Adding Contacts to individual Contact List Manager Lists

We explained in other flash videos about the Contact List Manager Lists and the powerful features these lists add to accessing your client contact database. You will need to add contacts to individual lists in order to access Action Plans for these lists and/or to separate your contacts for special attention.

Adding contacts to lists: Option #1: Drag and drop your contacts into these lists by following these procedures. Open your Contact list manager by clicking on the icon. Decide what list you wish to add contacts to and open that by clicking on the "+" next to the group heading.

For this example, we will open the Vendor Group and add contacts that are Attorneys to the Attorney list.

Step #1: We will filter our contacts at the left side of the screen by vendor type and then sort the list alphabetically. Once we have this list in order, you simply select the desired contacts by a single mouse click on the top contact. We will then hold down our "Shift" key and press the down arrow to select the contacts. You can also select individual contacts by holding down your "Ctrl" key and clicking on individual contacts.

Step #2: Drag the contacts from the listing on the left into your specified list. Do a single mouse click and hold down the mouse on one of the highlighted contacts and drag these contacts into the selected list.

You can also add contacts to a Contact List Manager List using the Reports. For additional information on how best to use the Reports inside WorkCenter, view the reports flash videos and also read the WorkCenter Quick Start Guide.

To add contacts from a report, open the report tab and select a specific report. For this example, we will open the "All Loans Report" and select a few contact records at the top by highlighting the lines. Right click on the highlighted loans and select "Add items to a list".

At this time you will see a "Contact List" box appear. Click the down arrow next to the Group heading and select the group you wish to access. For this example, we will choose Vendors again and under the Name line, we will select "Attorneys". Accept the transfer by clicking on the "OK" button. Keep in mind, you will want to sort and filter your database to select the appropriate contacts or loans that you wish to add to the Contact List Manager List prior to transferring the items.

To test the transfer, open your Contact List Manager and select the appropriate list. You will see the additional contacts added to your selected list.