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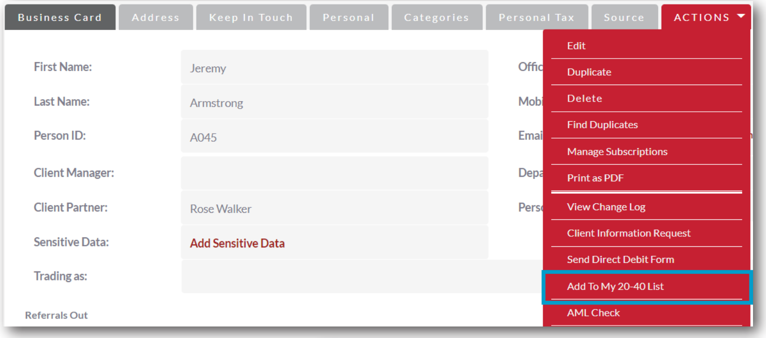
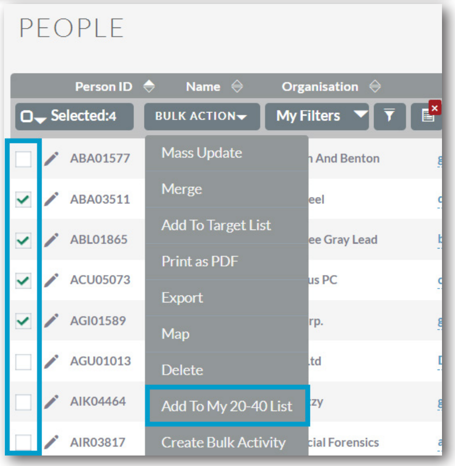
20-40 Doer-Seller Module
Your 20-40 List

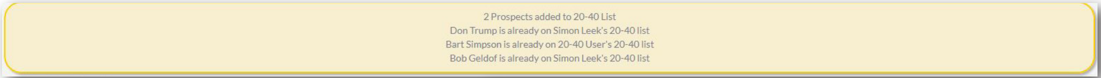
1. There are numerous ways of adding to your **20-40 List**. One way is by selecting the Lead/Person/Organisation record you wish to add and in the **Actions Menu** selecting the **Add to My 20-40 List** option.



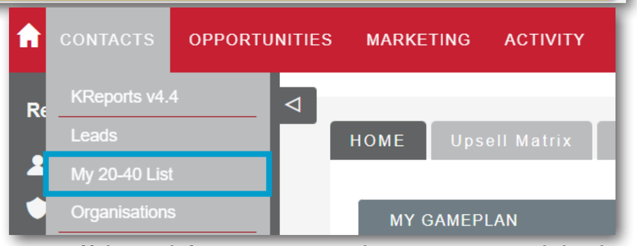
2. You can also use the **Bulk Actions Menu** in the list view of the Leads/ People/Organisation records in their respective modules. Select the records by using the tick boxes on the left hand side of the screen. Then select the **Add to My 20-40 List** option in the **Bulk Actions Menu**.



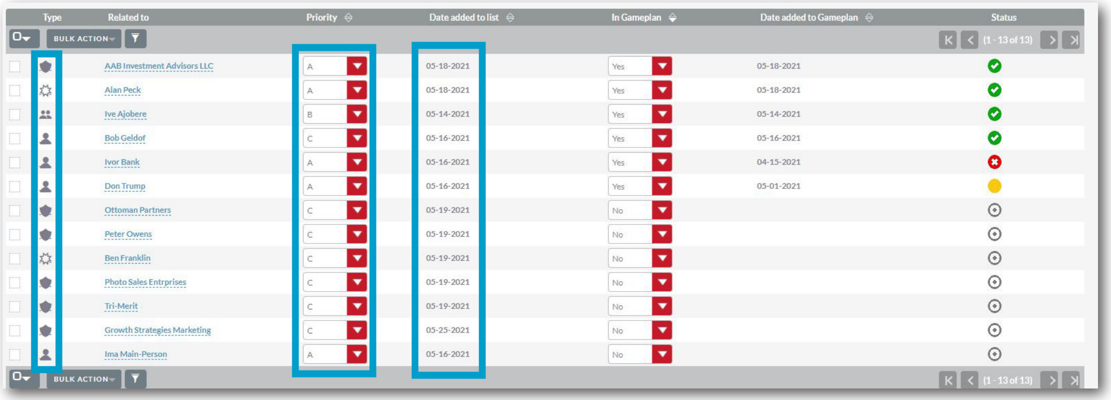
3. If a Person, Lead or Organisation has already been added to another users **20-40 List** a message will appear in the header of the list view, letting you know which user has added who to their lists. This increases visibility across your firm and stops people contacting the same clients. **NOTE: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



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. To remove anyone from your list select the 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**.