Redtail Style Sheet

**Contacts**

**Status:**

The highest level used to identify contacts in the CRM. These are mutually exclusive so a contact can only have one status at a time.

Status: When to Use:

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| Active Client | A contact that currently has at least one account or policy held with us. |
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**Category:**

The second level used to rank contacts. Once they have a status, the category can be used to clarify their rank within the status. Also mutually exclusive so a contact can only have one category at a time.

Category: When to Use:

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| AAA | Client has met threshold of AUM, Advocacy, and Attitude. |
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Contact Style Guide: Automate your contact sales cycle.

Status: Category: When to Use: Automation Triggered:

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| Active Client | A  AA  AAA | -Active Client and A level  -Active Client and AA level  -Active Client and AAA level | When status is changed to Active Client, Important Information Workflow links. |
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Source: Where the contact came from.

Source: When to Use:

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| Referral | A contact that was referred to us by someone outside of our organization. |
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Servicing Advisor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Advisor Name: Rep Code:

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| --- | --- |
| Hayley Mandrup | 4HA |
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Writing Advisor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Advisor Name: Rep Code:

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| Jonathan Maddock | 007 |
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Permissions: Applied to contacts based on the Servicing Advisor.

Servicing Advisor: Permissioned to Team:

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| Jonathan Maddock | A Team |
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Keyword: Label on a record used to filter and group contacts.

Keyword: When to Use:

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| Inherited IRA | When a contact is under 65 years old and has an inherited IRA account. |
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**Activity Types and Categories**

Activity Type: The medium in which you are completing the activity.

Activity Types: When to Use:

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| Client Review | When a contact is scheduled to have a client review. |
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Category: Subject of the activity, note, workflow, document, etc.

Categories: When to Use:

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| Client Review Notes | When an item in the database pertains to a client review. |
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Calendar Style Guide: Most effective when used with automations.

Activity Type: Category: When to Use: Automation Triggered:

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| Client Review | Client Review Notes | Yearly Client Review | 2018 Client Review Workflow |
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