Create a Rollup List

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

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

- Call Planning
- Imported Records
- Records to be mass updated or deleted
- Reporting needs
- Bulk Emailing Campaigns
- Sequencing

Create a Rollup List

1. Click the **Rollup** icon on the Main toolbar.
2. Click the **Add** action icon.
3. Enter a **Name** (up to 20 characters, this is the only Required field).
4. Enter a **Description** (Optional). Description is used for noting the purpose or contents of the list.
5. Select a **Category** (Optional). Category is helpful for organizing lists.
6. Modify the User Created and Owner Name fields if necessary.
7. Switch Shared to No if other users should not have access to open the list.
8. Specify a Default Activity Type (this step is normally skipped unless using an Activity Type/Result activity setup).
9. Click **Save.**

Creating Rollups on the Fly

When adding records to a Rollup, you can always create a new Rollup List on the fly instead of adding to an existing list.

1. From any Add to Rollup window, click the **Add Rollup** button on the bottom right.
2. Follow steps 3-9 from above.