



Custom Contact Categories



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What are Custom Categories?

Custom categories of contacts that are created by the agent or broker to keep track of where their contacts originated from.

You can create categories for prospects that you've imported through social media, contacts that were generated at open houses or other events, and allows for ease of reporting when needed at later dates.

Why Should I Use Custom Categories?

The main reason? for the long haul.

Power Suite offers an EXTENSIVE CRM system and the custom categories plays into how your contacts can be used in the various Applications found within Power Suite. For example, when sending out an email blast to all of your active buyers about a new listing on the market, or see how many buyer lead were generated from your website (or any other website) in a specific time period.

How Can I Customize My Contact Categories?

Power Suite comes with 15 Contact Categories by default to choose from. Contacts can be assigned to a single category or to multiple categories at once. Each default category name can be re-named.

Custom Contact Categories

Manage Contact Categories

Use Categories to sort your Contacts to make it easier to search and target your marketing efforts.

Below is a list of Contact Categories we have started you off with. We have provided a way for you to add your own custom categories that best suite yc business needs.

Attorney			Broker/Realtor			Buyer		
Buyer/Seller			Closing Agent			Employee		
Home Inspector			Internal User			Landlord		
Lender			Other			Seller		
Tenant			Title Agent			Unknown		

Add New Contact Category
(30 Character Limit)

Save

Leads & Contacts

Easily follow up on new leads, keep track of your contacts, identify buyer preferences and match them with listings.

You have the option of creating your own Categories for even more options.

First, go to the **Setup** section of the Leads and Contacts application in Power Suite dashboard and scroll down to the "Manage Contact Categories".

You can add a new category by entering it in the "Add New

Contact Manager

Buyer Profiles

Prospects

Tasks

Partners

Add New Contact Category
(30 Character Limit)

Save

Contact Category" box and clicking save.

Setup

Advanced Settings



Custom Contact Categories

In this example, I have added the categories Latest Listings and Latest News for easy contact sorting when I want to send out a mass email for those specific clients. You can see here how they show up within my contacts:

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Home Inspector			Internal User			Landlord		
Latest Listings			Latest News			Lender		
Other			Seller			Tenant		
Title Agent			Unknown			Zillow Contacts		

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For a better example on using custom categories within the Dashboard, please see Article: **Custom Categories & Emails.**