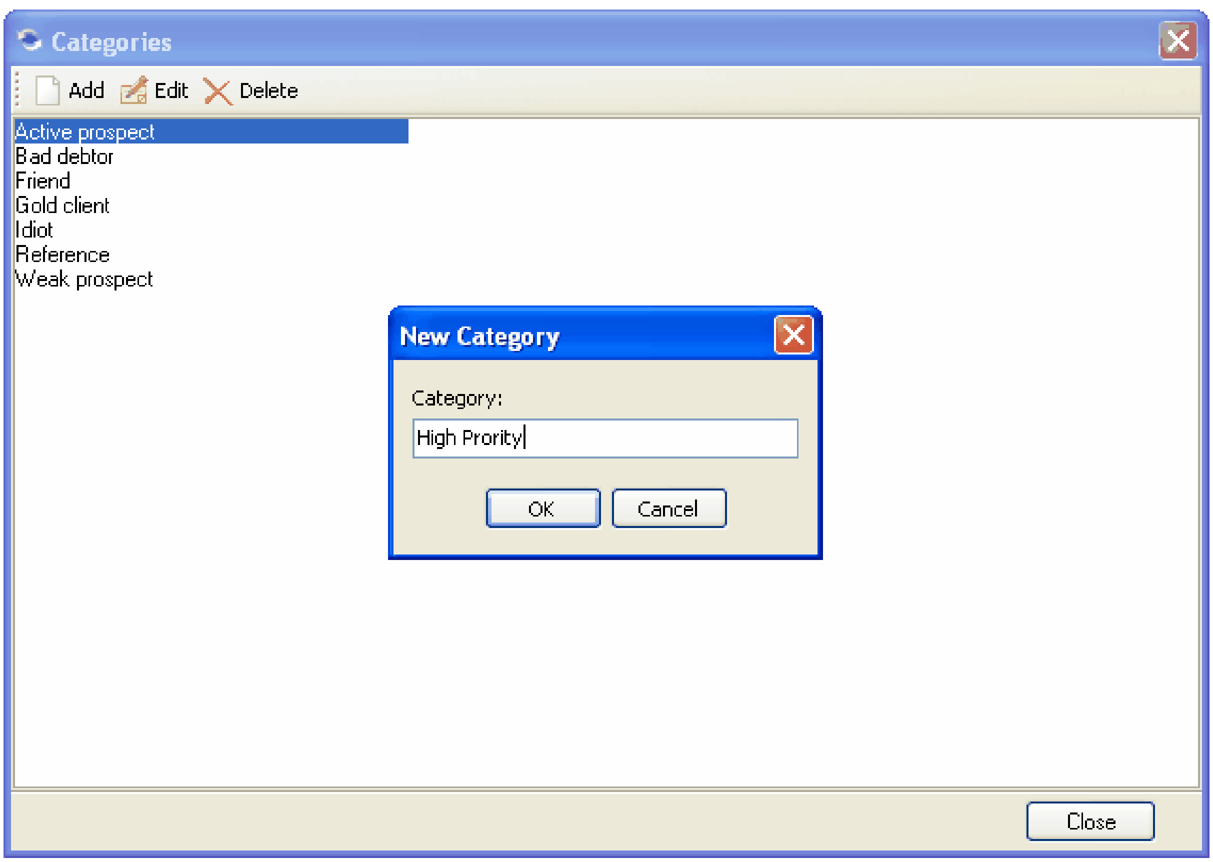
Categories

The categor es funct on allows you to ass gn any of your contacts or accounts to spec f c, pre-def ned categor es. The categor es you set up w ll be spec f c to your own organ sat on, and you can def ne as many categor es as your bus ness requ res. Accounts and contacts can be ass gned to more than one category. For example, accounts may be categor sed as H gh Pr or ty, Local Account, Overseas Account or New Account. Contacts m ght have categor es l ke Fr end, Plays Golf or Act ve Prospect.

Sett n Cate or es

To set up a new category:

- Cl ck on Setup at the top of the ma n Fort CRM screen.
- Select Categor es. (Th s opt on s only ava lable f the user has been ass gned the appropr ate perm ss ons). The Categor es set up screen conta n ng a l st of any ex st ng categor es w ll be d splayed.
- To create a new category, cl ck the 'Add' button.

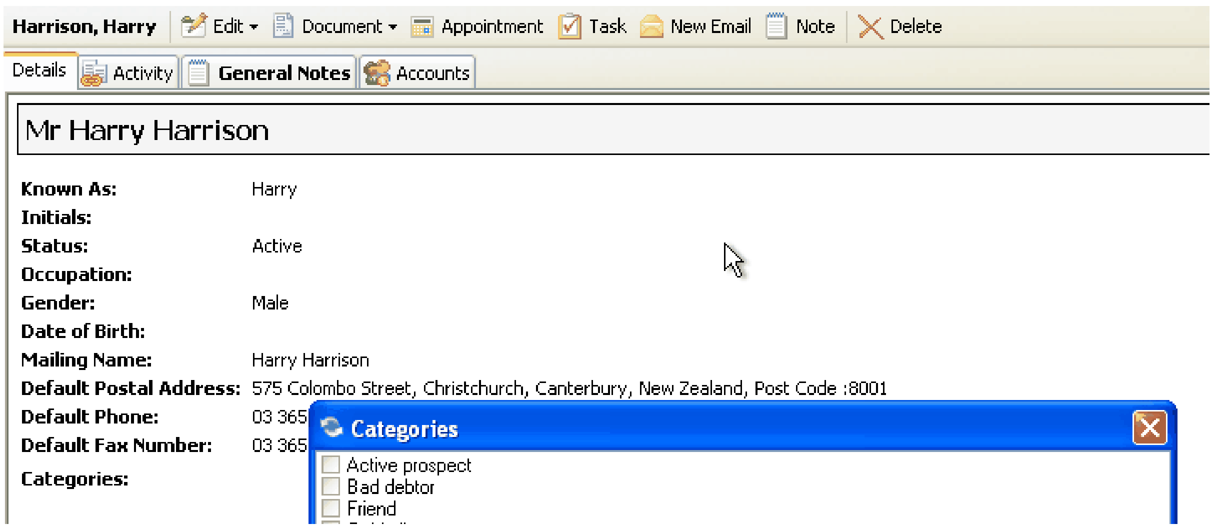


- Enter a descr pt on for the new category and cl ck Ok.

Ass n n Cate or es

To assign categories to existing contacts and accounts:

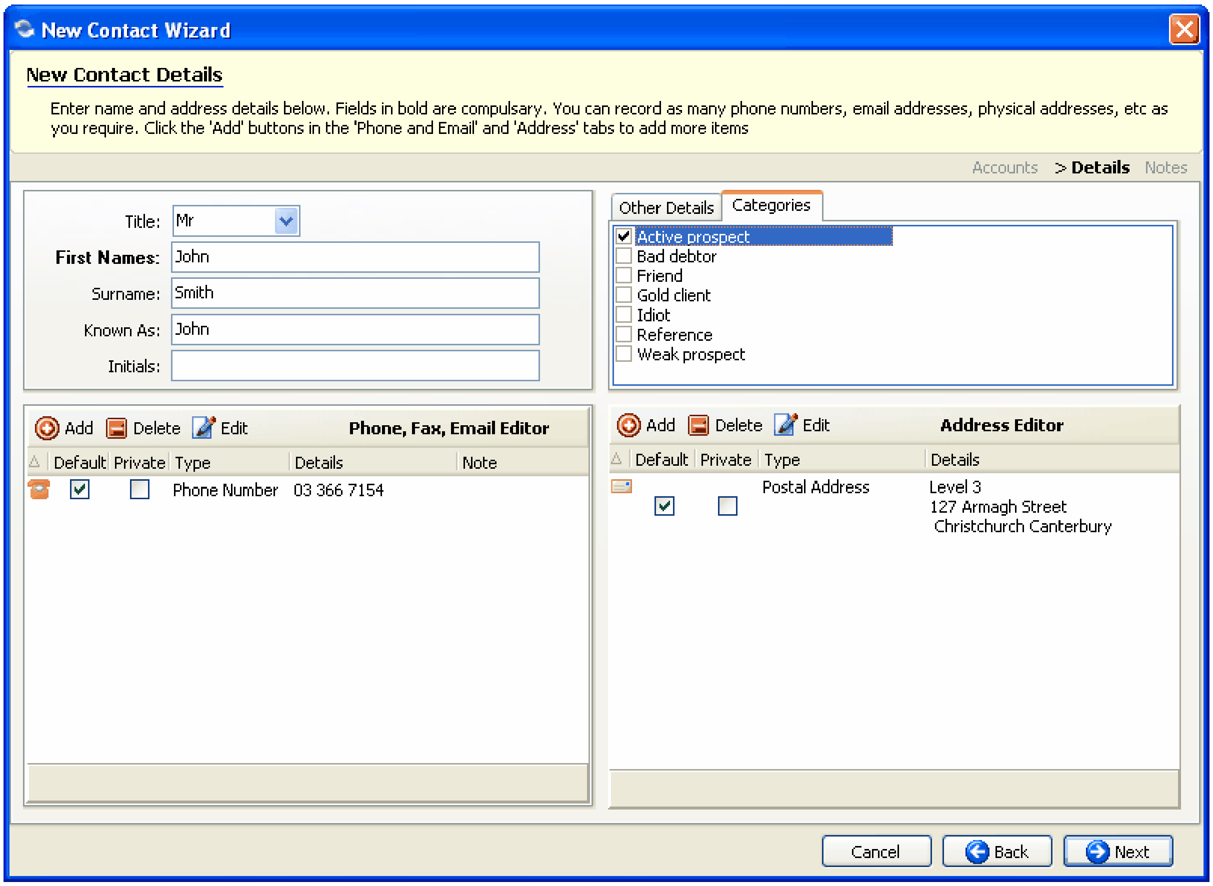
- Select an account or contact n the treev ew on the left of the screen. Account or contact deta ls w ll be d splayed n the r ght hand pane.
- Cl ck on the Categor es f eld.



- Select the requ red categor es for th s account or contact by t ck ng the boxes bes de the appropr ate opt ons.
- Cl ck Ok.
- The selected categor es w ll be shown on the deta ls screen.

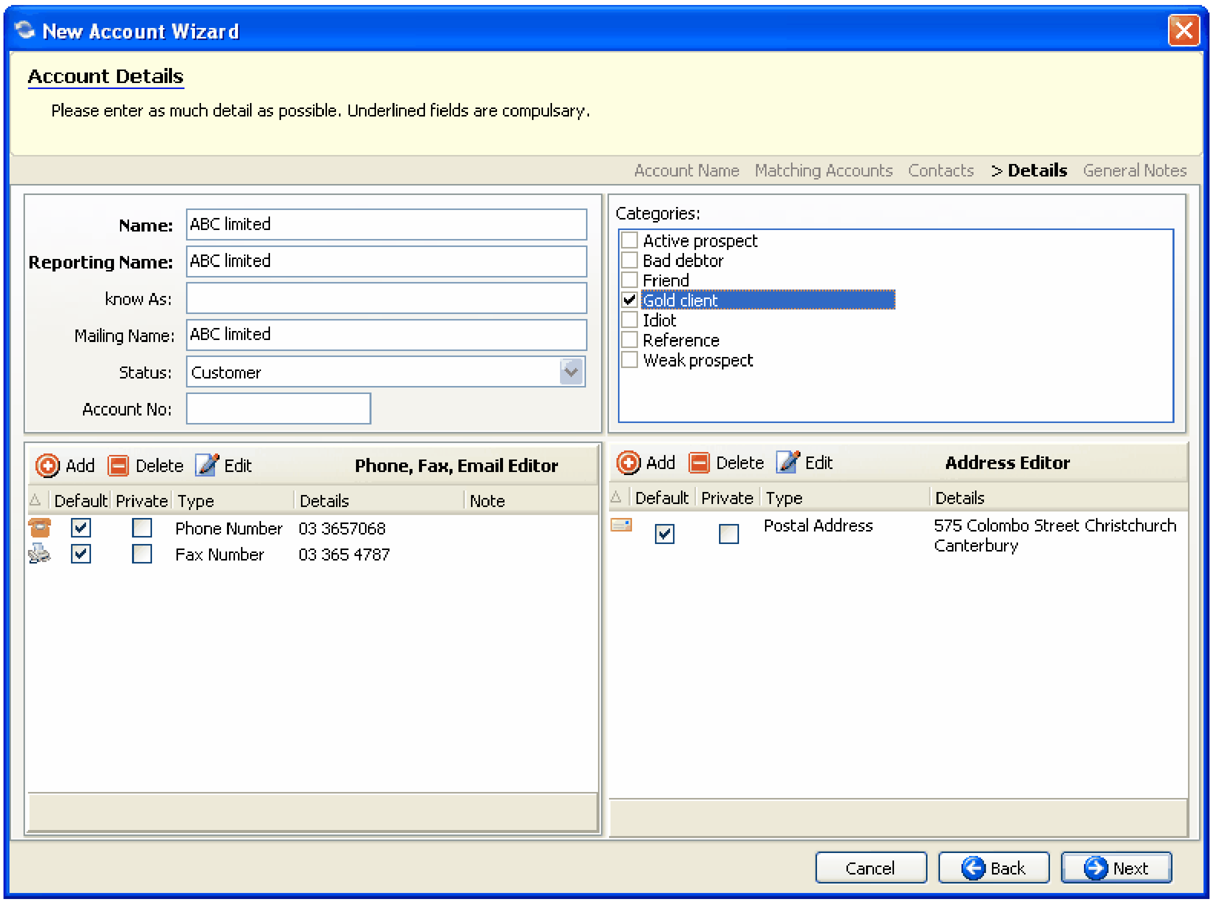
To assign categories when creating a new contact:

- In the New Contact w ard, cl ck on the Categor es tab on the New Contact Deta ls screen.
- Select the requ red categor es for the contact by t ck ng the boxes bes de the appropr ate opt ons.



To assign categories when creating a new account:

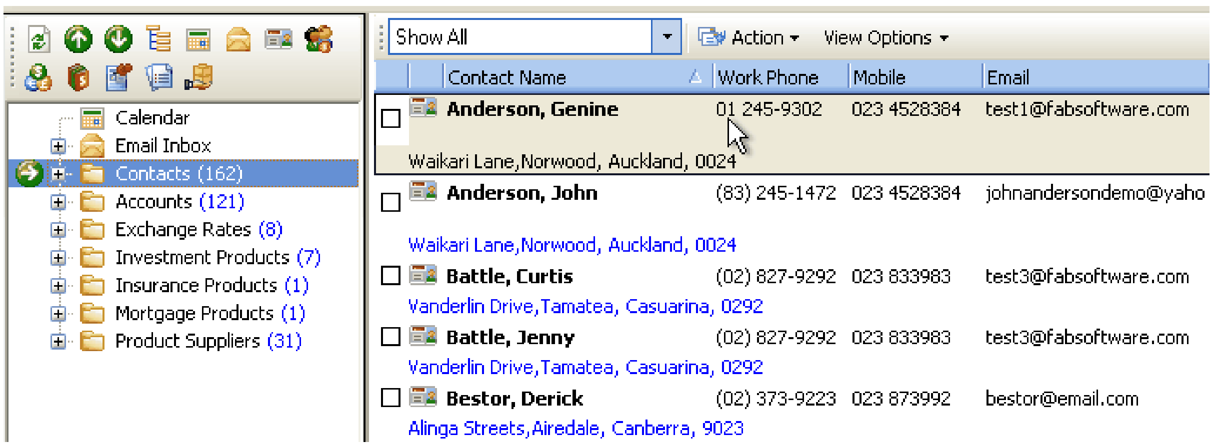
- Select the requ red categor es for the account by t ck ng the boxes bes de the appropr ate opt ons on the Account Deta ls screen n the New Account w ard.



F ter n on Cate ory

When accounts or contacts have been ass gned to categor es, a f lter can be appl ed to select the contacts or accounts n spec f ed categor es. To apply a f lter, the appropr ate f lter must f rst be set up by a h gh-level user.

At the top of the account or contact gr d s a drop down box conta n ng a l st of ava lable f lters. When no f lter s selected, 'Show All' s d splayed n the f lter l st.



To filter on category:

- Cl ck on the blue arrow to the r ght of the f lter l st. A l st of ava lable f lters w ll be d splayed.
- Cl ck on the requ red category f lter.
- Enter the selected category, and cl ck Ok.
- The gr d w ll show only those contacts or accounts n the selected category.
- It s poss ble to f lter on more than one category. Th s w ll l m t the select on to contacts or accounts that are n both (or all) categor es. For example, you could f lter on 'Act ve Prospect' and 'Plays golf' categor es to nv te potent al cl ents for a game of golf.
- Act ons can be then be taken for the selected group. Cl ck on 'Act on' and then 'Select All' to select all contacts or accounts l sted. An ema l, appo ntment, task, document or note can be generated for the group by cl ck ng 'Act on' aga n and select ng the requ red act on.