



BluWave- List Manager



For support please contact: 011 462 6871 or support@bluwave.co.za.

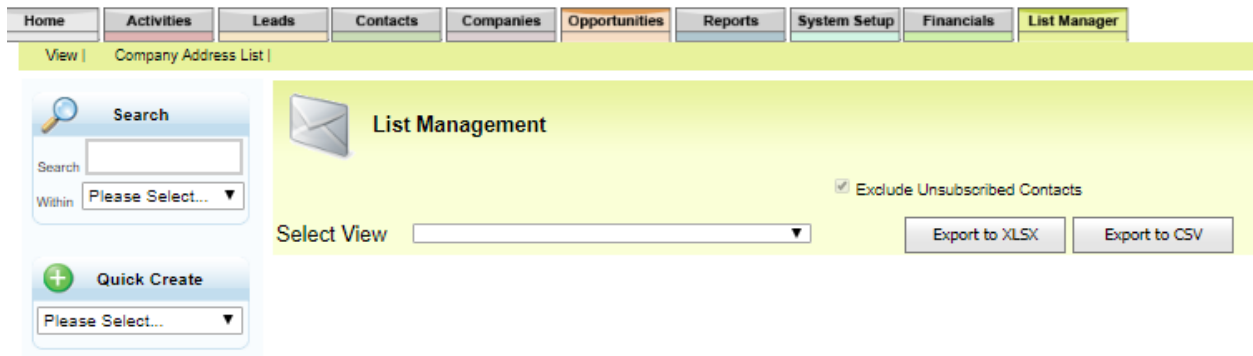
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1 How to use List Manager

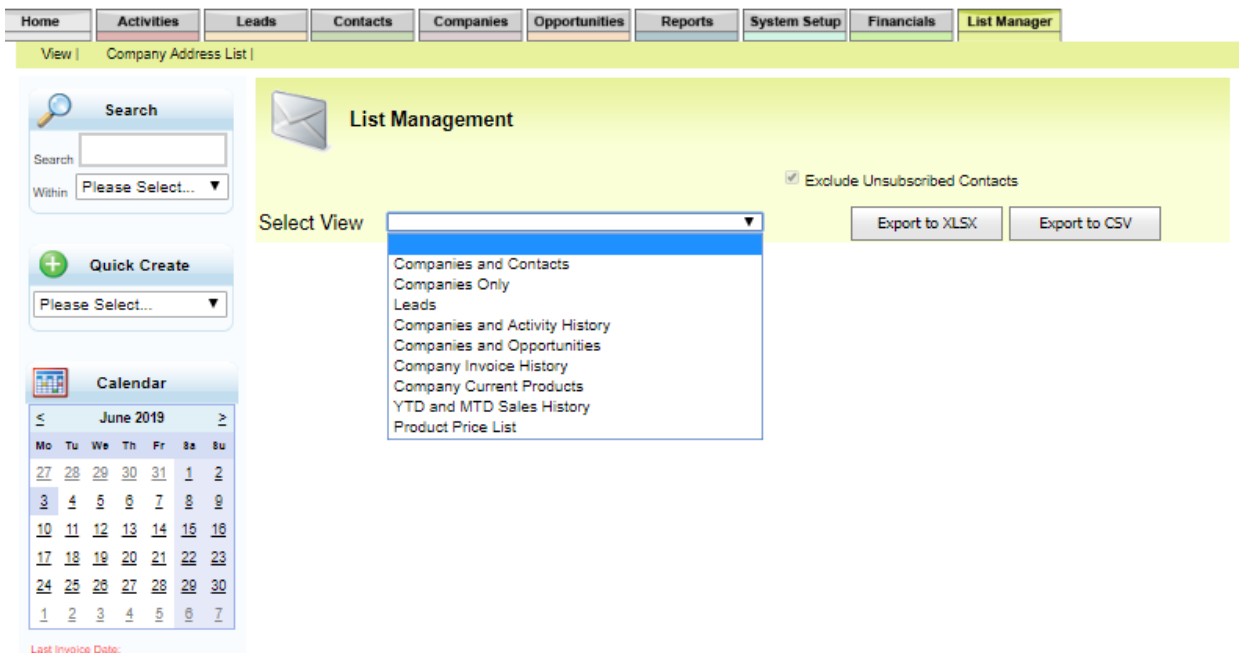
In order to use the list manager tab, the user would need to have the appropriate security role settings (List).

If the user does not have the correct security role settings (List)- he/she would not be able to see the Dropdown box as seen below:



From the dropdown the user would be able to choose from the different data options that could be exported.

The user would also be able to choose whether or not to include contacts that are marked as Unsubscribe.



The following amount of records per data selection can be exported at a time:

Companies & Contacts	15000
Companies Only	15000
Leads	No limit
Companies & Activity History	5000
Companies & Opportunities	5000
Company Invoice History	10000
Company Current Products	3000
YTD & MTD Sales History	No limit
Product Price list	No Limit

2 Adding in a Filter

In order to add a filter to the list of record- the user can click on Create Filter.

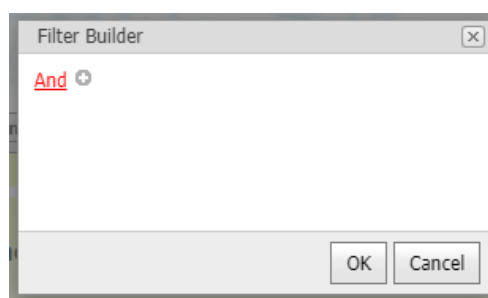
The screenshot shows the 'List Management' interface in BluWave CRM. The top navigation bar includes 'Home', 'Activities', 'Leads', 'Contacts', 'Companies', 'Opportunities', 'Reports', 'System Setup', 'Financials', and 'List Manager'. The main content area is titled 'List Management' and features a search bar, a 'Quick Create' button, and a calendar for June 2019. Below these is a table of records with columns: Company, C/P, Sales Staff, Branch, Account No, and Type. The table contains 15 rows of data. At the bottom of the table, there is a 'Create Filter' button. A black arrow points from the text above to this button.

Company	C/P	Sales Staff	Branch	Account No	Type
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
ADT/Fidelity	P	Michelle Snyders	Johannesburg		Definite Interest
ADT/Fidelity	P	Michelle Snyders	Johannesburg		Definite Interest
Afrox	P	Michelle Snyders	Johannesburg		On The Fence
Big 5 Guards	C	Byron Cooke-Tonnesen	Johannesburg	1024	Commercial
Big 5 Guards	C	Byron Cooke-Tonnesen	Johannesburg	1024	Commercial
BluWave Software	C	Byron Cooke-Tonnesen	Johannesburg	2346	Residential
BluWave Software	C	Byron Cooke-Tonnesen	Johannesburg	2346	Residential
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This will allow the user to narrow down the amount of records according to specific criteria/conditions. A pop up block will appear in the middle of the page.

Click on the **Plus icon** next to **And**. This allows the user to start selecting the criteria to filter the data by. We suggest the user move the pop up block to the top of the screen order to see all of the fields that can be chosen from.

In order to demonstrate the Filter function, we are using the Companies and Contacts data. However the concept can be used with all the data set options.

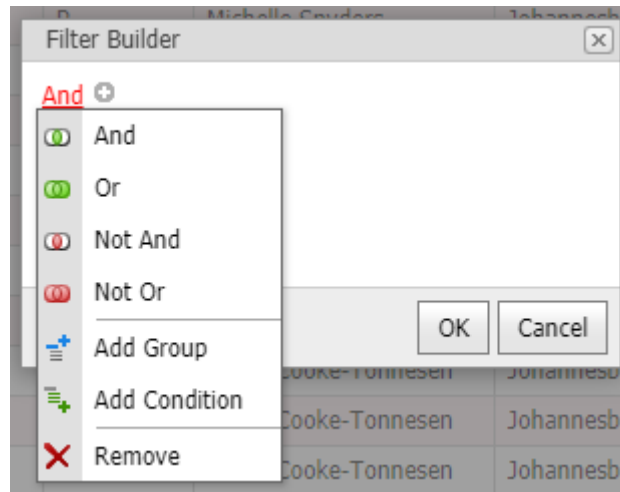


2.1 Step 1: Choose the Connector between the Conditions/Criteria

The **And** can be changed to another option, as can be seen below, or alternatively another group of conditions can be added. Click on the **red And link**

This allows the user to either for example to ...:

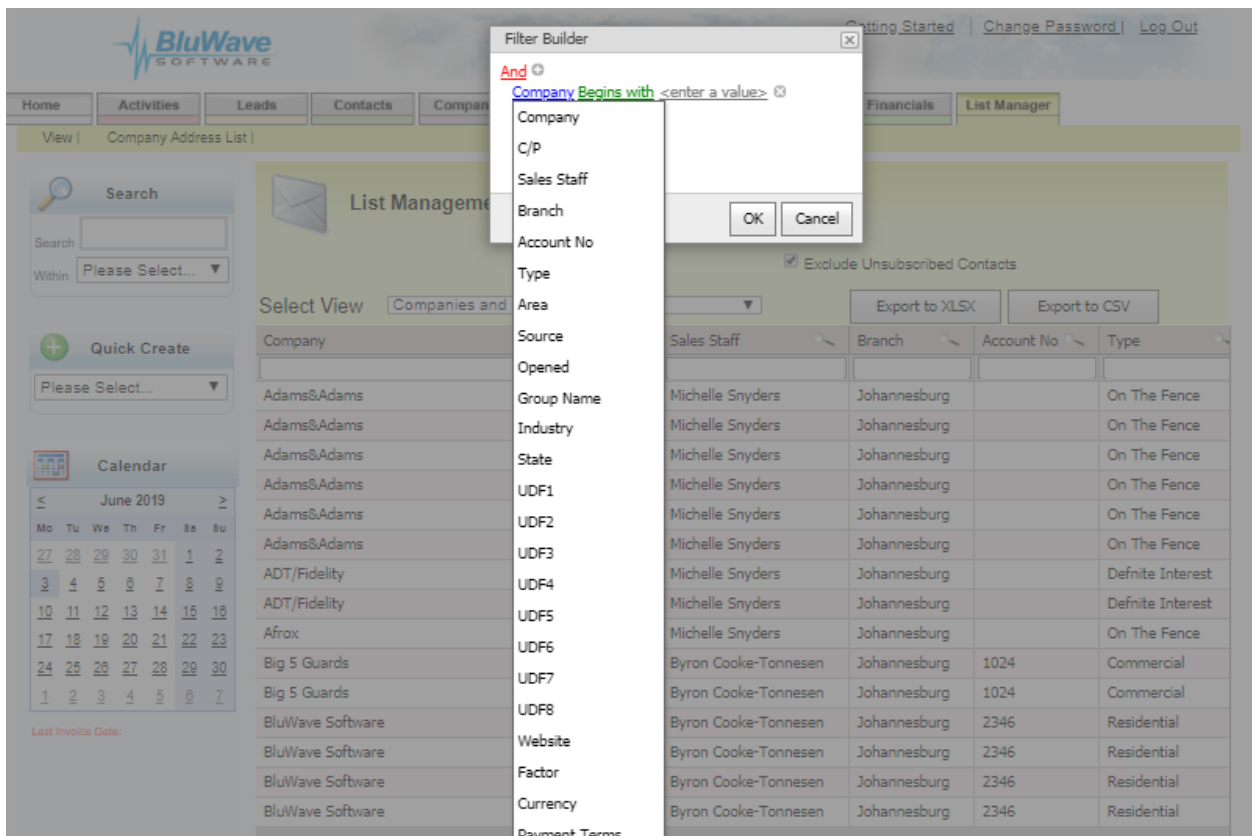
- choose two conditions that should be met simultaneously (**And**) or
- choose two conditions where one or the other should be met (**Or**), or
- where **Not And** or
- Where **Not Or**



After selecting the connector the user should click in the Plus icon next to the **red And link**, to add a criteria/condition that should be met.

2.2 Step 2: Choose the Field to take into Consideration

The user would at this stage be able to choose what field should be looked at. Click on the **blue Field link**. This will then display the list of fields available in the data set, that can be used to search for certain criteria/conditions. In our example we have chosen the **Type field**.

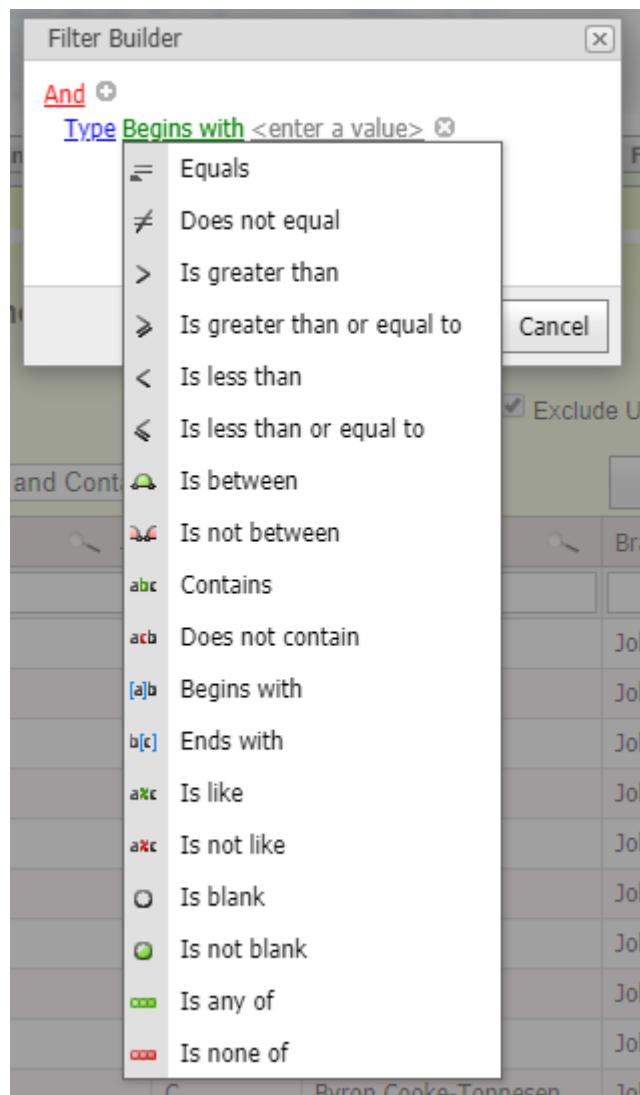


2.3 Step 3: Choose the Operator of the Criteria/Condition

This allows the user to determine if the value entered should match (or not) with what would be entered in that field.

For example should the value entered be Equal to the field entry? Or should the field only contain the value entered?

In our example we chose that the Value entered should be contained within the field chosen.

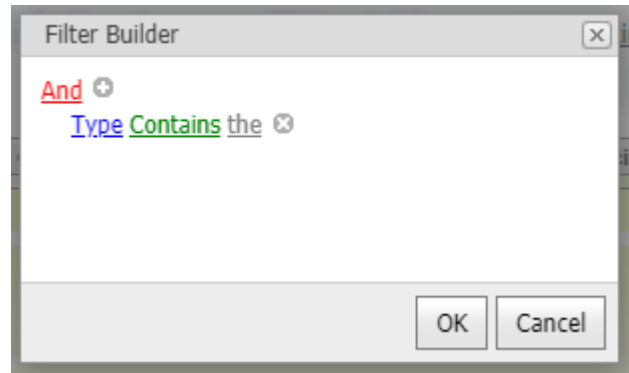


2.4 Step 4: Choose the Value

Here the user would enter what they are looking for.

In our example we were looking for the **Type** field to **Contain** the Value **The**.

The value could be a word, sentence, numeric value or specific date.



The user would be able to add in multiple conditions/ criteria that should be met. (Follow the steps to add additional conditions).

When the conditions/criteria are set, Click in **OK**.

The table displayed should then be changed to contain the data that meets the conditions/criteria set up in the filter.

Getting Started | User Profile | Log Out?

Home | Activities | Leads | Contacts | Companies | Opportunities | Reports | System Setup | Financials | List Manager

View | Company Address List |

List Management

Exclude Unsubscribed Contacts

Select View: Companies and Contacts | Export to XLSX | Export to CSV

Company	C/P	Sales Staff	Branch	Account No	Type
					the
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Adams&Adams	P	Michelle Snyders	Johannesburg		On The Fence
Afrox	P	Michelle Snyders	Johannesburg		On The Fence
SANPARKS	P	Michelle Snyders	Johannesburg		On The Fence
SANPARKS	P	Michelle Snyders	Johannesburg		On The Fence
Vodacom	P	Michelle Snyders	Johannesburg		On The Fence

Contains([Type], 'the') [Clear](#)

At the bottom the table, the filter entered would be displayed. To edit this filter, simply click on it (the **blue link**).

Click on the **Clear link** to remove the filter settings.

3 To EXPORT the data...

To export the data displayed, either click on the **Export to Xlsx button** or the **Export to CSV button**. This will export the data to excel in the format selected.