

CITK

Contact Type



Contact Type Print

Contact Types are like categories, labels, or groups you allocate to your contacts for easier and more useful segregation. They can be customized to suit your business needs.

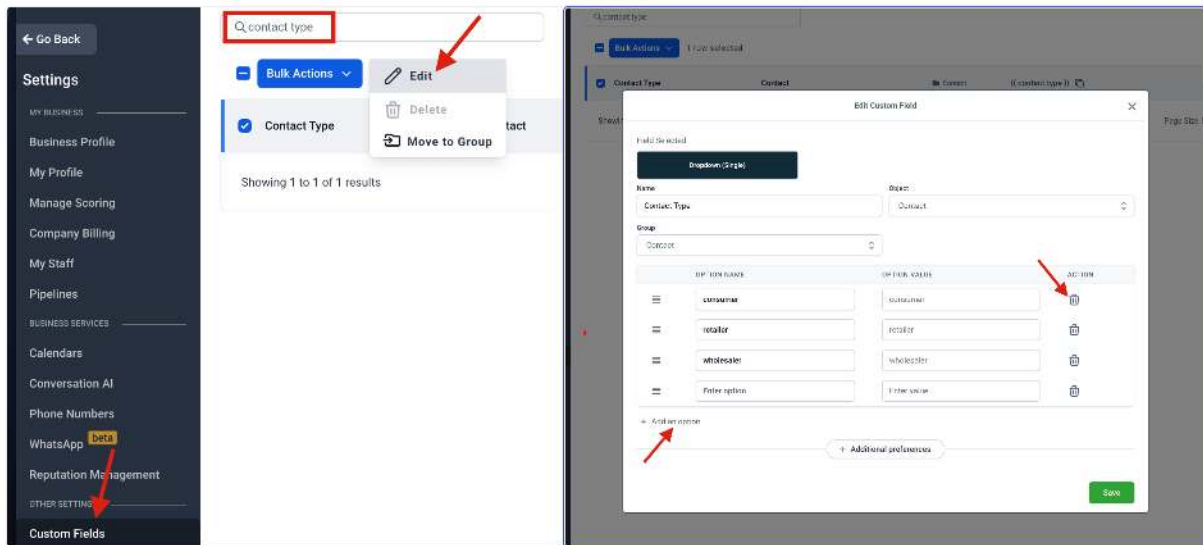
Contact can have only one Type at a time

- When creating a new contact, Contact type is a mandatory field with a dropdown to choose from the existing types.
- For an existing contact, the Contact Type can be updated on the contact details page
- Contact type can be assigned from the "Update Contact" action in Workflows.

The image displays two screenshots of a CRM interface. The left screenshot shows the 'Create Contact' form, and the right screenshot shows the 'Edit Contact' form. Both forms have a red box highlighting the 'Contact Type' dropdown menu, which is open and showing the following options: Lead, Customer, and Lead. The forms also include fields for First Name, Last Name, Email, Phone, Date of Birth, and Contact Source. The right screenshot shows a list of contacts with a red box highlighting the 'Contact Type' dropdown menu for a specific contact, which is also open and showing the same options.

Adding, renaming, or deleting Contact Types

Navigate to Settings > Custom Fields and search for "Contact Type" and click "Edit"



Filtering based on Contact Type

Use the "Type" filter in Smartlist filter to effectively create and save different filter views for different contact types.

