Sharing and Assigning Contacts

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Contact Records

A *contact record* (commonly just called a *contact*) in Total Expert is a complete set of saved details that represents a person in the real world. Such a person is commonly a business prospect, such as a borrower, banking customer, or credit union member, but it could be anyone you might communicate with for any reason, such as a real estate agent you're co-marketing with, a colleague, a lawyer, or even a personal contact.

When you create a contact record manually, you can provide as much or as little detail in the form as you have available. When a record is created by an automatic process, such as a data import job or a data push from an integration partner, the information must include, at a minimum:

- first name
- last name (must be in a separate field from the first name)
- at least 1 of the following:
  - email address
  - phone number (home, cell, or office number)
  - physical address (must include street address, city, state, and ZIP code in separate fields)

As you learn more about the person, you can add more details to their contact record. In addition, any processes that involve the contact record (such as sending them an email, progression steps along a journey, or customer intelligence alerts) are automatically recorded and attached to the record.

Ownership of a Record

When a contact record is created, it is deemed to be *owned* by a Total Expert user. If a user manually creates a contact record, that user is the owner of the record. If import job creates new records, the person setting up the details to import determines which user in their organization is the owner of each new record. If an integration pushes data to Total Expert and a contact record is created as a result, the owner is determined by the setup of the specific integration.

The owner of a contact record has full rights to view, edit, and take any available action on that record. This also includes sharing the record with or assigning the record to another user (either in your own organization or a co-marketing partner).

Only the owner of a contact record can delete that record.

Only the owner of a contact record can manually merge that record with another record.

Shared Records

When the owner of a contact record *shares* that record with another user, the owner retains full access to the record. The shared user gains access to view any information associated with that record. They also get limited ability to edit the record.

A user who has had a contact record shared with them cannot delete, archive, or un-archive (activate) that record. They also cannot share or assign that record via the contact list.

> **Note**
> A record can be shared with multiple users at a time.

Assigned Records

When the owner of a contact record *assigns* that record with another user, the owner retains full access to the record. The assigned user also gains full editing rights to the record, except that they cannot delete it. Assigned users can share the record with other users, or change the assignment to another user. If the user a contact record is assigned to archives that record, it is archived for all users with access to the record, including the owner.

> **Warning**
> A record can only be assigned to 1 user at a time. If the assigned user changes the assignment to another user, they will lose access to that record unless it is also shared with them.

How to Share and Assign Records

The owner of contact records can share or assign 1 or more records at once via the contact list. They can also share or assign a single record from the contact details page.

Sharing 1 or More Contacts from the Contact List

1. Navigate to **Leads & Contacts → Contacts**.
2. In the contact list, locate the records you want to share.
3. On the left side of the list, check the boxes for these records.

4. Select **Actions → Admin actions → Share with user**.
5. In the slide-out panel:
   a. Select the **Share** option.
   b. Select the user you want to share the contact records with in the **Select A Team Member** drop-down list. You can select active users in your organization and co-marketing partners.
   c. (optional) Click the **Notify Shared Users** button at the top of the panel. The Notify Shared Users box opens; this box lists any of the selected contact records that have previously been shared with other users and the users they were shared with.

> **Note**
> This box does not indicate whether the contacts have been assigned, only shared.

      i. Select the checkboxes for the users who should receive an email notification that you are sharing the record with another user.
      ii. Click the **Save** button. The box closes.
      iii. In the main panel, the Notify Shared Users button is updated with (#) to indicate how many users will be notified when you submit the form. You can click the button again and change your selections up until you submit.
   d. Click the **Submit** button at the top of the panel. The contact records are shared, and any selected users are notified.

You can unshare the record by following the same steps, except select **Unshare** in step 5a.

Assigning 1 or More Contacts from the Contact List

1. Navigate to **Leads & Contacts → Contacts**.
2. In the contact list, locate the records you want to assign.
3. On the left side of the list, check the boxes for these records.
4. Select **Actions → Admin actions → Assign to user**.
5. In the slide-out panel:
   a. Select the **Assign** option.
   b. Select the user you want to assign the contact records to in the **Select A Team Member** drop-down list. You can select active users in your organization and co-marketing partners.
   c. (optional) Click the **Notify Shared Users** button at the top of the panel. The Notify Shared Users box opens; this box lists any of the selected contact records that have previously been shared with other users and the users they were shared with.

> **Note**
> This box does not indicate whether the contacts have been assigned, only shared.

      i. Select the checkboxes for the users who should receive an email notification that you are assigning the record to another user.
      ii. Click the **Save** button. The box closes.
      iii. In the main panel, the Notify Shared Users button is updated with (#) to indicate how many users will be notified when you submit the form. You can click the button again and change your selections up until you submit.

d. Click the **Submit** button at the top of the panel. The contact records are assigned, and any selected users are notified.

You can unassign the record by following the same steps, except select **Unassign** in step 5a.

Single Contact from the Contact Record

1. Navigate to **Leads & Contacts → Contacts**.
2. In the contact list, locate the record you want to start on a journey.
3. Click the contact's name.
4. With the Profile tab selected, locate the Relationships section and click **Edit**. The Modify Relationships box opens.
5. In the Modify Relationships box:
    a. Click the **Assigned To** field and select 1 user from the drop-down list to assign the contact record to. If this field previously had a different name populated, the record is unassigned from that user and assigned to the new user.
    b. Click the **Shared With** field and select 1 or more users from the drop-down list to share the contact record with. You can remove names from this field by clicking the small **X** next to their name.
    c. Click the **Save** button.

The Relationships section of the record is updated to reflect the users you selected to assign the record to and/or share it with. If a field is left blank, that field is not shown on the record; the owner of the contact record is always shown (this cannot be blank).

Changing the Owner of a Record

If you are the owner of a contact record, you can transfer ownership of the record to another user in your organization (but not to a co-marketer outside your organization). When you transfer a contact record, any users who previously had access via sharing or assignment lose that access, and any progress the contact had on a campaign or journey on those users' behalf is stopped.

To transfer a contact:

1. Navigate to **Leads & Contacts → Contacts**.
2. Click the name of the contact you want to change the owner for. The contact details page appears.
3. Select **Actions → Change Owner**. The Change Owner box appears.
4. In the Change Owner box:
    a. In the **Select a New Owner** drop-down box, select the name of the user you want to transfer the selected contacts to. You can type a partial name in the box to filter the list.
    b. Click the **Next** button.
    c. (optional) In the Add Optional Group step's **New Group Name** field, enter the name of a group you want to add these contacts to.
    d. Click the **Next** button.
    e. You are asked whether you want to share the transferred contact with yourself. Select **Yes** or **No**, as desired. If you select No, once ownership is transferred, the record is no longer visible in your account.
    f. Click the **Next** button.
    g. Review the information regarding the effects on the contact if you proceed.

h. Click the **Confirm and Change Owner** button.

After a moment, a success message appears, then the contact list refreshes to reflect the changes.

> **Note**
> This assumes the contact record does not have an associated loan. See *Transferring Loans and Contacts* for more details.

Viewing Contact Information

To view the details of a contact record that you own, has been shared with you, or has been assigned to you:

1. Navigate to **Leads & Contacts → Contacts**.
2. In the contact list, locate the record you want to view.

> **Tip**
> Use the searching and filtering features on the contact list to help locate the specific contact you want.

3. Some basic details are shown in the contact list. Click the contact's name in the list to view the full record.
4. When the contact details page opens, you can view all the available data in the various sections and tabs of the page.
5. You can edit the details of the record by clicking **Edit** in the appropriate section. You can also take various actions on the record by selecting among the options in the **Actions** menu.

Journeys

When a contact is triggered onto a journey, any emails sent to that contact by the journey will appear to come from the owner of the contact record—*unless* the user who has the contact shared with or assigned to them manually triggers the contact onto the journey, in which case, emails will appear to come from that user.

Manually Triggering a Contact

1 or More Contacts from the Contact List

1. Navigate to **Leads & Contacts → Contacts**.
2. In the contact list, locate the records you want to start on a journey.
3. On the left side of the list, check the boxes for these records.
4. Select **Actions → Configure journeys → Add a journey**.
5. In the slide-out panel:
   a. Select the journey you want to run from the drop-down list.
   b. A list of all the triggers in the selected journey is shown. Select the trigger where you want the user to enter the journey.
   c. Click the **Submit** button at the top of the panel.

Single Contact from the Contact Record

1. Navigate to **Leads & Contacts → Contacts**.
2. In the contact list, locate the record you want to start on a journey.

3. Click the contact's name to open the contact details page.
4. Click the **Marketing** tab.
5. In the Journeys section of the Marketing tab, click **Add to Journey**.
6. In the pop-up box:
   a. Select the journey you want to run from the drop-down list.
   b. A list of all the triggers in the selected journey is shown. Select the trigger where you want the user to enter the journey.
   c. Click the **Submit** button.