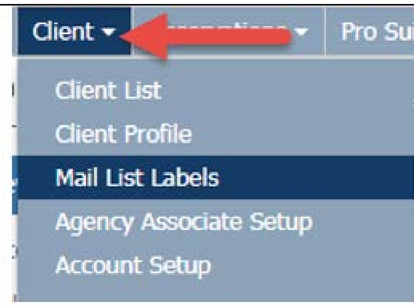
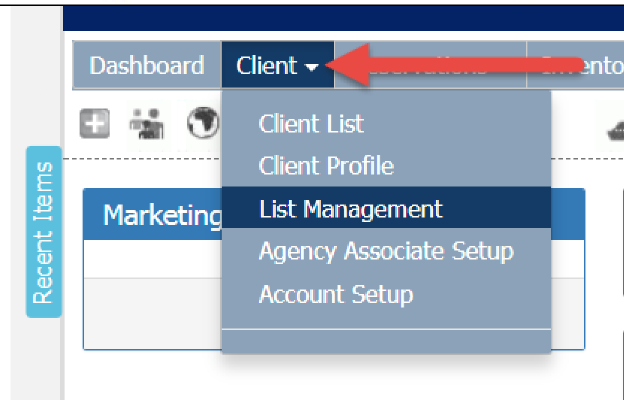
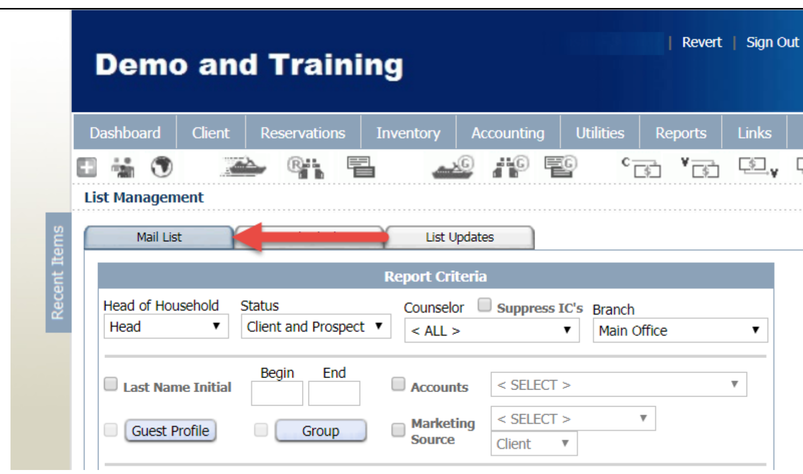
List Management

<table>
<tr><td>Step 1: Mail List Labels has been renamed List Management</td><td>
</td></tr>
<tr><td>Step 2: You can access the new List Management the same way you previously accessed Mail List Labels. Click on the drop-down arrow on the Client Tab and Select List Management from the menu.</td><td>
</td></tr>
<tr><td>Step 3: You're now in the List Management Screen. To get started by default you should already be in the Mail List tab. If not Click on the Mail List Tab.</td><td>
</td></tr>
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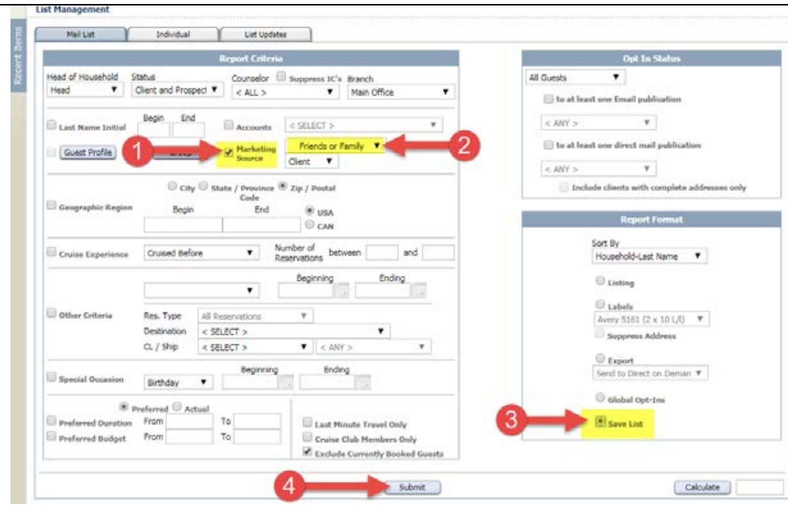
Step 4: For this example, we're going to update any clients in the system that have a Marketing Source of Friends and Family.

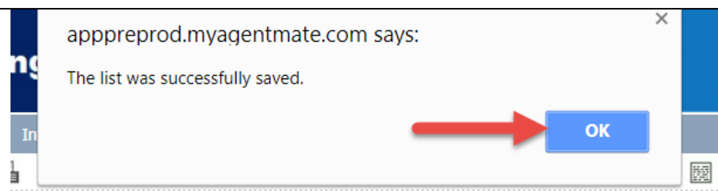
Click the radio button next to Save List

Then ***Click*** Submit.

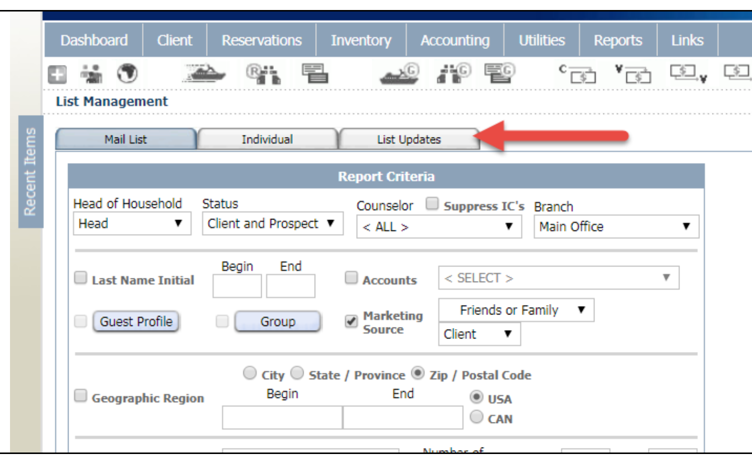


Step 5: The Save List pop-up box displays. ***Enter*** in the List Name then ***Click*** Save.

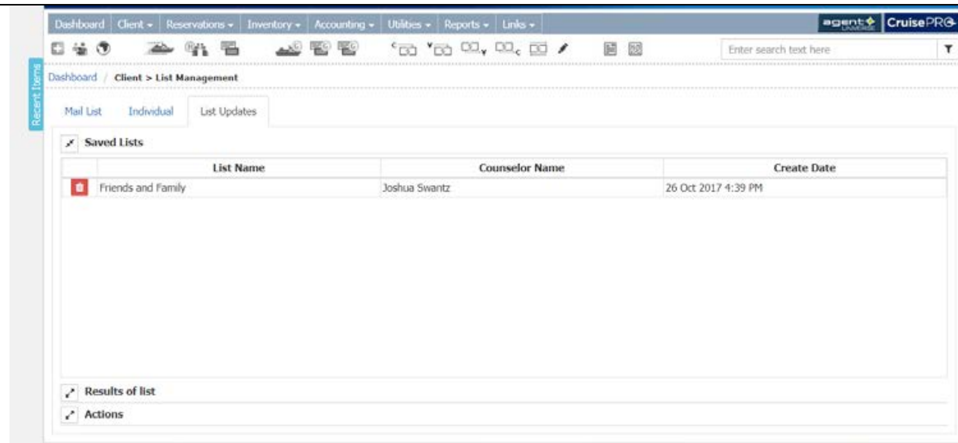
Step 6: A pop-up box displays stating that the list was successfully saved. ***Click*** OK



Step 7: Next ***Click*** on the List Updates tab

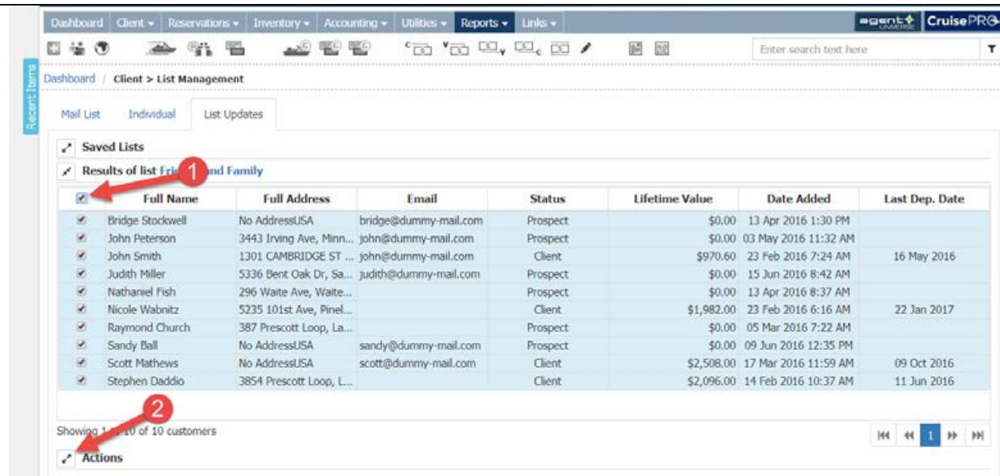


Step 8: Here you will see all available saved lists. ***Click*** on a list to see your client list.

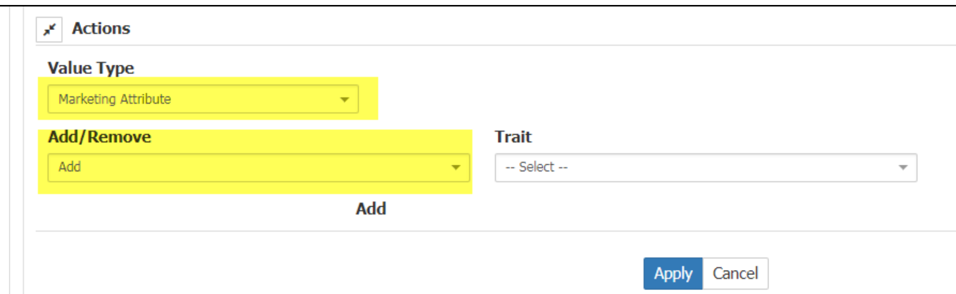


Step 9: Your list displays. Review your list. For this example, my list is correct so I'm going to ***Click*** in the very top left box so that it selects all.

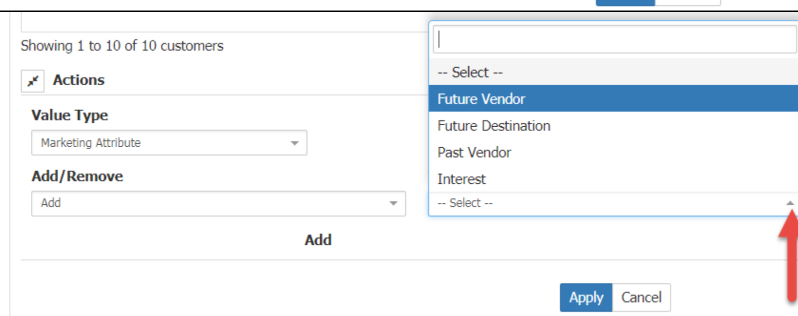
Next, ***Click*** on the arrows in the bottom left screen to display the Action steps.



Step 10: The Actions options display. Here you can either and or remove Marketing Attributes for the Clients in your list.



Step 11: The available Traits to update display once you ***Click*** the drop-down arrow. For this example, I'm going to select Future Vendor from the list.



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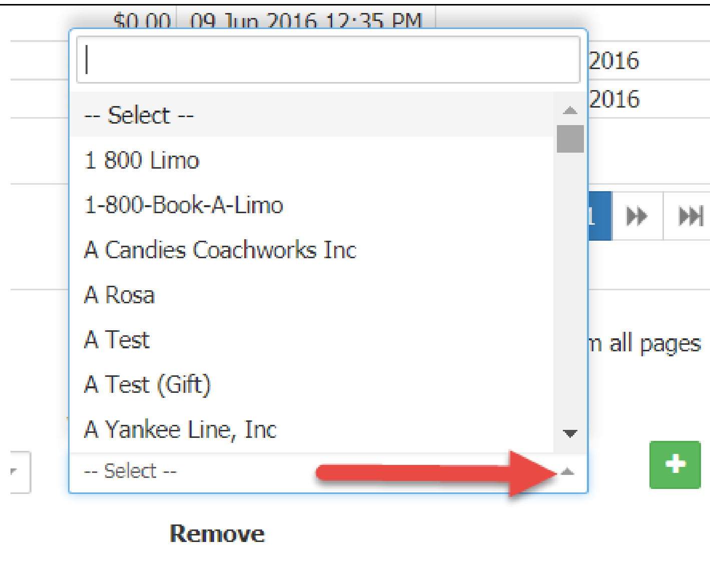
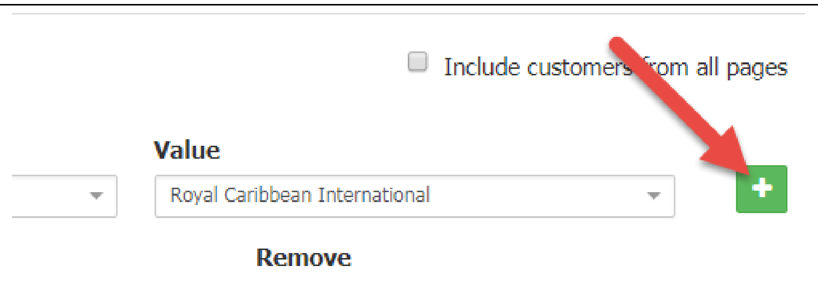
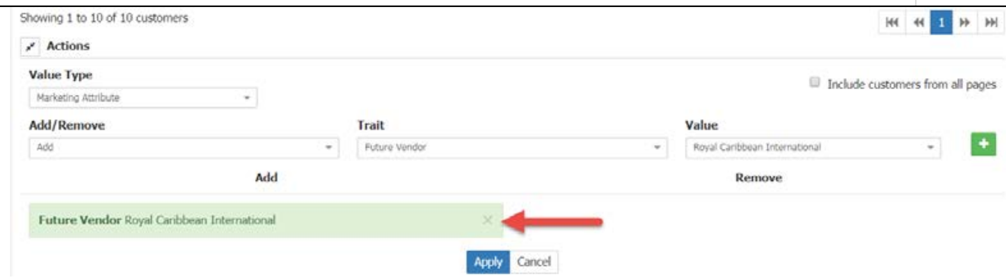
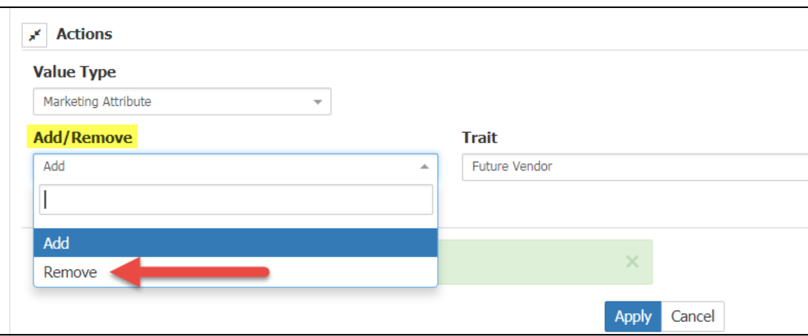
<tr><td>Step 12: Click on the drop-down arrow to see a list of Future Vendors that are in the system. Make your selection.</td><td>
</td></tr>
<tr><td>Step 13: In this example I've selected Royal Caribbean International.

Click on the green plus icon</td><td>
</td></tr>
<tr><td>Step 14: This will now add a Future Vendor of Royal Caribbean International to your selected list.

Repeat the same process to add other Future Vendors</td><td>
</td></tr>
<tr><td>Step 15: This same process above applies if you wish to remove a Future Vendors. You would just select Remove from the Add/Remove drop-down box.</td><td>
</td></tr>
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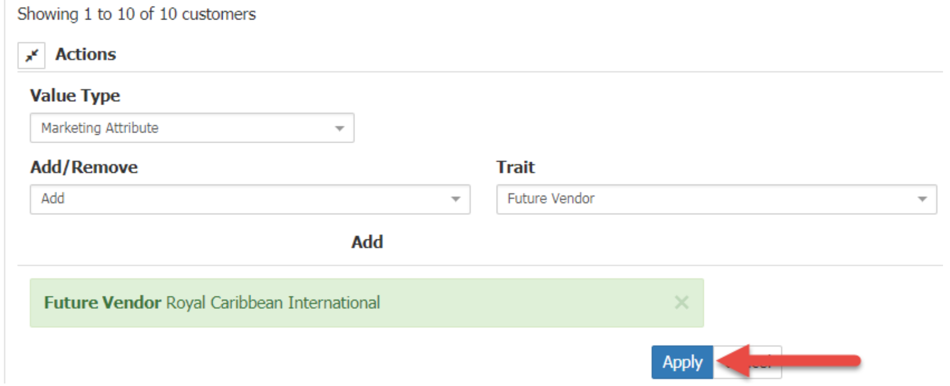
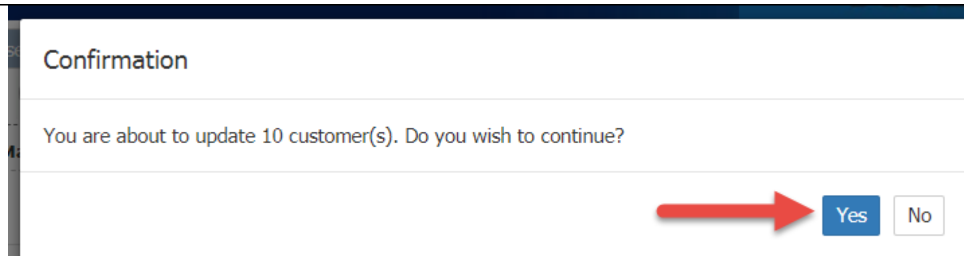
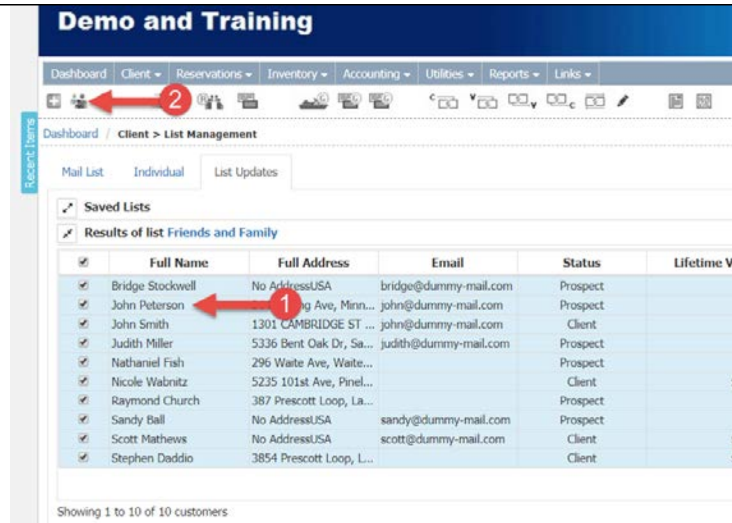
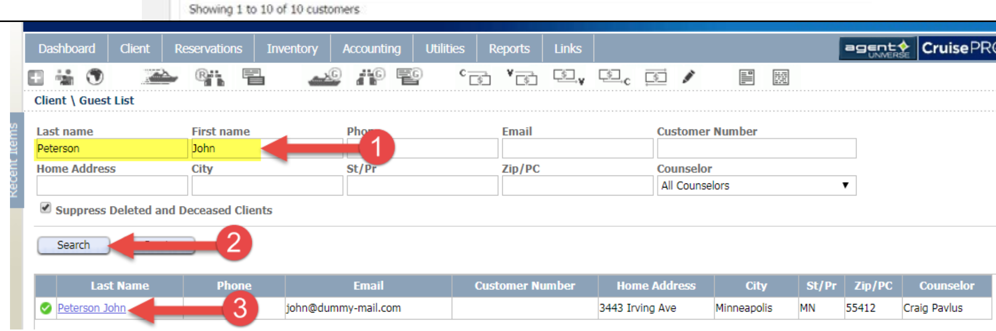
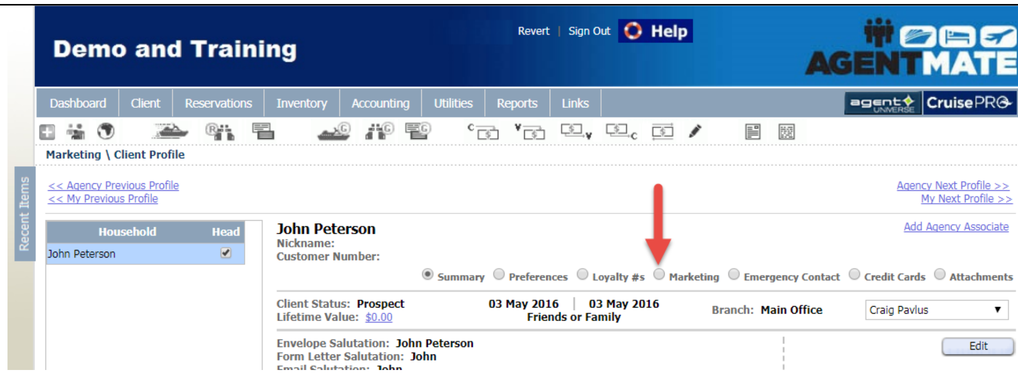
Step 16: Continuing with the Adding a Future Vendor to my client list I will ***Click*** Apply.	
Step 17: A Confirmation box displays asking you if you wish to continue. ***Click*** Yes.	
Step 18: To validate pick a customer from your list and then ***Click*** on the Client Icon.	
Step 19: Type in the Last and First name of the client and then ***Click*** Search and ***Click*** on the Client.	

Step 20: This Client Profile screen displays. ***Click*** on the Marketing radio button.	
Step 21: You're now in the Marketing section for that client. Next, ***Click*** on the Adjustments radio button and using the scroll bar on the right navigate to List Update to see the Marketing Attribute you just completed.