



TOOLS:

SERVICING/
WRITING ADVISOR

KEYWORDS

USER DEFINED
FIELDS

ADVANCED
SEARCH

REPORTS

Observation: When an office has multiple advisors, it can be difficult for staff to identify who clients belong to. Whether there are junior and senior level advisors, or a single advisor office, it is important to identify whom clients belong to. Designate specific office people or teams for the various interactions a client has with the firm.

Directions:

1. Create Servicing and Writing Advisors for all Advisors in the database.
[MANAGE YOUR ACCOUNT > MANAGE DATABASE LISTS > ADD](#)
2. Add the appropriate Servicing or Writing Advisor to client contact records.
[CONTACT RECORD > CONTACT DETAILS > ADD](#)
3. If there is more than a two-advisor split on contact records, add Keywords for each advisor instead of, or in addition to Servicing/Writing Advisor.
[MANAGE YOUR ACCOUNT > MANAGE DATABASE LISTS > KEYWORDS > ADD](#)
4. Add a User Defined Field for "Rep Code" as a "list of values" type of UDF. Add the various rep codes as value choices within the UDF.
[MANAGE YOUR ACCOUNT > MANAGE DATABASE LISTS > CONTACT UDFS > ADD](#)
5. Use the Advanced Search to find contacts that have the same Servicing Advisor, Writing Advisor, or Keyword of the advisor's names.
[CONTACTS > ADVANCED SEARCH > APPLY SEARCH CRITERIA > RUN](#)
6. View clients with a specific rep code UDF through the Contact User Defined Fields Report.
[REPORTS > UDF REPORTS > CONTACT USER DEFINED FIELDS](#)

Result: By tracking rep codes, or the servicing vs. writing advisor, you can quickly identify the primary contact in an office for a specific client. This helps with the distribution of work within an office, and also gives visibility to additional features like permissions to all users in the database.

Helpdesk Link: <http://bit.ly/howtoRTU>

**All of Redtail's best practice recommendations in these "How to Handle" documents are intended to provide a starting point for each office or database to develop their own processes from. These are not intended to comprehensively represent industry standards or compliance requirements. Terminology used in the examples may vary depending on the Database Lists, Templates, and other personalizations unique to each database.*