Working with CRM Lists

Last Modified on 02/26/2019 3:18 pm EST

After you create and activate a list, you can link existing contact and company records to it.

Adding Contacts or Companies from the Lists Module

- 1. In the Lists module, locate and select the list you want to work with.
- 2. Click the appropriate tab for the types of records you want to add Contacts or Companies.
- 3. Click the the Search icon (**Q**).

First	Last	Title	Comp	any Q	List Name	Phone	Email	Status	Q
Contacts						Selected C	ontacto		
Name	City		State	Company		Name	ontacts		
Ms. Angela Huar	,		CA	King's Rock School	<u>^</u>	John Smith		•) ^
Mr. Ben Moran	New York		NY	Pewter Anderson		Mr. Tim Col	lins		
Mrs. Bridget Sim	onford New York		NY	Macmillan					
Mr. Bruce Janser	n Sea Bay		ŊĴ	LearnWright Inc.					
Mr. Ethan DeWit	t New York		NY	Office Place					
Mr. Francis	Portland		OR	Textbook Emporium					
Mr. Francis	Portland		OR	Textbook Emporium					
Mr. Francis	Portland		OR	Textbook Emporium					
Mr. Grant Harold	lson Suffield		СТ	SU Physics Departmer	t 🔴				
Ms. Jamie Callav	vay New York		NY	Educause Marketing					
Mr. Jeremiah Mil	ler Sea Bay		NJ	LearnWright Inc.					
Ms. Julia Delane	y Shea		OH	Shea Township Schoo					
Mrs. Katherine d	e Berg Centerville		MO	Centerville High Schoo	l 🔴				
Ms. Lauren Padil	la Wikler		СТ	Regina County Area					
Dr. Luisa Ramos	Sacramento)	CA	Brightside Charter	•				~
isplaying 32 of 32 fo	und			s	elect All »	« Remove /	AII .		

- 4. In the Selector dialog, use the <u>Quick Search</u> bar to locate the desired record(s).
- Click a record to move it to the Selected Contacts / Companies section or click Select All to move all the currently displayed records.
 Note: You can also create new contact / company records by clicking the Plus identified to the currently displayed records.

6. Click Save.

Linking to a List from the Companies, Contacts, or Campaigns Modules

- 1. Navigate to the module for the records you wish to add to a list (e.g. Contacts), then locate the desired record.
- 2. At that record's detail view, click the Lists tab.

	ct Details	Sales & Ma						Notices !	Emails 📉	Docs 🖉
Company Info 🗳 🗣 Key Contact				Contact Info		Best Way to Reach				
Photo	Title			Direct Phone	Office Phone (555) 732-0201	Ext				
	Assistant Supe	rintendent								
	Department			Mobile Phone	Home / Other					
Company >		Locatio		Fax						
	iship School Distr			T dA						
Address				Phone / Fax Format	Primary					
9456 Highway 9				(###) ###-####						
	,			Email			Alt Contact Types			
				tc@sheaschools.org			Type Value			
City		State / Prov	Postal Code	Alt Email						^
Shea		ОН	43613							
Country		Postal Format		Web Address						
United States American								~		
Delated	Contacts L	inked Compa	nies Lists	\sum						

- 3. Click the **Search** icon (**Q**).
- 4. In the Selector dialog, use the <u>Quick Search</u> bar to locate the desired record(s).
- 5. Click a record to move it to the Selected Lists section or click Select All to move all the currently displayed records.
- 6. Click Save.

Managing Records from the List View

You can also update lists from the Companies or Contacts modules List view. First, use the <u>Quick Search</u> bar to filter the displayed companies or contacts. Then in the menu bar, click Actions > Add Companies/Contacts in Found Set to List. The Lists Selector dialog displays for you to specify which list to add the records to. Clicking Actions > Remove Companies/Contacts in Found Set functions the same.

aACE Software