

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:

☒ Can Bypass Hotlist Private Flag
Allows a user to see another user's private hotlists.

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:

BY PAGE

BY FIELD

Selecting a parent selects children ☒

hotlist

Hotlists

Details

Update Hotlist Contact Member

Update Hotlist Customer Member

Update Hotlist Employee Member

Hotlist Step

Hotlist Note

Page

Form

Form

Form

Field

Field

☒ Access

☒ Access

☒ Access

☒ Read ☒ Write

☒ Access

☒ Read ☒ Write

☒ Access

☒ Read ☒ Write

☒ Read ☒ Write

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

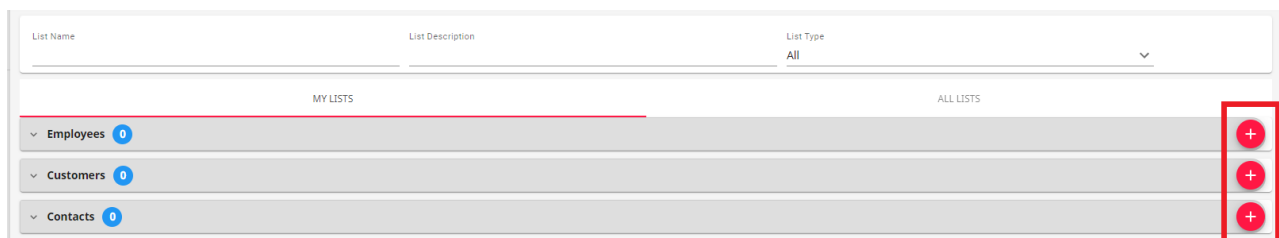
Hot lists can be created from three different areas:

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.

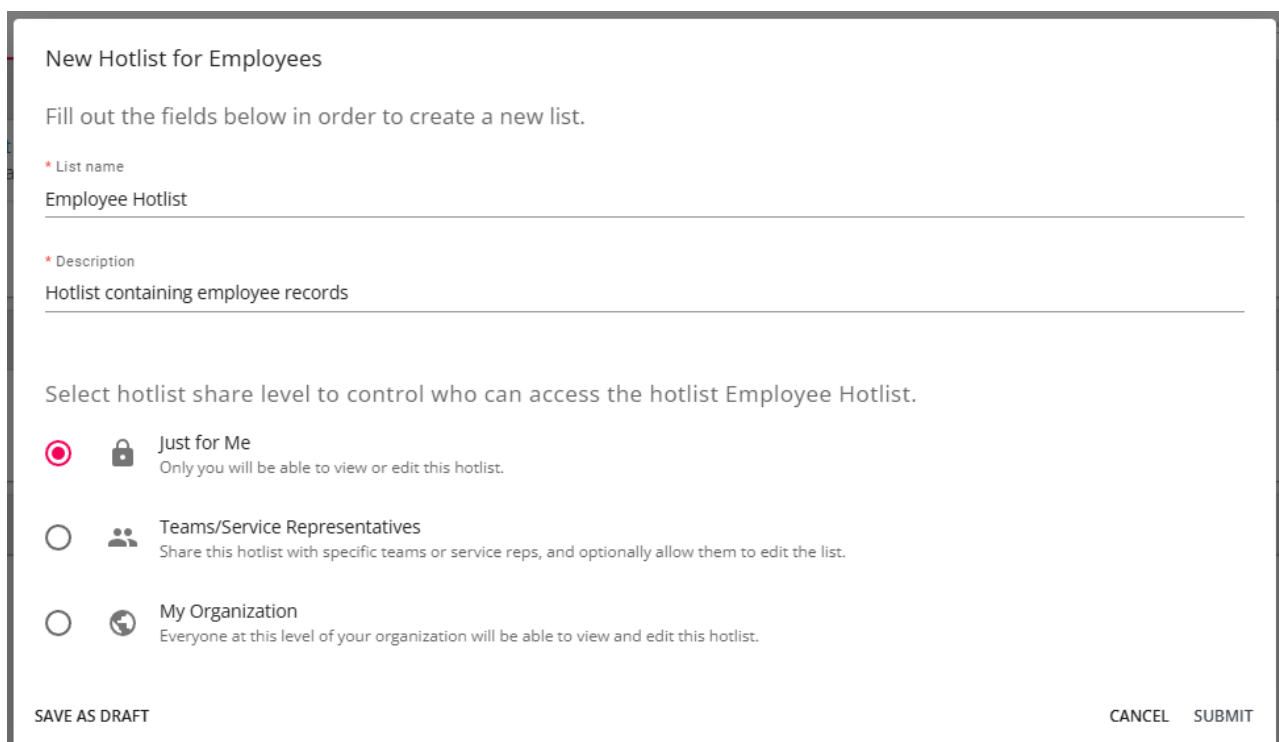
To create a hotlist, navigate to B Menu > Hotlists > "+" icon to the right of the record type you would like to create the hotlist for:



List Name	List Description	List Type
		All
MY LISTS		
Employees	0	+
Customers	0	+
Contacts	0	+

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

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Sales

* Service Representatives

Alan Grant




Alexander Swanson

[REMOVE ALL](#)

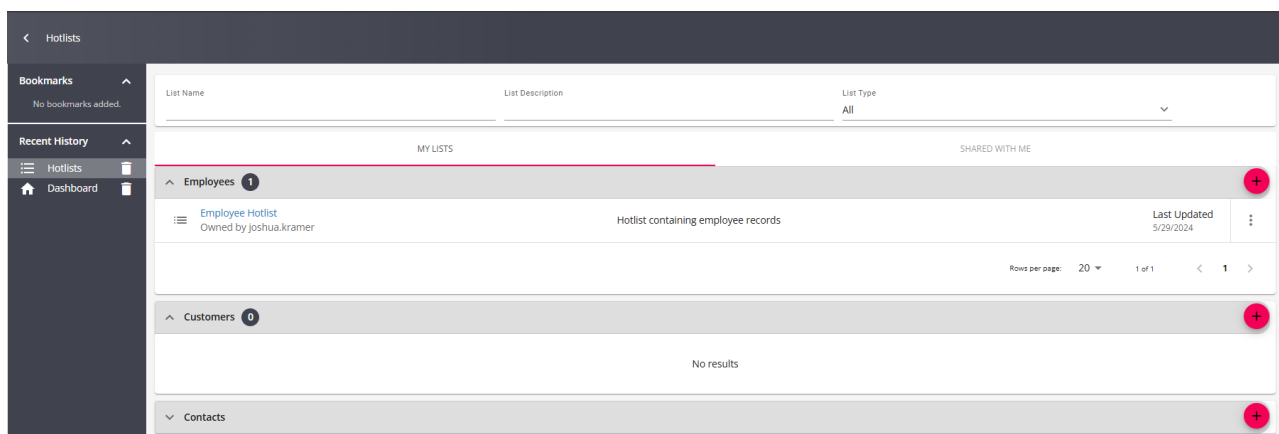
☐ This list can be edited by anyone that it is shared with

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 is a sidebar with 'Bookmarks' (No bookmarks added), 'Recent History' (Hotlists, Dashboard), and a list of hotlists. The main area is titled 'MY LISTS' and shows a table of hotlists. The first hotlist is 'Employee Hotlist', owned by joshua.kramer, containing employee records. It was last updated on 5/29/2024. Below it are 'Customers' (0 results) and 'Contacts' (0 results). The table has columns for List Name, List Description, and List Type (All). The 'Employee Hotlist' row has a red '+' button on the right. The 'Customers' and 'Contacts' rows also have red '+' buttons. The table footer shows 'Rows per page: 20' and '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:

BASIC				ADVANCED			
Last Name Abbott	First Name First	Employee Id	Government Id				
Assigned Either	Status Inactive	Branch All	Service Representative All				

RESET SEARCH

☒ SELECT ALL

ACTIONS

Email

Log Message for 2 Recipients

Make Candidates

Make Job Offers

Assign

Add to Hotlist

Merge Record
Select up to 2 records to merge

Onboarding

Assign a New Workflow...

Assign Pages Ad Hoc...

2 results

Branch	Is Active	Is Assigned	Last Message	Zip Code	Resume on file	Phone	Cell Phone	En
Minneapolis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Deactivate	35116	<input checked="" type="checkbox"/>			
New Brighton	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Reactivate	94108	<input checked="" type="checkbox"/>			

2 rows selected

Rows per page: 20 1-2 of 2

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).

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

4 Employees 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.

Add to Hotlist

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

EXISTING**NEW**


* 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**.

SAVE AS DRAFTCANCELSUBMIT

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

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[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.

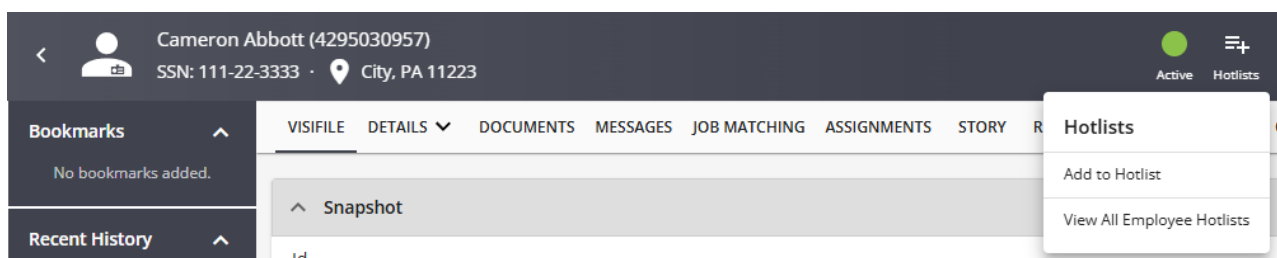
☒  **My Organization**
Everyone at this level of your organization will be able to view and edit this hotlist.

☒ 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

 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.

MATCHING ASSIGNMENTS STORY REFERENCES DAY SETUP 12 ONBOARDING DAY HISTORY

Add to Hotlist


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


EXISTING **NEW**


* 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**.

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

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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**
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- ☒  **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

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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.

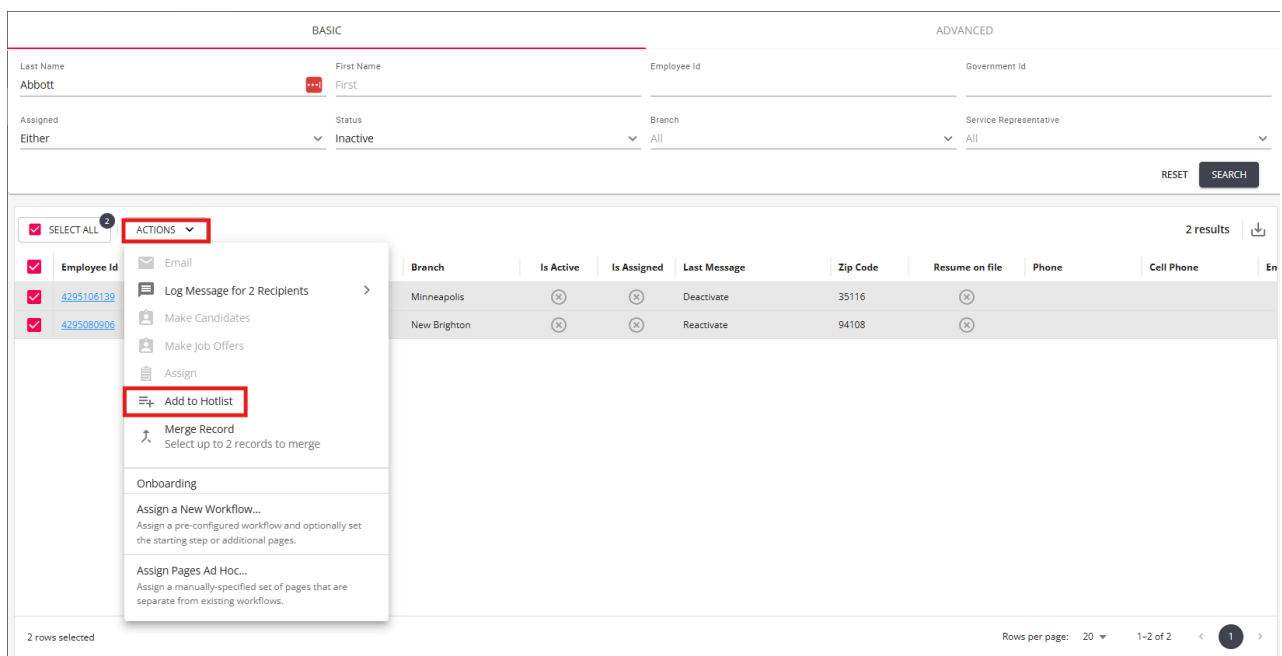
- ☐  **Just for Me**
Only you will be able to view or edit this hotlist.
- ☐  **Teams/Service Representatives**
Share this hotlist with specific teams or service reps, and optionally allow them to edit the list.
- ☒  **My Organization**
Everyone at this level of your organization will be able to view and edit this hotlist.
- ☒ This list can be edited by anyone that it is shared with

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







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.

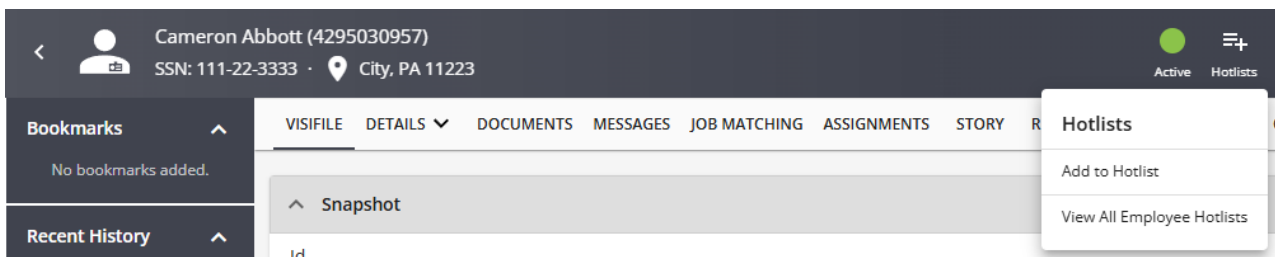
Adding from Search Results:



The screenshot displays a search results page with a 'BASIC' tab selected. The search criteria include Last Name (Abbott), First Name (First), Employee Id, Government Id, Assigned (Either), Status (Inactive), Branch (All), and Service Representative (All). The results table shows two entries: Minneapolis and New Brighton. The 'ACTIONS' dropdown menu is open, highlighting the 'Add to Hotlist' option.

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

Adding via the "Hotlists" Charm:



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).

A screenshot of the 'Add to Hotlist' window. The title is 'Add to Hotlist'. Below the title, it says 'You can choose to add to an existing hotlist or create a new one.' There are two tabs: 'EXISTING' (highlighted with a red box) and 'NEW'. Under the 'EXISTING' tab, there is a section titled '* Existing Hotlists' with a dropdown menu labeled 'Employee Hotlist'. Below this, there is a section titled 'Select Position on Hotlist' with two radio button options: 'Add to top of list' (selected) and 'Add to bottom of list'. At the bottom of the window, there is a blue information box that says '4 Employees will be added to Employee Hotlist.' and three buttons: '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.

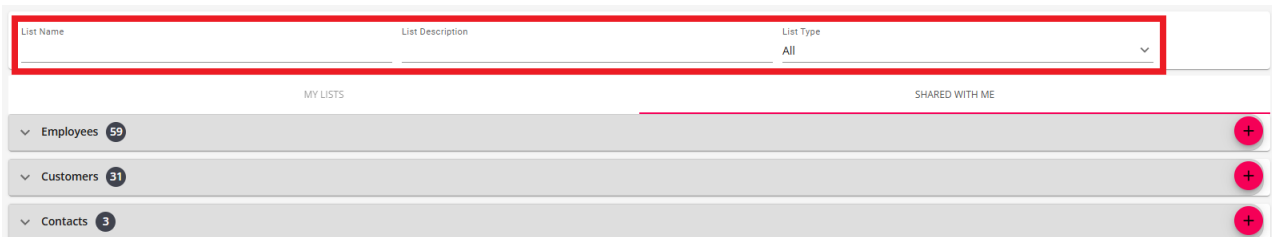
Note Records that are visible within any given hotlist are dependant on what the user can view within their hierarchy.

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:

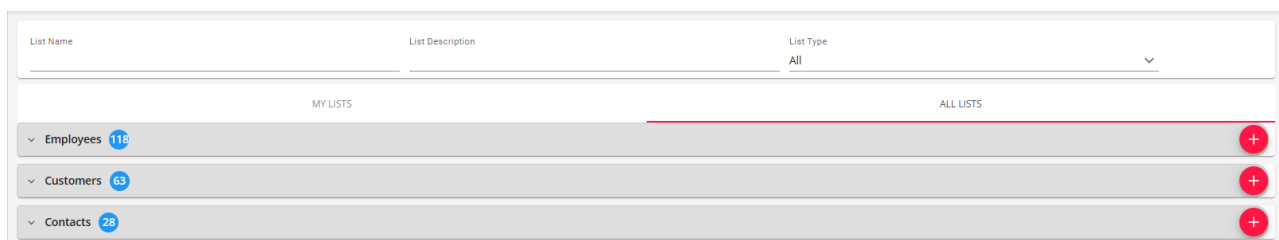
- List Name or
- List Description
- List Type (All, Static List, Saved Search)



The screenshot shows a search interface with three input fields at the top: 'List Name', 'List Description', and 'List Type' (set to 'All'). Below these fields, there are two tabs: 'MY LISTS' and 'SHARED WITH ME'. Under the 'MY LISTS' tab, there is a list of three items: 'Employees' (59), 'Customers' (31), and 'Contacts' (3). Each item has a red '+' icon to its right.

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.

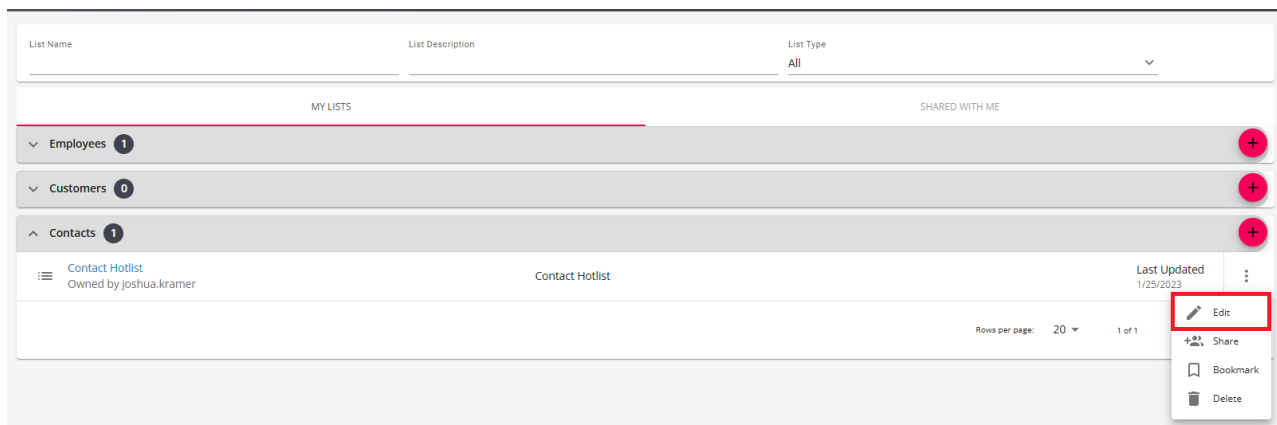



The screenshot shows the same search interface as above, but with the 'ALL LISTS' tab selected. The list of items is now: 'Employees' (118), 'Customers' (63), and 'Contacts' (28). Each item still has a red '+' icon to its right.

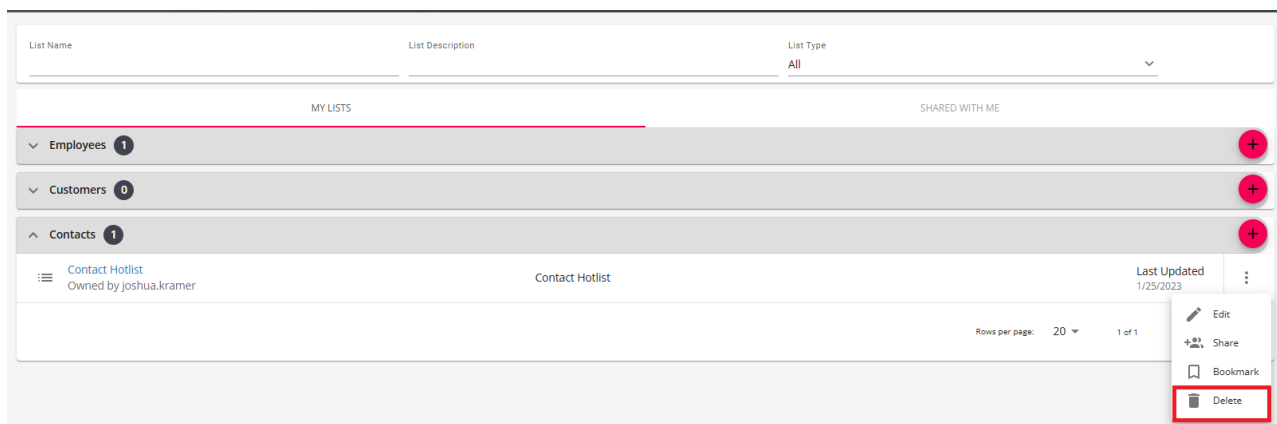
Editing or Deleting a Hotlist

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":



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







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

<input type="checkbox"/>	Position	Active	Assigned	Employee Id	Name	Hotlist Step	Hotlist Note	Phone Number	Email	
<input type="checkbox"/>	5	✓	✓	4295106643	Addams_Tuesday			(330) 602-9765	tuesday.aad@def.ogm	⋮
<input type="checkbox"/>	6	✓	✓	4295107498	Addison_Jordan			6127076157	jordan.addison@abc.xyz	⋮
<input type="checkbox"/>	7	✓	✓	4295105872	Alexander_Matison			9523567788	Alex.Matison@xyzabc.org	⋮
<input type="checkbox"/>	8	✓	✓	4295106795	Allbring_Will			6123332222	willallbring@std.yrt	⋮
<input type="checkbox"/>	9	✓	✓	4295105638	Ameche_Alain			6123456736	alan.ameche@badgers.xom	⋮
<input type="checkbox"/>	10	✓	✓	4295121077	Anderson_Megan			6128781888	megan.anders@bus.xom	⋮
<input type="checkbox"/>	11	✓	✓	4295108054	Anderson_Nicole			5445522522	nicole.anderson@gmailx.com	⋮
<input type="checkbox"/>	12	✓	✓	4295107108	Aniston_Jennifer			6517012521	jennifer.aniston@abc.xyz	⋮
<input type="checkbox"/>	13	✓	✓	4295059076	Applebee_Bandy					⋮
<input type="checkbox"/>	14	✓	✓	4295107026	Asner_Edward			(612) 223-4456	ed.asner@dfhjk.cmn	⋮
<input type="checkbox"/>	15	✓	✓	4295106808	Atcheson_Oakley			6512297584	oakleyatch@hfr.thg	⋮
<input type="checkbox"/>	16	✓	✓	4295120485	Baggins_Nora			7154855555	n.baggins@zjo.zom	⋮
<input type="checkbox"/>	17	✓	✓	4295107715	Balk_James			(651) 214-2235	jimmy.balk@gmail.xcom	⋮
<input type="checkbox"/>	18	✓	✓	4295106043	Ball_Jerry			6518589658	Jerry.Ball@xyz.com	⋮
<input type="checkbox"/>	19	✓	✓	4295106805	Bandile_Iliev			6518750003	ilievbandile@ser.mwt	⋮
<input type="checkbox"/>	20	✓	✓	11971	Barter_Roberto			(651) 068-0068x123	shaha403@yahoo.com	⋮

Rows per page: 20

1-20 of 224

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 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:

Confirm Remove

Are you sure you would like to remove this member?


CANCEL CONFIRM

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:

Confirm Remove

Are you sure you would like to remove this member?


CANCEL CONFIRM

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

SAVE AS DRAFT

CANCEL

SUBMIT

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

Confirm Remove

Are you sure you would like to remove this member?

CANCEL

CONFIRM

Related Articles