Contact Lists

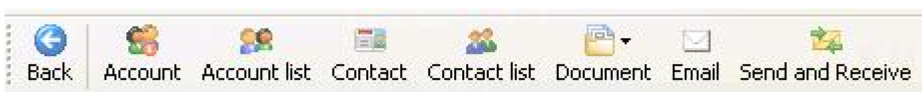
Contact l sts are used to log call group contacts for var ous purposes. For example, ou could create a compan w de contact l st called 'Compan Contacts' conta n ng people that are frequentl contacted. Contact l sts can be created for long term use, such as a newsletter l st, or the can be temporar , for example, a contact l st of people nv ted to, and then attend ng, a cl ent funct on or event.

Man ema l tools have d str but on and ma l ng l sts that allow ou to send ema ls to spec f ed groups of people. Contact l sts prov de the same funct on n Fort CRM, but can also be used for ma l merges or to create a grouped note, for example, for people who are all at the same meet ng.

Cr at ng a Contact L st

Step 1: Launch the New Contact List Wizard

To create a new Contact l st, cl ck on the 'Contact l st' button at the top of the screen.



The 'New Contact L st' screen w ll be d spla ed.

Step 2: Enter Contact List Name and Owner

Nam Enter a name that descr bes the purpose of the l st. For example, Sem nar: 23 Jul 2007. The l st name should be conc se, preferabl un que, and mean ngful to other users v ew ng the l st.

O n r Select the account manager who owns th s l st. If the l st owner s d fferent to the one shown, cl ck the 'Select' button to select a d fferent account manager as l st owner.

Shar L st T ck th s box to make the l st ava lable to all users. If th s box s unchecked, the contact l st w ll onl be v s ble to the l st owner.

Step 3: Add contacts to the list

Add an contacts to be ncluded n the l st. A contact l st ma n t all be set up w thout an contacts. Contacts can then be added to the l st over t me. A contact can be removed from a contact l st at an t me us ng the 'Remove' button.

- Cl ck the 'Add' button. The 'F nd Contact' screen s d spla ed.
- If the requ red contact belongs to another account manager, uncheck the 'M   Contacts Onl ' box.
- Check the 'Extra deta l' box to see the accounts that th s contact s assoc ated w th.
- Enter all or part of the contact's f rst name n the box, and cl ck the 'Search' button. A l st of contacts match ng the search cr ter a w ll be d spla ed.
- Double cl ck on the appropr ate contact to select them, or alternat vel   cl ck on a contact and then cl ck Ok.

Follow the procedure l sted above to select one or more further contacts to add to the contact l st. When all requ red contacts have been added, cl ck OK to create the l st. The contact l st w ll be shown n, and access ble from, the treev ew on the left of the screen.

V   ng Contact L sts

Once a contact l st has been created, t s v s ble n the Contact L sts sect on of the treev ew on the left of the screen.

- Expand the Contact L sts sect on (b   cl ck ng on the '+') to show all Contact L sts.
- Cl ck on the name of the requ red contact l st.
- Cl ck on the Contacts tab to v ew all contacts n the l st.

Contact List Tabs

D ta ls	Shows the account manager who owns the l st and whether or not the l st s shared. If the l st s not shared (false), onl the l st owner can v ew the l st, otherw se (true) all users can share t.
Act v ty	Not currentl used
G n ral Not s	The 'Ed t General Notes' button s used to add comments to the contact l st. Th s ma be used to descr be the purpose of the l st or to record an general nformat on about the l st.
Contact L st	Deta ls of all contacts currentl on the l st. Contacts can be added to or removed from the l st us ng the 'Add' and 'Remove' buttons on th s tab.

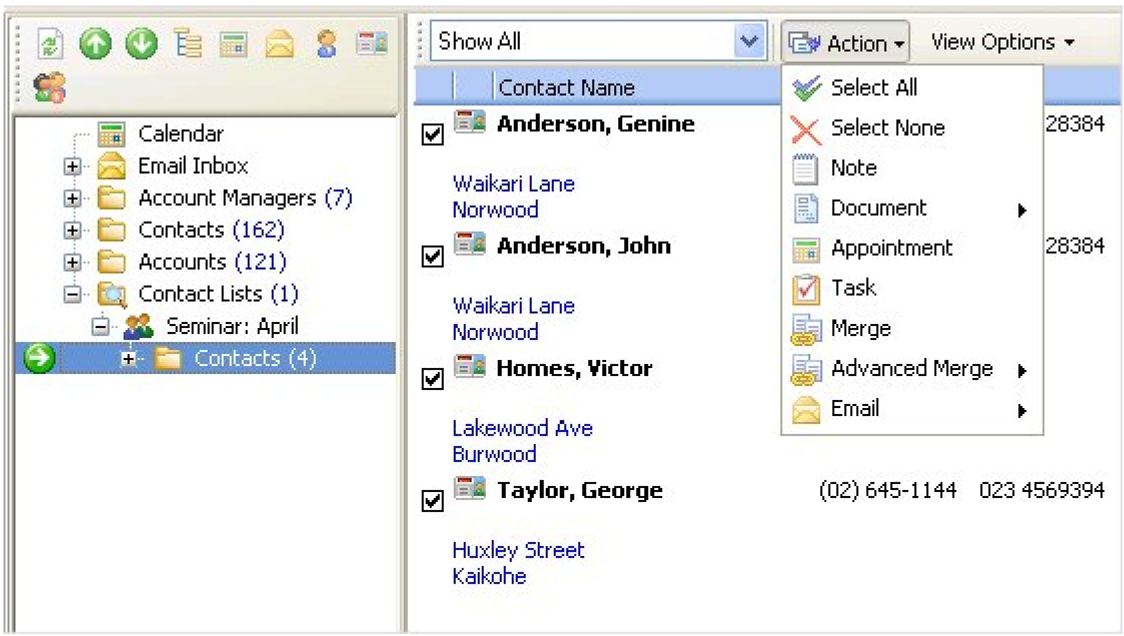
Us ng Contact L sts

The follow ng examples use a contact l st of part c pants at a cl ent sem nar (Sem nar: Apr l), to show some of the wa s that a contact l st can be ut l sed.

Cl ck on 'Contacts' below the name of the contact l st n the treev ew to show the gr d of contact l st members.
The gr d v ew s used when perform ng tasks related to a contact l st.

1. Mail merge from a Contact List

An nv tat on to the sem nar s to be sent to each person on the contact l st. The template for th s nv tat on s created as a document template.



To us th nv tat on t m lat th th Contact l st:

- Cl ck the 'Act on' button above the gr d of contact l st members, and choose 'Select All' from the drop down menu to send the nv tat on to all contacts on the l st. Alternat vel , nd v dual contacts can be selected b check ng the box bes de the r name.

- Cl ck the 'Act on' button aga n and select 'Document' and then the name of the nv tat on document template.

- Follow the same process as for ma l merge to create an nv tat on for each part c pant.

2. Email from a Contact List

Contacts can be added to or removed from the contact l st to accuratel reflect those attend ng the sem nar. Alternat vel , a separate l st of actual attendees ma be created. Closer to the sem nar date, each part c pant s sent a rem nder of the sem nar date.

- Cl ck the 'Act on' button above the gr d of contact l st members, and choose 'Select All' from the drop down menu.
- Cl ck the 'Act on' button aga n and select 'Ema l' and then Ema l To, Ema l CC or Ema l BCC. If ou are send ng an ema l to a group of people who don’t know each other, t s pol te to use BCC. Th s means that the cannot see each others ema l addresses (wh ch are v s ble f ou use Ema l To or Ema l CC).
- T pe the ema l message and send t.

3. Recording a Note for a Contact List

After the sem nar has taken place, a note ma be added to the act v t l st of each part c pant, as follows:

- Cl ck the 'Act on' button above the gr d of contact l st members, and choose 'Select All' from the drop down menu.
- Cl ck the 'Act on' button aga n and select 'Note'.
- Select the contacts and accounts ou w sh to f le th s note aga nst or choose 'Select All' to f le the note aga nst all l sted contacts and accounts.
- Select the note t pe from the drop down l st and enter the deta ls.
- Choose OK to save th s nto the act v t h stor of all contact l st members.

4. Deleting the Contact List

Once the sem nar s over and has been followed up appropr atel , the contact l st ma no longer be requ red.

To d l t th Contact l st:

- Cl ck on the contact l st Deta ls tab.
- Cl ck the 'Delete' button.
- Cl ck 'Yes' to conf rm the delet on.

Th s act on w ll delete onl the contact l st, not the contacts themselves. Contact l sts ma be reta ned ndef n tel , f requ red.