

Create & Save A List

NOTE: Lists are used as an effective way to view selected records and also serve as an easy and quick reporting tool. Use the steps below to create a “Deacons” list.

1. Click **Membership** in the Navigation area.
2. Choose **Shared Lists**.
3. Click the **Add New List** icon located at the bottom right of the grid area. (**Note:** We will keep the default type as Basic)

List Name and Description
Enter the name and description for your list

Name:

Type:

Category:

Description:

Category dropdown options:

- Select Category
- All Ministries
- Preschool
- Elementary
- High School & Youth
- College & Career
- Singles
- Young Married
- Couples
- Median Adults
- Senior Adults

4. Enter a Name for the list (i.e., “Deacon”).
5. Choose **Person Report** for Type.
6. Choose **All Ministries** for the Category.
7. Click the **Next** button at the bottom of the form.

NOTE: At this point, you will see a large array of options that work as filters. Any field you choose will limit the content of the list (to conform to options chosen). For this exercise, we will only use the **Tag Criteria** section.

8. Click the **Tag Criteria** header to access the **Tag Criteria** filter options.

The screenshot shows a software interface with several expandable sections: Extended Criteria, Advanced Criteria, Personality Criteria, Small Group Criteria, Tag Criteria, Sport Criteria, Campaign Criteria, and Contributions. The 'Tag Criteria' section is expanded, revealing a 'Ministry Tags' list. This list includes checkboxes for '08PLEDGE People giving 2008', 'Committees', 'Deacons' (which is checked), 'IPICTURE Individual Picture', 'LASTCN Last Date Contributions Given', 'PRESCHOL Preschool Children', 'RCHCHR Already a Christian', and 'RCHCOMMU Communion'. At the bottom of the interface are four buttons: 'Cancel', 'Previous', 'Next', and 'Finished'.

9. Locate and checkmark the tag you want used with this list.

10. Click the **Next** button.

NOTE: Your list can include any of the fields shown in the **Available Fields** section, as well as those that are in the default **Selected Fields** area.

11. Use the arrows between the screens to remove or add fields to the **Selected Fields** section.

The screenshot shows a 'Field Selection' dialog box with the instruction: 'Please select from the list of available fields those that you would like to appear on your list. Once you have selected your fields, you can order them in the way that you would like them to appear on the list.' The interface is divided into two main columns. The left column, titled 'Available Fields', contains a scrollable list of fields including Address ID, Address Line 2, Adults in Family, Age, Anniversary Date, Area ID, Area Name, Birth Date, Birth Day, Birth Month, Business Phone, Cell Phone, Children in Family, Country, Date Added, Date Modified, Distance From Church, Event Tags, External C, External D, External I, External S, Family ID, Family Role, First, Last Name, Gender, Group Status, In Small Group, and Tentative Person. The right column, titled 'Selected Fields', contains a scrollable list of fields including First Name, Last Name, Email, City, State, Street Address, and Zip Code. Between the two columns are four blue arrows pointing in different directions (right, left, up, down). To the right of the 'Selected Fields' list are two vertical blue arrows (up and down) for reordering. At the bottom of the dialog are four buttons: 'Cancel', 'Previous', 'Next', and 'Finished'.

12. Use the Up/Down arrows to arrange the field order. Notice that in the screenshot above, we have rearranged the fields in this section.

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13. Click the **Next** button.

14. Data in each column can be either Left, Center, or Right aligned. Change the alignment if desired.

Field Details

Below are the fields that will appear on your list. For each field, set the heading name, alignment, and any advanced options that need to be set.

Column	Heading Name	Alignment
First Name	<input type="text" value="First Name"/>	<input type="text" value="Left"/>
Last Name	<input type="text" value="Last Name"/>	<input type="text" value="Left"/>
Email	<input type="text" value="Email"/>	<input type="text" value="Left"/>
City	<input type="text" value="City"/>	<input type="text" value="Left"/>
State	<input type="text" value="State"/>	<input type="text" value="Left"/>
Street Address	<input type="text" value="Street Address"/>	<input type="text" value="Left"/>
Zip Code	<input type="text" value="Zip Code"/>	<input type="text" value="Left"/>

15. Click the **Next** button.

16. The output of the list can be sorted by any field, in any order that you choose. Use the **Sorting** form to select the sort order (i.e., Ascending).

Sorting

If you would like to sort the information that is included on your list, click "Add" to add new sorting information. Your list will be sorted based on the fields that you define here.

<input type="text" value="First Name"/>	<input type="text" value="Ascending"/>	✖
<input type="text" value="Last Name"/>	<input type="text" value="Ascending"/>	✖

17. Click the **Next** button.

18. If you do not want the new list to run, remove the check mark from the **Run List Now** field.

Summary

You have finished defining your list. Click the Finish button below to save your changes

☒ Run List Now

[Display SQL Query](#)

☒ List is available to everyone

19. Click **Finished**.

20. The program has now saved your list and you can simply select and run it at any time.

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