

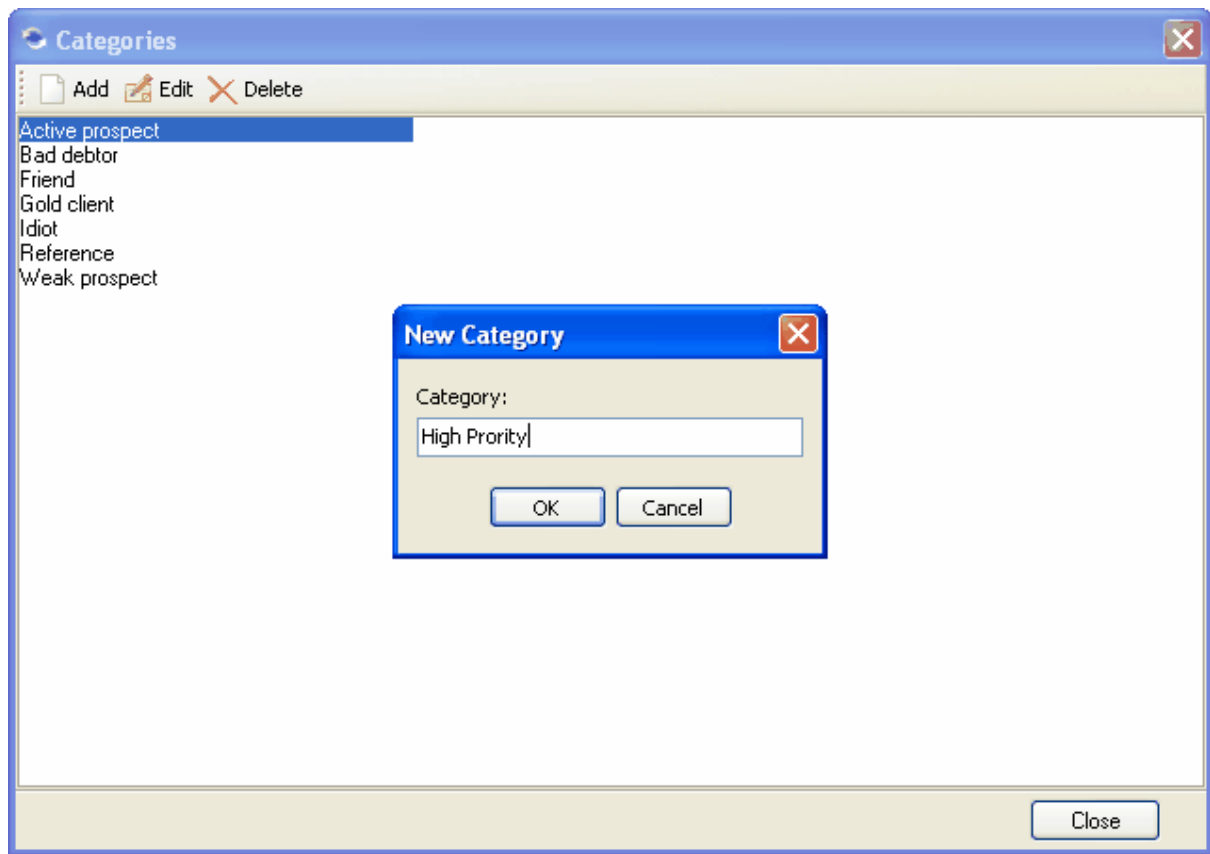
## Categories

The categories function allows you to assign any of your contacts or accounts to specific, pre-defined categories. The categories you set up will be specific to your own organisation, and you can define as many categories as your business requires. Accounts and contacts can be assigned to more than one category. For example, accounts may be categorised as High Priority, Local Account, Overseas Account or New Account. Contacts might have categories like Friend, Plays Golf or Active Prospect.

### Setting Categories

#### To set up a new category:

- Click on Setup at the top of the main Forté CRM screen.
- Select Categories. (This option is only available if the user has been assigned the appropriate permissions). The Categories set up screen containing a list of any existing categories will be displayed.
- To create a new category, click the 'Add' button.

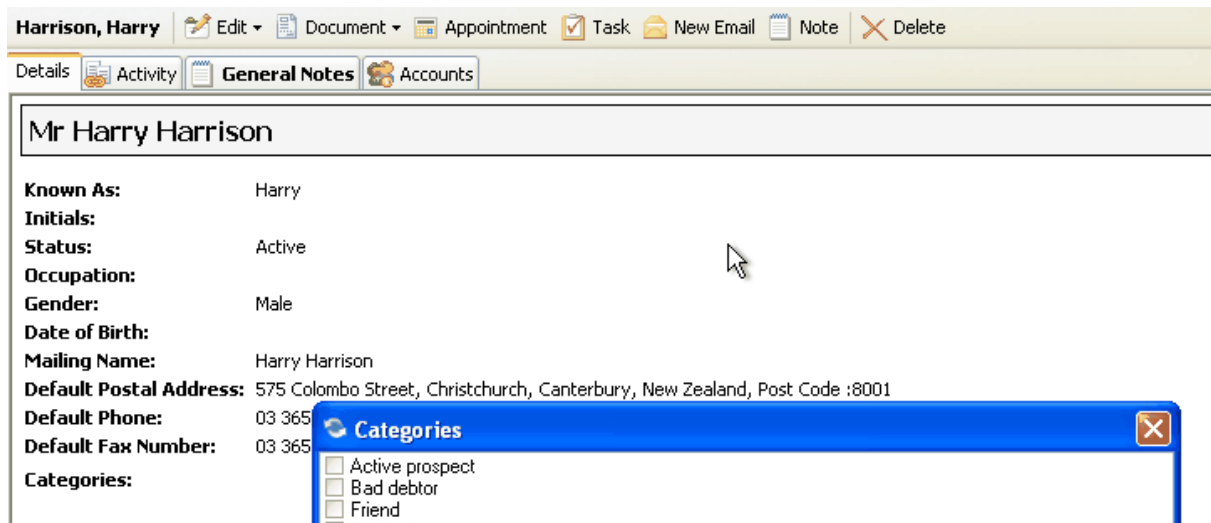


- Enter a description for the new category and click Ok.

## Assign Categories

### To assign categories to existing contacts and accounts:

- Select an account or contact in the tree view on the left of the screen. Account or contact details will be displayed in the right hand pane.
- Click on the Categories field.



- Select the required categories for this account or contact by ticking the boxes beside the appropriate options.
- Click Ok.
- The selected categories will be shown on the details screen.

**To assign categories when creating a new contact:**

- In the New Contact wizard, click on the Categories tab on the New Contact Details screen.
- Select the required categories for the contact by ticking the boxes beside the appropriate options.

**New Contact Wizard**

**New Contact Details**

Enter name and address details below. Fields in bold are compulsory. You can record as many phone numbers, email addresses, physical addresses, etc as you require. Click the 'Add' buttons in the 'Phone and Email' and 'Address' tabs to add more items

Accounts > **Details** Notes

**Other Details** **Categories**

- Active prospect
- Bad debtor
- Friend
- Gold client
- Idiot
- Reference
- Weak prospect

**Phone, Fax, Email Editor**

Default	Private	Type	Details	Note
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phone Number	03 366 7154	

**Address Editor**

Default	Private	Type	Details
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Postal Address	Level 3 127 Armagh Street Christchurch Canterbury

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**To assign categories when creating a new account:**

- Select the required categories for the account by ticking the boxes beside the appropriate options on the Account Details screen in the New Account wizard.

**New Account Wizard**

**Account Details**

Please enter as much detail as possible. Underlined fields are compulsory.

Account Name Matching Accounts Contacts > **Details** General Notes

**Name:** ABC limited

**Reporting Name:** ABC limited

know As: \_\_\_\_\_

**Mailing Name:** ABC limited

**Status:** Customer

Account No: \_\_\_\_\_

**Categories:**

- Active prospect
- Bad debtor
- Friend
- Gold client**
- Idiot
- Reference
- Weak prospect

**Phone, Fax, Email Editor**

Default	Private	Type	Details	Note
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phone Number	03 3657068	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fax Number	03 365 4787	

**Address Editor**

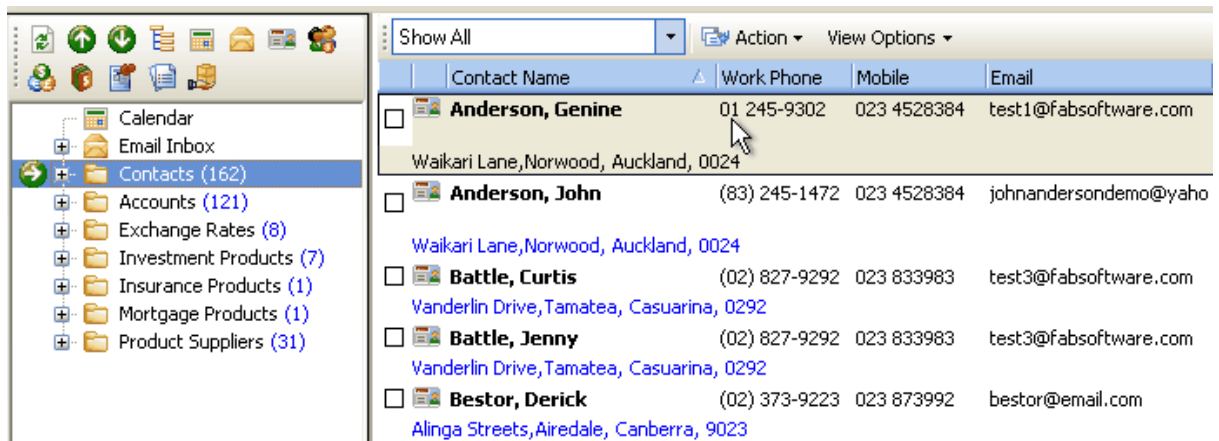
Default	Private	Type	Details
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Postal Address	575 Colombo Street Christchurch Canterbury

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## Filter on Category

When accounts or contacts have been assigned to categories, a filter can be applied to select the contacts or accounts in specified categories. To apply a filter, the appropriate filter must first be set up by a high-level user.

At the top of the account or contact grids a drop down box containing a list of available filters. When no filter is selected, 'Show All' is displayed in the filter list.



### To filter on category:

- Click on the blue arrow to the right of the filter list. A list of available filters will be displayed.
- Click on the required category filter.
- Enter the selected category, and click Ok.
- The grid will show only those contacts or accounts in the selected category.
- It is possible to filter on more than one category. This will limit the selection to contacts or accounts that are in both (or all) categories. For example, you could filter on 'Active Prospect' and 'Plays golf' categories to invite potential clients for a game of golf.
- Actions can then be taken for the selected group. Click on 'Act on' and then 'Select All' to select all contacts or accounts listed. An email, appointment, task, document or note can be generated for the group by clicking 'Act on' again and selecting the required action.