Contact Type

Best Practices

Client | **Agent** | **Farm** | **Personal** | **Vendor** | **Prospect** | **Hidden**

The contact type allows the user to specify in a dedicated field the broad type of contact the record is...

- **Client** (**default**) - all contacts added to the database are "Client" by default -
  THIS TYPE IS USED WHEN CALCULATING RFACTOR

- **Agent** - any contact that is a real estate agent
  THIS TYPE IS NOT USED WHEN CALCULATING RFACTOR

- **Vendor** - any contact that is used as a vendor for transactions (Lender, Title, Escrow, Attorney, etc…)
  THIS TYPE IS NOT USED WHEN CALCULATING RFACTOR

- **Personal** - personal contacts usually family members etc..
  THIS TYPE IS USED WHEN CALCULATING RFACTOR

- **Farm** - some contact that you are marketing to in a "Farming Area". A Farming area is a list of names in a subdivision or city area that you market to regularly.   The name of the farm could be a TAG.
  THIS TYPE IS USED WHEN CALCULATING RFACTOR

- **Prospect** - some contact that you are marketing to is a "Prospect".
  THIS TYPE IS USED WHEN CALCULATING RFACTOR

- **Hidden** - A contact which is part of a transaction but **NOT** your client. If you are the listing agent and another agent represents the 'buyer' - we have a place in a transaction for 'Buyer' which you could/should put the buyer's contact information as a link. This buyer is NOT your client and you would not want to market to this contact under normal situations. We need the link but the contact should be hidden for all other uses. When the Contact "List View" is shown, **hidden** contacts should not be shown unless the user is specifically FILTERING for "HIDDEN" contact type (new filter). Or if they are SEARCHING for them in a property/transactions people tab or Search field by name. DOES NOT SYNC TO GOOGLE
  THIS TYPE IS NOT USED WHEN CALCULATING RFACTOR

If you have any questions, please contact us at: support@realvolve.com

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