Accessing a Rollup List

Lists · https://learning.pcrecruiter.net/site/docs/lists/accessing-a-rollup-list/

Rollup Lists are lists of Company, Name or Position records. These records are grouped together for a variety of reasons including but not limited to:

- Call planning
- Importing from a file
- Records to be mass updated or deleted
- Reporting needs
- Bulk emails
- Email Campaigns
- Sequencing

Open Rollup Lists

1. Select **Rollup** from the Main Toolbar.
2. By default you will see the most recent rollups you have clicked on. This will include up to 20 Name, 20 Company, and 20 Position Rollups (60 Rollups maximum). However you can choose to filter your Rollups as well:
   - **Search for a Rollup:** Enter the Rollup you are searching for into Rollup Name and hit Enter on your keyboard.
   - **Choose a Category:** If you are selecting Categories when creating rollup lists, you may choose to filter by the Category dropdown.
   - **Usernames:** Use the Username dropdown to select the user's rollup lists you would like to view.
   - **Toggle:** Use the Recent Rollups/All Rollups toggle to choose if you are viewing Rollups you have recently accessed or All Rollups.

3. Once you have added Filters to your Rollup Menu view, you must choose Clear from the Action Icon on the right to remove your filter and return to the recently viewed.
4. You will also see some basic details in regards to the lists being displayed (This layout cannot be customized).
    - **Rollup Name:** This is the name given to the rollup list upon creation
    - **Name/Company/Position Count:** Shows the number of each record type that exists on your Rollup, you will select these numbers to access the list
    - **Description:** An optional longer description of what the list was created for, such as Monday Call Plan, Marketing Director Candidates, etc.
    - **Date Created:** The date the rollup list was created
    - **Rollup Code:** The code used to store your rollup list in the back end of the database. You will see this code if you choose to search within a rollup list
    - **Username:** The username assigned to the rollup list when the list is created, this is typically the rollup creator.
5. Every rollup list can contain Names, Companies, and Positions. Each record type is stored in a separate area of the list. Click on the number under the record type of any rollup list to access the records.

From an Individual Record

Every record (name, company, or position) has a **Rollup** tab that lists the rollups the current record is linked to. If you click a rollup name from this list, it will take you directly to the rollup list.

From Sequencing

Since every Sequence you activate is tied to a Rollup List, the **Overview** tab lists your current sequences with a link to the Rollup List. If you click the Rollup icon next to the Sequence name, it will take you directly to the list.