

LISTS

The **Lists** section is where you manage your prospect databases. It is divided into two main tabs: **Contacts** and **Companies**. From here, you can organize your data, enrich it, and launch engagement campaigns.

1. The Lists Dashboard

Upon entering the section, you will see your lists organized in rows or folders.

Columns in the List Table

Each row represents a list and displays the following information:

- **Name:** The name of the list.
- **Contacts:** The total count of contacts within the list.
- **Created by:** The user who created the list.
- **Associated Companies:** The count of companies linked to the contacts in that list.
- **Folder:** The folder where the list is located (if applicable).
- **Tags:** Tags added to the list for better organization.
- **Last update:** The timestamp of the last modification.

List Actions (Three-Dot Button)

At the far right of every row, there is a button with three dots. Clicking it opens a pop-up with:

- **Share:** Opens the settings panel on the right. Here you can edit the **Name** and **Description** via text boxes and manage **Access and Permissions** (select which users have visibility).
- **Settings:** Access list configuration.
- **Delete:** Permanently remove the list.

Search and Filters

To locate specific lists, use the bar above the table:

- **Search bar:** Search by list name.
- **Created by:** Filter by the user who owns the list.
- **Tags:** Filter by specific tags.
- **Folders:** Filter by folder location.

Bulk Actions

When you select one or more lists using the checkbox on the left, a bottom bar appears with the following actions:

- **Campaign:** Add the list to a specific campaign. You can filter campaigns by Name, Creation Date, Identity, Status (Running, Paused, Draft, Archived, Scheduled), and Tags.
 - **Export:** Export the list to CRM, CSV, or Excel.
 - **Merge:** Combine multiple lists (active only when more than one list is selected).
 - **Add to folder:** Move the list to a folder.
 - **Trash Icon:** Delete the selected lists.
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2. Working Inside a List (Detail View)

Clicking on a list opens the **Detail View**. This table displays columns from various sources: LinkedIn data, AI variables, CRM fields, Formula fields, Custom fields, and data enrichment providers (e.g., professional emails/phones).

Managing Columns and Views

Above the table, you have tools to customize your view:

- **Search bar:** Search for specific records.
- **View Selector:** Switch between saved views.
- **Sort by:** Order rows ascending or descending by any field.
- **Manage Views Button:** Opens a side panel where you can toggle columns on/off, save the view (Public/Private), pin it to the top, or click "**Reset to original view layout**".
- **Add Column (+):** Hover between any two columns to see a divider with a circle **(+)** button. Clicking this opens a menu to add:

- **New Company AI Variable.**
- **New Company CRM Field.**
- **New Company Formula Field.**
- **New Company Custom Field.**
- *Note:* You can search for fields or browse tabs like All, Company, AI Variables, CRM, Formulas, Nodes, and Other Columns.

Actions on Selected Rows

When you select contacts or companies using the checkboxes, a bottom bar appears with these options:

- **Campaign:** Add to an existing campaign or create a new one.
- **Export:** Export to CRM, CSV, or Excel.
- **Blocklist:** Add records to a blocklist to prevent contact.
- **Change List:** Move leads to another list or create a new one.
- **Remove from List:** Remove the lead from the current list.
- **Delete Contacts:** Permanently delete the records (requires confirmation).
- **More:** Opens additional actions:
 - Change associated company.
 - Move values between columns.
 - Clear column values.
 - Merge duplicates.
 - **Switch to Companies View:** (Only in Contact lists) Switches to the "All Companies" view but filters it to show only the companies associated with your selected contacts.

3. Enrichment Tools

Clicking the **Enrich** button opens a modal with specific tools depending on whether you are viewing Contacts or Companies.

Enrichment for Contacts

The modal is divided into five categories:

1. Data Enrichment

- **Enrich Email Address:** Includes **Advanced Configuration** to choose between **Fast** (fastest sub-providers) or **Deep** (all suppliers, slower).
- **Enrich Phone Number:** Also includes **Advanced Configuration** (Fast vs. Deep).
- **Find Data by LinkedIn URL.**
- **Find Data by Name.**

2. Data Cleanup

- **Verify Email Address:** Checks if the professional email is **Verified**, **Invalid**, or **Unsure** (risky/unknown behavior).
- **Verify Phone Number:** Checks if the phone is **Valid**, **Unsure**, or **Invalid**.
- **Extract Domain:** Extracts the website domain from the professional email address.
- **Combine Name and Last Name:** Generates a "Full Name" column by merging First Name and Last Name.

3. Enrich with AI

- Select from the list of AI Variables to run them on selected contacts.
- **Create New AI Variable** button.

4. CRM Sync

- **Sync with your CRM:** Updates fields in the platform based on the data in your connected CRM (using your integration mapping).

5. Enrich with Formula

- Select an existing formula or use the **Create New Formula** button.



Enrichment for Companies

The modal is divided into four categories (Data Cleanup is not available):

1. Data Enrichment

- **Get company open jobs from LinkedIn.**
- **Get company open jobs from their stack.**
- **Get headcount by department.**

- **Get company EQ insights.**
- **Get company posts from LinkedIn.**
- **Enrich technology stack.**
- **Find data by LinkedIn URL.**
- **Find data by name or domain.**
- **Get contacts from company.**

2. Enrich with AI

- Select Company AI variables or **Create new AI variable.**

3. CRM Sync

- **Sync with your CRM:** Sync mapped company fields from the CRM settings.
- **Create new CRM field.**

4. Enrich with Formula

- Select formulas or **Create new formula.**

4. How to Add Companies (Create List)

Click **Add Companies** to open the "Create List" modal with the following options:

AI Finder

- **Description:** A text box to describe your ideal customer (e.g., "companies in Barcelona that has two million revenue").
- **Presets:** Pre-defined folders of prompts to help you start.

Find Companies on LinkedIn

- **Identity:** Toggle "**Choose an identity**" to use a specific Sales Navigator account.
- **Tabs: General Search and Sales Nav URL.**
- **General Search Filters:**
 - **Search Keywords:** Use keywords as tags. Clicking the star icon (★) allows AI to generate related tags based on your input.

- **Industry:** Includes AI star icon (★) for suggestions.
- **Headquarters location:** Includes AI star icon (★) for suggestions.
- **Company headcount.**
- **Annual revenue.**
- **Company headcount growth.**
- **Number of followers.**
- **Department headcount.**
- **Department headcount growth.**
- **Fortune.**
- **Recent activities.**
- **Job opportunities.**
- **Identity Specific Filters** (requires Sales Nav identity):
 - **Saved accounts.**
 - **Account lists.**
 - **Connections.**
- **Advanced Settings:** Toggle "Only import new companies" to skip companies already in your database.

Import from LinkedIn Jobs

- **Identity:** Select an identity with Sales Navigator.
- **LinkedIn Job Search URL:** Paste the URL (format:
`linkedin.com/jobs/search...`).

Import Companies from HubSpot

- **Filter Logic:** Define filters using **HubSpot Property**, **Operator** (is equal to, is not equal to, is known, is unknown), and **Value**.
- **Fetch Preview:** See results before importing.

Import Companies from HubSpot List

- **List Selection:** Choose a list from the "Their CRM list" dropdown.

- **Match Toggle:** Activate "**Match with existing companies**" to sync data with companies already in the platform.

Import Companies from Google Maps

- **Category:** Enter the search term (e.g., "Restaurant").
- **Area:** Choose between **Radius** or **Select area in the map**.
- **Limit of companies:** Set a maximum number of results.
- **Other filters:**
 - Only import companies with domain.
 - Also import companies that are permanently closed.

Import by Technology Stack (TheirStack)

- **Saved searches:** Access previous filter sets.
- **Filters :**
 - **Technologies used:** (Required) Includes an **OR / AND** toggle.
 - **Company headquarters country.**
 - **Industry:** Includes AI star icon (★).
 - **Company type.**
 - **Company name.**
 - **Company domain.**
 - **Only YC companies:** (On/Off toggle).
 - **Revenue:** (In dollars).
 - **Employee count.**
 - **Funding:** (In dollars).

Import Companies by Job Posts (TheirStack)

- **Job Filters :**
 - **Job Posted At:** (Required).
 - **Job Title:** Includes AI star icon (★) asking for "Roles" and "Region".
 - **Job Description.**

- **Job Country.**
- **Job Location.**
- **Pattern.**
- **Technologies in Job:** (OR/AND toggle).
- **Remote.**
- **Annual Salary:** (In dollars).
- **Company Filters:**
 - Company Name, Domain, Technologies Used, HQ Country, Industry, Type, Only YC Companies, Revenue, Employee Count, Funding.

Import from CSV

- **Mapping:** Match your CSV columns ("Name") to system columns ("Column"). Use the **Override** checkbox to overwrite existing data.
- **Requirement:** You **must** map a column to **Company Name**. If your file only has a website, map the website column to the "Company Name" field to force the import, then move the values later .

Create a New Company Manually

- **Search Company on LinkedIn:** Search bar to find and auto-fill data.
- **Add Manually Fields:**
 - **Company Name (Required).**
 - Company LinkedIn URL.
 - Company Website Domain.
 - Company URN.
 - Industry.
 - Number of Employees.
 - Range of Employees.
 - Year Founded.
 - Street Address.
 - Company Email.

- Revenue Range.
 - Hiring on LinkedIn (Yes/No).
 - Company Country.
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5. How to Add Contacts (Create List)

Click **Add Contacts** for the following options:



AI Finder

Works the same as the Company version.



Find Contacts on LinkedIn

- **Identity:** "Choose an identity" toggle (optional).
- **Contact Information Filters:**
 - **Current Job Title:** Includes AI enrichment option.
 - **Geography:** Includes AI enrichment option.
 - **Past Job Title:** Includes AI enrichment option.
 - **Function.**
 - **Seniority Level.**
 - **Years in Current Company.**
 - **Years in Current Position.**
 - **Years of Experience.**
 - **First Name.**
 - **Last Name.**
 - **Profile Language.**
 - **School.**
- **Company Information Filters:**
 - **Industry:** Includes AI enrichment option.
 - **Company Headquarters Location:** Includes AI enrichment option.
 - **Company Headcount.**

- **Current Company.**
- **Past Company.**
- **Company Type.**
- **Intent Filters:**
 - **Changed Jobs:** (On/Off toggle).
 - **Posted On LinkedIn:** (On/Off toggle).
- **Identity Specific Filters** (requires Sales Nav identity):
 - **Connection.**
 - **Persona.**
 - **Connections Of.**
 - **Shared Experiences:** (On/Off).
 - **Following Your Company:** (On/Off).
 - **Past Colleague:** (On/Off).
 - **Viewed Your Profile Recently:** (On/Off).
 - **Lead Lists.**
 - **People You Interacted With.**
 - **Account Lists.**
 - **Groups.**

Social Imports

- **Import from LinkedIn Post:** Paste the post URL ([linkedin.com/posts/...](https://linkedin.com/posts/)). Imports users who engaged (likes/reactions).
 - **AI Suggested Posts:** Presets suggested by AI based on your "AI Playbook" (e.g., Posts from Competitor, Posts Mentioning Competitors, Posts from Industry Mention).
- **Import from LinkedIn Event:** Paste event URL. Imports attendees. Includes AI Suggested Events.
- **Import from LinkedIn Poll:** Paste poll URL.

Network Imports

- **Import from LinkedIn Connections:** Imports all connections from the selected identity.
- **Import from LinkedIn Followers:** Imports all followers from the selected identity (distinct from connections).

HubSpot Imports

- **Import Contacts from HubSpot:** Same property filters as Companies.
- **Import Contacts from HubSpot List:** Select a CRM contact list.

Import from CSV

- **Requirement:** You must map **First Name**, **Last Name**, AND either **Company Name** OR **LinkedIn Profile URL**.

Create a New Contact Manually

- **Search Contact on LinkedIn:** Search bar to find and auto-fill data.
- **Add Manually Fields:**
 - **First Name (Required).**
 - **Last Name (Required).**
 - **Company Name (Required).**
 - Job Title.
 - Country.
 - LinkedIn Profile URL.
 - Mobile Phone.
 - Professional Email.
 - LinkedIn Headline.
 - Geo Region.
 - Years in Company.
 - Years in Role.
 - Image URL.
 - LinkedIn Profile ID.

- Profile BIO.