

Filters and Smart Lists are one of the most powerful and commonly used tools in Daylite. They help organize, search, and make sense of all the information put in someone's database. They are often used as reports, for research, or just to help reduce the number of records someone is viewing.

A Daylite User might choose to use a Filter or Smart List for a variety of reasons, some of which included:

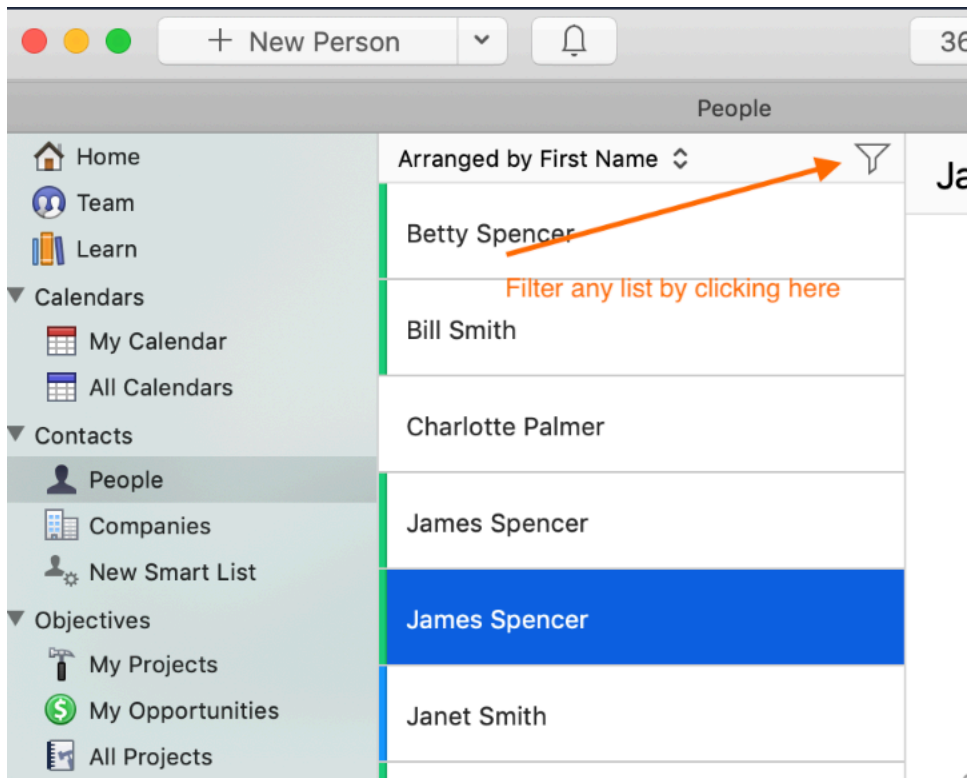
- A mailing list
- Find hot prospects
- People you haven't had an activity with lately

Filters

Filters create a search for records based on whether or not they match, or do not match certain criteria the user specifies. It helps reduce the number of records to a specific set you are looking for. For example, you may create a Filter over on All People, so you can find only people who are within a specific location. Filters can search for information on the record, such as Name, classification such as keywords, as well as metadata like the create date. They can also search for information about linked records, for example, you can create a list of People, who are linked to a Company that is within a specific location. Creating a filter can be done at any time, by clicking on the filtering funnel from the Object you are viewing. These sub-filters can go multiple objects deep and can create incredible insights for customers.

Adding a Filter

In most views in Daylite, you will see a Filter icon. Click this to expose the Filter builder.



Here is a breakdown of a people Filter. You can see what type of object it is searching for, by looking at the top left, in this case, a people list. Next, you can see the type of information it is looking for. Filters use “Boolean logic” which means, it looks for things that are true, or not true, as well as can specify the information that must be included, or find records with any one of the fields specified.

These logics are written in plain English, so they are more easily understood and are broken down as:

Match all:

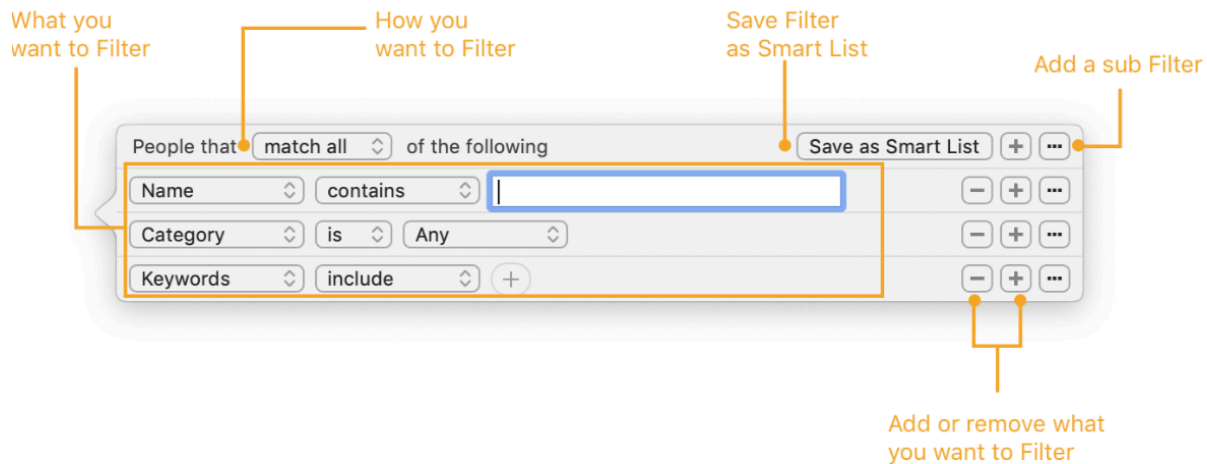
A record must match **ALL** criteria in order for a record to appear

Match any:

A record must match **ONE OR MORE** criteria listed in order for a record to appear

Do not match all:

A record must **NOT** match **ALL** criteria in order for a record to appear



Sub Filtering

When you are sub-filtering, you can look at the details of records linked to an object. You can do this for any number of objects, and can even add more sub filters to a sub-filter. When adding a sub filter, you have additional search criteria to leverage.

At least one matching:

Display all records where at least one specified objects linked to the record matches the following criteria

None matching:

Display all records where none of the specified objects linked to the record match the following criteria

All matching:

Display all records where all of the specified objects linked to the record match the following criteria

At least one exists:

Display all records that have at least one of the specified linked

Using Forms with Filters

Forms are great for collecting information and later on filtering. Forms can gather any number of information, and with sub-filters, you can dig deep into records and find interesting cross-sections of your database.

Smart Lists

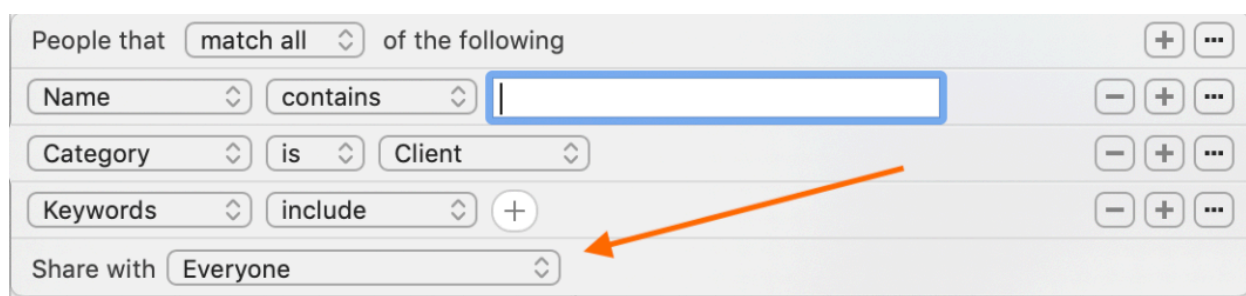
Smart Lists are the same as filters, except where a filter is placed over a list and for one-time use, a Smart List is a filter that you save and can use over and over again. Each time you select the Smart List, the filter is applied to your data and the list is populated. As information changes within your database, the records within your Smart List changes.

You can save a Smart List from the Filter builder by clicking **Save as Smart List**, or start from scratch by clicking the record type you want to filter on the sidebar, then click **+** in the lower right corner and choose **New Smart List**.

In Daylite, you can also create lists, which are lists of records people create by dragging and dropping into the list. These should not be confused with Smart Lists because they do not apply any filters when you select them. You can identify a Smart List because it will have a gear icon at the bottom right of the object icon, whereas a list will have three lines.

Sharing Smart Lists

Smart Lists aren't just great for segmenting information, they are also great for Sharing. Consider a team setting, where a specific segment is relative to each member of the team. Instead of creating the same list multiple times for each user, it can easily be shared with Everyone or a specific Team created in User and Team Preferences.



Only the person sharing a Smart List can unshare, modify, or delete the Smart List. In some cases, customers may ask for help deleting a shared Smart List when the sharing user is no longer active. To resolve this you will need to give the customer a custom script to resolve this issue.

Duplicating Smart Lists

If you have extensive lists you've created, where there are minute changes from one to another, you can easily duplicate the master list, and make those tweaks to segment the other specifics too.

This is a great way of saving time, and not having to repeat that work over. You can also duplicate a list This can be done by right-clicking on the Smart List name from your sidebar and choosing to duplicate.

