



## Sample – Marketing Categories

The administrator of the application can add or Edit Marketing Categories in Restoration Manager by going to Settings→ System Setup→ Settings→ Other Settings, Marketing Categories.

*Note: Marketing Categories are associated with the individual Company Contact. They are also searchable by hovering over Contacts in the Blue navigation bar then single click on Company Contacts the data that populates within this page can be printed and/or exported.*

| Marketing Category Sample Descriptions |
|--|
| ASAM                                   |
| Association (Name)                     |
| Baseball - TEAM (Pro or College)       |
| Basketball - TEAM (Pro or College)     |
| BOMA                                   |
| CE Class                               |
| Church                                 |
| Fire Department Association            |
| Football - TEAM (Pro or College)       |
| Hockey - TEAM (Name)                   |
| Marketing Brochure (Name)              |
| Priority Response                      |
| Mailing Lists (Plumber, Agent, etc.)   |
| RHA                                    |
| Seminar (Type)                         |



## Sample – Marketing Categories

Company Contact Page:

### General Information

Primary Contact  Secondary Contact  My Contact

First:  MI:  Last:

Title:

Use Same Address as Company  Use Same Address as Territory

Address:

City:  State:  Zip:

Email Address:

Username:

Password:

Phone 1:

Phone 2:

Phone 3:

Phone 4:

Phone 5:

SMS/Text:

Birthday:

Married/Kids:

Anniversary:

Hobbies:

Other Info:

Previous Comp.:

Notes:

Site:  All Offices

### Sales Information

More Marketing Reps

Marketing Rep:

Territory:

### Marketing Categories

Drag & drop or select & move Marketing Categories from the left, over to the right side to add them to the contact.

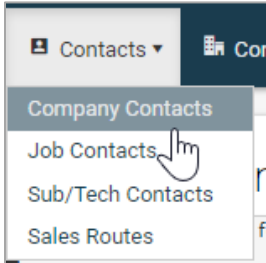
|              |  |                   |
|--------------|--|-------------------|
| Associations |  | CE Class - 2019   |
| Church       |  | Mailing List      |
|              |  | Priority Response |
|              |  | Sports TEAM       |





## Sample – Marketing Categories

Company Contacts Page



### View Company Contacts

Save Grid Preferences? (uncheck for defaults)

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Drag a column header and drop it here to group by that column

| Company              | Territory            | First Name           | Last Name            | Marketing Category   |
|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

- Associations
- CE Class - 2019
- Church
- Mailing List
- Priority Response
- Sports TEAM