

- Identify a saved List from a saved Search

Saved Lists and Searches

LISTS AND SEARCHES

The Lists and Searches selection in the Plan menu is where you'll find Lists and Searches that you saved for future use. From this area, we can combine lists, create reports, and delete obsolete information, among other tasks.



You may be asking yourself, what is the difference between saving a Search versus saving a List? The main function behind saving a Search is capturing the criteria you used to achieve your results. Each time you access your saved Search, the criteria will be re-run through the database to return the most up-to-date results.

Saving a List gives you the opportunity to follow either the Contacts, Outlets, or both the Contact and the Outlet that the search returned. Let's use John Doe, reporter for CNN as an example. If John leaves CNN for MSNBC, you have three options. You can follow John, and your List will update to reflect that he is now with MSNBC. Or, you can follow John's position. Once the vacancy is filled, the new reporter for CNN will replace John in your List. Or you can follow both.

Either way, clicking on Lists and Searches from the Plan dropdown will allow you to manage your saved collateral.

<input type="checkbox"/>	Name	Type	Project	Last Updated Date	Record Count	Created By
<input type="checkbox"/>	Cloud Computing - San Francisco	List	Stacey Wine	6/6/2013 12:44:24 PM	20	Reiss, Stacey
<input type="checkbox"/>	Contacts covering Wine/Winemaking	List	Nicole Wine	5/21/2013 11:23:34 AM	169	Bauman, Nicole
Located in the Top 3 Call DMA's						
<input type="checkbox"/>	Contacts in 1 location covering 3 topics	Search	Sara Eason	5/22/2013 11:53:47 AM	0	Eason, Sara
<input type="checkbox"/>	Contacts in 1 location covering Children's Health	Search	Darrin P	6/10/2013 2:26:00 PM	0	Philp, Darrin
<input type="checkbox"/>	Contacts in 2 locations covering jazz	Search	General Project	6/4/2013 1:33:50 PM	0	Hachiuma, Asami
<input type="checkbox"/>	Contacts in Fresno County	Search	Jay Pilotto	5/28/2013 9:59:33 AM	0	Pilotto, Jason
<input type="checkbox"/>	Daily Newspaper	List	Anderson, Kristin	5/23/2013 5:57:24 PM	1479	Anderson, Kristin

You will see the name of the item, whether or not it's a List or a Search, which Project it belongs to, the last time it was updated, how many records the item contains, and who created the item.

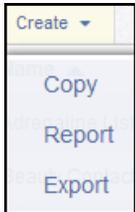
Each item has a check box next to it. Checking the box next to an item let's you select an option from the Edit menu.



- Deleted Selected—delete the selected list or search
- Edit Description—edit the optional description you gave the item when you first saved it
- Move—move the item from one Project to another
- Add To Workspace—open the item in a new or existing workspace
- Add To Favorites—favorite the list, making it available for use on the homepage widget

- Unlock List—unlock the list to allow access (be careful, as another user may be working in the list and progress can be lost)
- Search Within a List—all contacts associated with an Outlet in the list or search will be compiled into a new list (see our Search Within document for more info)

The Create menu offers a few more options.

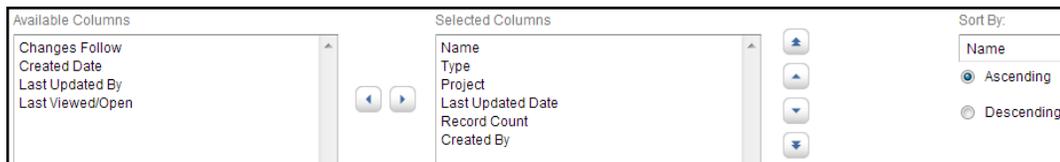


- Copy—make a copy of the item which can be edited and re-saved with a new name
- Create—make a report displaying the information from the item
- Export—choose to export the item's information into Excel or a CSV file

Display Settings will allow you to change the information displayed in the columns on the Lists & Searches page.



- Hide/Show Descriptions—toggle the optional description on and off
- Change Columns Displayed—choose from the options below to customize your view



The Add Filter menu can help you quickly and easily locate a List or a Search by narrowing your total to a specific sub-set.

