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:

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Bookmarks 🔨	VISIFILE DETAILS V DOCUMENTS MESSAGES CUSTOM DATA							
No bookmarks added.	V Personal						•	
Ken Albrech	✓ Address						•	
Details / 6192	∧ Interest Codes						•	
Ken Albrech	1st Shift						:	
Learch Contact	2nd Shift						:	
🏫 Dashboard	Forklift						:	
	Labor/Industrial						:	
	✓ Customer Information						•	
	✓ Other Information							

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

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Bookmarks	^	VISIFILE	DETAILS 🗸	DOCUMENTS	MESSAGES	CUSTOM DATA
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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:

Manage Interest Codes		
Category	✓ Add Interest Code	~
Selected Interest Codes (4)	- Add interest code	
1st Shift	Î	
Note		
2nd Shift		
Note	_	
Forklift	Î	
Labor/Industrial	Î	
Note		
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When editing or adding an interest code you can also add a note with any additional information

1st Shift	Ē
Note	
Preferred	

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If you want to delete an interest code that is no longer applicable to a contact, select the 🔹 to access additional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

VISIFILE DETAILS V DOCUMENTS MESSAGES CUSTOM DATA	
Interest Codes (5)	0
1st Shift Preferred	:
2nd Shift	:
Contract Labor	🗨 Edit
Forklift	Delete
Labor/Industrial	:

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:

Manage Interest Codes	
Category 🗸 Add Interest Code	~
Selected Interest Codes (5)	
1st Shift	Î
Note Preferred	
2nd Shift	î î
Note	
Contract Labor	Î
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Forklift	Î
Note	
Labor/Industrial	
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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.

 Contact Advanced Search 	ch	
Bookmarks 🔨	BASIC ADVANCED	
No bookmarks added.		
Recent History	E Click to select a saved search	^
Advanced Sea	NOT AND OR	
Contact Search	Active VICE Show in results	×
Ken Albrech : Interest Codes	EQUALS V Interest Code V EQUALS V	×
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🏫 Dashboard		

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:

 Contact Advanced Sear 	ch	
Bookmarks 🔨	BASIC	ADVANCED
No bookmarks added. Recent History	E Click to select a saved search	^
Contact Advanced Sea a Contact Search	NOT AND OR Active IS TRUE ✓ ✓ Show in results	×
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	SAVE	RESET SEARCH

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