View All Contacts in a List

Basics: All Users
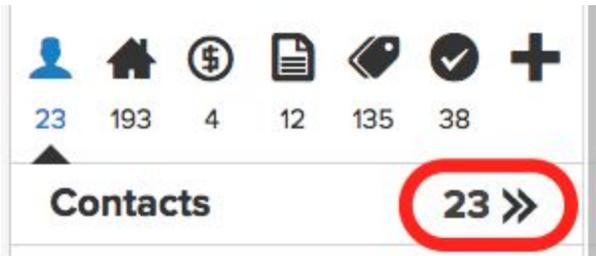
From the Listview on the left side of the screen, click on the double chevron " **>>** " next to the Contact count to display a list of contacts.

The image below shows the top section of the View All work pane, I've numbered each element to make it easier to describe. Use the "more menu" (7) on the far right to perform a process on multiple contacts at one time.
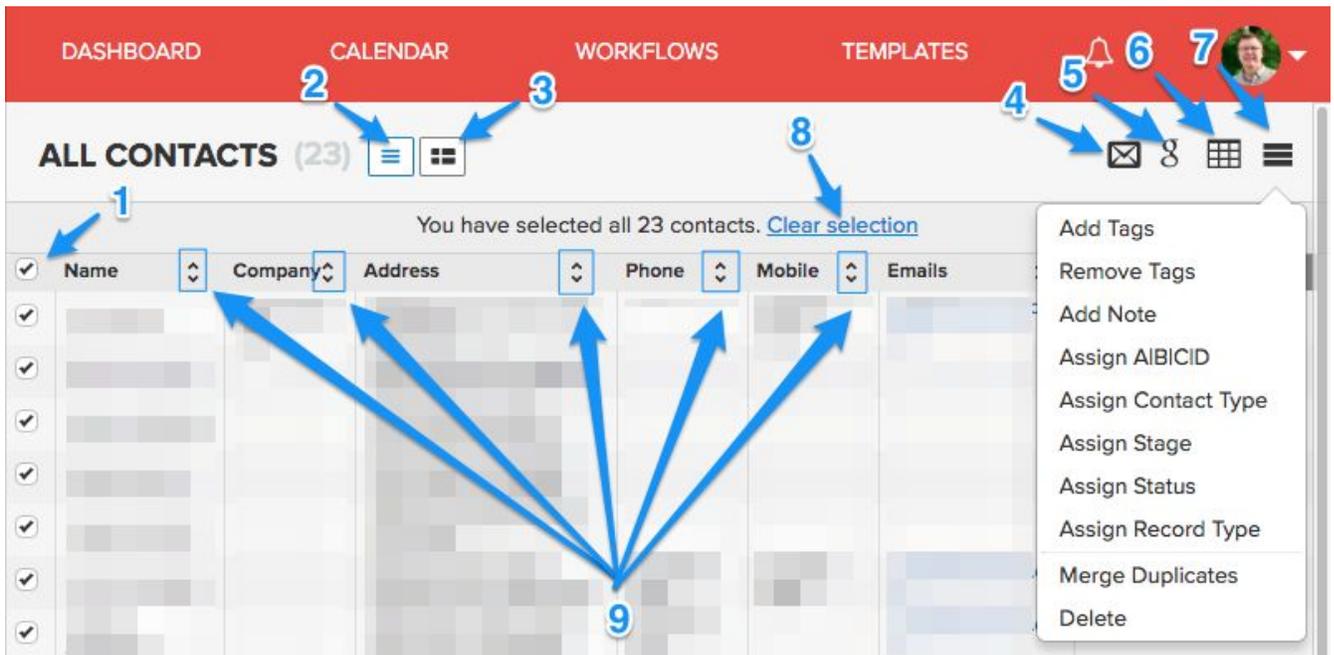
1. **Select Records** - This check box selects those records that are loaded into the current view. The table of contacts only displays a limited number of records at a time to increase load speed in low bandwidth areas.

2. **Table View** - List of contacts in table format of columns and rows.

3. **Grid View** - Lists contacts in a grid format which include an Image and the A|B|C|D category.

4. **Send Email** - Send an email to the selected contacts.

5. **Send to Google** - Sends the selected contacts to your Google drive as a spreadsheet. (must have a Google account setup in Settings > My Social Network.

6. **Export to CSV** - Exports the selected contacts to a Comma Separated Values file.

7. **Three horizontal line Icon** - Select any number of Contacts and this icon and a drop-down menu will appear giving you the following choices:

   - **Add Tags** - Adds a tag or tags to each selected contact.
   - **Remove Tags** - Removes a tag or tags from each selected contact.
   - **Add Note** - Adds a note to each selected contact.
   - **Assign A|B|C|D** - These are categories
   - **Assign contact Type** - One of the following: Client, Agent, Farm, Personal, or Vendor.
   - **Assign Stage** - One of the following: Aware, Know, Like, and Trust
   - **Assign Status** - One of the following: Prospect, Suspect, Lead, Client, Past Client, or None
   - **Assign Record Type** - Person or Company
   - **Merge Duplicates** - When 2 or more records are selected which are the same contact this button allows you to merge the data into one record to eliminate duplicates.
   - **Delete** - Deletes each selected contact and puts them in the trash. (**Settings** > **Trash**)

8. **Clear selection** (link) - de-selects all the selected contacts in the list.

9. **Column Sorting** - Allows for sorting in ascending or descending order. The first click will sort that column in ascending order (A-Z), a second click will change to descending order (Z-A)

If you have any questions, please contact us at: support@realvolve.com