





How-to-instruction on creating a dynamic list

To create a list in SharpSpring, do the following:

- 1 In SharpSpring's top toolbar, click Contacts > Lists.
- 2 On the right side of the page, click Options > New List.
- 3 Enter a name for the list.
- 4 Optionally, enter a list description.
- 5 Select the folder to add the list to.
- 6 Optionally, click the Make this list available in the Contact Manager checkbox.
- 7 Click one of the following toggles:
 -  Rules-Based
 -  Manual
- 8 Click Create List.

Adding Triggers and Filters

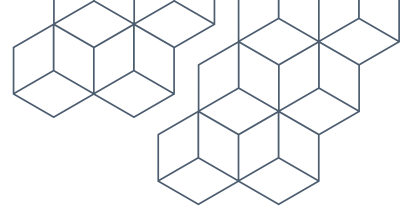
In SharpSpring, lists and automation depend upon triggers and filters to operate.


A trigger is an event that results in an action group running. Only triggers can start an action group, and at least one trigger is necessary to perform any automated action. A filter is an optional part of an automation that is used to narrow the scope of triggers. Filters are only applied when triggers are fired.

Lists function only as well as their triggers and filters allow. As such, lists must have triggers and filters configured. To add triggers and filters to a list, do the following:

- 1 In SharpSpring's top toolbar, click Contacts > Lists.
- 2 Create or edit a list.
- 3 In the Triggers and Filters section, click New Group.
- 4 Set the conditions modifier to either When all or When any.
- 5 Choose either Add the Trigger or Add the Filter.





- 6 In the When a contact field, select the appropriate condition.
- 7 Enter condition parameters as necessary.
- 8 Click Add Rule.
- 9 Complete the list with other triggers and filters.
- 10 Optionally, remove triggers and filters by clicking  .
- 11 Click Save Changes.

