How To Create and Edit Smart Lists

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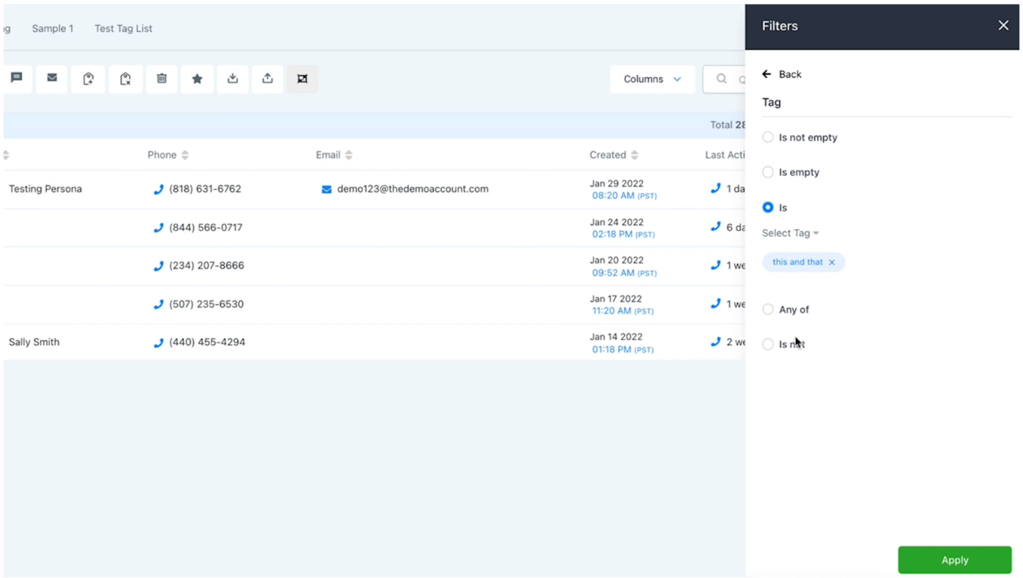


Smart Lists are a great way to organize contacts, by customizing filters to create 'lists' or categories of contacts.

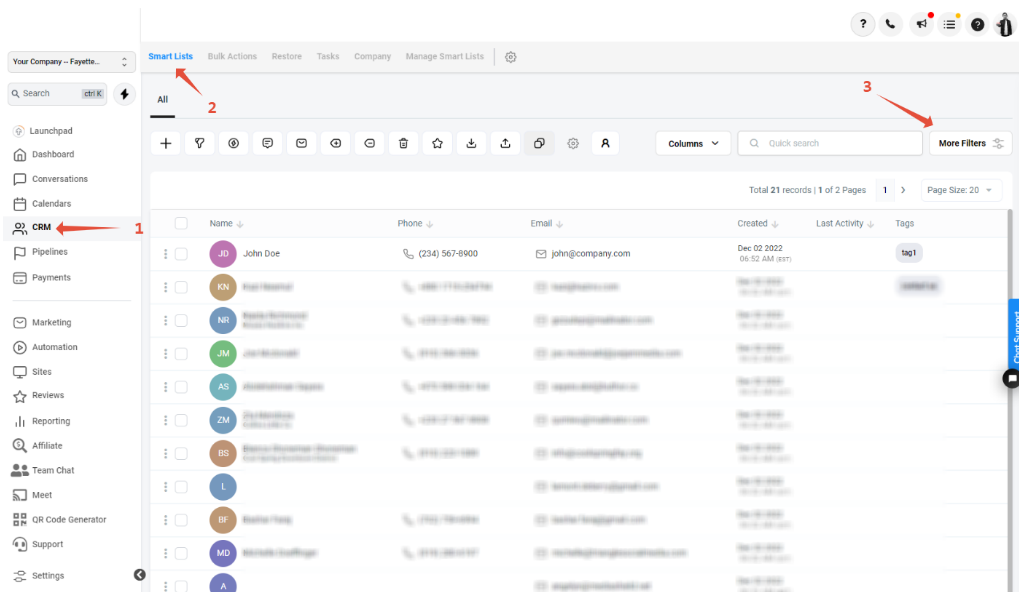
You may use as many filters as you like, completely customizing the experience, and how thoroughly filtered you want contacts to be. You can keep it simple with one filter, for example - any leads with no activity in the last 60 days, OR leads with a particular tag. Or, you may also choose to add multiple filters, to further specify a particular group, such as leads with a particular tag, AND no activity in the last 60 days, AND with a particular area code in their phone number. The more filters you add, the more specific a list will be.

Follow these steps to learn how to create, edit, and use Smart Lists.

Part 1: Creating a Smart List

Step 1: Create a Smart List

- Navigate to CRM > Contacts/Smart Lists.
- Click More Filters

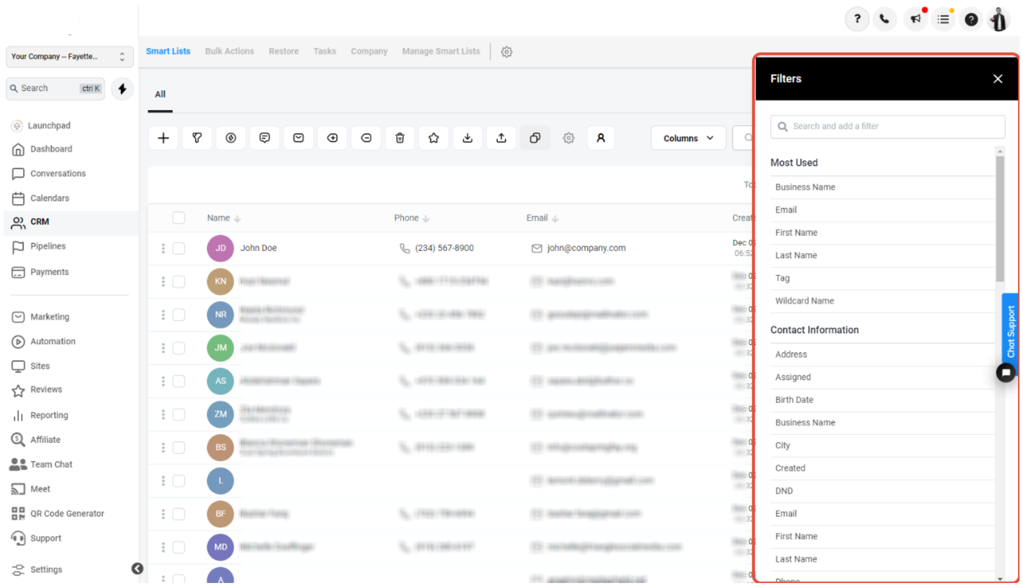


Depending on your system access, you may see Option A or Option B as shown below.

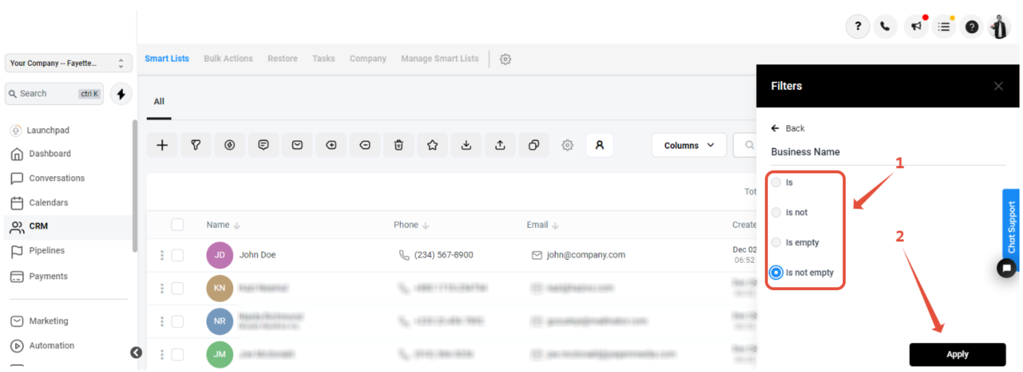
NOTE: Both options offer the same functionality, they just feature different visual displays.

Option A

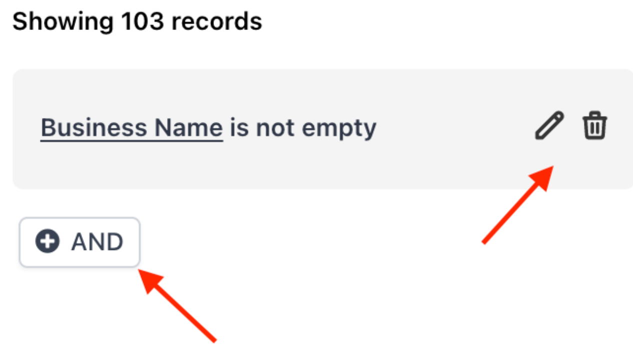
- Choose one or more filters from the list that pops out from the right side of the screen.
- You may search for a filter or scroll through the list (which is categorized into different sections, beginning with “Most Used” at the top).



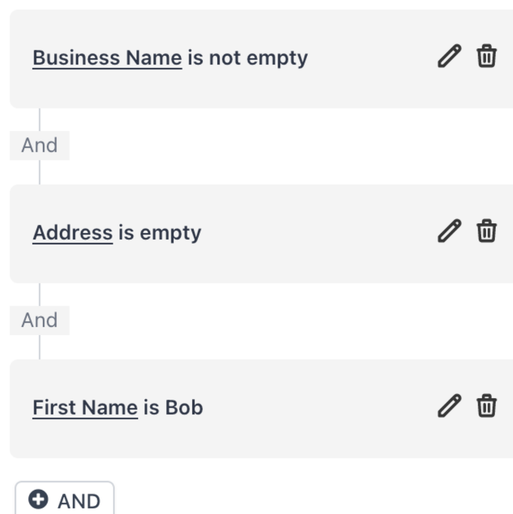
- When you click into a filter, fill out the appropriate information as requested.
  - In this example, we’ve selected “Business Name” and filtered by “is not empty” so the filter will find anyone with any Business Name in that field.



- Click “Apply” to save your filter.
- On the next screen, you may edit or delete the filter using the icons.
- You may also add one or more additional filters. Click “AND” to add another filter.



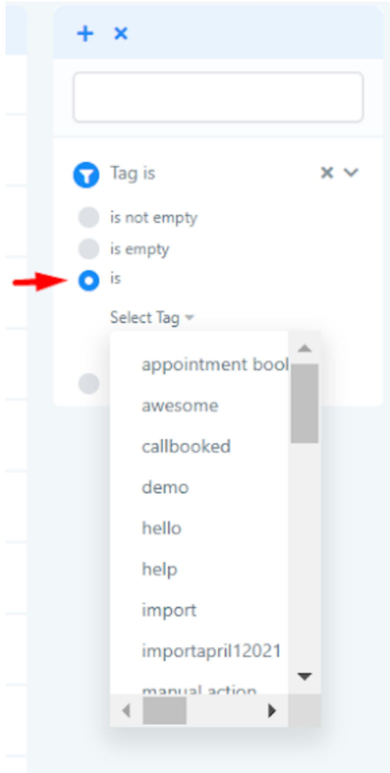
- As you add filters, you can see them ‘building’ as a list on the right side of the screen in the filter window. This gives you a preview of how the filters are set up.



- At the bottom of the window, click “Save as smart list” to save the filter(s) as a permanent list in your system. (You can always edit or delete this list later.)

Option B

- Select "More Filters" on the right side of the screen.
- Choose one or more filters from the dropdown, and fill out the information accordingly to add a filter. In this example, we filtered by "Tag Is" and chose the tag we wanted to search by.

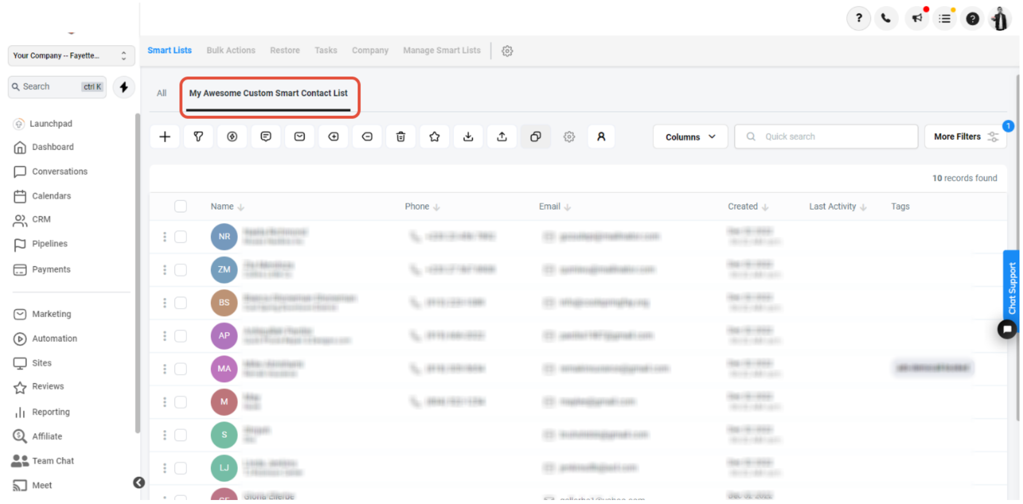


- Repeat the steps above if you want to add additional filters.
- Once you've applied the filter(s), you wish to use, click the + icon to add this as a new Smart List.
- You will now be able to click through all your Smart Lists as tabs on the top of the contact page.

Part 2: Accessing, Editing, and Duplicating Smart Lists

Step 1: Accessing Your Smart Lists

- Within the Contacts section of your system, the default view is "All".
- Click the name of a Smart List at the top, to view that tab / Smart List.



Step 2: Editing and Duplicating Your Existing Smart Lists

- Click into an existing Smart List
- The filters that are saved for that Smart List will appear on the right hand side.
- Click the trash can icon (Option A) or X (Option B) to delete a filter.
- Click the pencil icon (Option A) or dropdown arrow (Option B) to edit a filter.
- Then, click the Save icon to save your changes, the + icon to save the changes as a new list, or the undo arrow to undo any unsaved actions you just did.

Step 3: Smart List Settings

- Navigate to "Manage Smart Lists" in the top right of the Contacts page.
- Here you'll see a list of your Smart Lists.
- You can copy, share, edit the name, or delete a Smart List using the icons on the right.