

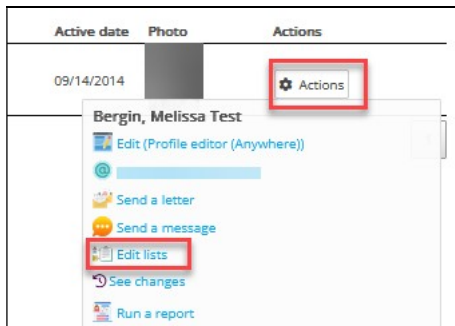
## VSys Anywhere– “Lists & Intellilists” Webinar (March 2025)

### Types of lists

**Standard List** – The *Standard list* is a permanent list that exists until you delete it. People are added to/removed from this list by you, as needed.

#### How to:

- **From Person Lookup** - where the Action button allows you to add/remove or create new lists



- **inside a person’s profile** at the bottom of their Personal data

A screenshot of a person's profile page for 'Bergin, Melissa Test'. At the top right are 'Save' and 'Save and stay here' buttons. Below the name is a 'Team' checkbox. The profile fields include 'Name prefix', 'First name' (Melissa), 'Middle name' (Test), 'Family/last name' (Bergin), 'Name suffix', 'First name (preferred)' (Missa), 'Code (short)' (8F9UJ), and 'Portrait photo' (with a 'Drop files here to upload' area). Below these is a 'Rotate portrait photo' button. Further down are 'Volunteer type' and 'Volunteer source' dropdowns. At the bottom, a 'Lists' section is highlighted with a red box, showing a list with 'Kiosk testers' and a red 'X' icon to its right.

For several people



<b>Add these to the list</b>	People who meet all the criteria here will be added to the interim results.
<b>Remove these from the list</b>	People who meet all the criteria here will be removed from the interim results.
<b>Keep only those both here and on the list</b>	People who are in the interim results list, but who do not meet these criteria are removed from the interim results.

You can test an individual set of criteria by clicking on the **Test** button while editing that set of criteria.

Test the complete list's criteria by clicking on the **Click here to test the list** link.

### Using Lists

Person lookup, report or mail merge/mailling label by selecting it from either an option on screen or as an advanced filter. If you have the option to +Add on screen, then look under **Others** and select **Lists**. This option will allow you to choose the list you want as well as three additional options **All of**, **Any of**, and **None of** which will use the list and apply the selected option to include or exclude people on the list appropriately.

Person lookup, you may have a Lookup by field with a dropdown of Lists, which when selected will prompt you for the list you want to use. Or it may show in the **Other** filters section.

#### Sample use cases:

##### Shared Decision-Making committee: *Standard list*

You have a team of people who have nothing in common. By putting them on a list, you now have an identifier for filtering.

##### Tracking volunteers who have returned something for compliance: *Standard list*

Over a three-week period, you are collecting a compliance document. As people turn in the document, add them to the list. Then use that list as a filter to bulk add the certification or training. The list can be cleared if you want to do this incrementally.

##### Updating volunteer data: *Standard list that expires*

You have a team of volunteers who are going to take on a project. They are all a sub-set of a specific job association. Search the job association. Put those people on a standard list and use that to bulk

create their new job association. The list disappears when you exit, that job association becomes what they have in common for filtering.

#### Eligibility/visibility – *Intellilist*

If you are using VSys Live, Intellilists may be driving some of your visibility rules. When you need more detailed filtering than Group/People type Intellilists allow you to create complicated filter rules.