Overview of the Lists Module

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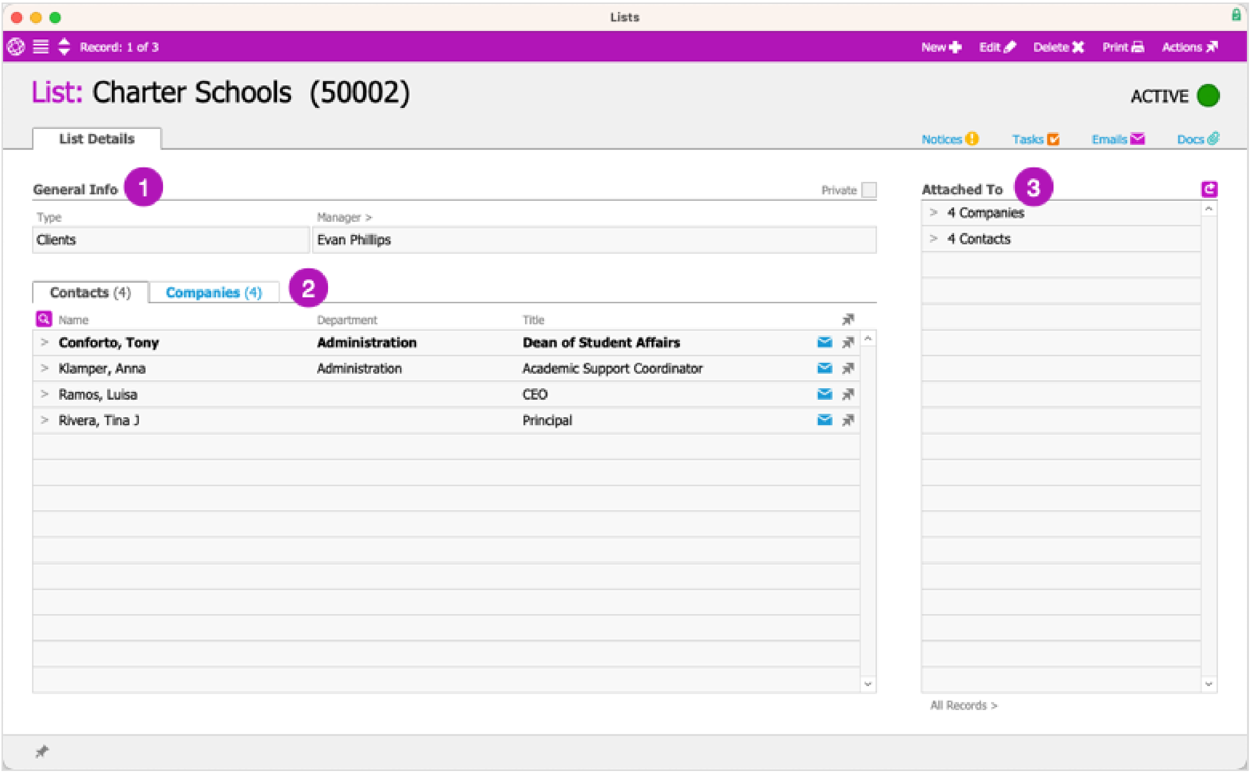
This guide reviews features in the Lists Module. It is intended for general users.

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

Note: Any general list view or detail view icons will not be discussed below. For information on these icons, please read our help guides on the [List View](https://aace6.knowledgeowl.com/help/overview-of-the-list-view) (https://aace6.knowledgeowl.com/help/overview-of-the-list-view) and the [Detail View](https://aace6.knowledgeowl.com/help/overview-of-the-detail-view) (https://aace6.knowledgeowl.com/help/overview-of-the-detail-view).

Navigate from Main Menu > CRM & Sales > Lists, then select a list to view details:



1. General Info

Creating a list allows you to specify the type of list, a manager, and if the list is 'private.'

- **Type** — Select an existing category from the dropdown list or click Edit to add a new one. You must specify a Type before you can activate the list.
- **Manager** — Select a team member from the dropdown to specify them as in charge of the list

- **Private** — This flag prevents other users from viewing the list.

2. Contacts / Companies

These tabs display the individual contact or company records included in the list. Select a record to display details in the corresponding module. You can add contacts or companies to their respective lists by clicking either the Contacts selector icon ( ) or the Companies selector icon ( ).

Attached To

aACE displays all related contact and company records in a summarized format. Select an item to display *all* the individual records in their corresponding module. You can click the 'All Records' go-to link at the bottom of the Attached To section to auto-open all modules that have the attached records.

Clicking the Refresh icon ( ) will update the Attached To section with any new related records.