


Working with CRM Lists

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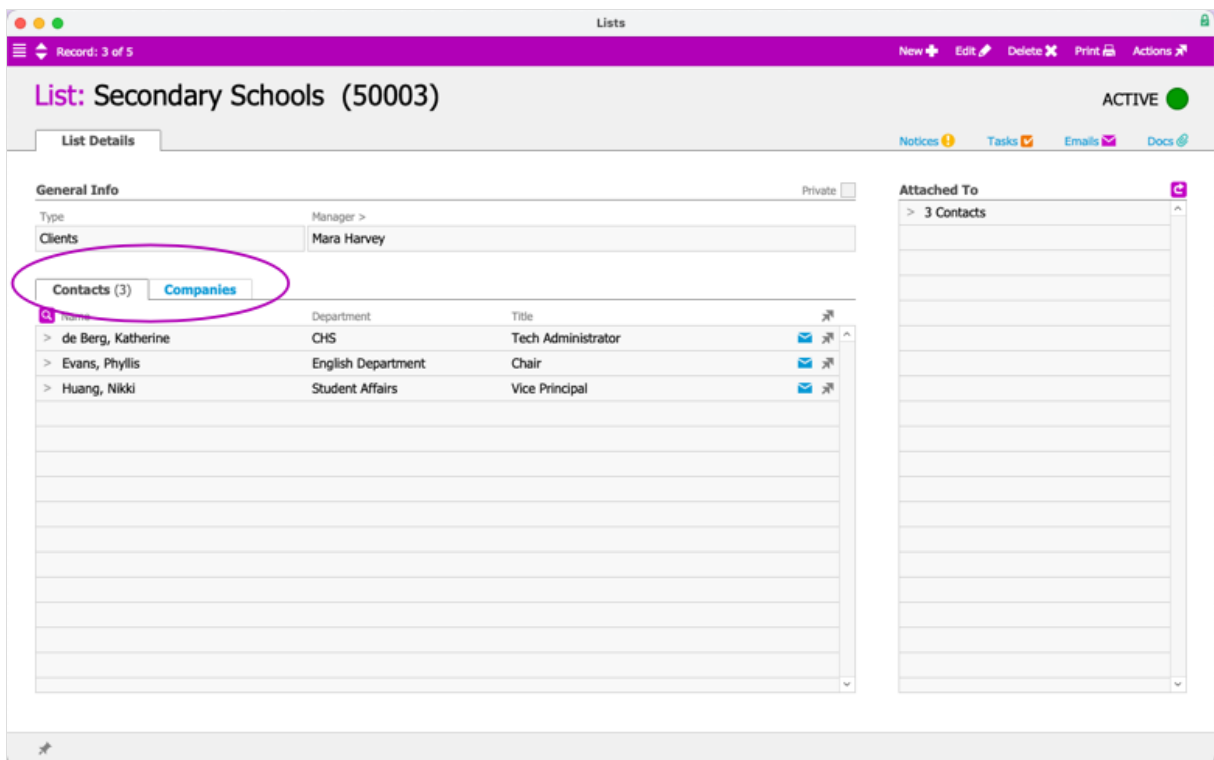
This guide explains how to link contact and company records to CRM Lists. It is intended for general users.


After you [create and activate a list](https://aace6.knowledgeowl.com/help/overview-of-the-lists-module) (https://aace6.knowledgeowl.com/help/overview-of-the-lists-module), 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).



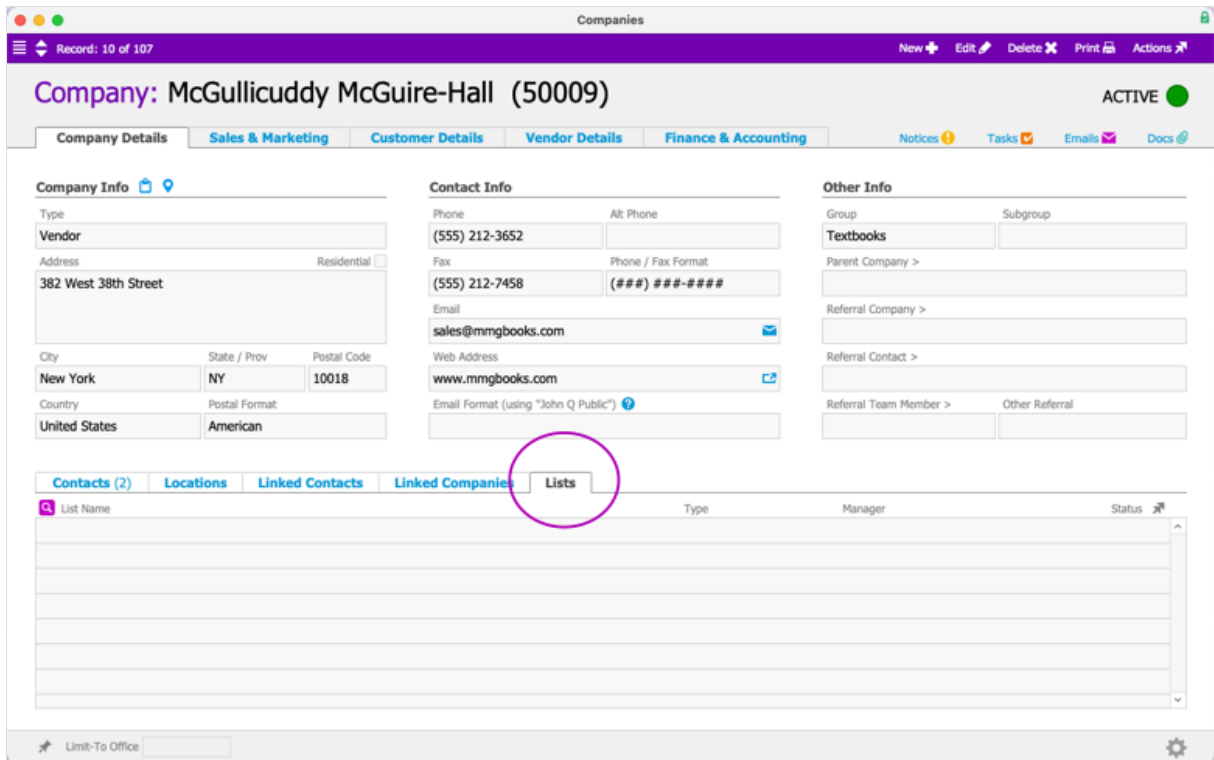
3. Click the **Search** icon ().
4. In the Selector dialog, use the [Quick Search](http://aace6.knowledgeowl.com/help/using-the-quick-search-bar) (http://aace6.knowledgeowl.com/help/using-the-quick-search-bar) bar to locate the desired record(s).
5. Move records to the Selected Companies section by clicking 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.



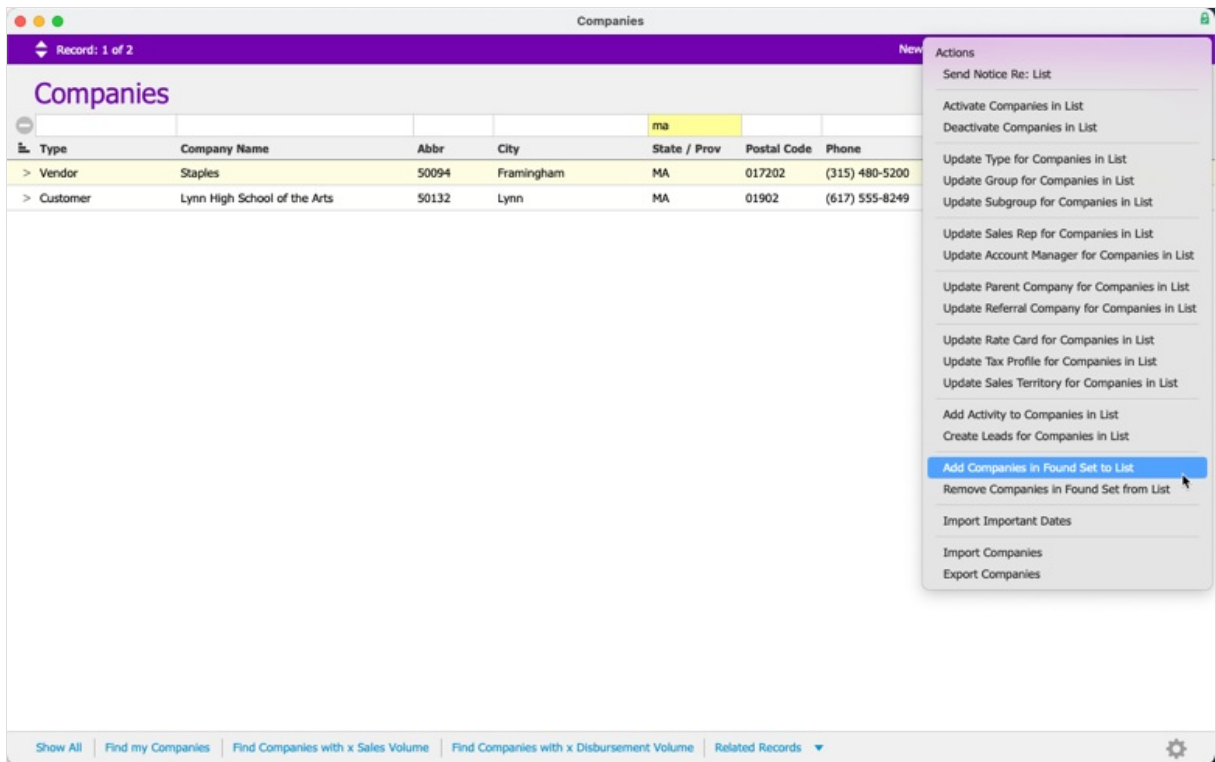
3. Click the **Search** icon ().
4. At the selector dialog, use the **Quick Search** (<http://aace6.knowledgeowl.com/help/using-the-quick-search-bar>) bar to locate the desired record(s).
5. Move records to the Selected Lists section by clicking individual records or clicking **Select All**.
6. Click **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 **Quick Search** (<http://aace6.knowledgeowl.com/help/using-the-quick-search-bar>) bar to filter the displayed companies.

3. Click **Actions > Add Companies in Found Set to List.**



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.**