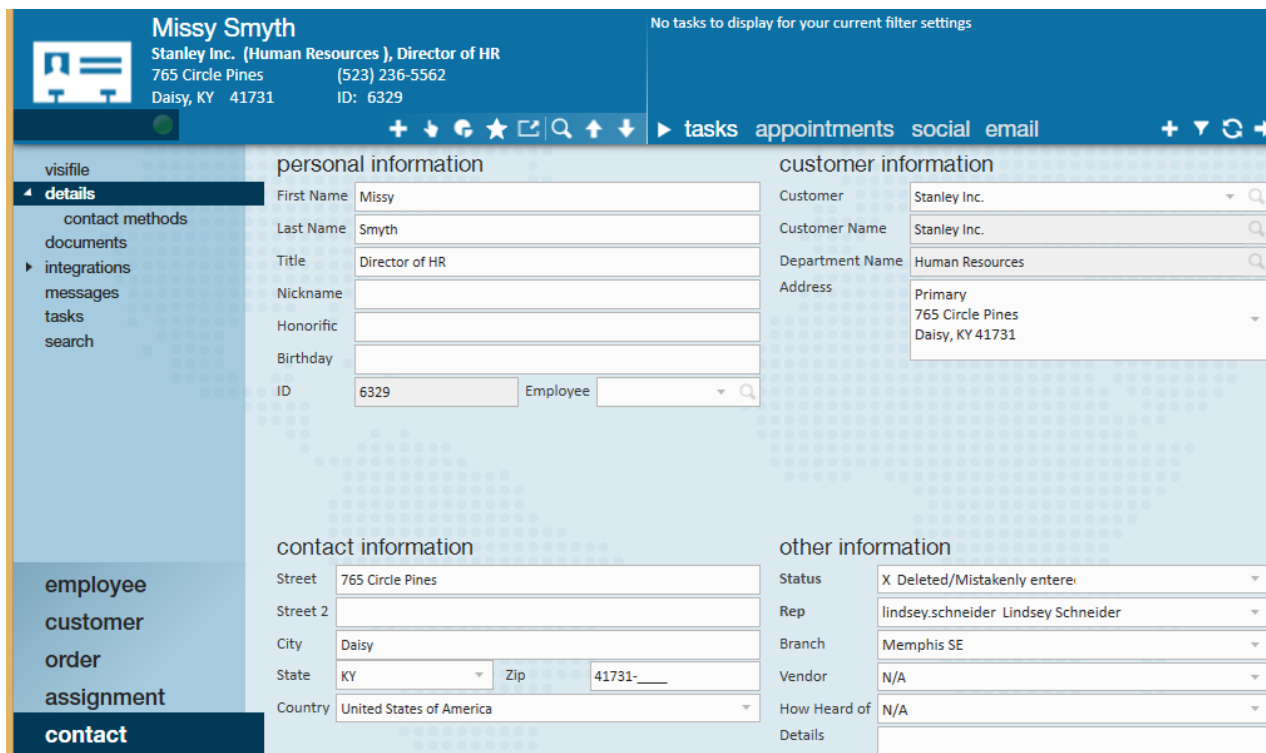
The contact status of "Active" should be given to individuals you are currently doing business with; this includes discussions on open order requests, invoice details and assignments. Within the contact avatar the green light icon  indicates the contact is currently active.

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.



The screenshot displays a CRM contact record for Missy Smyth, Director of HR at Stanley Inc. The record is organized into several sections:

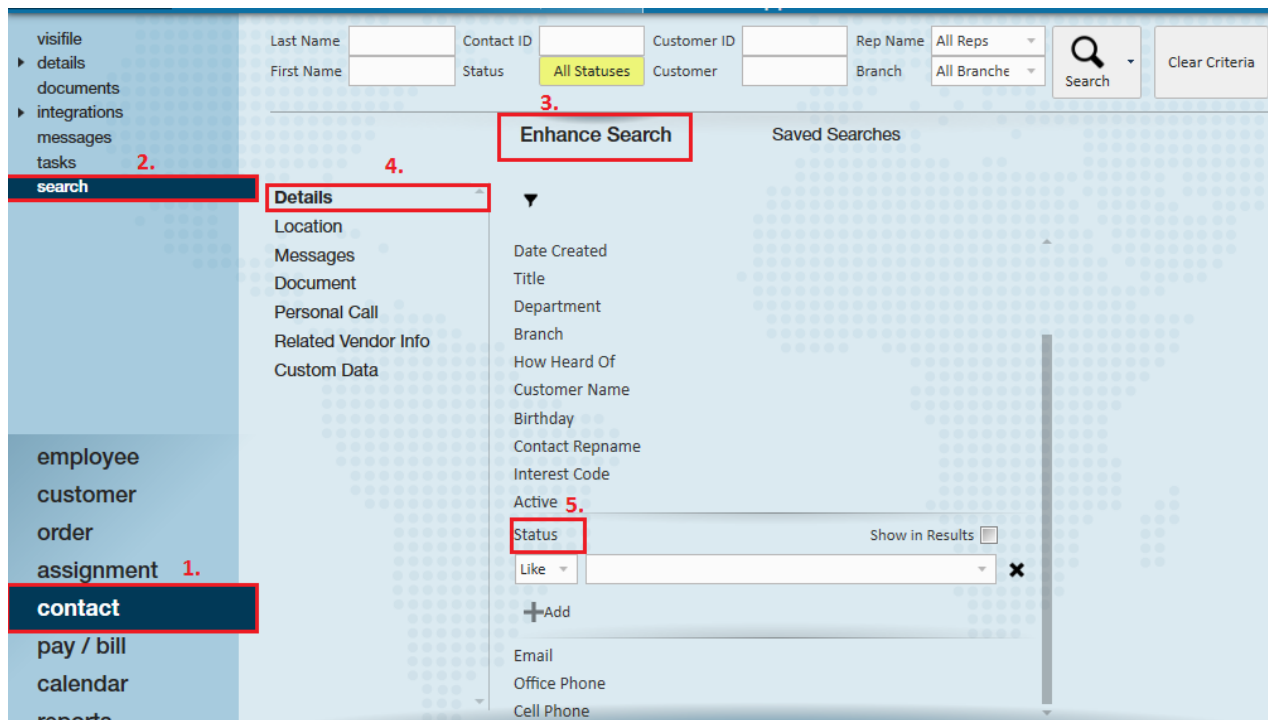
- Header:** Contact name (Missy Smyth), company (Stanley Inc.), title (Director of HR), address (765 Circle Pines, Daisy, KY 41731), and phone number ((523) 236-5562).
- Navigation:** tabs for tasks, appointments, social, and email.
- Left Sidebar:** visifile, details (selected), contact methods, documents, integrations, messages, tasks, search, employee, customer, order, assignment, and contact.
- Personal Information:** First Name (Missy), Last Name (Smyth), Title (Director of HR), Nickname, Honoric, Birthday, ID (6329), and Employee type (Employee).
- Customer Information:** Customer (Stanley Inc.), Customer Name (Stanley Inc.), Department Name (Human Resources), and Address (Primary, 765 Circle Pines, Daisy, KY 41731).
- Contact Information:** Street (765 Circle Pines), Street 2, City (Daisy), State (KY), Zip (41731-\_\_\_\_), and Country (United States of America).
- Other Information:** Status (X Deleted/Mistakenly entered), Rep (lindsey.schneider Lindsey Schneider), Branch (Memphis SE), Vendor (N/A), and How Heard of (N/A).

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.

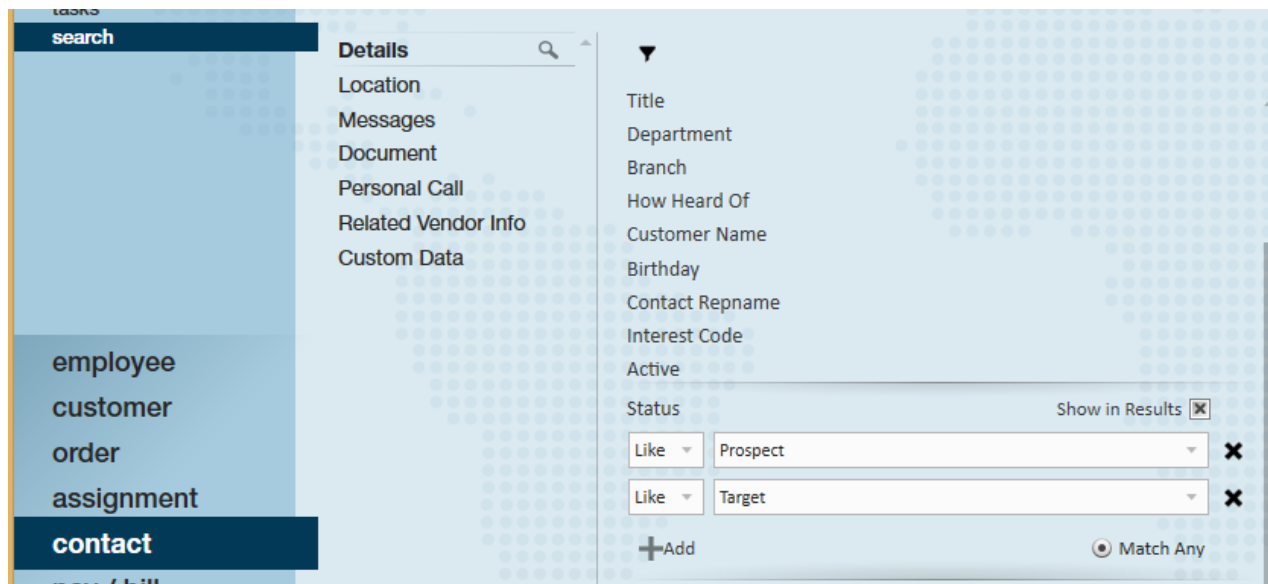
When new business is being developed, adding contacts in with a status of "Prospect" can be helpful in being able to identify who should be connected with more frequently. If a contact is a key prospect worth extra attention, or has been chosen as a main focus, selecting "Target" will help to set them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



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.

tasks  
search

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

employee  
customer  
order  
assignment  
contact

## Related Articles