Beyond - Managing Contact Interest Codes

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What are Interest Codes?

Within Beyond, you can use interest codes on a customer contact record to tag the contact with important information. This can be for sales purposes, industry info, the types of roles they staff, or anything else you may need to track.

Note The list of interest codes available in your system is customizable by your admin. Check out Enterprise - Creating Interest Codes for more information.
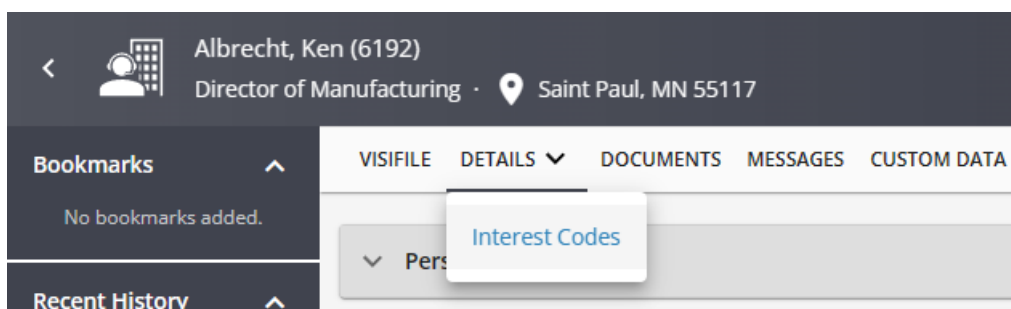
1. Managing Interest Codes
2. Deleting Interest Codes
3. Searching based on Interest Codes

Managing Interest Codes

Interest codes for contacts can be found by navigating to the Details tab > Interest Code Card:
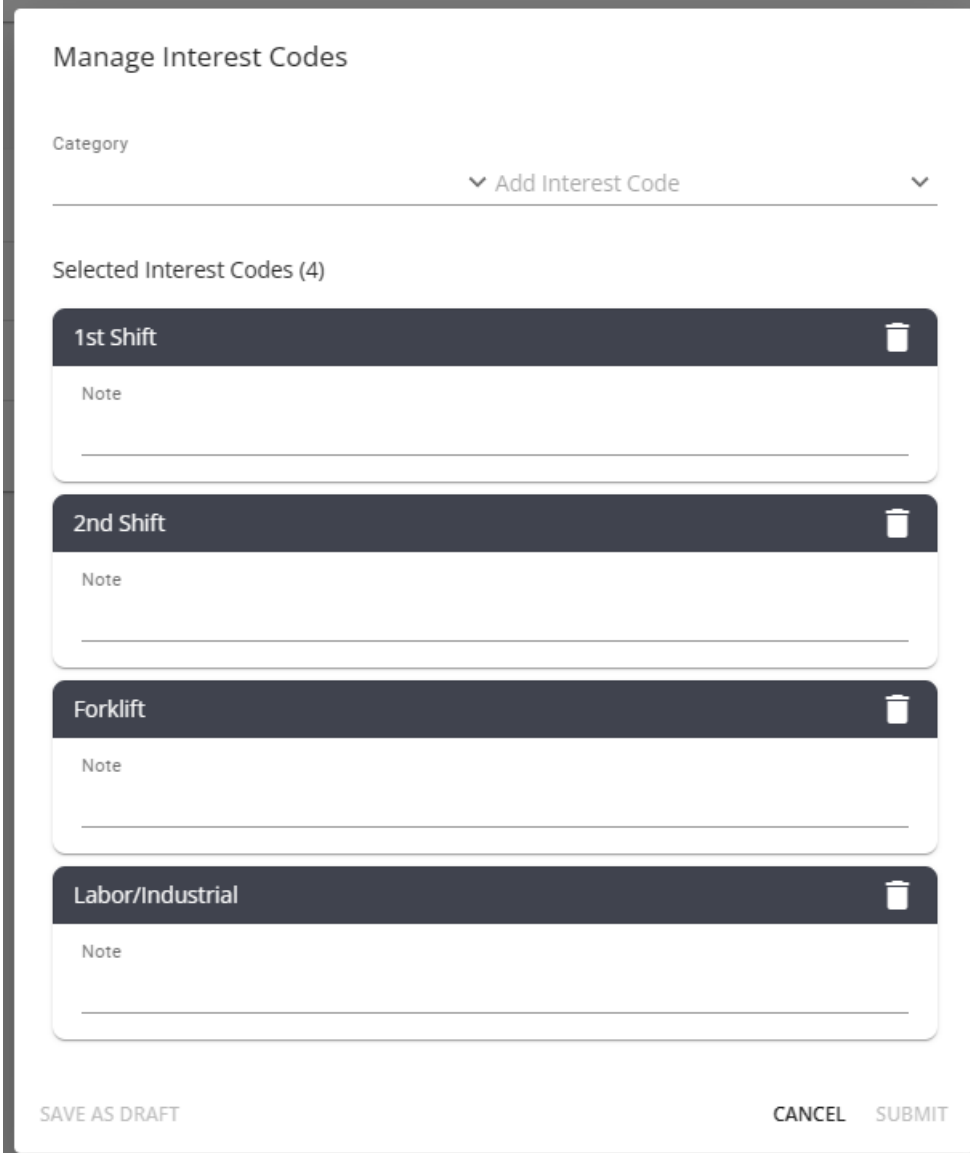

Or by selecting the arrow next to Details and choosing Interest Codes:

In either location, select the to add or edit interest codes en mass.

This will open the 'Manage Interest Code' window.

Use the drop down to scroll through the list or begin typing the skill you wish to tag your Contact with:

When editing or adding an interest code you can also add a note with any additional information
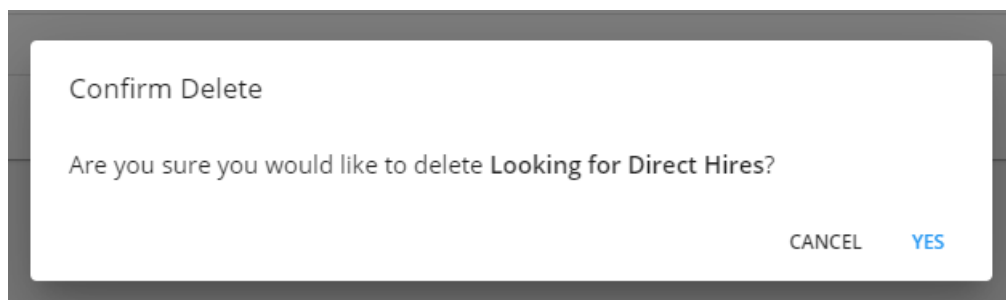

Deleting Interest Codes

If you want to delete an interest code that is no longer applicable to a contact, select the ⋮ to access additional

options for the interest code.

Choose the 'Delete' button to delete the individual interest code.

Users will be asked to confirm that they would like to delete the selected code, select YES to confirm the deletion:

You can also delete when you are in the managing interest codes window by selecting the trach can icon next to the interest code you want to remove:
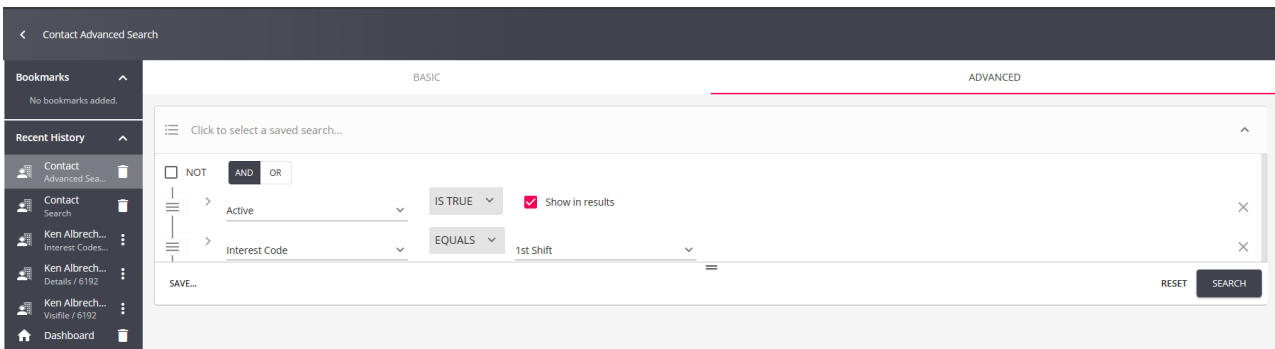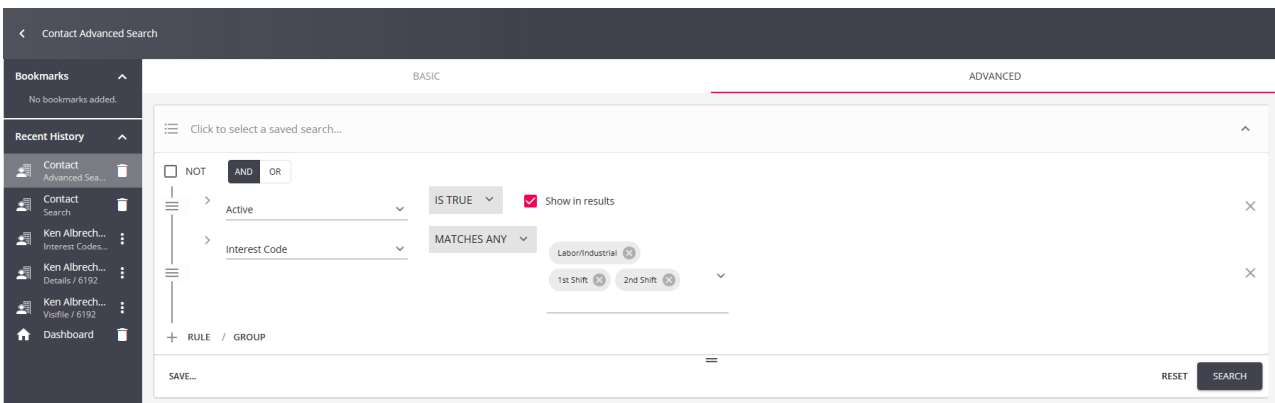
Searching Interest Codes

Once you have started using interest codes, you can create powerful contact searches including them.

Navigate to a contact search and select the advanced tab. From here add a rule for interest codes.

New to searching in Beyond? Check out Beyond - Advanced Searching.

You can also set the rule to matches any to include multiple interest codes in your search:

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