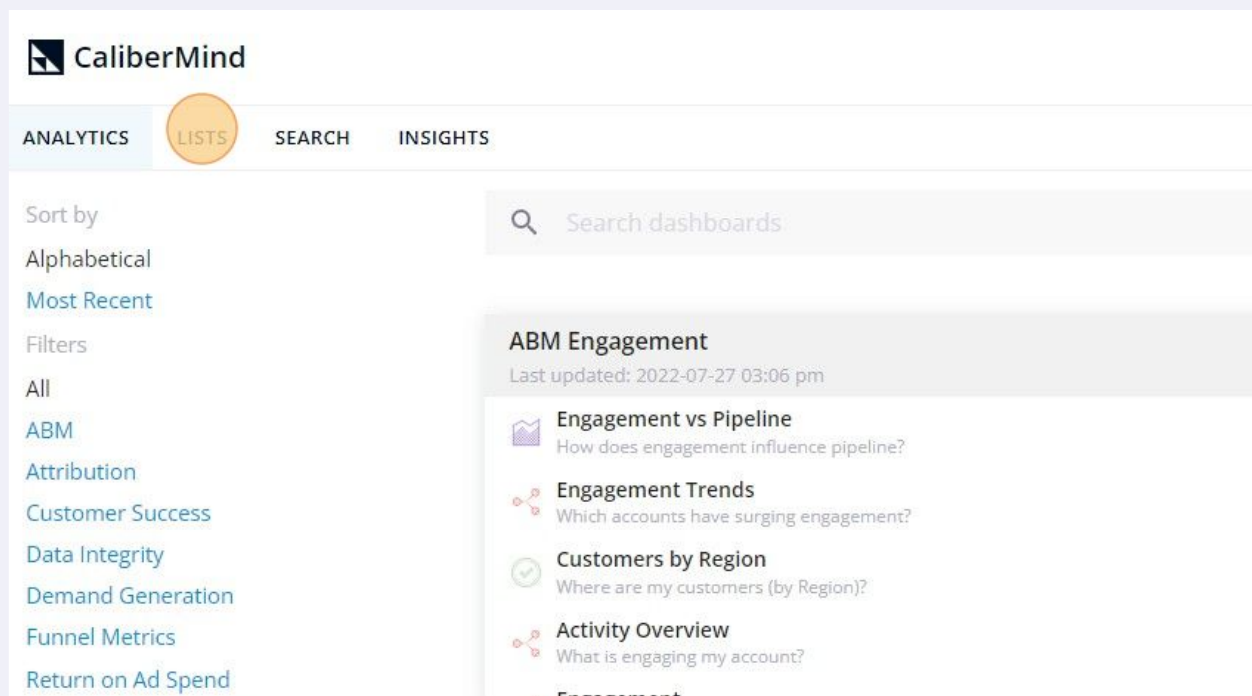


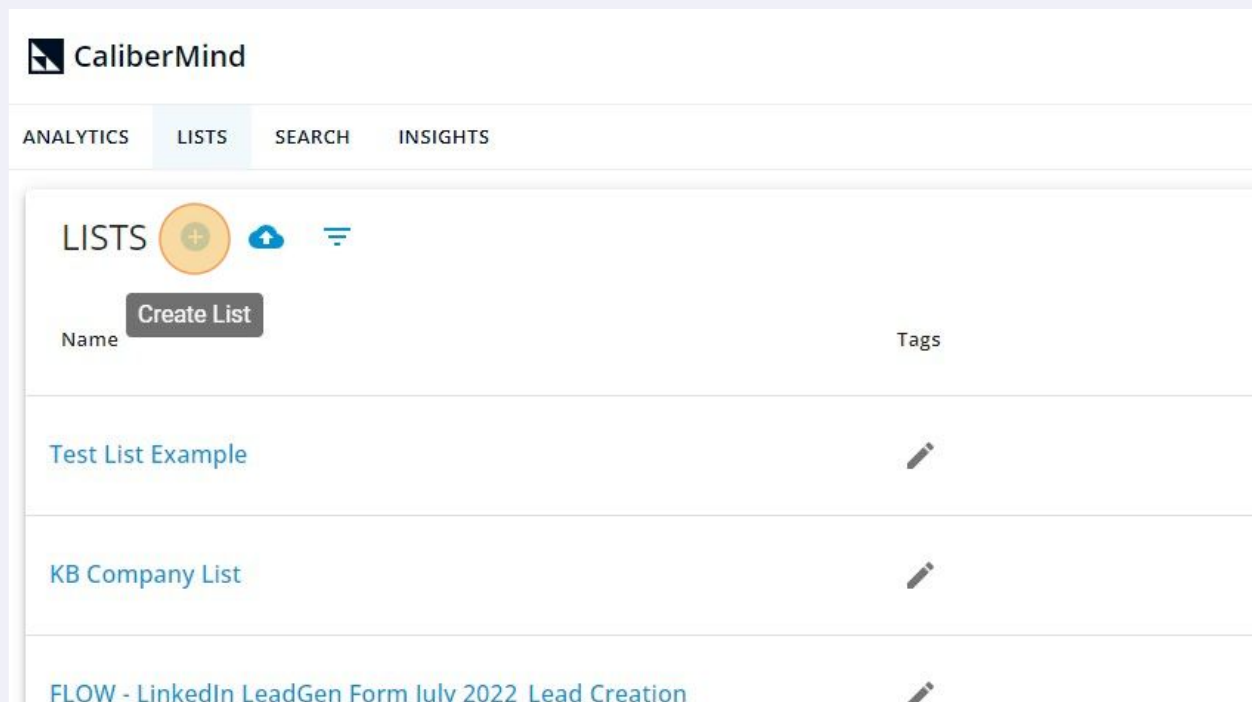
# Create a List Workflow

1 Navigate to <https://my.calibermind.com/analytics/dashboards>

2 Click "LISTS" tab on the main menu.



3 Click the blue plus symbol.



4 Give your list a name. In this example I've title mine "List Example."

5 In this example do not change any drop-down options. Now, Click "OK."

	Person	Yes	Dynamic	2022-07-21
	Generic	Yes	Dynamic	2022-07-15

6 Time to define your list. To do so, Click "ADD RULE"

ANALYTICS LISTS SEARCH INSIGHTS

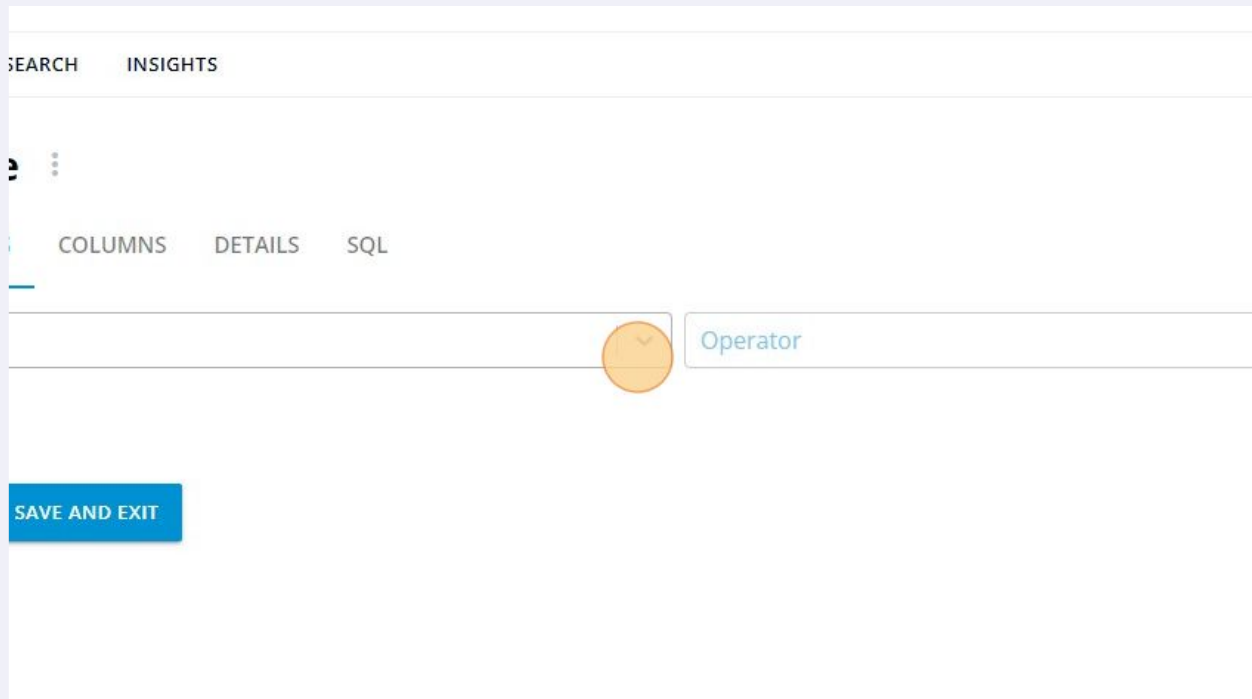
## List Example

PREVIEW FILTERS COLUMNS DETAILS SQL

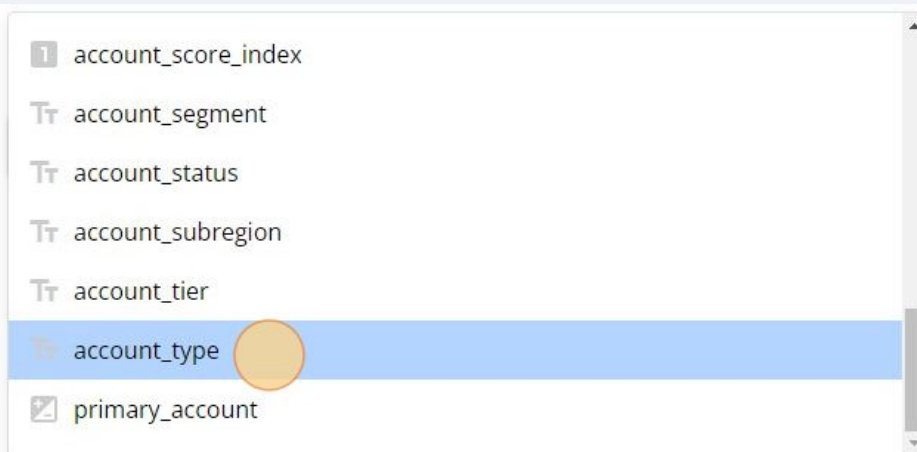
ADD RULE

TEST SAVE SAVE AND EXIT

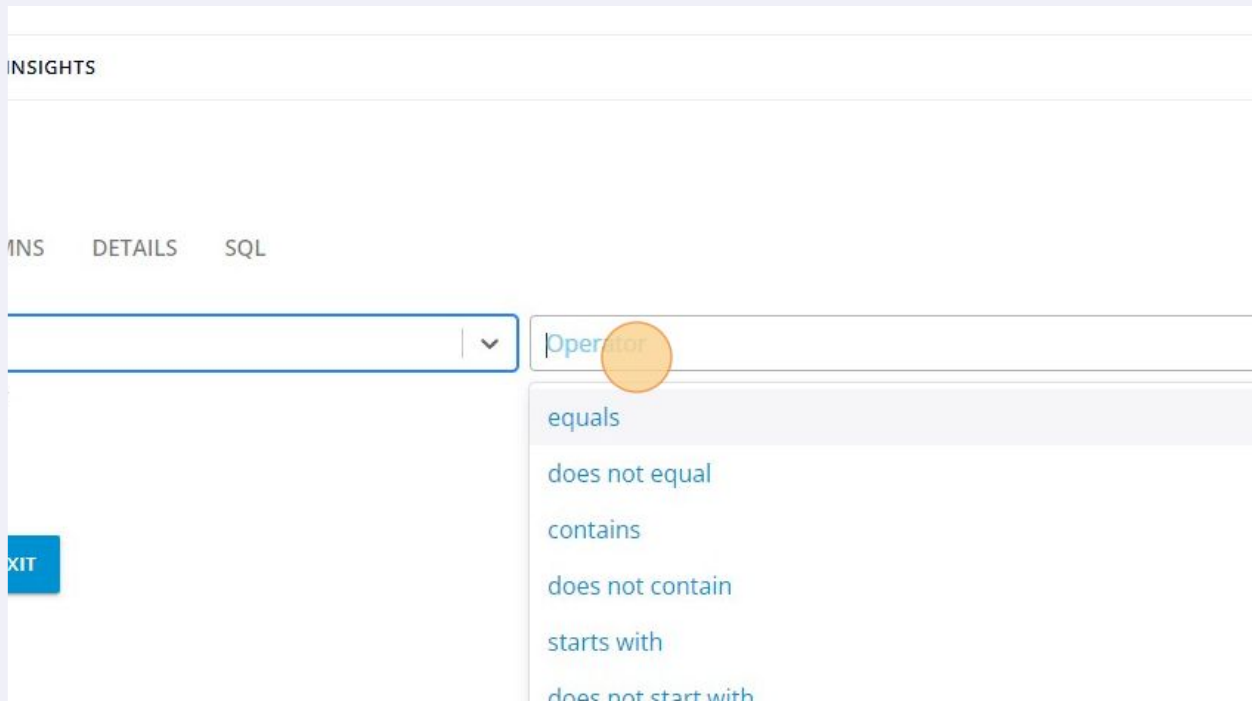
7 In the drop-down search for the desired category



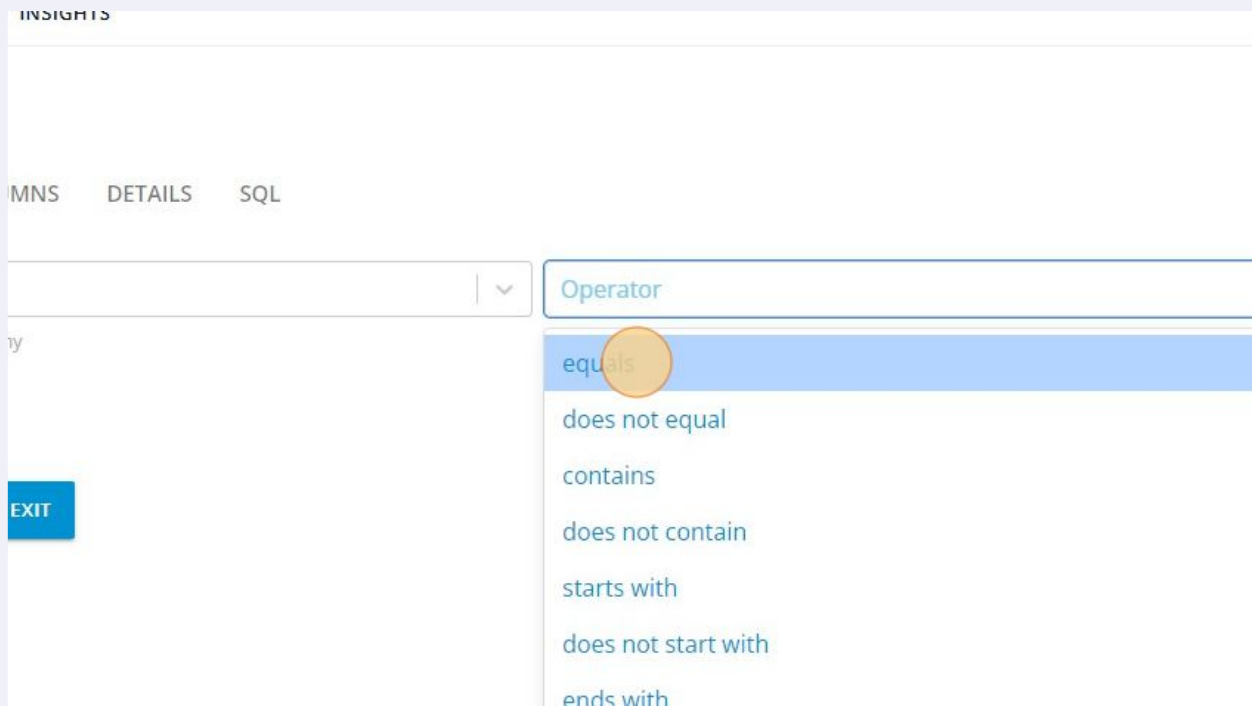
8 Begin typing "account." Select "account\_type."



9 Click "Operator" drop-down list



10 Select "equals"



**11** Now select the desired type of account from the drop-down list.

A screenshot of a web form interface. At the top right, there are icons for settings (gears) and notifications (bell). Below these is a large empty text input field. Further down, there is a dropdown menu with a blue border and a small downward arrow on the right. The text inside the dropdown is "Select...". An orange circle highlights the dropdown arrow. Below the dropdown, a list of options is visible: "Agency", "Analyst", "Churned", "Competitor", and "Customer".

**12** Begin typing then select "Prospect" from the drop-down list.

A screenshot of a web form interface, similar to the previous one. The dropdown menu now contains the text "prospect". Below the dropdown, a list of options is visible, with "Prospect" highlighted in blue. An orange circle highlights the highlighted "Prospect" option.

13 Click "ADD RULE" to include only Prospects within the United States.

### List Example

PREVIEW **FILTERS** COLUMNS DETAILS SQL

account\_type equals

The type category of the account/company

**ADD RULE**

**TEST** **SAVE** **SAVE AND EXIT**

14 Begin typing "Country" to select this option.

country Operator

CM\_COMPANYSTATS

- company\_country\_alpha
- company\_country\_latitude
- company\_country\_longitude
- country**
- country\_alpha2
- country\_latitude
- country\_longitude

**15** Click on the Operator drop-down list and select "equals."

The screenshot shows a search filter interface. At the top, there is a text input field containing the word "equals". Below this, a dropdown menu is open, displaying a list of operators: "equals", "does not equal", "contains", "does not contain", "starts with", "does not start with", and "ends with". The "equals" option is highlighted with a blue background and a yellow circle, indicating it is the selected option.

**16** Click the last drop-down list, type, and select "UNITED STATES" to include only those records from the United States.

The screenshot shows a search filter interface. The first dropdown menu is set to "Prospect" and displays the text "The first 300 values are displayed." Below this, a second dropdown menu is open, showing a search input field with the text "united s". The dropdown list below the input field contains two options: "UNITED STATES" and "United States". The "UNITED STATES" option is highlighted with a blue background and a yellow circle, indicating it is the selected option.



17 Click "TEST" to see a sample of your records.

The type category of the account/company

AND

country equals

The country that the account/company is located

ADD RULE

TEST SAVE SAVE AND EXIT

18 Click "Preview showing 50 of 73 records" to see the sample of records.

country equals

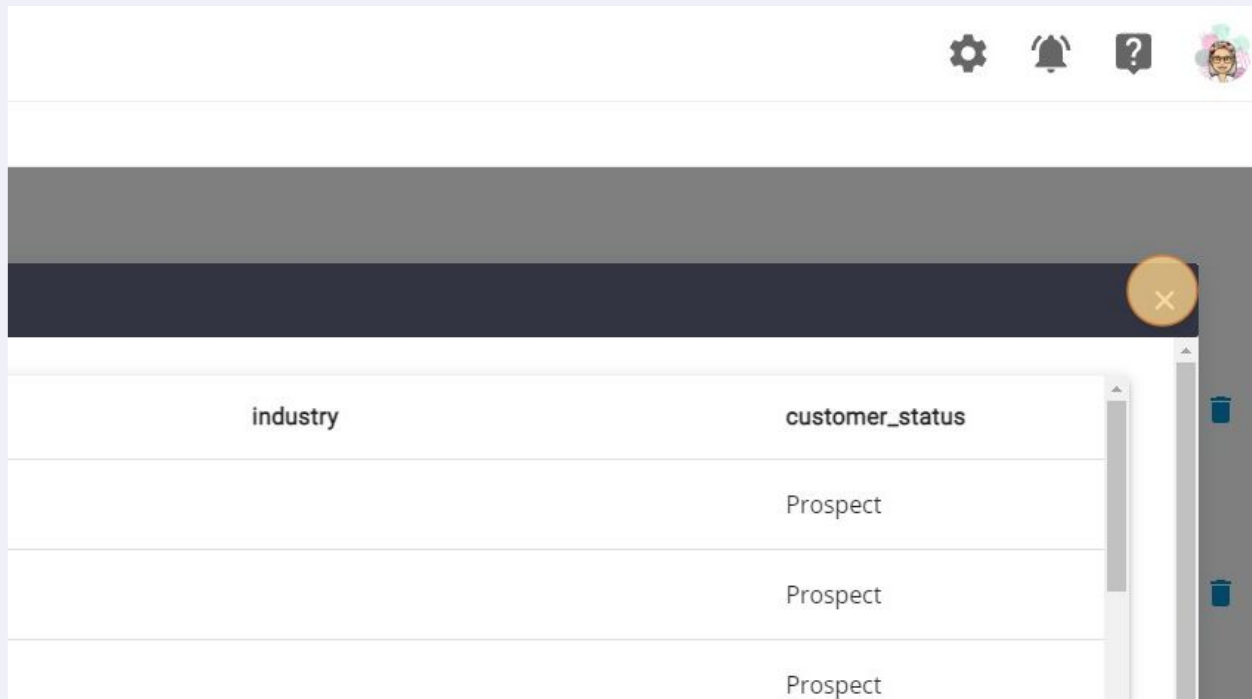
The country that the account/company is located

ADD RULE

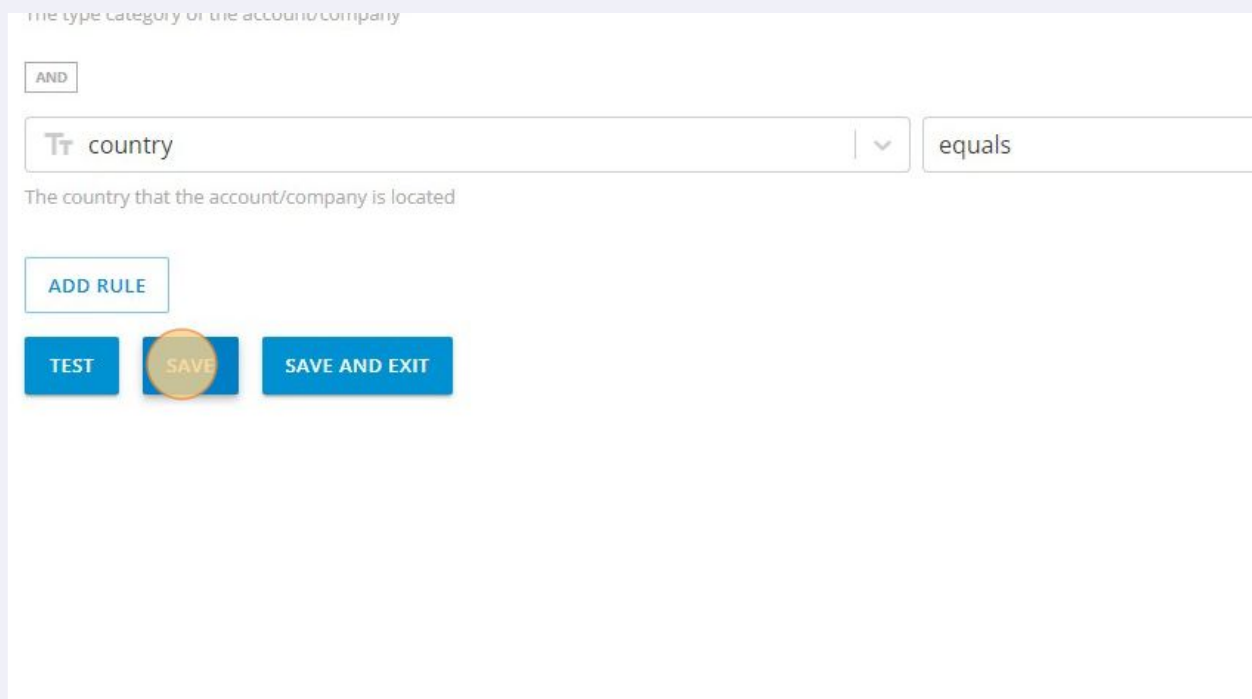
TEST SAVE SAVE AND EXIT

PREVIEW showing 50 of 73 records

19 Click "Close Icon" once you are done previewing the records.



20 Click "SAVE" to save the list criteria.



21 Click "SAVE AND EXIT" to leave the filters dialog box.

AND

country equals

The country that the account/company is located

ADD RULE

TEST SAVE SAVE AND EXIT

22 Click the "CLOSE" button found on the bottom left of the screen to return to the main list menu.

KB Company List	
FLOW - LinkedIn LeadGen Form July 2022_Lead Creation	
LIST - Insights Trainings Scheduled	
FLOW - LinkedIn LeadGen Form July 2022_Campaign Member Creation	
Jul22 LinkedIn leadform	

Account Flows