fibreCRM

HEART OF THE PRACTICE

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20-40 Doer-Seller Module Your 20-40 List

There are numerous ways of adding to your 20-40 List.
One way is by selecting the Lead/Person/Organisation record you wish to add and in the Actions Menu selecting the Add to My 20-40 List option.

Business Card		Keep In Touch		Categories	Personal Ta	< Source	ACTIONS	
First Name:		Jeremy			Offic	C Duplicate		
Last Name:		Armstrong			Mobi	Delete		
Person ID:		4045			Find Duplicat			
						Manage Subscripti	ons	
Client Manager:					Depa	Print as PDF		
Client Partner:		Rose Walker		Perso	View Change Log			
Sensitive Data:	ensitive Data: Add Sensitive Data				Client Information	Request		
						Send Direct Debit Form		
Trading as:						Add To My 20-40 L	ist	
Referrals Out						AML Check		

2. You can also use the Bulk Actions Menu in the list view of the Leads/ People/Organisation records in their respective modules. Select the records by using the tick boxes on the left hand side of the screen. Then select the Add to My 20-40 List option in the Bulk Actions Menu.

_				
	PEOPLE			
	Person	ID 🔶 Name 🔶	Organisation $~~\ominus~$	
	□ - Selected:4	BULK ACTION-	My Filters 🔻 🔻	7
E	ABA015	77 Mass Update	h And Benton	į
	ABA035	Merge	eel	9
	ABL0186	Add To Target L	ist ee Gray Lead	!
	ACU050	Print as PDF	us PC	9
5	AGI0158	9 Man	rp.	Į
c	AGU010	13 Delete	.td	
	AIK0446	Add To My 20-4	10 List ^{zy}	Į
L	AIR0381	7 Create Bulk Act	tivity cial Forensics	i

3. If a Person, Lead or Organisation has already been added to another users 20-40 List a message will appear in the header of the list view, letting you know which user has added who to their lists. This increases visibility across your firm and stops people contacting the same clients. NOTE: If a Person or Organisation is a Referrer then they can be added to more than one users 20-40 list.

4 To view your 20-40 List navigate to the **My 20-40 List** in the **Relationships tab** in the **Navigation Menu**.



5 In the **My 20-40 List** module you'll be able to view who you've added to your **20-40 List**. On the left hand side the grey icons will tell you whether they are a Lead, Person or Organisation record or an Employee.

Туре	Related to	Priority \ominus	Date added to list 🔶	In Gameplan 🔶	Date added to Gameplan $~~\ominus$	Status
O- BUL	ACTION-					K < (1 - 13 of 13) > X
	AAB Investment Advisors LLC	A	05-18-2021	Yes	05-18-2021	0
	Alan Peck	A .	05-18-2021	Yes	05-18-2021	0
	Ive Ajobere	в	05-14-2021	Yes	05-14-2021	0
□ 1	Bob Geldof	c 🔽	05-16-2021	Yes	05-16-2021	0
	Ivor Bank	A 🔽	05-16-2021	Yes	04-15-2021	0
□ ▲	Don Trump	A 🔽	05-16-2021	Yes	05-01-2021	
•	Ottoman Partners	c 🔽	05-19-2021	No		\odot
• •	Peter Owens	c 🔽	05-19-2021	No		\odot
□ ☆	Ben Franklin	c 🔽	05-19-2021	No		\odot
•	Photo Sales Entrprises	c 🔽	05-19-2021	No		\odot
	Tri-Merit	c 🔽	05-19-2021	No		\odot
•	Growth Strategies Marketing	c 🔽	05-25-2021	No		\odot
	Ima Main-Person	A	05-16-2021	No		\odot
	ACTION-					K < (1 - 13 of 13) > X

To help you prioritise you can rank each individual A – C in the priority drop down arrow. The date you added that record onto the list is also available for you to see, so you are able to keep track of how long it's been in your **20-40 List**.

6. record you'd like to remove by using the tick boxes on the left hand side and then select the Delete option from the Bulk Actions Menu.

