CITK

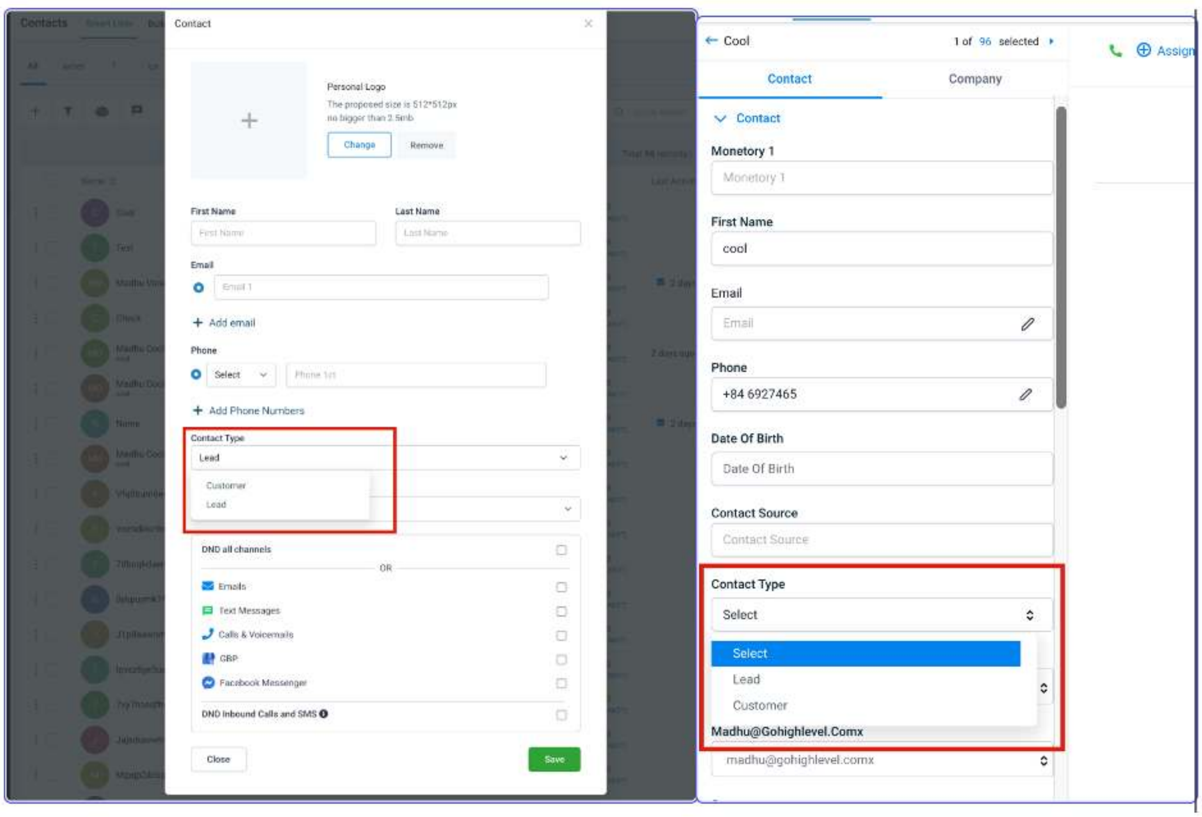
Contact Type

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.

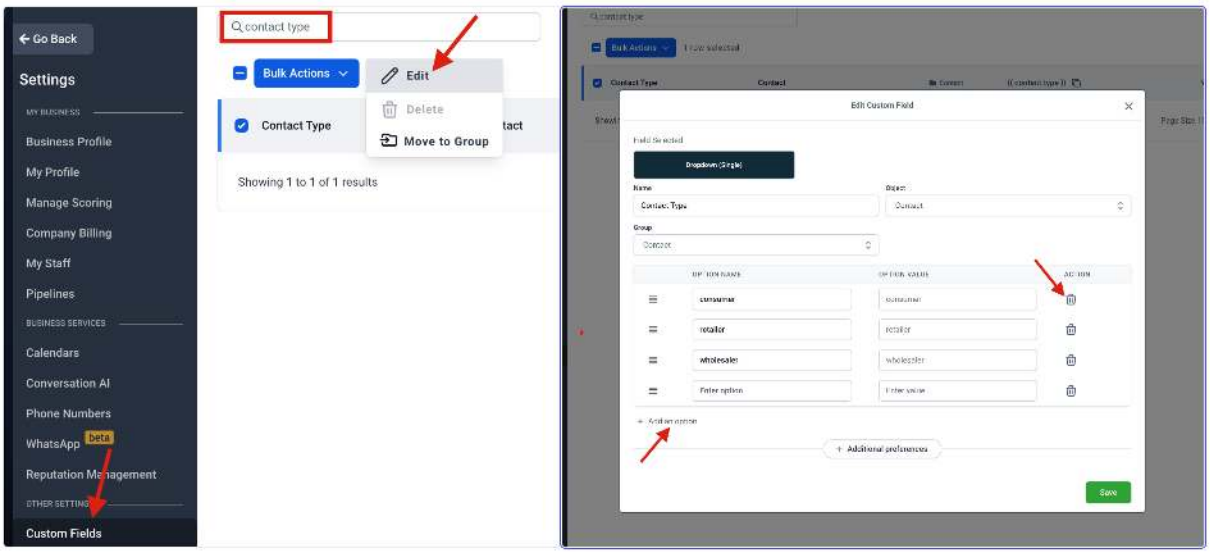
Contact can have only one Type at a time

- 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.



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.