

Beyond - How to Create and Manage Hot Lists

Last Modified on 09/18/2025 9:42 pm CDT

What are Hotlists?

Hotlists allow you an opportunity to place employees, customers, and/or contacts within given static lists in order to easily access and locate them, without having to run a search.

Hotlists may commonly be used to group employees who have been pre-qualified for a specific customer or skill set, or to track your key or target customers. The hot list section of Beyond can be accessed directly from via B Menu > Hotlists.

Note Hotlists are created at the hierarchy level you are currently located within.

Ensure you are at the proper hierarchy level before creating/editing hotlists.

Note Employee and Customer hotlists created in Enterprise will also appear in Beyond, and vice versa.

Contact hotlists are new functionality that has only been added to Beyond.

This article covers the following:

1. [Setting Up Permissions](#)
2. [How to Create a Hotlist](#)
3. [Add Employees, Customers, or Contacts to an Existing Hotlist](#)
4. [Searching for Hotlists](#)
5. [Editing or Deleting a Hotlist](#)
6. [Functionality Available Within a Hotlist](#)

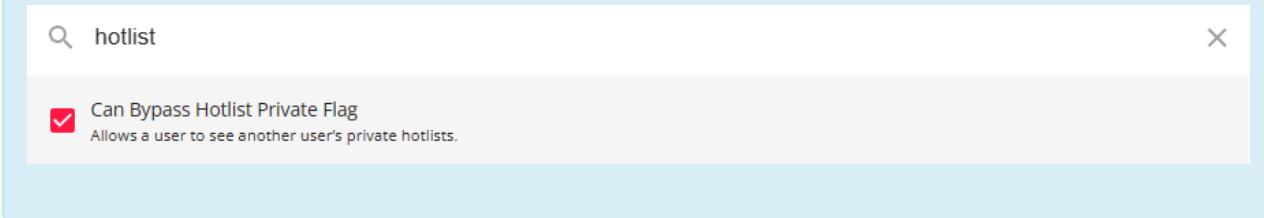
Setting Up Permissions

The ability to create hotlists within Beyond is a standard feature and therefore does not require additional standard Security Group permissions.

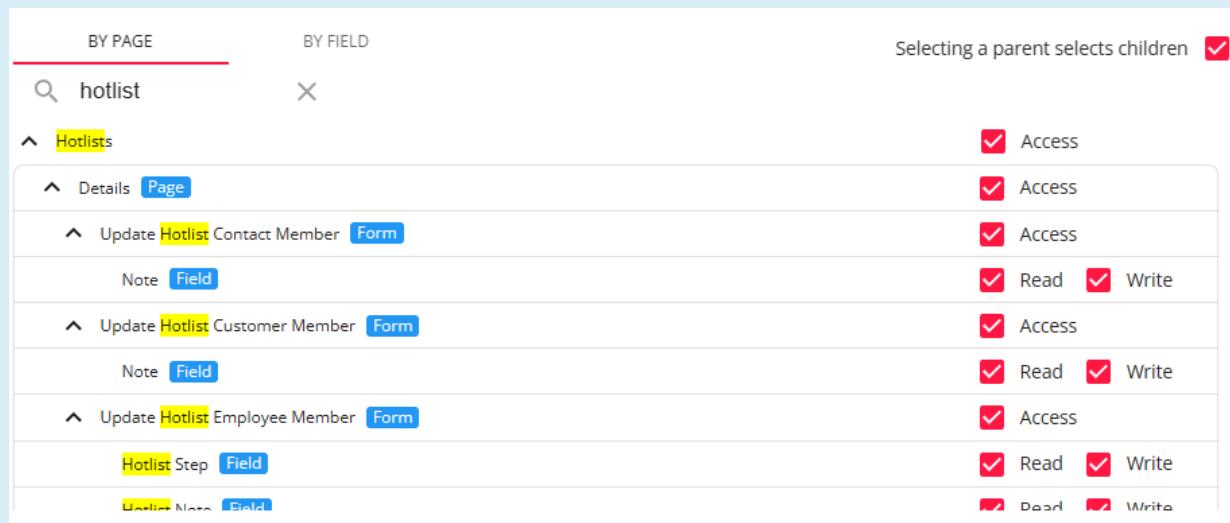
Note Users have the ability to create "Private" hotlists which make the hotlist viewable by only the user who

created that hotlist.

If you or other users should have access to view "Private" hotlists, the "Can Bypass Hotlist Private Flag" permission will need to be added to your intended Security Group:



Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Hotlists" pages and forms to the Security Groups that require the functionality:



For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "["Beyond - Creating Security Groups with Advanced Permissions"](#)".

How to Create a Hot List

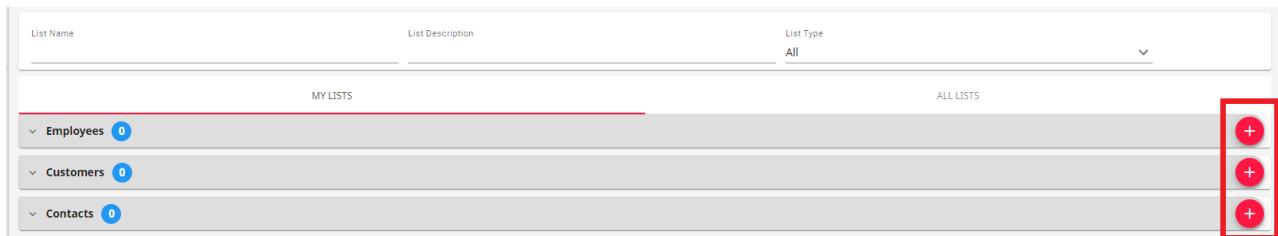
Hot lists can be created from three different areas:

1. Within B Menu > Hotlists
2. Via an Employee/Customer/Contact search
3. Via the "Add to Hotlist" charm on the Employee/Customer/Contact record

Create a Hotlist from B Menu > Hotlists

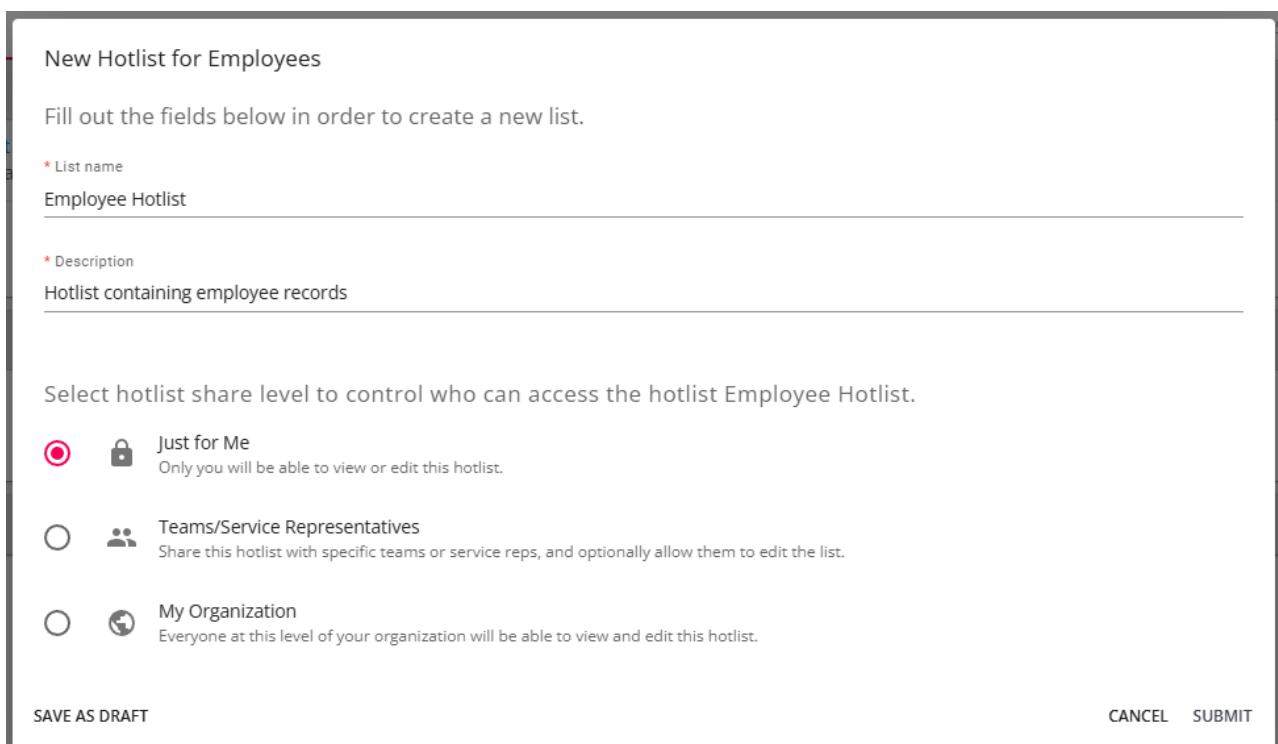
Hotlists are separated by record type and can be created for employees, customers, or contacts.

To create a hotlist, navigate to B Menu > Hotlists > "+" icon to the right of the record type you would like to create the hotlist for:



This will open the "New Hotlist" window where you will enter the following:

1. Enter the name of the hotlist.
2. Enter the description of the hotlist.
3. Mark the hotlist as either "Private" (default) or select how you would like to share the hotlist.



New Hotlist for Employees

Fill out the fields below in order to create a new list.

* List name
Employee Hotlist

* Description
Hotlist containing employee records

Select hotlist share level to control who can access the hotlist Employee Hotlist.

 Just for Me
Only you will be able to view or edit this hotlist.

 Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.

 My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

SAVE AS DRAFT CANCEL SUBMIT

Note When you want to share a hotlist, you can select the option for "Teams/Service Representatives" or "My Organization":

- Selecting "Teams/Service Representatives" allows you to select complete Service Rep Teams and/or individual Service Representatives to share your hotlist with:

Search by Team and/or Service Representative to share access to hotlist Employee Hotlist.

-  Just for Me
Only you will be able to view or edit this hotlist.
-  Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
-  My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

* Teams

Recruiters  Sales 

* Service Representatives

Alan Grant  Alexander Swanson 

- Selecting "My Organization" will share the hotlist with everyone at the hierarchy level the hotlist is created within:

Select hotlist share level to control who can access the hotlist Employee Hotlist.

-  Just for Me
Only you will be able to view or edit this hotlist.
-  Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
-  My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

If the "Teams/Service Representatives" option is selected, you will also have the ability to allow editing by anyone the hotlist is being shared with via the checkbox at the bottom of the window:

Search by Team and/or Service Representative to share access to hotlist Employee Hotlist.

-  Just for Me
Only you will be able to view or edit this hotlist.
-  Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
-  My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

* Teams

Recruiters  Sales 

* Service Representatives

Alan Grant  Alexander Swanson 

REMOVE ALL

This list can be edited by anyone that it is shared with

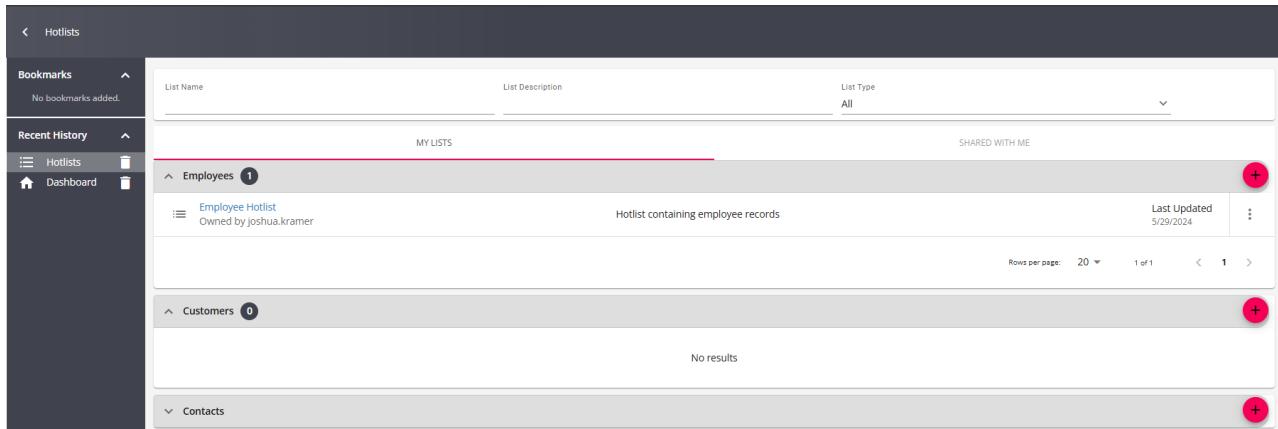
If the "My Organization" option is selected, this checkbox is checked by default and will not be able to be deselected:

Select hotlist share level to control who can access the hotlist Employee Hotlist.

-  Just for Me
Only you will be able to view or edit this hotlist.
-  Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
-  My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

This list can be edited by anyone that it is shared with

Once the information has been entered, select "Submit" for the hotlist to be created and for it to appear within the "My Lists" tab:



The screenshot shows the 'Hotlists' interface. On the left, there's a sidebar with 'Bookmarks' (No bookmarks added), 'Recent History' (Hotlists selected), and 'Dashboard'. The main area is titled 'MY LISTS' and shows a table with one entry:

List Name	List Description	List Type
Employee Hotlist	Hotlist containing employee records	SHARED WITH ME All

Details for the 'Employee Hotlist':
Owned by joshua.kramer
Last Updated 5/29/2024
Rows per page: 20 (1 of 1)

Create a Hotlist via an Employee/Customer/Contact Search

If you have completed an employee, customer, or contact search, and wish to add all, or some of those results to a new hotlist; you can create a hotlist directly from the search result.

To do so, select the "Actions" dropdown and select "Add to Hotlist" within the search results:

The screenshot shows a software interface for managing employee records. At the top, there are 'BASIC' and 'ADVANCED' search filters. Below these are fields for Last Name (Abbott), First Name (First), Assigned (Either), Status (Inactive), Branch (All), Service Representative (All), and buttons for 'RESET' and 'SEARCH'. The main area displays a table with columns: Branch, Is Active, Is Assigned, Last Message, Zip Code, Resume on file, Phone, and Cell Phone. Two rows are shown: Minneapolis (Deactivate, 35116) and New Brighton (Reactivate, 94108). A '2 results' message is at the top right. A 'Rows per page' dropdown is at the bottom right. On the left, a 'SELECT ALL' checkbox is checked, and an 'ACTIONS' dropdown menu is open, showing the 'Add to Hotlist' option highlighted with a red box.

This will open the "Add to Hotlist" window where you can do the following based on the tab selected:

If you want to add the records to an existing hotlist, select the "Existing" tab, and enter the following information:

1. Select the appropriate existing hotlist from the "Existing Hotlists" dropdown menu.
2. Select the position the records will appear within the hotlist (either top or bottom of the list).

The 'Add to Hotlist' dialog box is open. It has two tabs: 'EXISTING' (which is selected and highlighted with a red box) and 'NEW'. Below the tabs, there is a dropdown menu labeled 'Employee Hotlist'. Under the 'Select Position on Hotlist' section, the radio button for 'Add to top of list' is selected. A message box at the bottom says '4 Employees will be added to Employee Hotlist.' At the bottom of the dialog box are 'SAVE AS DRAFT', 'CANCEL', and 'SUBMIT' buttons.

If you want to add the records to a new hotlist, select the "New" tab and enter the following information:

1. Enter the name of the hotlist.

2. Enter the description of the hotlist.
3. Mark the hotlist as either "Private" or select how you would like to share the hotlist.

Add to Hotlist

You can choose to add to an existing hotlist **or** create a new one.

* New List Name
Abbott Employees

* New Description
Employees with the last name of Abbott

Select hotlist share level to control who can access the hotlist
Abbott Employees.

 Just for Me
Only you will be able to view or edit this hotlist.

 Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.

 My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

 4 Employees will be added to the new hotlist **Abbott Employees**.

Note When you want to share a hotlist, you can select the option for "Teams/Service Representatives" or "My Organization":

- Selecting "Teams/Service Representatives" allows you to select complete Service Rep Teams and/or individual Service Representatives to share your hotlist with:

Search by Team and/or Service Representative to share access to hotlist Employee Hotlist.

-  Just for Me
Only you will be able to view or edit this hotlist.
-  Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
-  My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

* Teams

Recruiters  Sales 

* Service Representatives

Alan Grant  Alexander Swanson 

- Selecting "My Organization" will share the hotlist with everyone at the hierarchy level the hotlist is created within:

Select hotlist share level to control who can access the hotlist Employee Hotlist.

-  Just for Me
Only you will be able to view or edit this hotlist.
-  Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
-  My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

If the "Teams/Service Representatives" option is selected, you will also have the ability to allow editing by anyone the hotlist is being shared with via the checkbox at the bottom of the window:

Search by Team and/or Service Representative to share access to hotlist Employee Hotlist.

-  Just for Me
Only you will be able to view or edit this hotlist.
-  Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
-  My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

* Teams

Recruiters  Sales 

* Service Representatives

Alan Grant  Alexander Swanson 

REMOVE ALL

This list can be edited by anyone that it is shared with

If the "My Organization" option is selected, this checkbox is checked by default and will not be able to be deselected:

Select hotlist share level to control who can access the hotlist Employee Hotlist.

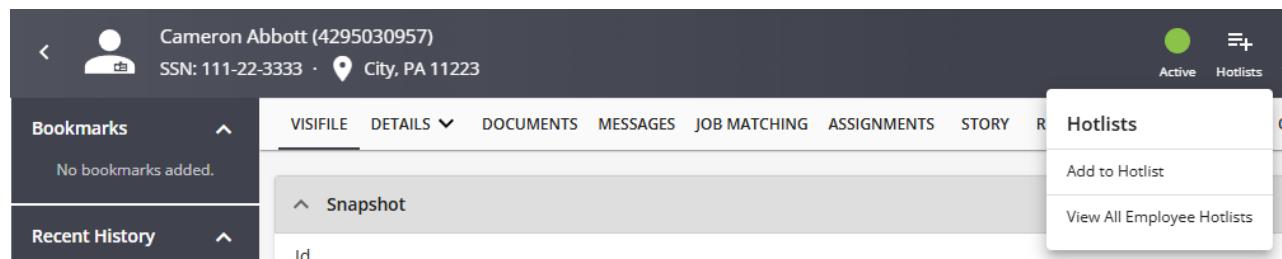
-  Just for Me
Only you will be able to view or edit this hotlist.
-  Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
-  My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

This list can be edited by anyone that it is shared with

Once the information has been entered, select "Submit".

Create a Hotlist via the "Hotlists" Charm on the Employee/Customer/Contact Record

While on an employee, customer, or contact record, you can create a hotlist for the employee by selecting the "Hotlists" charm and selecting "Add to Hotlist":



This will open the "Add to Hotlist" window where you can do the following based on the tab selected:

If you want to add the record to an existing hotlist, select the "Existing" tab, and enter the following information:

1. Select the appropriate existing hotlist from the "Existing Hotlists" dropdown menu.
2. Select the position the record will appear within the hotlist (either top or bottom of the list).

Add to Hotlist

You can choose to add to an existing hotlist **or** create a new one.

EXISTING NEW

* Existing Hotlists

Employee Hotlist ▼

Select Position on Hotlist

Add to top of list

Add to bottom of list

Info 1 Employee will be added to Employee Hotlist.

SAVE AS DRAFT CANCEL SUBMIT

If you want to add the records to a new hotlist, select the "New" tab and enter the following information:

1. Enter the name of the hotlist.
2. Enter the description of the hotlist.
3. Mark the hotlist as either "Private" or select how you would like to share the hotlist.

WATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP MY ONBOARDING PAY LISTS

Add to Hotlist

You can choose to add to an existing hotlist **or** create a new one.

* New List Name
Abbott Employees

* New Description
Employees with the last name of Abbott

Select hotlist share level to control who can access the hotlist
Abbott Employees.

Just for Me
Only you will be able to view or edit this hotlist.

Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.

My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

1 Employee will be added to the new hotlist **Abbott Employees**.

Note When you want to share a hotlist, you can select the option for "Teams/Service Representatives" or "My Organization":

- Selecting "Teams/Service Representatives" allows you to select complete Service Rep Teams and/or individual Service Representatives to share your hotlist with:

Search by Team and/or Service Representative to share access to hotlist Employee Hotlist.

-  Just for Me
Only you will be able to view or edit this hotlist.
-  Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
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* Teams

Recruiters  Sales 

* Service Representatives

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- Selecting "My Organization" will share the hotlist with everyone at the hierarchy level the hotlist is created within:

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Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
-  My Organization
Everyone at this level of your organization will be able to view and edit this hotlist.

If the "Teams/Service Representatives" option is selected, you will also have the ability to allow editing by anyone the hotlist is being shared with via the checkbox at the bottom of the window:

Search by Team and/or Service Representative to share access to hotlist Employee Hotlist.

-  Just for Me
Only you will be able to view or edit this hotlist.
-  Teams/Service Representatives
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
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Recruiters  Sales 

* Service Representatives

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If the "My Organization" option is selected, this checkbox is checked by default and will not be able to be deselected:

Select hotlist share level to control who can access the hotlist Employee Hotlist.

 Just for Me

Only you will be able to view or edit this hotlist.

 Teams/Service Representatives

Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.

 My Organization

Everyone at this level of your organization will be able to view and edit this hotlist.

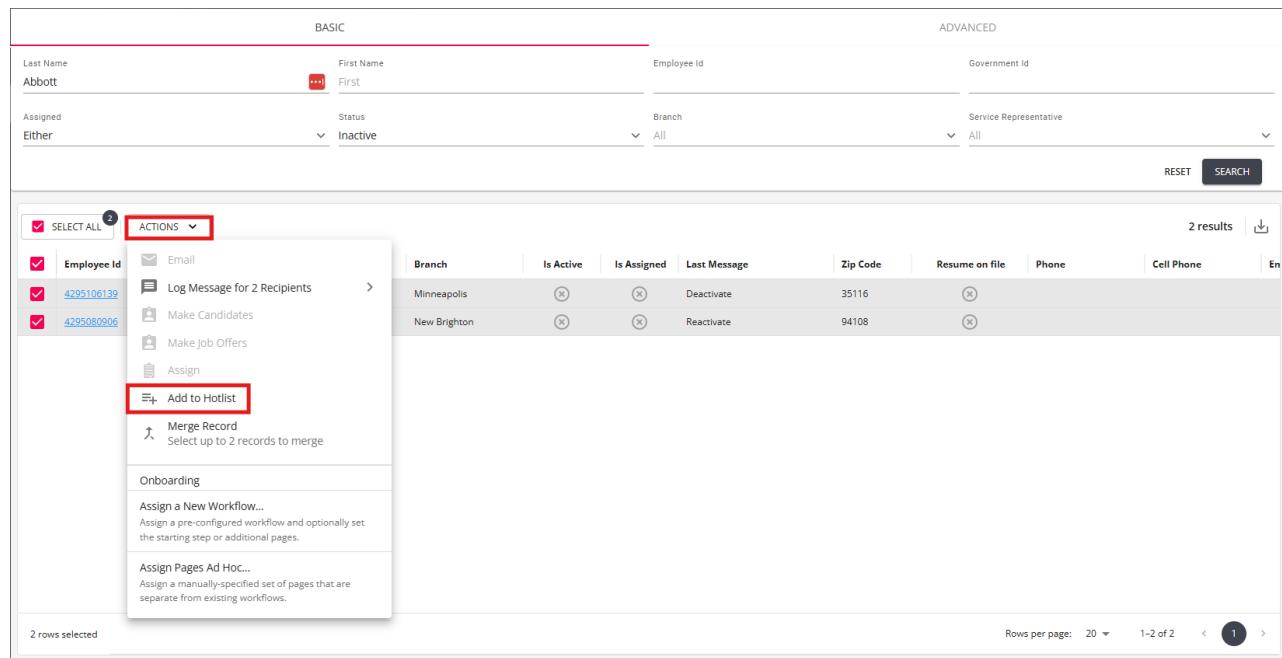
This list can be edited by anyone that it is shared with

Once the information has been entered, select "Submit".

Add Employees, Customers, or Contacts to an Existing Hotlist

Once you have created the hotlist you can add employees, customers, or contacts to a hotlist at any time from either a search result, or from within the specific record via the "Hotlists" charm.

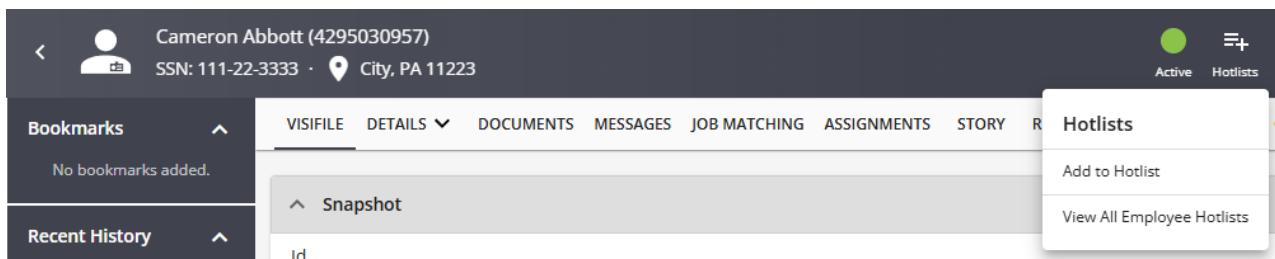
Adding from Search Results:



The screenshot shows the Dynamics 365 search interface for employees. The search results table has columns: Branch, Is Active, Is Assigned, Last Message, Zip Code, Resume on file, Phone, Cell Phone, and Email. Two results are shown: Minneapolis and New Brighton. A context menu is open over the first result (Minneapolis), with the 'Add to Hotlist' option highlighted.

Branch	Is Active	Is Assigned	Last Message	Zip Code	Resume on file	Phone	Cell Phone	Email
Minneapolis	(X)	(X)	Deactivate	35116	(X)			
New Brighton	(X)	(X)	Reactivate	94108	(X)			

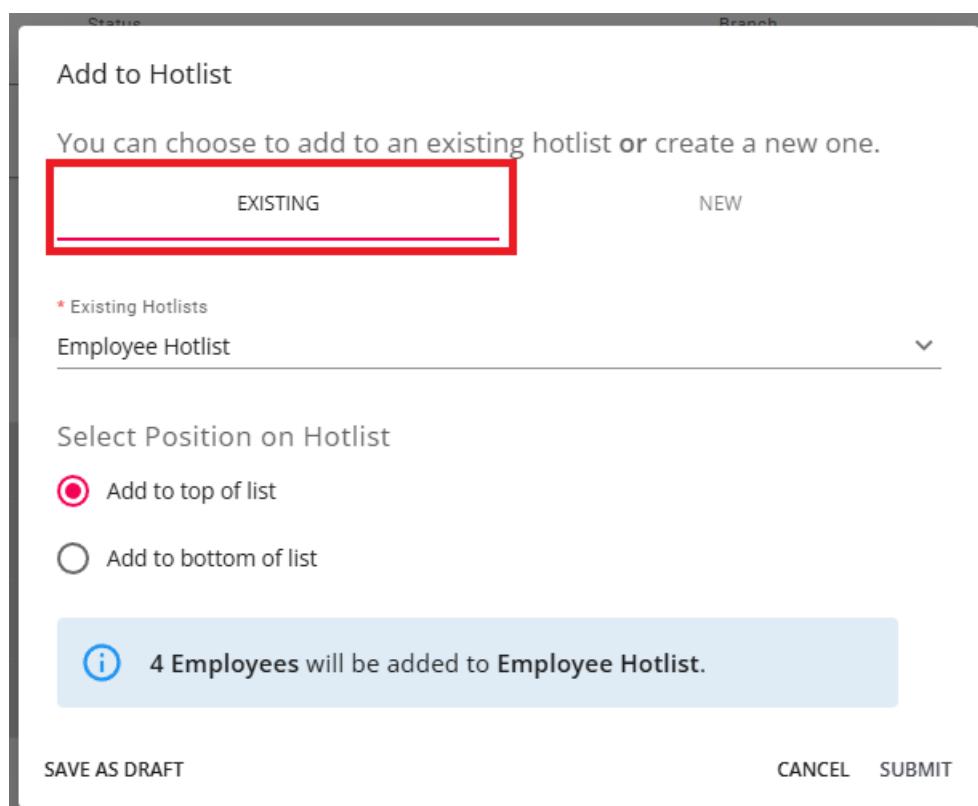
Adding via the "Hotlists" Charm:



The screenshot shows the Visifile software interface for an employee named Cameron Abbott. The top bar displays the employee's name (Cameron Abbott (4295030957)), SSN (111-22-3333), and location (City, PA 11223). On the right, there are buttons for 'Active' and 'Hotlists'. A dropdown menu is open under 'Hotlists', showing 'Add to Hotlist' and 'View All Employee Hotlists'.

Both options will open the "Add to Hotlist" window where, within the "Existing" tab, you will select the following:

1. Select the appropriate existing hotlist from the "Existing Hotlists" dropdown menu.
2. Select the position the record will appear within the hotlist (either top or bottom of the list).



The screenshot shows the "Add to Hotlist" window. The "EXISTING" tab is selected, highlighted with a red box. The "NEW" tab is also visible. Below the tabs, there is a dropdown menu labeled "Employee Hotlist" with a dropdown arrow. Under "Select Position on Hotlist", the "Add to top of list" radio button is selected. A message box at the bottom states "4 Employees will be added to Employee Hotlist." At the bottom of the window are buttons for "SAVE AS DRAFT", "CANCEL", and "SUBMIT".

Note The hotlists that appear within this dropdown include:

- Your hotlists that pertain to the specific record type.
- Other users' hotlists that have been made "Public" that pertain to the specific record type.
- Other users' hotlists that have been shared with you and have editing allowed.
- All "Private" hotlists as long as you have the security permission to view other users' "Private" hotlists.

Once the intended hotlist has been selected from the dropdown, and the position of the records has been chosen, select "Submit" to add the records to the hotlist.

Note Records that are visible within any given hotlist are dependant on what the user can view within their hierarchy.



Searching for Hotlists

To locate the hotlist you wish to utilize, navigate to B Menu > Hotlists.

You can then search for your desired hot list by using the available search and filter options:

- List Name **or**
- List Description
- List Type (All, Static List, Saved Search)

The screenshot shows a search interface for hotlists. At the top, there are three input fields: 'List Name', 'List Description', and a dropdown menu for 'List Type' set to 'All'. Below these are two sections: 'MY LISTS' and 'SHARED WITH ME'. The 'MY LISTS' section contains three items: 'Employees' (59), 'Customers' (31), and 'Contacts' (3), each with a red '+' icon to its right. The 'SHARED WITH ME' section is currently empty.

You can also filter between viewing your lists or viewing all hotlists shared with you. Viewing all shared hotlists includes the following:

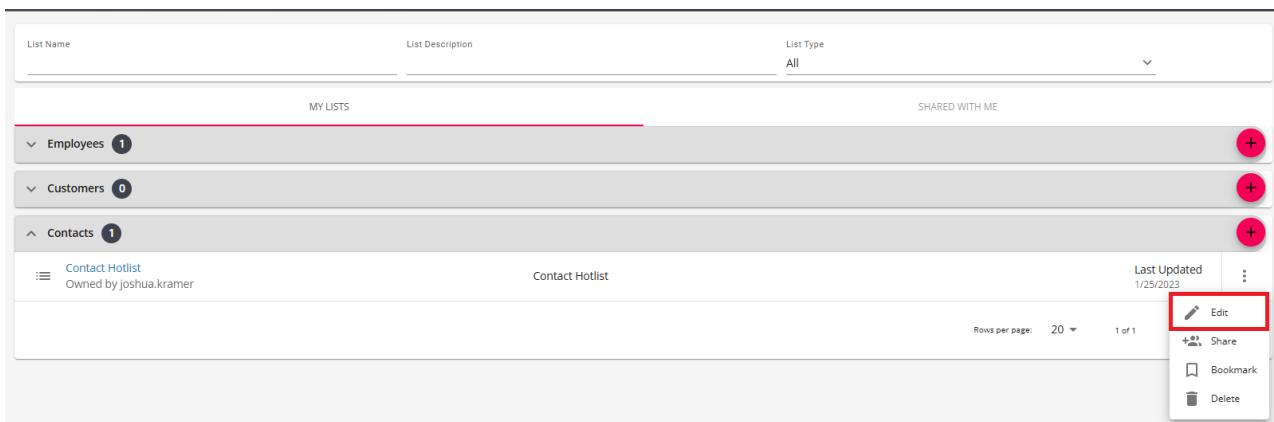
- All hotlists that have been made public.
- Hotlists that were made private by the original user, but you have the associated permission to view them.

The screenshot shows the same search interface as the previous one, but the 'List Type' dropdown is now set to 'All'. The 'MY LISTS' section remains the same. The 'ALL LISTS' section is now visible and contains the same three items: 'Employees' (118), 'Customers' (63), and 'Contacts' (28), each with a red '+' icon to its right.

Editing or Deleting a Hotlist

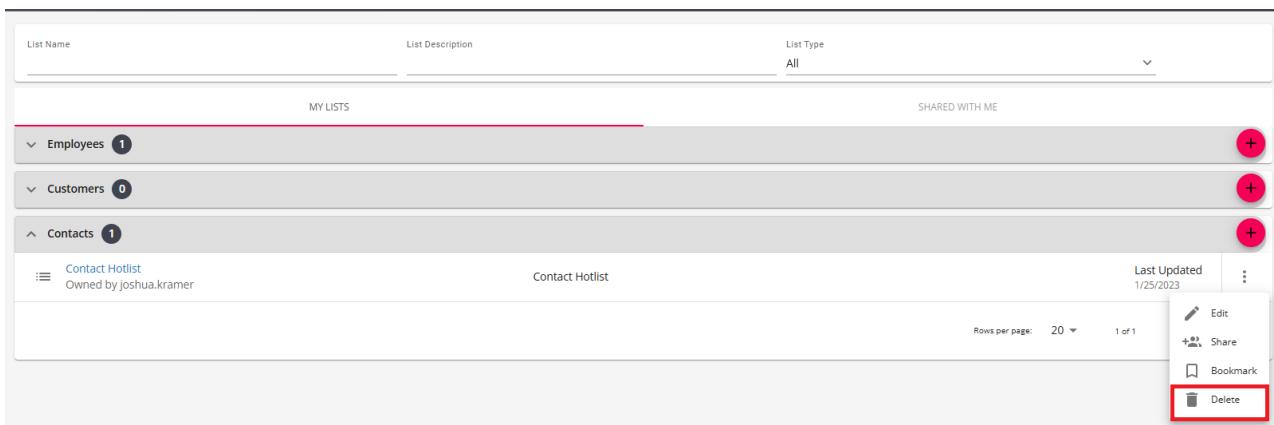
Hotlists can be edited or deleted by navigating to B Menu > Hotlists.

To edit a hotlist, select the icon to the right of the hotlist and select "Edit":



The screenshot shows the 'MY LISTS' section of a software interface. At the top, there are fields for 'List Name', 'List Description', and 'List Type' (set to 'All'). Below this is a table with three rows: 'Employees' (1 item), 'Customers' (0 items), and 'Contacts' (1 item, which is currently selected). The 'Contacts' row contains a 'Contact Hotlist' record, which is detailed in a sub-table: 'Owned by joshua.kramer', 'Contact Hotlist', 'Last Updated 1/25/2023', and 'Rows per page: 20'. To the right of this sub-table is a context menu with options: 'Edit' (highlighted with a red box), 'Share', 'Bookmark', and 'Delete'.

To delete a hotlist, select the  icon to the right of the hotlist within record type dropdowns and select "Delete":



This screenshot is identical to the one above, showing the 'MY LISTS' page. The 'Contact Hotlist' record is selected, and its context menu is open. The 'Delete' option in the menu is highlighted with a red box.

Select "Confirm" within the prompt to delete the hotlist.

Note If you have been given access to shared hotlists with editing permissions, you will also have the ability to delete those hotlists.

Functionality Available Within a Hotlist

Within the hotlists, different functionality is available for employees, customers, and contacts.

For all hotlists you have created, you can do the following:

1. Export the hotlist by selecting the  icon to the right of the hotlist record.
2. Edit the hotlist by selecting the  icon to the top right of the hotlist record.
3. Share the hotlist by selecting the  icon to the top right of the hotlist record.
4. Bookmark the hotlist by selecting the  icon to the top right of the hotlist record.

2nd shift forklift 224 Total Records
2nd shift forklift TEST

Edit Assign Delete

224 results Download

<input type="checkbox"/>	Position	Active	Assigned	Employee Id	Name	Hotlist Step	Hotlist Note	Phone Number	Email	More
<input type="checkbox"/>	5	✓	✓	4295106643	Addams_Tuesday			(330) 602-9765	tuesday.add@def.ogn	More
<input type="checkbox"/>	6	✓	✓	4295107498	Addison_Jordan			6127076157	jordan.addison@abc-xyz	More
<input type="checkbox"/>	7	✓	✓	4295105872	Alexander_Martison			9523567788	Alex.Martison@xyzabc.org	More
<input type="checkbox"/>	8	✓	✓	4295106795	Allbring_Will			6123332222	will.allbring@zfd.yrf	More
<input type="checkbox"/>	9	✓	✓	4295105638	Ameche_Alan			6123456736	alan.ameche@badgerx.xom	More
<input type="checkbox"/>	10	✓	✓	4295121077	Anderson_Megan			6128781888	megan.anders@bux.xom	More
<input type="checkbox"/>	11	✓	✓	4295108054	Anderson_Nicole			5445522522	nicoole.anderson@gmail.com	More
<input type="checkbox"/>	12	✓	✓	4295107108	Aniston_Jennifer			6517012521	jennifer.aniston@abc.xy	More
<input type="checkbox"/>	13	✓	✓	4295059076	Applebee_Randy					More
<input type="checkbox"/>	14	✓	✓	4295107026	Asner_Edward			(612) 223-4456	ed.asner@fthjk.cmn	More
<input type="checkbox"/>	15	✓	✓	4295106608	Atcheson_Oakley			6512297584	oakleyaton@hfr.fhg	More
<input type="checkbox"/>	16	✓	✓	4295120485	Baggins_Nora			7154855555	n.baggins@zop.com	More
<input type="checkbox"/>	17	✓	✓	4295107715	Balk_James			(651) 214-2235	jimmy.balk@gmail.xcom	More
<input type="checkbox"/>	18	✓	✓	4295106043	Ball_Jerry			6518589658	jerry.Ball@xyz.com	More
<input type="checkbox"/>	19	✓	✓	4295106805	Bandile_Jiiev			6518750003	jiievbandile@ser.mwi	More
<input type="checkbox"/>	20	✓	✓	11971	Barker_Roberto			(651) 068-0068x123	shaha403@yahoo.com	More

Rows per page: 20 1 2 3 4 5 ... 12 >

Employee Hotlist Functionality

Navigate to B Menu > Hotlists > Select a hotlist that contains records.

Select multiple records from the hotlist and select the "Actions" dropdown for the following options:

- Text Employees (if a texting integration is enabled and you have texting credentials setup)
- Email
- Log Message
- Make Candidates
- Make Job Offers
- Assign
- Edit Hotlist Members

Additionally, you can select the More icon to the right of the record within the hotlist for the following options:

- Edit
- Remove

By selecting "Edit", the "Edit Hotlist Member" window will open with the following options:

- Hotlist Step: This column allows you to track the status of an employee in relation to this specific hot list. This is not correlated to a candidate status (tied to an order) nor is it logged, or visible, on the employee's record.
- Hotlist Note: A note for the record of the hotlist.
- Hotlist Position: The position the record will appear within the hotlist.

Edit Hotlist Member

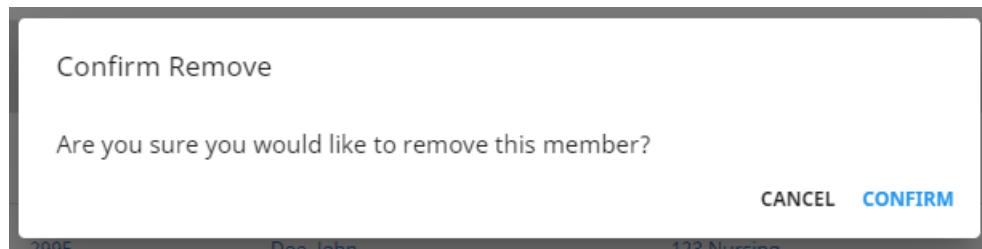
Hotlist Step
Accepted

Hotlist Note
Note

* Hotlist Position
1
Enter a number between 1 and 18

SAVE AS DRAFT **CANCEL** **SUBMIT**

By selecting "Remove", you can select "Confirm" within the prompt to remove the record from the hotlist:



Customer Hot List Functionality

Navigate to B Menu > Hotlists > Select a hotlist that contains records.

Select multiple records from the hotlist and select the "# Selected Items" dropdown for the following options:

- Log Message

Additionally, you can select the icon to the right of the record within the hotlist for the following options:

- Edit
- Remove

By selecting "Edit", the "Edit Hotlist Member" window will open with the following options:

- Note: A note for the record of the hotlist that will also update on the customer record.
- Hotlist Position: The position the record will appear within the hotlist.

Edit Hotlist Member

Note

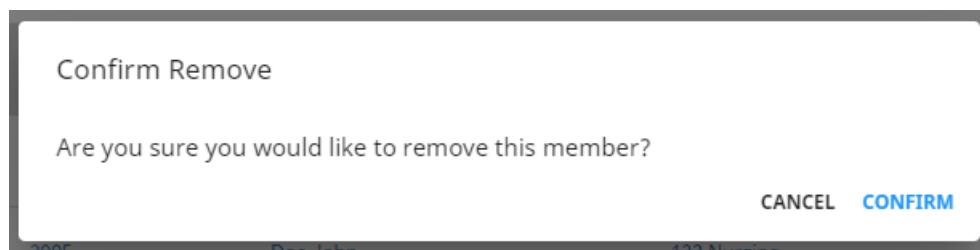
* Hotlist Position

3

Enter a number between 1 and 6

[SAVE AS DRAFT](#) [CANCEL](#) [SUBMIT](#)

By selecting "Remove", you can select "Confirm" within the prompt to remove the record from the hotlist:



Contact Hot List Functionality

Navigate to B Menu > Hotlists > Select a hotlist that contains records.

Select multiple records from the hotlist and select the "# Selected Items" dropdown for the following options:

- Email
- Log Message
- Text Contacts (if a texting integration is enabled and you have texting credentials setup)

Additionally, you can select the icon to the right of the record within the hotlist for the following options:

- Edit
- Remove

By selecting "Edit", the "Edit Hotlist Member" window will open with the following options:

- Note: A note for the record of the hotlist that will also update on the contact record.
- Hotlist Position: The position the record will appear within the hotlist.

Edit Hotlist Member

Note

New Contact

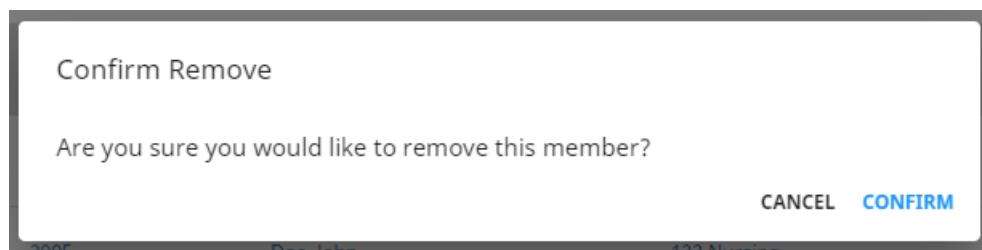
* Hotlist Position

1

Enter a number between 1 and 3

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By selecting "Remove", you can select "Confirm" within the prompt to remove the record from the hotlist:



Related Articles