Working with CRM Lists

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This guide explains how to link contact and company records to CRM Lists. It is intended for general users.

After you <u>create and activate a list (https://aace6.knowledgeowl.com/help/overview-of-the-lists-module</u>), you can select existing contact and company records to add to it. Note: At the Selector, you can also create contact and company records by clicking the **Add** icon (•).

This guide focuses on companies as an example, but the functionality is available in other CRM modules.

Adding Records from the Lists Module

- 1. Navigate from Main Menu > CRM & Sales > Lists, then select the desired list.
- 2. Click the appropriate tab for the types of records you want to add (e.g. companies).

♦ Record: 3 of 3 Next ● 61 # Detext > Prote 6 List: Secondary Schools (50003) List Details General Info Type Manager > Clents Mara Harvey Contacts (3) Department Title > de Berg, Katherine CH Popartment Title > Huang, Nikid	
List Details Seneral Info Type Manager > Contacts (3) Companies Department Title Attached To 3 Contacts Contacts (3) Companies Department Chair Chair Attached To 3 Contacts 4	Actions 2
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> Evans, Phyllis English Department Chair Image: Chair	
Huang, Nikki Student Affairs Vice Principal Image: Student Affairs Image: Student Affairs	
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- 3. Click the **Search** icon (**Q**).
- 4. In the Selector dialog, use the <u>Quick Search (http://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u> bar to locate the desired record(s).
- 5. Move records to the Selected Companies section by clicking individual records or clicking **Select All**.

6. Click **Save** and **OK**.

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

You can link to a list from various CRM modules.

- 1. Navigate from Main Menu > CRM & Sales > Companies, then locate the desired record.
- 2. At the detail view, click the **Lists** tab.

Company Info 📋 오			Contact Info		Other Info		
Type			Phone	Alt Phone	Group	Subgroup	
Vendor			(555) 212-3652		Textbooks		
lddress		Residential	Fax	Phone / Fax Format	Parent Company >		
82 West 38th Street			(555) 212-7458	(###) ###-####			
			Email		Referral Company >		
			sales@mmgbooks.com	2			
ity .	State / Prov	Postal Code	Web Address		Referral Contact >		
New York	NY	10018	www.mmgbooks.com	C2			
Country	Postal Format		Email Format (using "John	Q Public") 😮	Referral Team Member >	Other Referral	
Contacts (2) Loc	ations Link	ed Contacts	inked Companies List				
List Name	auons Linki	eu contacts - L	inked companies	Туре	Manager	Status 🛪	
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- 3. Click the **Search** icon (**Q**).
- 4. At the selector dialog, use the <u>Quick Search (http://aace6.knowledgeowl.com/help/using-the-quick-search-bar</u>) bar to locate the desired record(s).
- 5. Move records to the Selected Lists section by clicking individual records or clicking **Select All**.
- 6. Click Save.

Managing Records on a List from the Module List View

You can update a list with multiple company or contact records at a module list view.

- 1. Navigate from Main Menu > CRM & Sales > Companies.
- 2. At the list view, use the <u>Quick Search (http://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u> bar to filter the displayed companies.

	Record: 1 of 2						New	Actions Send Notice Re: List
	Companie	es			ma			Activate Companies in List Deactivate Companies in List
. 1	Туре	Company Name	Abbr	City	State / Prov	Postal Code	Phone	Update Type for Companies in List
> 1	Vendor	Staples	50094	Framingham	MA	017202	(315) 480-5200	Update Group for Companies in List
> (Customer	Lynn High School of the Arts	50132	Lynn	ма	01902	(617) 555-8249	Update Subgroup for Companies in List
								Update Sales Rep for Companies in List Update Account Manager for Companies in List
								Update Parent Company for Companies in List Update Referral Company for Companies in List
								Update Rate Card for Companies in List Update Tax Profile for Companies in List Update Sales Territory for Companies in List
								Add Activity to Companies in List Create Leads for Companies in List
								Add Companies in Found Set to List
								Remove Companies in Found Set from List
								Import Important Dates
								Import Companies
								Export Companies

- 4. In the Lists Selector, use the Quick Search bar to locate the desired list.
- 5. Move records to the Selected Lists section by clicking individual records or clicking **Select All**.
- 6. Click **Save** and **OK**.