

# 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.

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## 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.

## 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.**
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# 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://www.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.