

# How do I create a filtered list?

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Applies To: ☒ PoliteMail Desktop ☒ PoliteMail Online ☐ PoliteMail M365

Version: ☒ 4.9 ☒ 5.0 ☒ 5.1+

Filters are a search parameters that are used to generate a list of contacts. By using Filters, you can quickly create and manage groups of contacts. For example, you could create a list of contacts that are grouped by manager. Alternatively, you could create a list of contacts that are grouped by location. Filters use Custom Fields to generate lists.

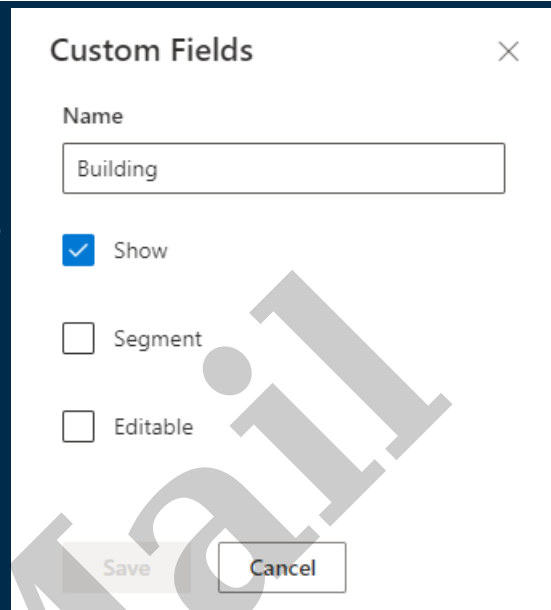
## Step 1: Create Custom Fields

First you will need to create and set Custom Fields. PoliteMail provides users with an unlimited number of Custom Fields.

1. Navigate to **POLITEMAIL > Account (Settings in v4.9) > Custom Fields**

Name	Show	Segment	Editable
Building	✓	✗	✗
ChangedName	✓	✗	✓
CUSTOM12	✓	✓	✓
CUSTOM13	✓	✗	✗
CUSTOM15	✗	✗	✓
CUSTOM16	✗	✗	✓
CUSTOM17	✗	✗	✓
CUSTOM18	✗	✗	✓
CUSTOM19	✗	✓	✓
CUSTOM20	✗	✗	✓
CUSTOM21	✗	✗	✓

2. Click on the Custom Field you want to edit to open the editing window. In **version 4.9**, you'll need to click the Edit button in the upper right.
3. You can type in the name for your new Column, as well as decide whether it should be shown in the default view, able to be segmented for reports, and made editable by ticking the boxes. Once you've finished Editing, click **Save (Update in v4.9)**.
4. You now have your Custom Field ready to use! In order to have specific Custom Fields display as options for filtering, you must tick the "Show" box.



**Custom Fields** [X]

Name

Building

☒ Show

☐ Segment

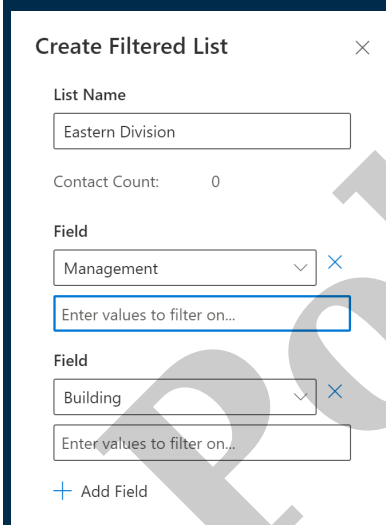
☐ Editable

Save Cancel

## Step 2: Create a Filtered List

Within the **POLITEMAIL** tab, click on the Lists icon.

To create a new list using a filter, select the "New" drop-down and then select "Filtered List".



**Create Filtered List** [X]

List Name

Eastern Division

Contact Count: 0

Field

Management [X]

Enter values to filter on...

Field

Building [X]

Enter values to filter on...

+ Add Field

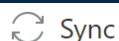
From here you'll be able to name your list. From the Field pull-down menu (In **v4.9**, this is the "Filter by Custom Field Values" section), choose your Custom Field you want to filter by. You'll then be asked to enter the values to filter on.

*Example: You want to create a list of all contacts managed by Joe Smith and are in the Eastern Standard Time zone. You can select the Custom Fields of Timezone and Manager. The Contact Count will automatically update based on your selected fields.*

When you are done, simply select the save button and a new Contact List will be generated using the filter that you just created.

## Syncing Your Filters

If you want to ensure that all of your contact lists are using up to date contacts based on your filters, use the sync button from the Lists page. This will force the filters to update the contact lists using the most recent contact information.



In order to have specific Custom Fields display as options for filtering, you must check the "Show" column.

PoliteMail