

Assigning a Category to a Contact

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Applies To: PoliteMail Desktop PoliteMail Online PoliteMail O365

Version: 4.94 4.97 5.0+

My Profile Preferences Personal Access Tokens Reporting Admin Users Groups **Categories** Custom Fields

You can organize your contacts outside of mailing lists using categories. Categories are assigned manually to individual contacts, or when selecting or importing a list or group of contacts.

Select the categories you want to use, and change the labels as necessary to create your own categories.

Categories

- None
- Prospect
- Lead
- Customer
- Employee
- Personal/Friend

Extended Categories

- Professional Service
- Reseller
- Key Customer
- Business Partner
- Agent
- Vendor

Save

PoliteMail gives you the option to assign a Category to your contacts. You can either assign a Category when you import a mailing list, or edit it from the Contacts tab.

Categories are accessed by going to **PoliteMail > Settings > Categories**. You can edit the Category names, and place check boxes next to the categories you want to use. Click **Save** when you are finished.

When you import a mailing list, you'll be presented with a dialogue window to help define the parameters of your list. From this window, you'll see a Contact Category pull-down menu. Leaving it blank will assign the default "None" to the category column. Or, you can choose a Category from the pull-down menu. You also have the option to overwrite or change any category setting for existing contacts.

How to Change the Category in the Grid view

Category	Name	Action
Customer	Tom E.	Update Cancel

To access Contacts in the data grid view, navigate to **PoliteMail > Lists > Contacts**. If you have not assigned a category to a Contact, it will be set to "None." To change the Category, click on the **Edit** button on the far right-hand side of the row. Now use the pull-down menu to see the Category options and choose one. Click **Update** when you are finished.

Assigning a Category to a contact allows you to have a quick glance at the relationship you have with that contact. You can also search contacts in PoliteMail version 4.91+. Using the pull-down menu at the top of the Column, choose **Filter** and then enter in the Category value from the pull-down menu of options.