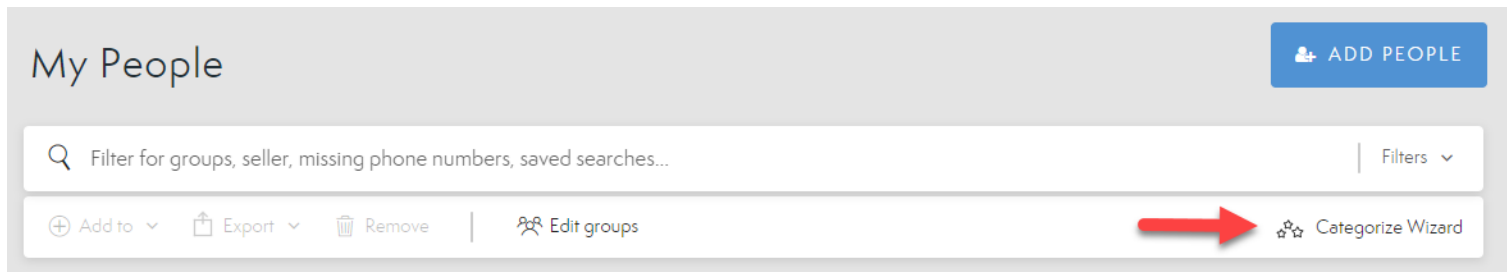


Organizing Your Uncategorized Contacts

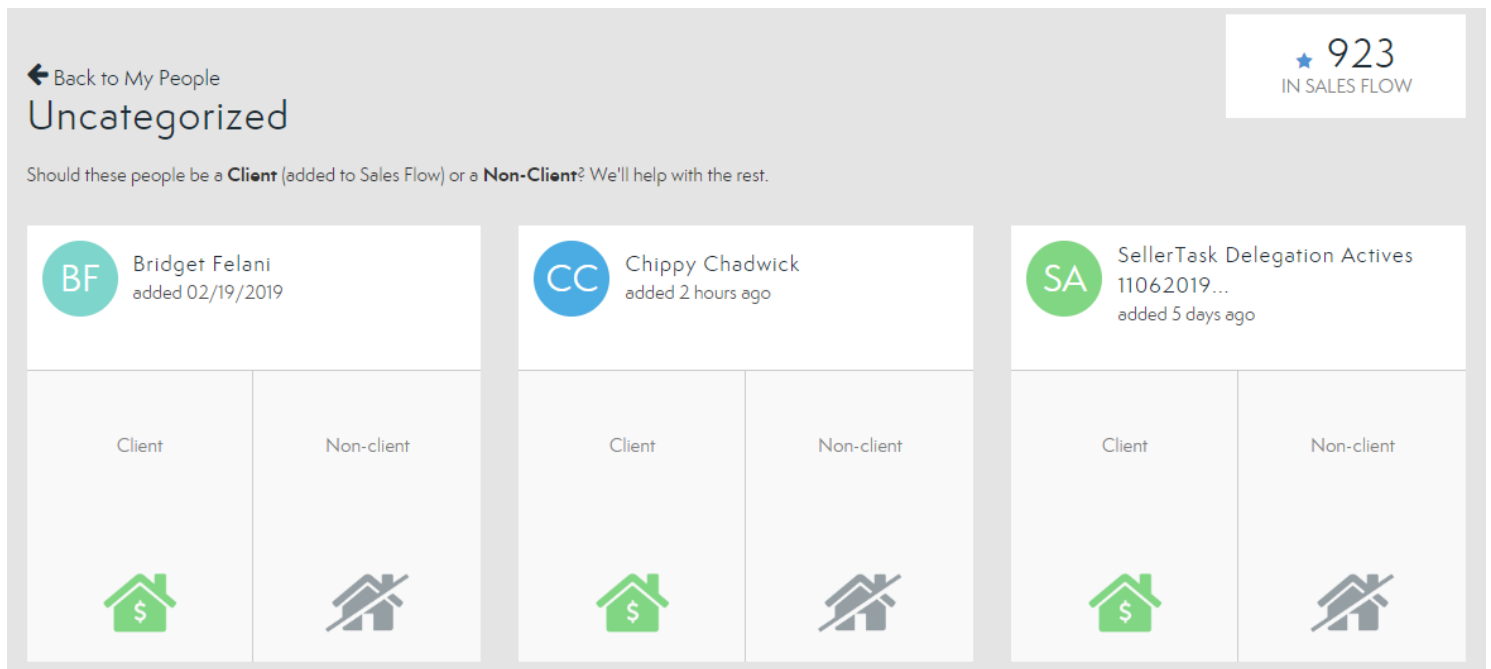
When you have new people added to Engage, they will be “Uncategorized”. You can put your people in the correct section of the sales flow or organize them as a Personal or Collaborator.

Organizing Your Uncategorized Contacts

1. From **My People** screen, select **Categorize Wizard**.

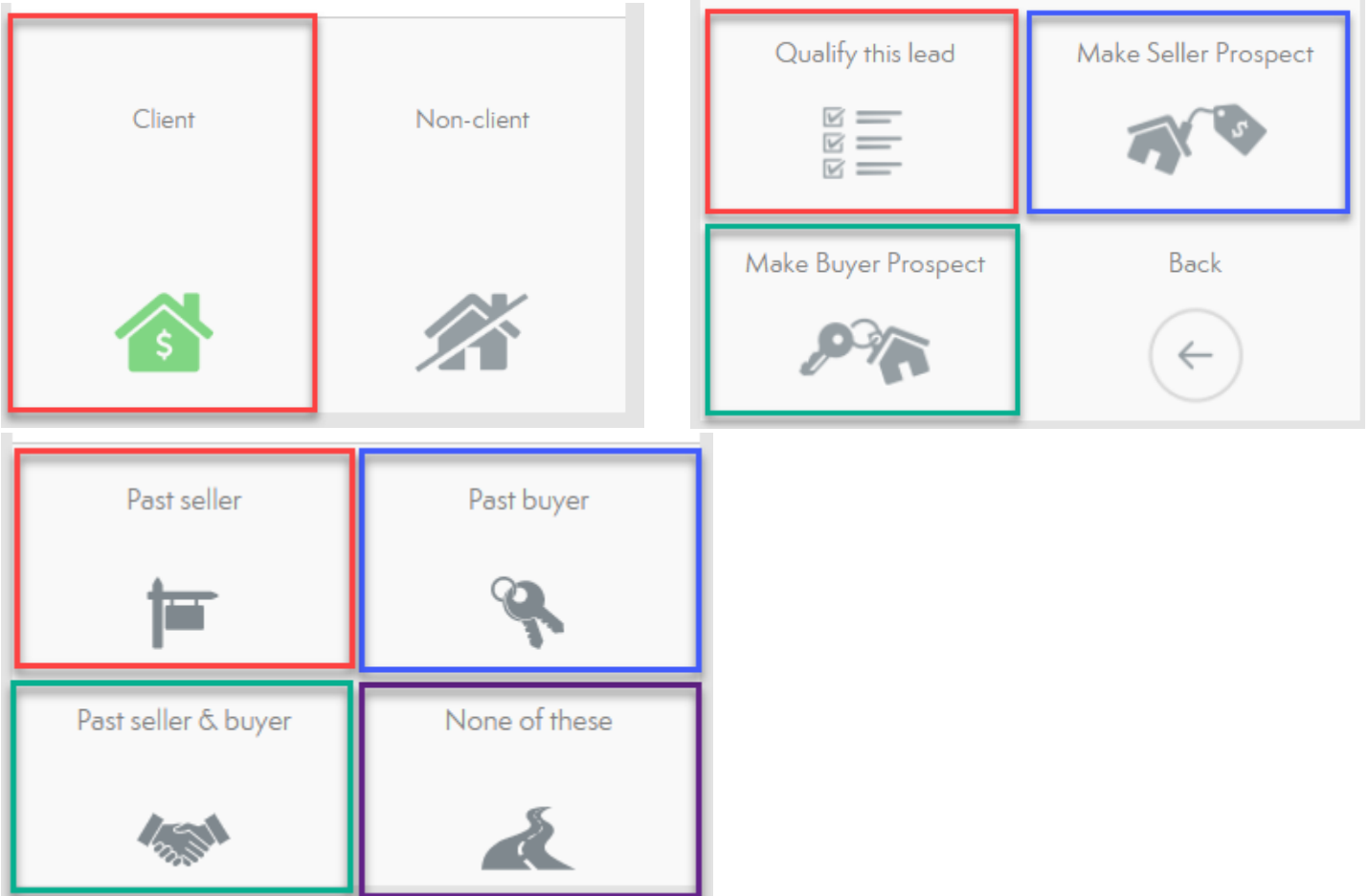


2. This leads you to the Uncategorized screen. Here you will see all your uncategorized contacts and be able to easily get them organized.



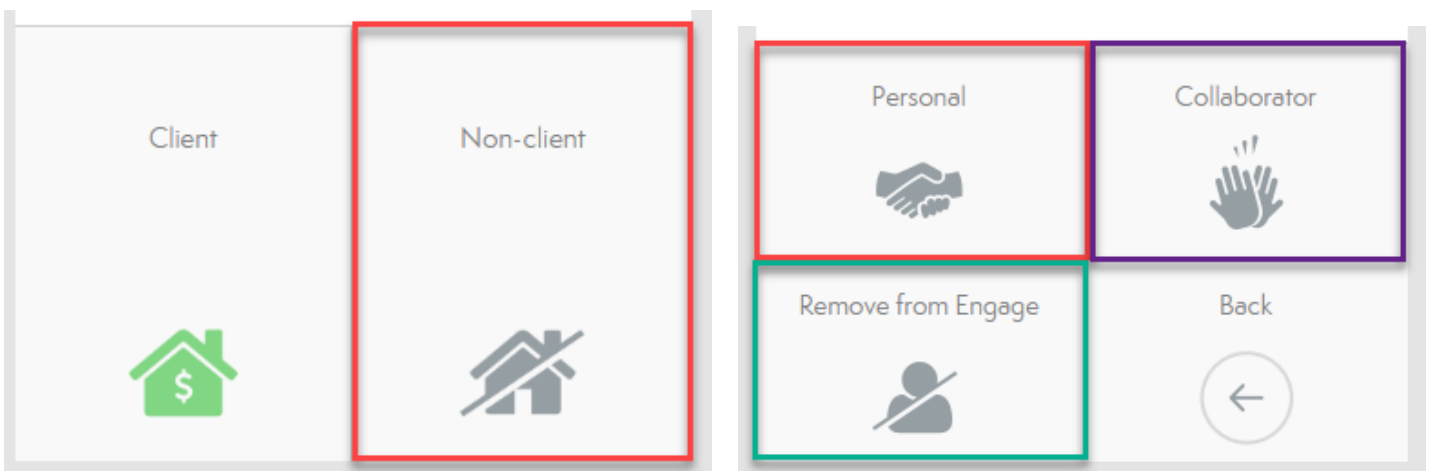
3. Select the **Client** button on your contact card to designate contacts as **Buyer, Seller, Past Buyer, Past Seller, Past Buyer & Seller** or you can **Create a Marketing Plan** if they are not ready to Buy or Sell.
 - **Create a Marketing Plan:** Sometimes shown as **Qualify This Lead**, these clients are not ready to Buy or Sell, Add to Marketing Flow. This brings you to the Past Buyer & Seller options or you can choose **None of These** to create the marketing plan.
 - **Past Buyer:** Buyer you have worked with previously. Creates a marketing plan and adds a past buyer tag.
 - **Past Seller:** Seller you have worked with previously. Creates a marketing plan and adds a past seller tag.

- **Past Buyer & Seller:** Someone you have worked with as a buyer and seller. Creates a marketing plan and adds past buyer & seller tag.
- **Seller:** Actively looking to Sell. This will add the contact to the Prospect section of the Sales Flow.
- **Buyer:** Actively looking to Buy. This will add the contact to the Prospect section of the Sales Flow.

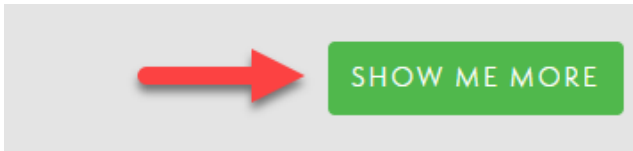


4. Select the **Non-client** button on your contact card to designate contacts as **Collaborator**, **Personal** or **Remove them from Engage**.

- **Personal:** Contacts who are not collaborators or clients, e.g. family members and friends.
- **Collaborator:** Contacts who you work with professionally and are not clients, e.g. colleagues, and other industry professionals.
- **Remove from Engage:** Removes contact from Engage.



5. Once you have categorized all the people on this screen, select the **Show Me** at bottom of the page to continue categorizing your new contacts!



6. You can see how many people you have left to categorize with the Remaining Bar in the bottom left corner.

