Overview of the Lists Module

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An aACE list is a collection of CRM records. The Lists module allows you to create and manage groups of contacts or companies.

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1. General Info
   - Private — Prevents other users from viewing the list
   - Type — Dropdown list where you can select an existing category or click Edit to add a new one; you must specify a Type before aACE will let you move the list to Active status
   - Manager — Dropdown list to specify the team member in charge of the list
2. Attached To — Summarizes the records included in the list; click an item to display *all* the individual records in their corresponding module
3. Contacts / Companies — Displays the individual records included in the list; click an item to display an individual record in the corresponding module

After you create a new list, enter the general information, and click Save, aACE prompts you to Activate the record.