



Saving Lists on the Contacts Page

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Introduction

The Contacts page allows you to configure custom setups or *lists* for the displayed information and save those lists for future use. You can easily switch between saved lists. You can even designate one saved list as the default, which will load that list each time you navigate to the Contacts page.

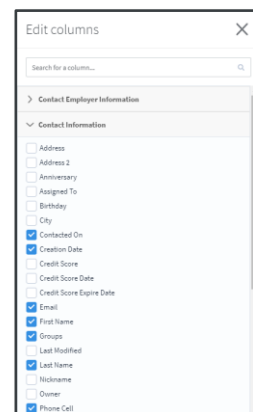
Setting Up a List

When building a list on the contact list, you can add or remove columns, rearrange columns, and apply filter rules. Filter rules can be either *inclusion rules* or *exclusion rules*. Records are only shown in the list if they match *all* of the defined inclusion rules. Records are hidden from the list if they match *any* of the exclusion rules, even if they would be shown by the inclusion rules.

Note

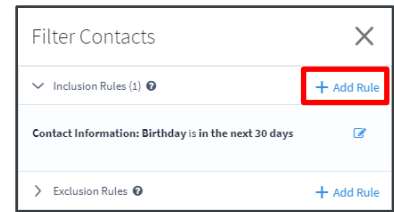
The checkbox, Actions, Notes, First Name, and Last Name columns are pinned in the section on the left side of the table. This means they cannot be rearranged (though First Name and Last Name can be hidden). Other columns cannot be dragged into the pinned section.

1. Navigate to **Leads & Contacts → Contacts**.
2. To add or remove columns from the view:
 - a. Click the **Edit Columns** button.
 - b. In the Edit columns slide-out panel, check the boxes for any columns you want to include and uncheck the boxes for columns you want left out. The list updates in the background each time you make a change.
 - c. Close the slide-out panel by clicking the **X** in its upper-right corner.
3. To rearrange the order of columns, click and drag a column header left or right to a new location.
4. To apply filters:
 - a. Click the **Filter** button.





- b. In the Filter Contacts slide-out panel, click the **+Add Rule** button in the Inclusion Rules section.
- c. Use the Search box or scroll through the list to find your desired filter criterion and click its name.
- d. The panel displays a new tile for this criterion (in addition to any existing inclusion rules, which you can edit). Enter or select the filter information according to the data type (such as text or date range).
- e. Click the **Done** button.
- f. Add additional inclusion and exclusion rules until you are satisfied with the list. The list updates in the background each time you save a new rule.



Note

When filters are applied, the Filter button has a circled number indicating the number of rules in place. In addition, the Filter Contacts slide-out panel indicates the number of inclusion and exclusion rules with a number in parentheses next to the label for each type.

When you are fully satisfied with the setup of your list, you can save it so you can return to the same setup quickly in the future.

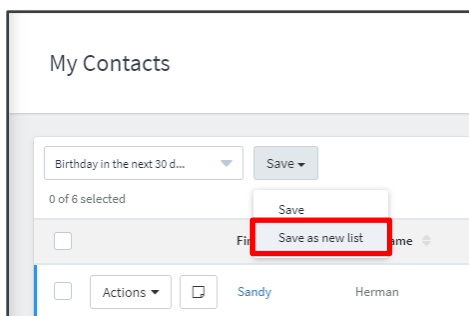
Saving a New List

A saved list allows you to quickly return to the same column and filter customizations at any time, regardless of the current state of the Contacts page. If you open a saved list or navigate to another page without saving the current setup, that setup is lost; you would need to re-create it from scratch if you wanted to view contacts in that setup again.

You can save as many lists as you like. Lists you save are only available to you and cannot be shared with other users.

To create a new saved list:

1. Navigate to **Leads & Contacts → Contacts**.
2. Add or remove columns, rearrange columns, and apply inclusion and/or exclusion filter rules as described above.
3. Select **Save → Save as new list**.



4. In the Create new contact list box:
 - a. Enter a name for your list. The name should describe the definition of the list.



- b. (optional) Check the **Make this my default list** option if you want the list you are saving to be the list that is shown every time you navigate to the Contacts page.

Note

Only one list can be default at a time; if another list is already set as default, checking this option will move the default designation to the new list.

- c. Click the **Create** button.

Opening a Saved List

When you save a new list, it is added to the drop-down list to the left of the Save button. To switch to another saved list, click the drop-down list to expand it and select the name of the list you want. Note that the current default list is clearly marked here.

Updating an Existing List

There are 3 kinds of updates you can make to a list:

1. Changing the setup of the list (columns and filters)
2. Changing the name and default status of the list
3. Deleting the list

Changing the Setup

Warning

This will overwrite the setup of the current lists, so be careful to select the list you want to change first.

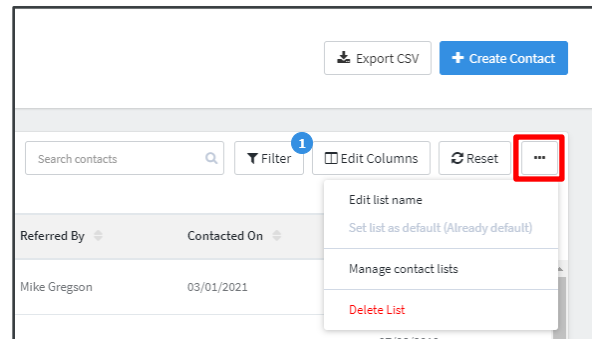
1. Ensure that the list you want to update is selected in the drop-down list on the left side of the page.
2. Make any desired changes to column visibility, column order, and filters.
3. Select **Save** → **Save**.

The saved list is updated with the new setup. The overwritten setup cannot be retrieved.

Changing the Name and Default Status

If you only want to change the name of the current list:

1. Ensure that the list you want to update is selected in the drop-down list on the left side of the page.
2. Select [...] → **Edit list name** on the right side of the page.
3. In the Edit list name box, enter a new name for the list.
4. Click the **Save** button.





If you only want to make the current list the new default:

1. Ensure that the list you want to update is selected in the drop-down list on the left side of the page.
2. Select [...] → **Set list as default** on the right side of the page. (If the current list is already the default, this option is not available, as shown in the screenshot above.)

If you want to change a list other than the current list:

1. Select [...] → **Manage contact lists** on the right side of the page.
2. In the Manage contact lists slide-out panel:
 - a. Use the search box or scroll to locate the list you want to change.
 - b. Click the **Edit** button for that list on the right side.
 - c. The view name expands to a tile. Change the name and/or make this the new default list.
 - d. Click the **Save** button.

Deleting a List

Warning

Deleting a list is permanent, so be careful when selecting the view you want to delete.

Note

If you delete the current default list, then no saved list will be considered default. When you navigate to the Contacts page, the system default setup will be used. You can then create a new list or update an existing one to be the new default.

If you want to delete the current list:

1. Ensure that the list you want to update is selected in the drop-down list on the left side of the page.
2. Select [...] → **Delete List** on the right side of the page.

If you want to delete a list other than the current list:

1. Select [...] → **Manage contact lists** on the right side of the page.
2. In the Manage contact lists slide-out panel:
 - a. Use the search box or scroll to locate the list you want to delete.
 - b. Click the **Edit** button for that list on the right side.
 - c. The view name expands to a tile; click the **Delete** button.
 - d. Click the **Delete** button in the confirmation box.