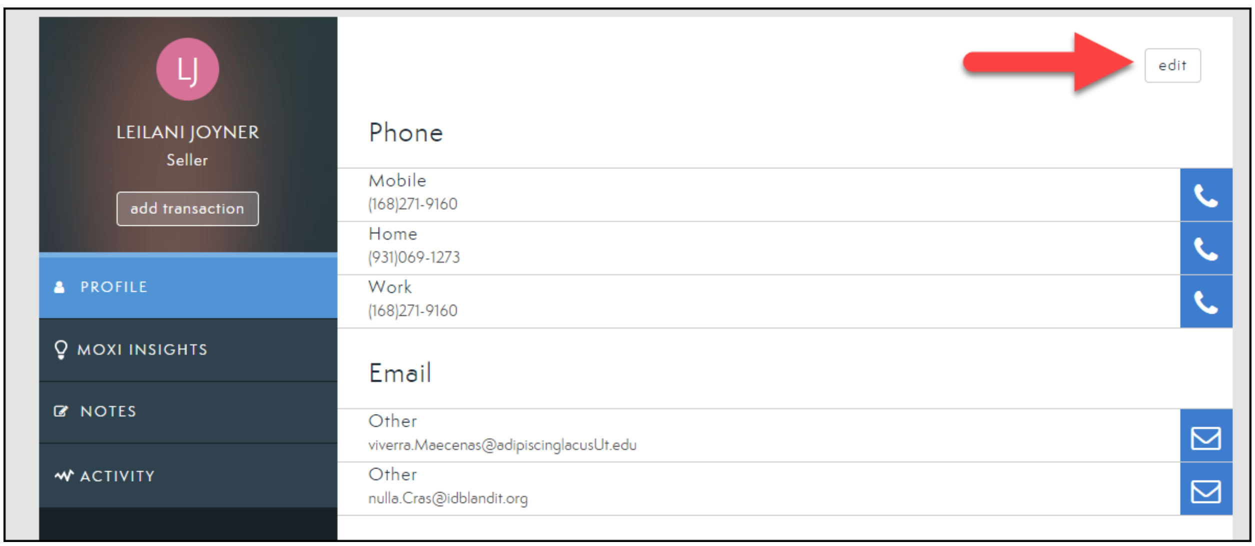
Organizing Your Contacts as Collaborator or Personal

When you upload your contacts to Engage, they will be **Uncategorized**. You will want to use the **Categorize Wizard** to organize these people in your database. However, if you have people that are already in your database you can organize them from your **My People** screen. They might be family and friends, or other agents and vendors you work with. You can remove these people from your Sales Flow and Marketing Plan while still being able to add them to groups and subscriptions by designating them as either a **Collaborator** or **Personal** contact.

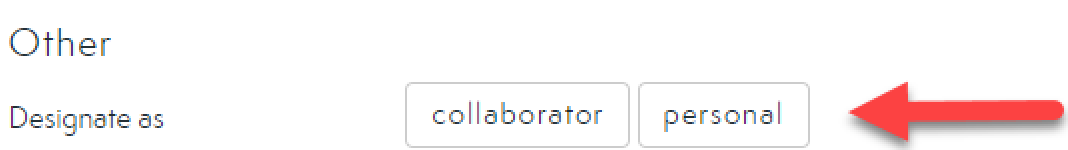
NOTE: If this is the first time you are uploading your contacts, follow the instructions on **Organizing Your Uncategorized Contacts.**

Designate an Individual Person

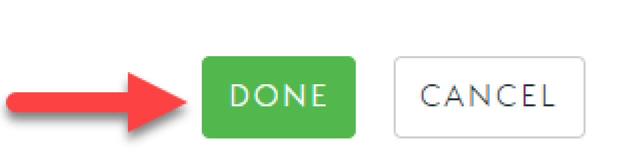
1. From the person's contact card, select **Edit.**



2. Scroll to the very bottom of the screen and select **Collaborator** or **Personal**.

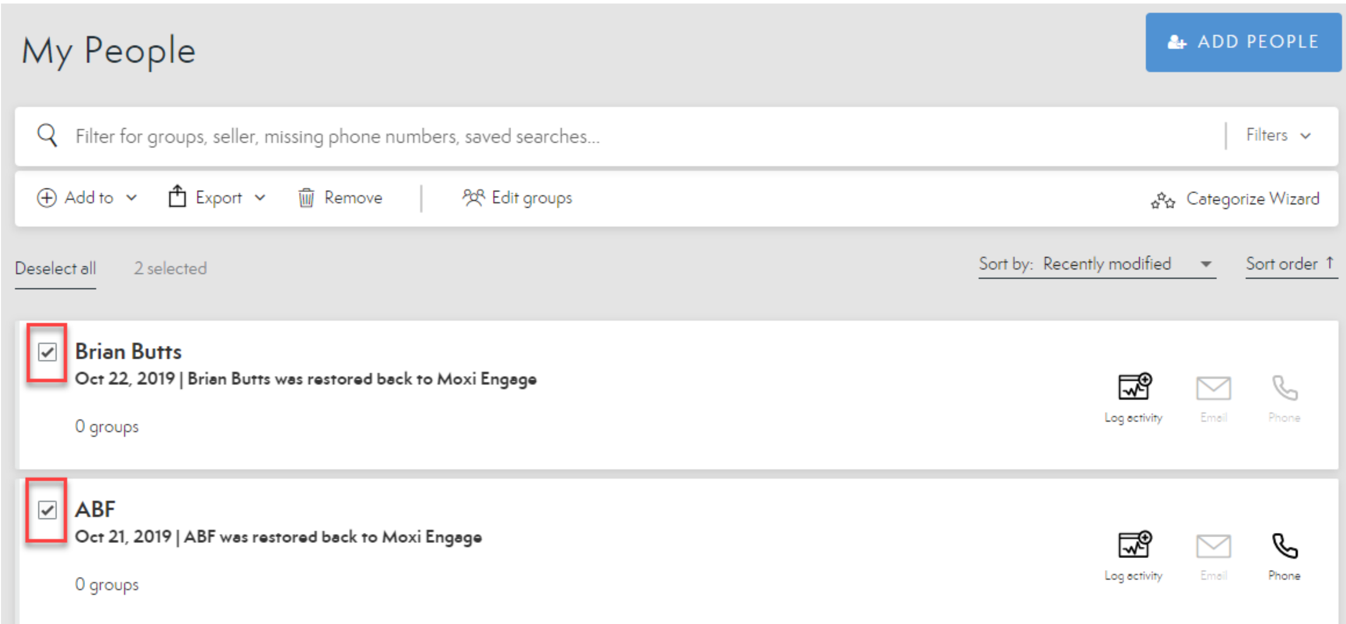


3. Select **Done** at the top right**.**



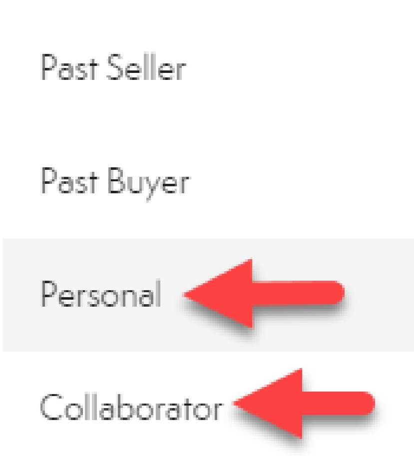
Designate Multiple People

1. From the **My People** screen, select all people you wish to designate using the check box next to their name.

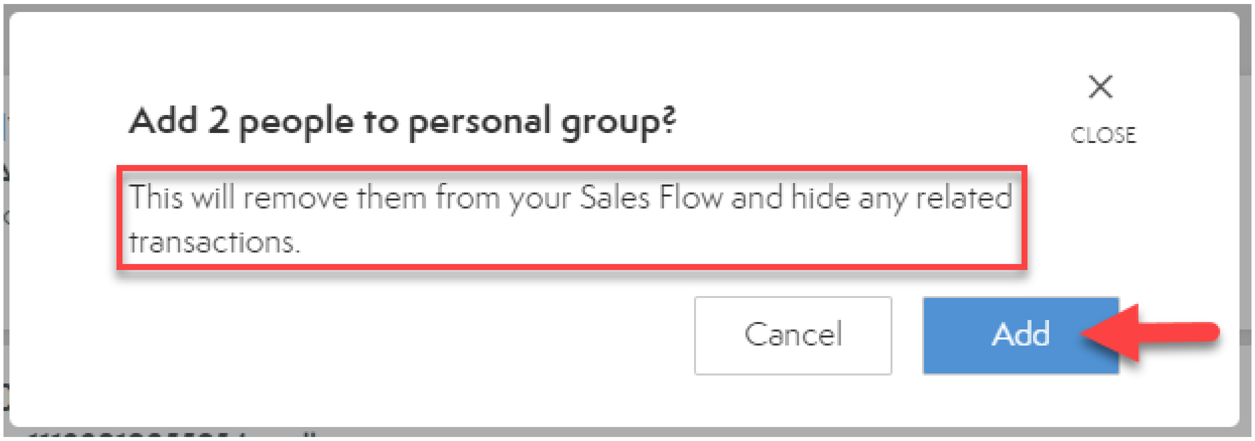


2. Select **Add To** in the command bar.

3. Select **Personal** or **Collaborator.**



4. Confirm you would like to remove selected contacts from the Sales Flow by selecting **Add**.


Add 2 people to personal group?
CLOSE
This will remove them from your Sales Flow and hide any related transactions.
Cancel
Add