Managing contact data

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Contents

OVERVIEW

This document provides best practices for using custom fields, user fields, categories, campaigns, and notes.

SUMMARY OF BEST PRACTICES

The following table summarizes best practices for using custom fields, user fields, categories, campaigns, and notes, which are outlined later in the document. This information is intended to guide organizations who may be deciding how to store specific information.

Data capture option	Best used for
Custom fields	Storing structured contact data that is used for a limited number of contacts. You can store data in text, number, currency, convertible currency, date, and relationship custom fields. Filtering, searching, and reporting at runtime.
User fields	Storing unstructured contact data. User fields are not supported for search or reporting purposes.
Categories	Searching and grouping contacts based on labels such as Avid Golfer.
Campaigns	Managing bulk email lists, tracking responses from contacts, managing and sending invitations to events, and tracking lead stages for targeted marketing campaigns.
Notes	Storing large amounts of unstructured data or for record keeping purposes

CUSTOM FIELDS

A *custom field* is a user-defined field that stores information not otherwise provided in a contact profile. Custom fields display in tabs for contacts on the **Contacts** workspace.

You can add text, number, currency, convertible currency, date, and relationship custom fields. For example, you can add a custom date field that only accepts date values.

A *custom field group* enables you to group related custom fields together. A custom field group defines the following in NexJ CRM:

- The types of contacts that you can add the custom field to. For example, a custom field group can make a custom field available to only company contacts.
- The tab name that displays on a contact's profile on the **Contacts** workspace. For example, the custom fields in the Profile group display in the **Profile** tab in NexJ CRM.

Note: A custom field can belong to only one group. By default, the Profile and Private custom field groups display on the **Contacts** workspace.

Best practices for custom fields

Custom fields can be setup and maintained at runtime. Custom field data becomes available for filtering, searching, and reporting as soon as it is added to the system.

Consider using custom fields to:

- Store optional contact data used by a limited number of contacts in the system

- Store contact-level information, for example, interests, demographics, and financial information
- Track relationships

Avoid using custom fields to:

- Store business-critical contact data that is:
    - Frequently used for the majority of contacts in the system. In this case, consider adding or customizing a contact attribute in the model.
    - Used by NexJ CRM business logic or that is integrated with other functionality in NexJ CRM, for example, Service Level Management (SLM) functionality.

    Note: In these cases, consider adding or customizing a contact attribute in the model.
- Track aggregate account-level information, such as products and services, or restrictions. Custom fields do not aggregate at the household-level.

Some examples of custom fields include:

- Referral Source
- Favorite Sports Team
- Lawyer

Managing custom fields

While you can allow users to manage their own custom field types, doing so can result in duplication of custom field types over time. Avoid duplication of fields to ensure that the number of custom field types does not grow beyond system limits.

It is recommended that a central team, such as a business administration group, manages custom field types. This group should have responsibility for:

- Collecting requests for new custom field types from users or teams
- Configuring new custom fields or leveraging existing custom fields
- Providing recommendations for use of existing custom fields

Ensure that only the centralized team has create and edit privileges for custom field types. Custom field types may be made visible to other specific groups as needed.

USER FIELDS

User fields enable you to store information for a contact. User fields display in tabs for contacts on the **Contacts** workspace.

Note: User fields differ from custom fields because custom fields are designed to hold specific types of structured data (for example, dates) while user fields are designed to hold unstructured data.

Best practices for user fields

Consider using users fields to:

- Display optional data on the **Detail** tab for a contact when searching, filtering, and reporting are not required.

Avoid using user fields to:

- Store data for search or reporting purposes. You cannot search or report on user fields.

CATEGORIES

A *category* is a label for entities, such as Avid Golfer for a contact or user. Categories can be used for searching and grouping entities. Add and view categories using the Categories tabs in a contact's profile.

A *category group* enables you to group related categories together. A category group defines the following:

- The types of contacts that you can add the category to. For example, a category group can make a category available to only company contacts.
- The tab name that displays on a contact's profile on the **Contacts** workspace. For example, a category in the Private category group displays in the Private Categories tab in NexJ CRM.

A category can belong to only one group.

Best practices for categories

Categories are best suited for the following purposes:

- Storing simple classifying information about a contact that you will filter and report on.

Avoid using categories for:

- Capturing information that may be applicable only to a few clients, such as a birth or anniversary date.

Some examples of categories include:

- High Net Worth
- Avid Golfer

CAMPAIGNS

A *campaign* is a coordinated set of predefined activities for achieving a marketing-related goal, such as a fundraising campaign.

The **Campaigns** workspace lets you create campaigns and manage the details associated with them, including steps, participants, and opportunities.

About participants

A *participant* is an entity (usually not a user) that is involved in a campaign, and will be in contact with the user responsible for it during the campaign.

The *status* of a participant signifies their current standing within a campaign. You can choose from any of the five default statuses (inactive, initiated, responded, not interested, or removed) as well as any custom statuses that have been set in the Enumerations page in NexJ Admin Console.

The *owner* of a participant is the user who is specifically assigned to all the activities for a specific participant in a campaign. Depending on your allocation rules, an owner may be automatically assigned to the participant upon creation. Each participant must have an owner associated with it or you will not be able to initiate their campaign.

Best practices for campaigns

Consider using campaigns to:

- Manage bulk email lists and track responses from contacts

- Manage and send invitations for events such as seminars
- Track lead stages for targeted marketing campaigns

Avoid using campaigns to:

- Create saved lists or to share lists

About opportunities

An *opportunity* represents a potential sale of one or more products to a client. A *product opportunity* is an opportunity that is associated with a product, for example, home insurance or a company credit card.

Best practices for opportunities

Consider using opportunities to:

- Track specific products or services that create further upselling opportunities, for example, a new account or an outbound referral

Opportunities should not be used to:

- Track interests, tasks, or potential inbound referrals

NOTES

A *note* is a text field that you can use to store detailed information about a client. You create and browse notes for a contact in the **Notes** tab in the **Detail** tab. Entering and saving a note creates a Note activity for the contact. Notes are listed in reverse chronological order by default.

Best practices for notes

Consider using notes to:

- Store large amounts of unstructured data or for record keeping purposes. Notes are searchable.