Fast-Class File

Client Data System

Volume 132: Adding Contacts to a Set

To Add a Contact to a Set:

- Open a contact record.
- Click on the Add'l Personal tab.
- In the Set Membership section, click the Add Record button.
- In the **Find Sets** window, enter the name of the set in the Name field.
- Click OK.

| - Set Membership | | | | | |
|------------------|-----------|------------|------------|------------|---|
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| | | Set Name | Created | Created By | ^ |
| | | EVERYONE | 07/06/1998 | NANCY | - |
| | | CALIFORNIA | 03/19/2008 | DEMO | |
| | | GOLF GROUP | 03/19/2008 | DEMO | ~ |
| | | | | | |

Figure 1: Set Membership section

To Add a List of Contacts to a Set:

- Open a list of contacts.
- Tag the contacts you want to add to the list.
- Click the Sets button.
- In the Find Sets window, enter the name of the set in the Name field.
- Click OK.
- In the Set List window, highlight the set and click the Select, Ok button.

To Add Contacts to a Set from an Open Set:

- From the Set Members window, select the Add Record button.
- In the Find Contact Information window, enter the name of the contact you want to add in the **Name** field.
- Click OK.