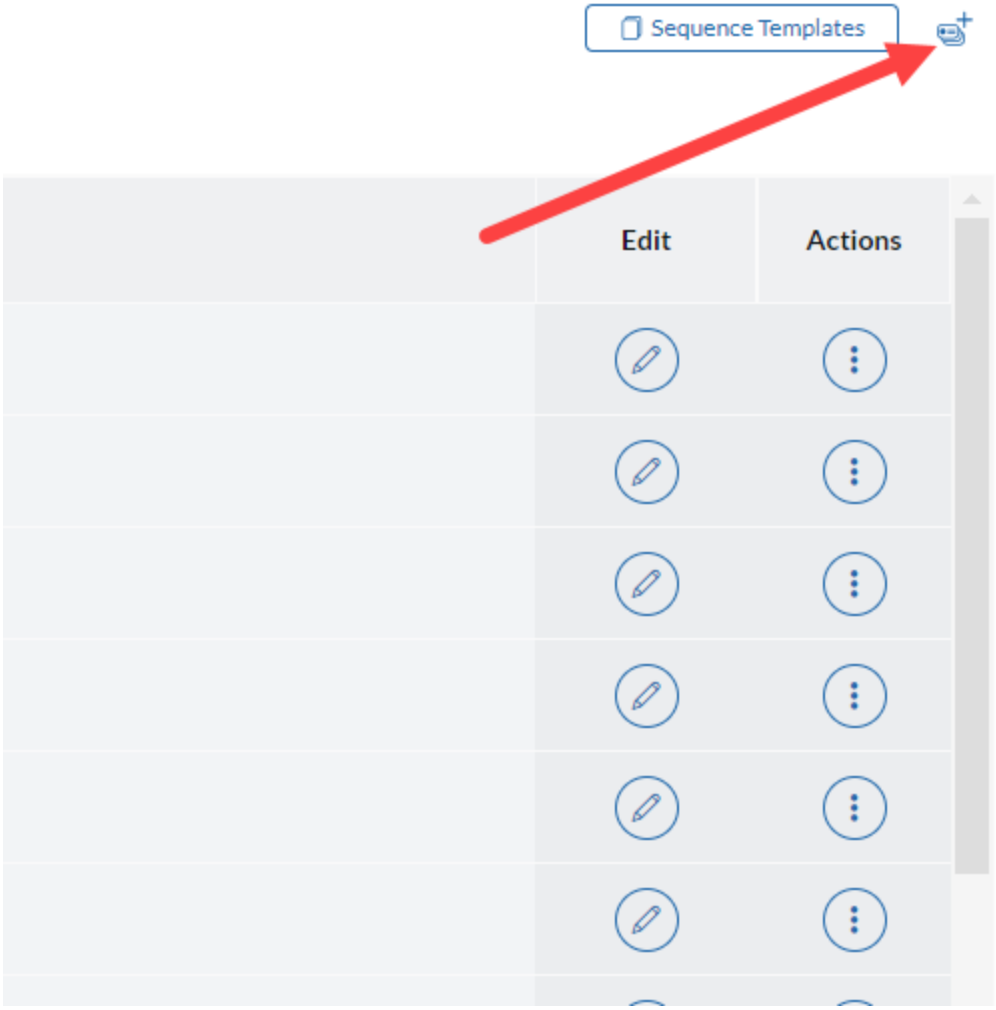
Creating and Configuring Rollup Lists

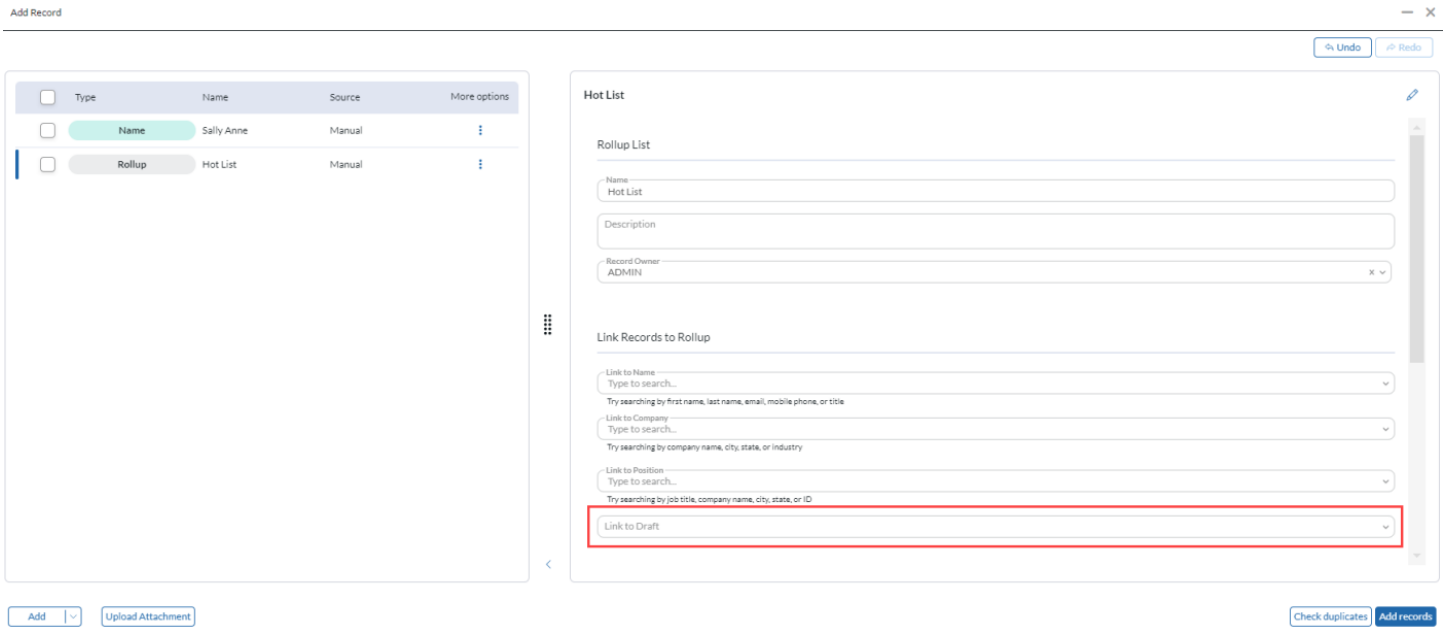
Lists · https://learnpcr.pcrecruiter.net/site/docs/lists/creating-and-configuring-rollup-lists/

Rollup Lists are lists of Company, Name, or Position records. These lists allow you to organize information in your database and make your processes easier to manage. These can be used for Marketing, Candidate Outreach, or General Workflow Maintenance. For instructions on editing the view inside of a Rollup List click HERE.

Creating a Rollup List

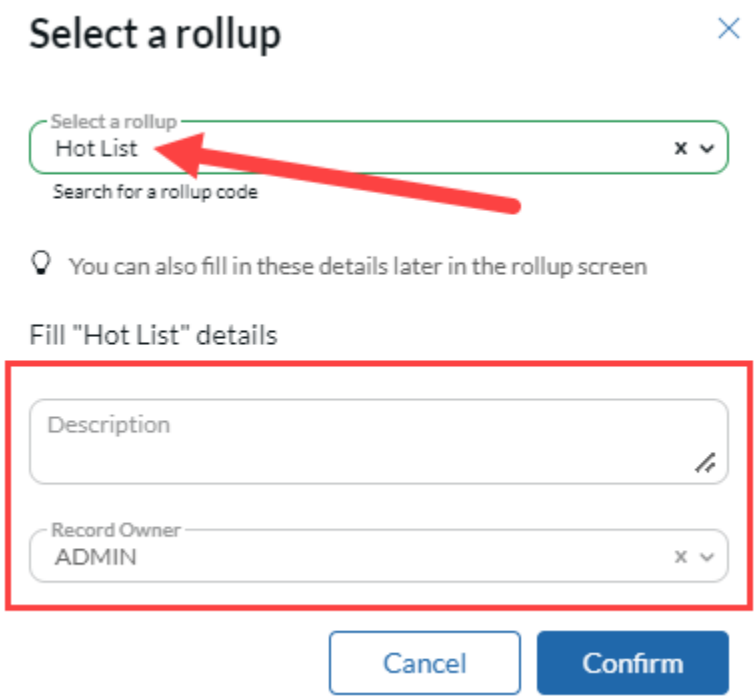
1. Navigate to **Rollups** using the System Menu on the left hand side of the screen.
2. Click the **Add Rollup** button at the top right corner of the screen.
3. On the right side of the add record window, give your Rollup List a **Name** and **Description** (Not required).
4. Choose a **Username** from the Record Owner dropdown.
5. Link existing or drafted records to the Rollup List being created using **Link Records to Rollup**.


Sequence Templates
Edit
Actions


Add Record
Undo
Redo
Type
Name
Source
More options
Name
Sally Anne
Manual
Rollup
Hot List
Manual
Hot List
Rollup List
Name
Hot List
Description
Record Owner
ADMIN
Link Records to Rollup
Link to Name
Type to search...
Try searching by first name, last name, email, mobile phone, or title
Link to Company
Type to search...
Try searching by company name, city, state, or industry
Link to Position
Type to search...
Try searching by job title, company name, city, state, or ID
Link to Draft
Add
Upload Attachment
Check duplicates
Add records

When adding records to a Rollup, you can always create a new Rollup List on the fly instead of adding to an existing list.

1. From any Add to Rollup search window, type in the new Rollup name and click **Create New Rollup "(Rollup Name)"**.
2. Inside of the window, give your Rollup List a **Name** and **Description**.
3. Choose a **Username** from the Record Owner dropdown.
4. Click **Confirm.**



- Rollup Lists can also be created from the Add Record window.

Viewing Rollup Lists

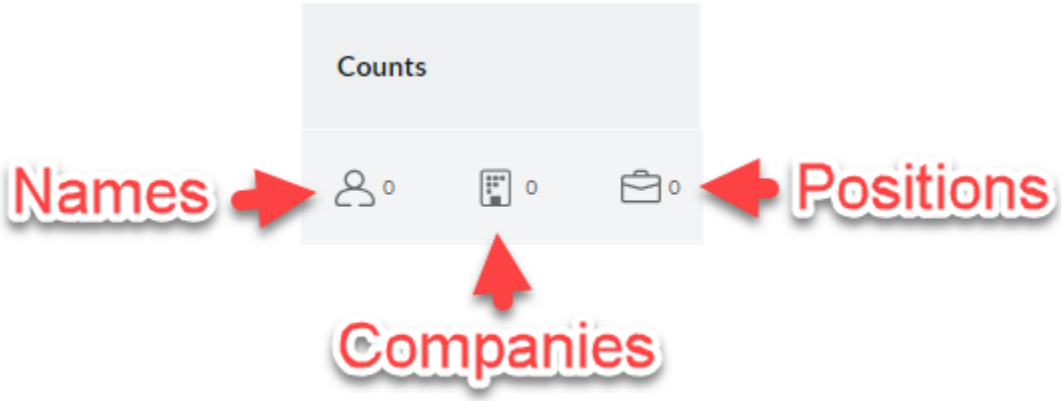
Towards the top left of the screen, you will see a dropdown that will give you the ability to change the display order or **View** of all **Rollup Lists**

1. Go to **Rollup Lists** from the System Menu on the left side of the screen.
2. Locate the dropdown menu at the top left of the screen. By default, this will display **Recently Viewed**.
3. Click the arrow icon and a dropdown menu will appear.

4. Within this dropdown menu, there are 4 options
    - **Saved Searches:** This displays a list of saved views that can be applied to the current Rollup List View. There are also several default views preloaded into your database.
    - **Reset to Default**: This restores the Default View.
    - **Copy current view:** Duplicate the current arrangement of columns.
    - *Create New View: (Coming Soon!)*

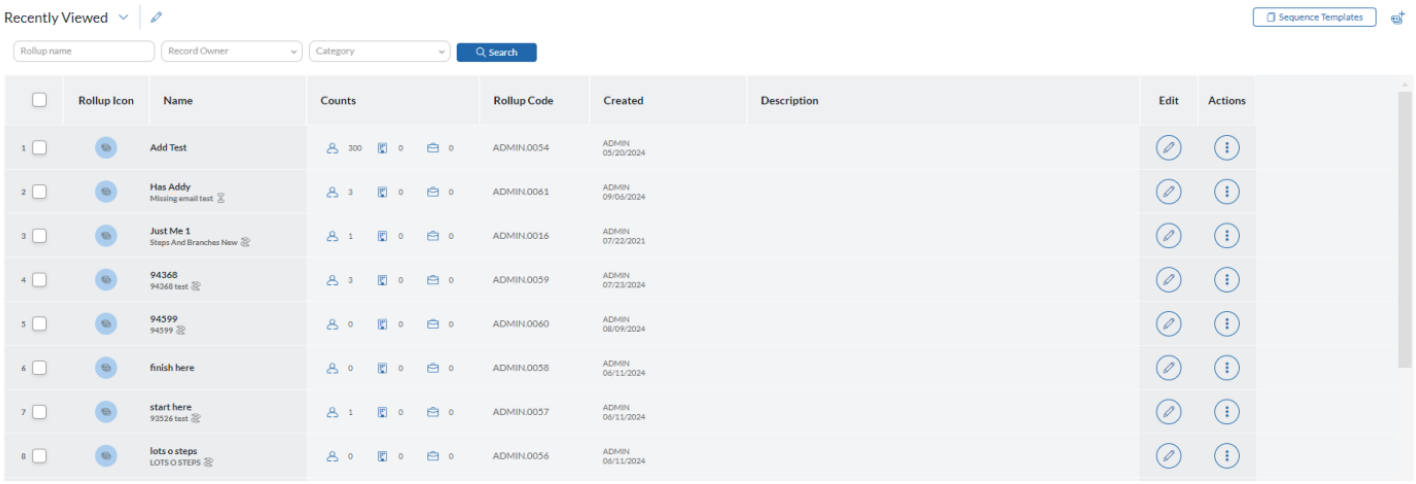
Viewing the Grid

- You can search for **Rollup Name, Username,** or **Category** using the search fields located at the top of the Rollup List.
- **Rollup Icon**: Use this icon to open the fly-in display of the Rollup List to view the associated records.
- **Name:** The current name of the Rollup List. This will display a Simple or Advanced Sequencing icon if there is an active Sequence connected to the Rollup.
- **Counts**: Contains a count of the types of records inside of this list with a record type breakdown. Click on the icon of the record type you wish to view to open that tab directly.



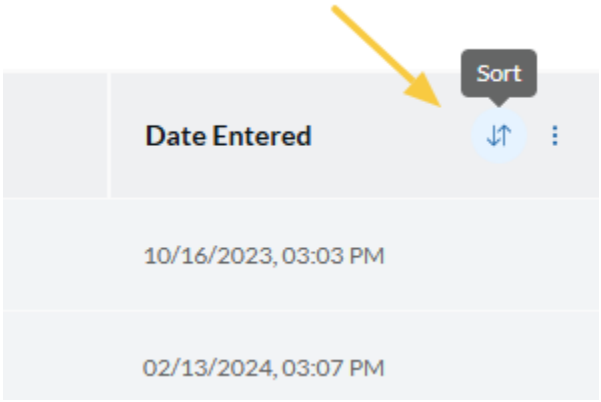
- **Rollup Code:** This is the code assigned to the Rollup List upon creation of the list.
- **Created:** This displays the Date the Rollup List was created, in addition to what User created it. (Please note this column is not sortable since it contains Username AND Date Created. To sort by Date Created or Username you need to add those columns separately.)
- **Description:** This is used to provide contextual information on the purpose of the Rollup List.
- **Edit:** This will give you the ability to edit the Grid View of the Rollup List Grid.

- **Actions:** This is a list of actions that can be performed on the Rollup List in the current row.



Editing the Grid View

To sort the grid hover over the column header you wish to sort by and click the sorting icon. This will reorder the list to sort by that specific column. Click on the column again to switch from the Descending to Ascending view. Clicking the icon a third time will remove the sorting altogether, returning the grid to the default sort. (Please note that this currently only allows for single column sorting.)



The columns within most grids can be altered to suit your key data points for specific tasks and to maximize your available screen space.

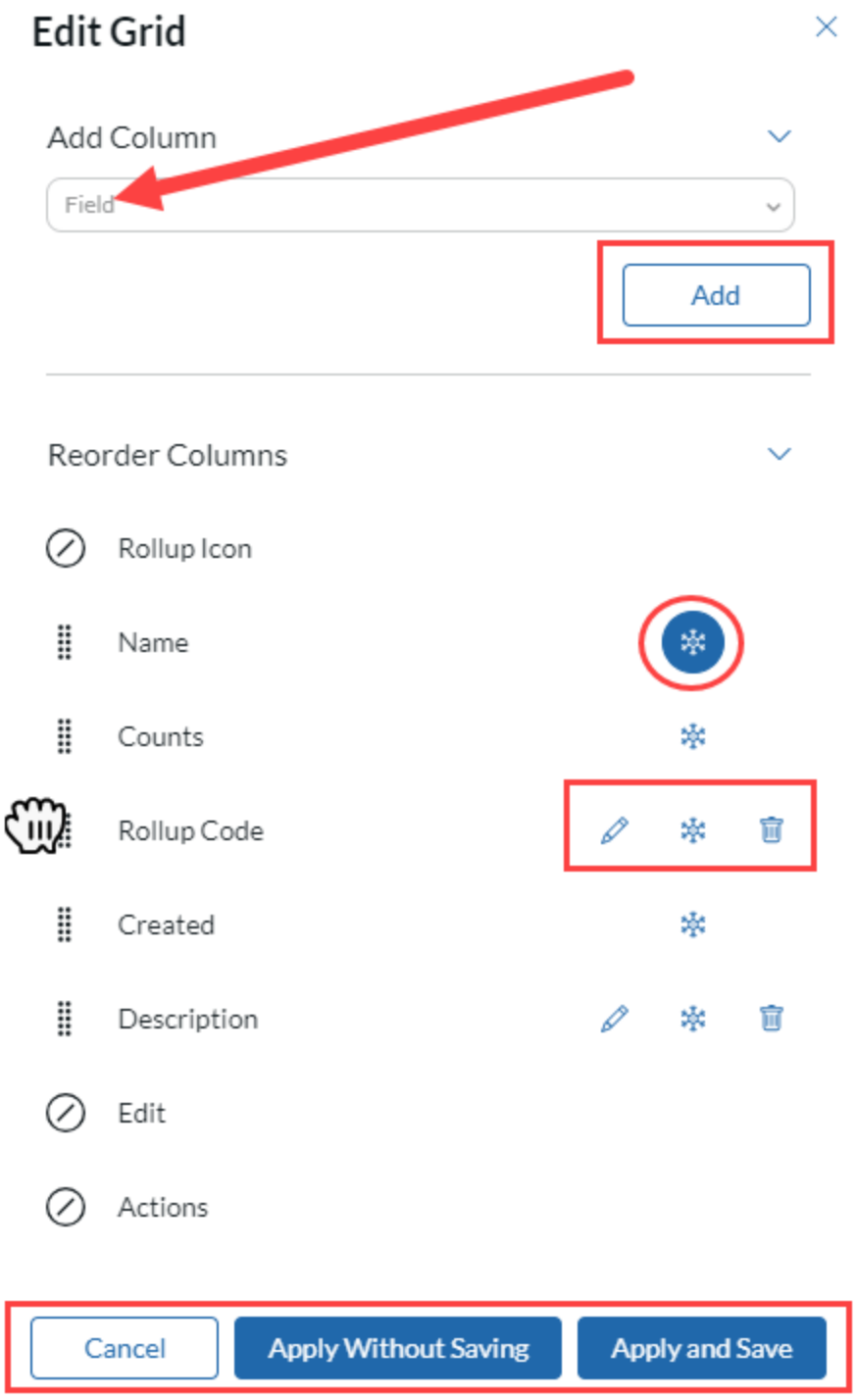
To edit your grid view, click the **Pencil** icon next to the View Options dropdown at the top left corner of the grid. In the Edit Grid dialog:

- Use **Add Column** to select any field from the currently active record type and click **Add** to place it into the Reorder Columns list below.

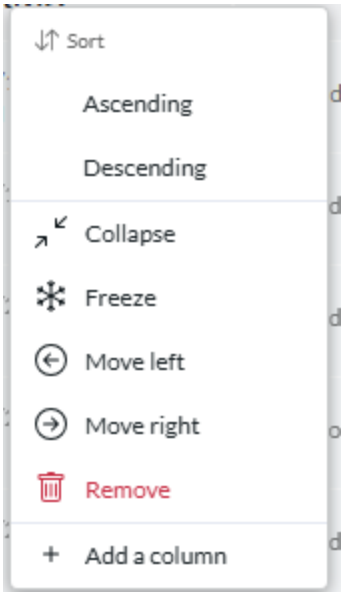
- Drag fields up or down within the Reorder Columns list to change their placement. Higher items in this list appear further to the left in the grid.
- Within any row of the Reorder Columns list, click the pencil icon to:
  - Change which field is displayed.
  - Set the field's default width.
  - Freeze the column so that it does not leave the screen when scrolling horizontally. When this box is checked, you will also have the option to freeze the column at the right or left side of the grid. **Note:** There are columns that are permanently frozen and built into the Grid Display; these cannot be removed or unfrozen as they are integral to the design and function of the Grid.
- Within any row of the Reorder Columns list, click the snowflake icon to freeze the column so that it does not leave the screen when scrolling horizontally.
- Within any row of the Reorder Columns list, click the trash icon to remove that field from the columns.

After making your desired alterations, you may choose to:

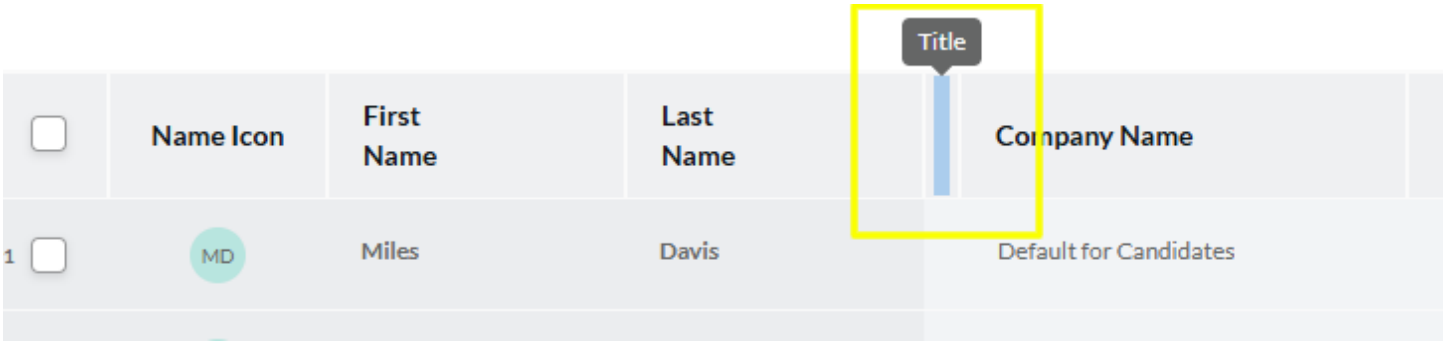
- **Apply Without Saving**: Alters the columns temporarily — they will return to the saved layout when you leave and return to the screen.
- **Apply and Save**: Stores the column changes into the current layout for future use.



You can also edit your grid view with the Options button at the top of each column:



- **Sort Ascending** - Sort the column in ascending alphabetical or numerical order.
- **Sort Descending** - Sort the column in descending alphabetical or numerical order.
- **Collapse** - collapsing a column will hide the data in that column as well as the column header. Hover over the column header of the collapsed column to see the column name. Double-click the collapsed column to expand it.



- **Freeze/Unfreeze** - frozen columns will not leave the screen when scrolling horizontally
- **Move left** - move the column one space to the left
- **Move right** - move the column one space to the right
- **Remove** - remove the column from the grid layout
- **Add a column** - choose a record field to add as a column to the right of the current column

Rollup Grid Actions

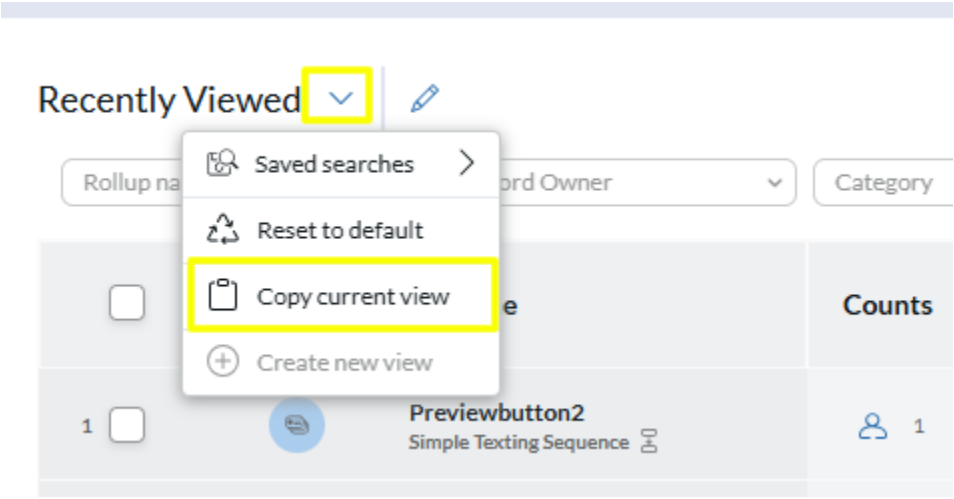
From the Rollup List grid view you are able to do several actions related to these lists.

- The checkboxes on the left allow you to select and delete Rollup Lists in bulk. This is helpful for database cleanup.
- Clicking the edit icon allows you to edit the viewable fields from the grid.
- The actions icon allows you to add new Name, Company, and Position records to that Rollup. You can also delete the individual Rollup from here.

Copying Grid Views Between Users

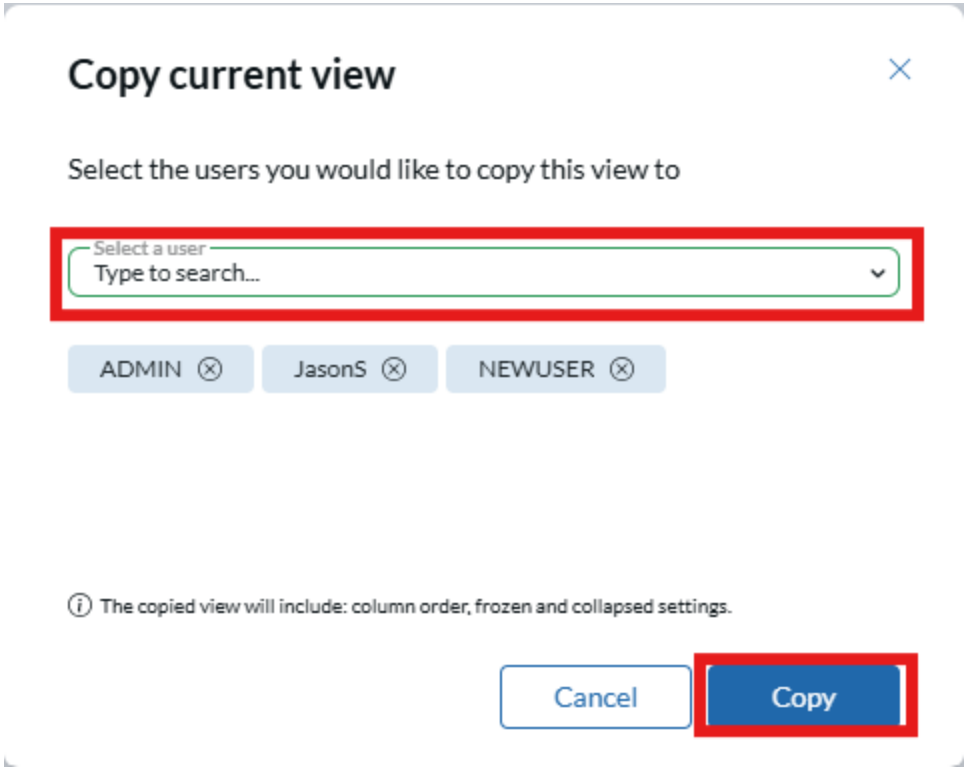
Click the dropdown arrow from the top left corner next to 'Recently Viewed'

Select 'Copy Current View'



From the dropdown menu, choose the user(s) that you wish to apply the current grid view to. *Note: The copied view will include: column order, frozen and collapsed settings.*

Click the 'Copy' button and the current layout view will be applied to all selected users.


Copy current view
Select the users you would like to copy this view to
Select a user
Type to search...
ADMIN
JasonS
NEWUSER
The copied view will include: column order, frozen and collapsed settings.
Cancel
Copy