

# Assigning a Category to a Contact

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Applies To: ☒ PoliteMail Desktop ☐ PoliteMail Online ☐ PoliteMail M365

Version: ☒ 4.94 ☒ 4.97 ☐ 5.0+

The screenshot shows the 'Categories' tab in the PoliteMail settings. It contains two sections: 'Categories' and 'Extended Categories'. In the 'Categories' section, there are checkboxes for 'None', 'Prospect', 'Lead', 'Customer', 'Employee', and 'Personal/Friend', all of which are checked. In the 'Extended Categories' section, there are checkboxes for 'Professional Service', 'Reseller', 'Key Customer', 'Business Partner', 'Agent', and 'Vendor', with 'Agent' and 'Vendor' checked. A 'Save' button is located at the bottom left of the form.

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

The screenshot shows a data grid with columns for 'Category' and 'Manager'. The 'Category' column has a pull-down menu open, showing options: 'Customer', 'Prospect', 'Personal/Friend', 'Competitor', 'None', and 'Intercompany'. The 'Manager' column shows 'Tom E.'. To the right of the grid, there are 'Update' and 'Cancel' buttons. A red arrow points from the 'Customer' option in the pull-down menu to the 'Update' button.

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.