

Pinpointing specific information just got a whole lot easier!

Why would I want to do that?

You're smart. You add tags and address information to all of your accounts and contacts so that you can interact with them better in the future. You know the benefit of a well oiled, well fed CRM is the ability to get stronger answers back out of it. List Builder lets you finally reap the rewards of your diligent work by allowing you to find information like contacts/addresses for only those accounts from a particular category, outlet, city, zip code...and that's just a few of the thousands of ways we know you'll want to create lists from Matrix!

General Navigation

When you want to create a custom list, you will find List Builder under the Lists menu.

NAME	DESCRIPTION	TYPE	Run	Edit
Lead Gen Alpha Accounts	Accounts tagged with Lead Gen Alpha for Oklahoma and spent on my .com	Accounts	Run	Edit
Automotive Contacts	List of all contacts affiliated to accounts that have an Automotive... (see more)	Contacts	Run	Edit
Accounts in Zip 33107	33107	Accounts	Run	Edit

CLICK HERE TO ADD NEW Add New

- 1) Run** - After lists have been built, this is where you come to run them. Each run will get the latest information in the database that meets the criteria that you setup and is not simply a saved list of results. This means that your lists could dynamically change daily if you add and change your information on Accounts and Contacts.
- 2) Edit** - Change the way your lists are configured. This could be the actual criteria supplied, the columns to display on the results, or even the name of your custom list.
- 3) Delete** - Sometimes you only need a temporary list like for a project or single trip out of the office. When you're done, you can delete it to keep your lists clean and easier to navigate.
- 4) Add New** - When you're ready to make your first (or next) custom list, you'll want to click this button in order to get started. Depending on your screen resolution, you may need to scroll in order to see it.

Tip:

- * List Builder is a premium feature. If you do not see the List Builder option under lists and would like to learn more about getting Matrix Premium, please contact us at 877.687.9066 today!
- * If this is the first time that you are running List Builder you will see two custom lists as general samples to get you started on the various functionalities of running and editing/create lists.

Adding or Editing a List

When you want to add a list, click on the Add New button at the bottom of your list builder landing page and then start on Summary A. When you want to edit a list, click on the Edit option from the row/list that you wish to edit and start on Summary B.

Summary A: When you add a new list, the first screen that you will see will outline your experience. It's a simple summary letting you know each of the steps that you're about to take. Click Next to proceed.

Summary B: When you edit an existing list, the first screen that you will see is a summary screen letting you know what is already configured. This is helpful so that you do not need to navigate through each step in order to determine if a particular criteria is setup or a column is displaying on the results. Click Next to proceed.

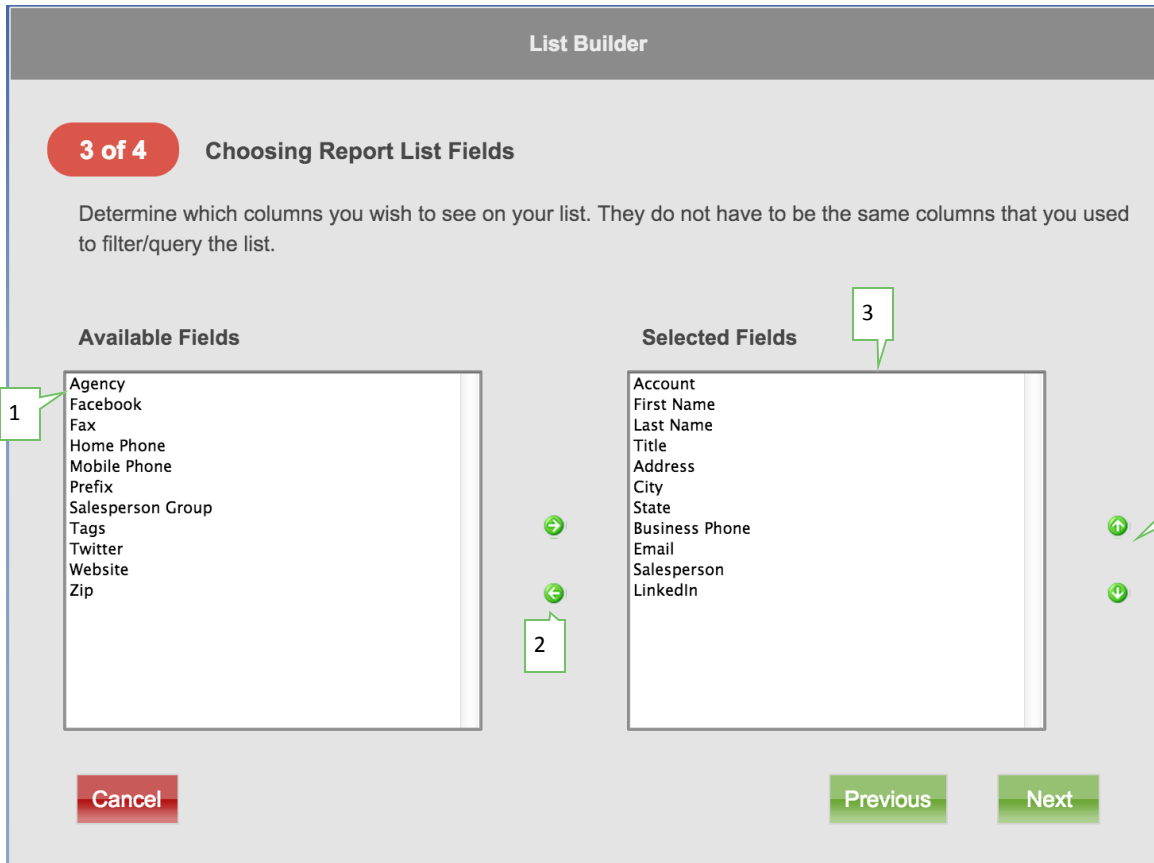
Step 1: Picking a List to build - The first step in creating your list is to pick which kind of list that you want to build. Are you looking for a listing of accounts or a listing of Contacts? This is the basic setup for your criteria that we will cover in Step 2, but for now you'll need to pick Account or Contact and click Next.

Step 2: Configuring Your List Criteria - Here you have the opportunity to pick from multiple fields in order to get just the right combination of results returned. In the below example, I have started a Contact List and have it configured to find Contacts that are affiliated with Prospect Accounts that are also in the city of Pittsburgh.

NOTE: This may sound a little daunting but it's one of those things that is far easier to actually do than explain in writing. We encourage you to get in there and give it a try. Make mistakes, learn how it impacts your results, edit them, and show off your ability to create complex queries from a simple builder!

- 1) Pick a filter item** - You can select many different ways of narrowing your Accounts and Contacts. Simply select one that you want (ex: State) and Matrix will allow you to setup a filter for it.
- 2) Filter on selected item** - You can select 1 or more items to match on when looking for results. For example, If you selected State as your filter item then you could then select Pennsylvania. This may be a dropdown or search box depending on the filters chosen. *Note: search boxes allow for multiple items to be chosen whereas a dropdown will require another logical operator to get the same results.*
- 3) In Parenthesis AND/OR** - You'll notice (parentheses) around your statements as you build them. Matrix utilizes the logical order of operations when building your lists. You'll want to use AND whenever you need everything to be true like "Show me the Prospects AND in Pittsburgh". You'll want to use OR whenever you could have multiple conditions being true like "Show me the Prospect OR Leads AND in Pittsburgh"
- 4) Between Parenthesis AND/OR** - This is far less common, but extremely useful when needed. You would use AND/OR between a set of parentheses when you need to find multiple conditions of truth. For example I want to find my (Auto Dealer AND Pennsylvania Accounts) OR (Auto Dealer AND Ohio Accounts). This would return any auto dealers that are in either Pennsylvania or Ohio.

Step 3: Choosing Report List Fields - So you've just finished determining *what* you want to see. Now you determine *how* you want to see it. Depending on if you chose an Account or Contact list, your available and selected fields will vary. Matrix gives you the ability to put together a list from basic address information to more complete lists with Account attributes like Outlets purchased, salespeople handling the accounts, and even tags and social media information attributed to each Account/Contact.

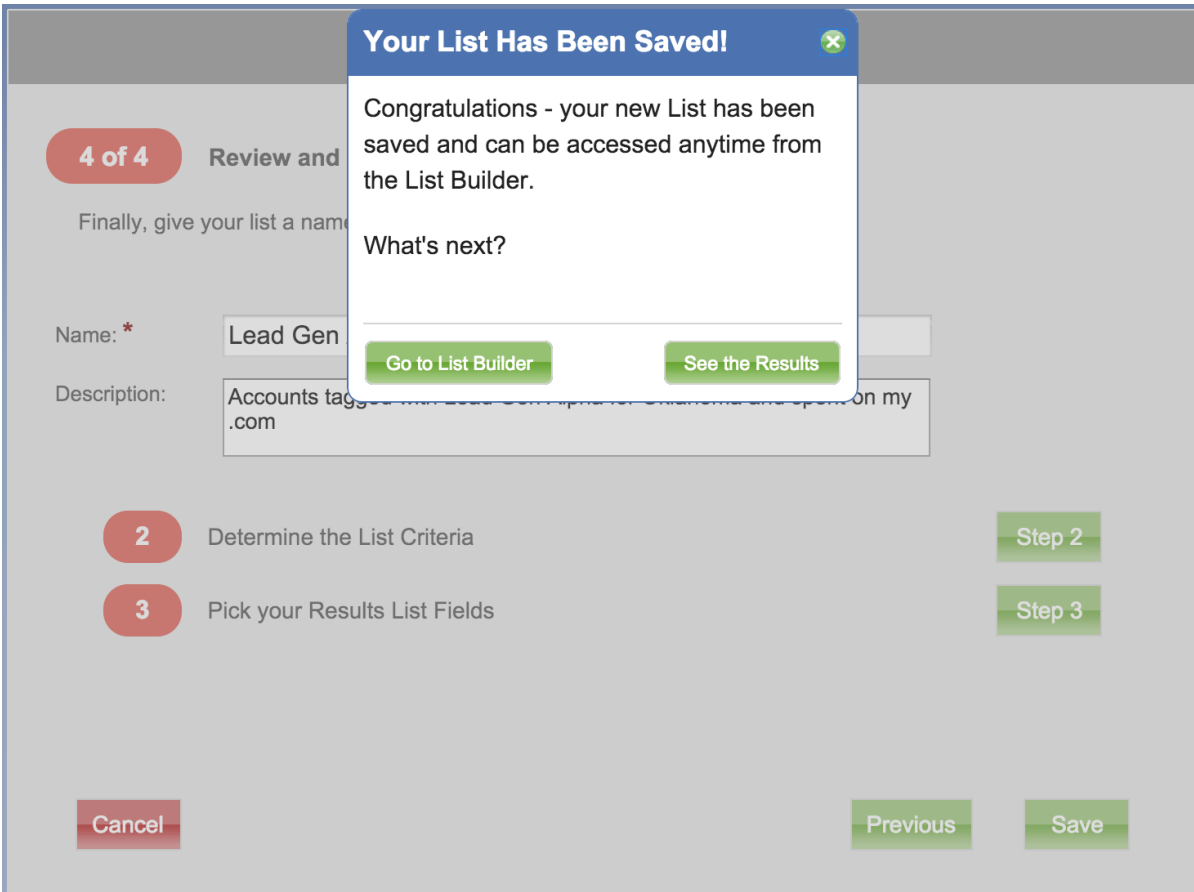


- 1) **Available Fields** - If you can place it onto your custom list, then you'll find it here. In order to add more fields to the Selected Fields you simply select the field(s) (either by single, Shift, or Control clicking them) and then use the right arrow.
- 2) **Move Left/Right** - Once you have your items selected in the Available fields, click the arrow pointing to the right in order to move them to the Selected Fields. Just the opposite, if you no longer want a field in the Selected Fields, select them and then click the arrow pointing to the left in order to move them to the Available fields.
- 3) **Selected Fields** - Everything on this section will display on your custom list, in the order that they are listed. If you need to remove a field, simply select the field(s) (either by single, Shift, or Control clicking them) and then use the left arrow.
- 4) **Move Up/Down** - The items in the Selected Fields will display on your custom list in the order that they appear. You can quickly move items up or down in the list by highlighting them (via single, Shift or Control clicking them) and then clicking the Up and Down arrows.

Step 4: Review and Save— Now that you've determined *What* you want to see and *How* you want to see it, you can give it a unique name and description so that you can easily locate and run the list in the future. Optionally you can also go back to Step 2 or Step 3 if you want to make additional changes. When you're ready click Save.

You're done building your list! Once Matrix has saved the changes to your list, you have two options. You can go to the List Builder (where we started) and build/run another list or you can view the results of the list that we just built.

Account Executive Quick Reference



Viewing Your List Results

The results to any list will look and feel much like your Account or Contact lists, however they've been generated to match only the criteria and results that you have supplied. From these lists you can do a quite a few powerful actions like exporting selected results or mass tagging them.

<input type="checkbox"/>	NAME	SALESPERSON	ADDRESS	CITY	STATE	ZIP
<input type="checkbox"/>	A & L Motors	1Clark, Damon	123 Main Street	Pittsburgh	PA	15233
<input type="checkbox"/>	Acura - National	Lemon, Lenore	746 City Drive	Pittsburgh	PA	43029
<input type="checkbox"/>	Alliance For Justice	Lemon, Lenore	1234 Vally Rd.	Pittsburgh	PA	43029
<input type="checkbox"/>	Als Diner	Lemon, Lenore	43 Chester St.	Pittsburgh	PA	43029
<input type="checkbox"/>	Animal Shelter	Lemon, Lenore	4333 Green Lawn Drive	Pittsburgh	PA	43029
<input type="checkbox"/>	Appliance World	Lemon, Lenore	888 State Route 40	Pittsburgh	PA	43029
<input type="checkbox"/>	Aquarium	Lemon, Lenore	43 Pethtel Lane	Pittsburgh	PA	43029
<input type="checkbox"/>	Arby's	Lemon, Lenore	1235 Vally Rd.	Pittsburgh	PA	43029
<input type="checkbox"/>	Arthur Mitchell Group, P.s.	Lemon, Lenore	88 Lincoln Highway	Pittsburgh	PA	43029
<input type="checkbox"/>	Audi of America	Lemon, Lenore	903 Business Park Drive	Pittsburgh	PA	43029
<input type="checkbox"/>	Avonmore Travel Council	Lemon, Lenore	3 Orchard Way	Pittsburgh	PA	43029
<input type="checkbox"/>	Bakersfield Home & Rv Show	Lemon, Lenore	76 City Drive	Pittsburgh	PA	43029
<input type="checkbox"/>	Beaver County Fair	Lemon, Lenore	1554 Vally Rd.	Pittsburgh	PA	43029
<input type="checkbox"/>	Beru Lars	Lemon, Lenore	35 Western Ave.	Pittsburgh	PA	43029
<input type="checkbox"/>	Best Western International	Lemon, Lenore	908 Business Park Drive	Pittsburgh	PA	43029
<input type="checkbox"/>	Big G Foods	Lemon, Lenore	39 Western Ave.	Pittsburgh	PA	43029
<input type="checkbox"/>	Blanchard Convention & Visitors Bureau	Lemon, Lenore	9909 Business Park Drive	Pittsburgh	PA	43029
<input type="checkbox"/>	Blue Cross Blue Shield	Lemon, Lenore	2224 Western Ave.	Pittsburgh	PA	43029

- 1) **Name and Description** - Displays the name that you called your list as well as the description if you optionally added one.
- 2) **Edit the List** - If the results on your list are not displaying as you had anticipated, simply click this edit button and you will be taken back into the wizard where you can edit the criteria and results pages to better suit your needs.
- 3) **Mass Actions** - By selecting rows in the results (either individually or by clicking the select all next to the first column) you can perform various actions on your results like Tagging your Accounts and Contacts. These Mass Actions are designed to help with mechanical flow of doing similar actions over and over again by batching them into a single action.
- 4) **Column Filters** - Use the column filters to find specific results in your list. The filter boxes will return anything that contains the letters or numbers entered. To apply the filter you must hit enter. Multiple columns can be filtered at a time.
- 5) **Export the List** - You can export your selected results into a .CSV file that is easily imported into other systems like mail mergers and card creation programs. Be aware that this will not be available until you have selected at least one record and will only export the selected records.

NOTE: One of the great things about list builder is that it gives you an easy way to see your accounts and contacts without addresses! Take a look at all of the N/A records above. This example salesperson has not taken advantage of Matrix and if they would update the basic address information they could create even more powerful lists within Matrix.