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Sample Database Lists

Contact Status:

High-level segmentation to cast the greatest net.

Active Client
Business
Dead List
Deceased
Dependent
Inactive Client
Not Specified*
Personal
Prospect
Spouse of Client

Contact Category:

Used to give further detail and/or rank contacts within their status.

A
AA
AAA
Business Relationship
Business Vendor
Business Wholesaler
Child
Cold
Contact*
Grandchild
Hot
Lost
Other
Pending
Personal Client*

Contact Source:

Identify where the bulk of your business is coming from.

Internet Lead
Marketing List
Radio Lead
Referral
Seminar
Workshop

Contact Interests:

Interests unique to your contacts.

Auto Racing
BBQ
Classical Music
Comic Books
Disc Golf
Organic
Reading
Sailing
Woodworking

Contact Keyword:

Labels on contact records that make them easily searchable.

401k Participant
Brokerage Client
Direct Investment Client
Fee-Based Client
Inherited IRA
IRA
Hourly Client
Investment Advisory Client
Life Insurance Client
Rep code: 9X4B
Retirement Client
Tax Client
Trust Account

Admin – Qualified
Admin – Unqualified
Admin – Beneficiary
Admin – Will

Event – Baseball
Event – Football
Event – Golf
Event – Wine

Mailing – Do not Mail
Mailing – Birthday Card
Mailing – Holiday Card
Mailing – Newsletter

more on reverse...

**These items are Redtail CRM system defaults and cannot be edited or deleted.*

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Contact User Defined Fields:

Custom fields to track relationship builder questions. Any text, yes/no, true/false, date, and list of fields options available.

Alma Mater
Coffee Preference
Cookie Preference
Drink Preference
Favorite NBA, NFL, MLB Team
Highest Education
Military Service Branch
Pet's Name
Withdrawal Date
Generation
Political Affiliation
RMD Type
RMD Amount
RMD 2018 Taken

Activity Types:

Medium of the calendar item.
Calendar colors apply per the Activity Type.

Appointment*
Client Lunch
Client Meeting
Client Review
Face-to-Face
Holiday
Onboarding Meeting
Open Appointment Slot
Out of Office
Personal
Phone Call*
Seminar
Staff Meeting
Task*
Unassigned*
Vacation Day
Webinar

Activity and Note Categories:

Enhance your reporting abilities with categories to segment entered information. These categories are also available on workflows and documents.

Account Support
Business – Accounting
Business – Annuities
Business – Insurance
Business – Real Estate
Business – Taxes
Business – Wealth Management
Cancelled/ No Show
Client Meeting Notes
Client Review Notes
Compliance Email Review
Customer Service*
Email Received
Email Sent
Important Conversation
General Information*
Pending Item
Phone Call – Incoming
Phone Call – Outgoing
Policy Support*
Technical support*
Underwriting Information*

Opportunity Stages:

Know where you are in your sales pipeline with customizable stages.

Commitment
Data Gathering
Discovery
Introduction
Onboarding
Proposal

Seminars Attendee Status:

Define and clarify where contacts are in the event planning process.

Attended
Invited
No Response
No Show
RSVP - Yes
RSVP - No

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