

Institution | Initialisation | Contacts criterion

Contact type: the operator can create the criteria for Individual and Structure contacts necessary for contact categorization.

The operator can view the contact criterion screen in the context of the Institution.

The criteria and values can be assigned individually to each contact sheet or be created before the initial import of the contacts planned during the client's onboarding ([Contact import Format \(Extended\)](#))

Note: these criteria and values also serve as filters for contacts using queries used in the marketing tools (for customers using SAM, **Secutix Audience management**)

Initialisation

Institution parameters

Institution characteristics

Organisations

Seat categories

Payment Methods

Payment methods groups

Delivery Zones

Shipment Modes

Sales Channels

Contingents

Topics

Document types

Documents to send

Validation

Overheads

Overheads

Overheads Tables

Validation

Rates definition

VAT Rates

Exchange rates

Validation

Pre-parameter

Lists of values

Contact criterion

Validation

Contact criterion

Contact type * Individual

Visibility level * All

Internet visibility * All

Internal name

Status * Visible

+NEW

=DELETE

REVALIDATE

INVALIDATE

INTERNAL NAME	ACTIVE	CODE	CENTRALISED	VISIBILITY	MANDATORY	APPLY ON CONTACT	INTERNET VISIBILITY	RANK	DATA TYPE
APPTK1	Visible	APPTK1	yes	Contact criterion	no	Individual	Read	10	TEXTINPUT
APPTK2	Visible	APPTK2	yes	Contact criterion	no	Individual	Read	10	TEXTINPUT
APPTK3	Visible	APPTK3	yes	Contact criterion	no	Individual	Read	10	TEXTINPUT
External GDPR Delete	Visible	EXTDEL	yes	Contact criterion	no	Individual	None	115	RADIO
Spezialinteresse Japan	Visible	SPJP	no	Contact criterion	no	Individual	None	5	CHECKBOX
Would you like to collect loyalty points?	Visible	LOYALTY	no	Contact criterion	no	Individual	Update	20	RADIO

General

Contact criteria elements

Contact criterion > VIP

Internal name *

FR * VF

DE

EN

External name *

FR * VIP

DE

EN

Code *

VP

ID code *

VP

Apply on contact *

Both

Internet visibility *

None

Visibility level *

Contact criterion

Mandatory *

☒ yes ☐ no

Rank *

9

Centralised *

☐ yes ☒ no

Type *

☐ Simple ☒ List

Data type

Drag and drop list

Technical parameters

Export to reporting *

☒ yes ☐ no

Contact screen: In the contact file a contact can have one or more criterion with one or more values

Contact

Clients

Individuals

Structures

Guides

Suppliers

Partners

Producers

Support

Artists

Exhibitors

Check for duplicates

B2B validation contacts

Waiting List

Advantage targeting

Import contacts

Individual contacts

Search: First name, last name, contact number, email

Advanced >>> With prospect contacts Contact criteria: Profes

+NEW

=DELETE

RESET PASSWORD

SUPPORT

	NO	ROLE	NAME
<input checked="" type="checkbox"/>	24111	Public	LECLAIRE, Charlotte
<input type="checkbox"/>	1000000268	Public	TESTAUT01, Testauto1

Contact individual > 24111 Miss LECLAIRE Charlotte (Client) (CUBE) - Mozilla Firefox

Details

Information

Addresses

Shipments' list

Purchase history

Cultural history

Attendance History

Financial history

Producer opt-in

Criteria

Indicators

Connections

Interactions

Audit contact

Contact individual > 24111

+NEW

=DELETE

INTERNAL NAME	VALUE
I would like to subscribe to the newsletter	yes
Press	yes
Professional	yes
Qualification financière	CFA
Would you like to collect loyalty points?	yes

Contact > Qualification financière (CUBE) - Mozilla Firefox

Details

Information

Contact > Qualification financière

General

Criteria

Qualification financière

Value * CFA