Creating New Lists and Linking these lists to Action Plans

In the course of using WorkCenter, you will find it necessary to create additional Contact List Manager Lists. Please keep in mind that using the Contact List Manager Lists will enhance your ability to categorize your contacts and target them for specific tasks and marketing campaigns.

There are two methods for creating new lists in your Contact List Manager:

Option #1: You an manually create a new list by clicking on the Plus sign in the lower left hand corner of the List Manager screen. A Contact List box will appear. This list has three fields:

1. Group – this is the main group heading that you wish to create

2. Name – this is the name of the sub group that will be loaded under the GROUP title.
For example, if we type: "Vendors – Preferred" in the Group line and wish to have a sub group: High Priority, we would type that into the NAME line and click OK.

3. Action Plan – This is used to tie the Contact List to a specific action plan. For example we will assign this contact list to the FSBO action plan. You can do that by clicking the drop down menu in this screen view and selected the appropriate action plan. You will need to create an Action Plan prior to assigning this list or use one of our pre-programmed Contact List Manager Lists.

As you now can see, we have created a group called: Vendors – Preferred and we have a list underneath it called: High Priority that is assigned to the FSBO action plan.

We recommend you name your groups and contact lists with appropriate Names for quick access and identification. For more information about The Contact List Manager and features, view the additional flash videos or read the WorkCenter Quick Start Guide.