

Quick Reference Guide: Custom Lists and Filters Management

This Quick Reference Guide contains the following information:

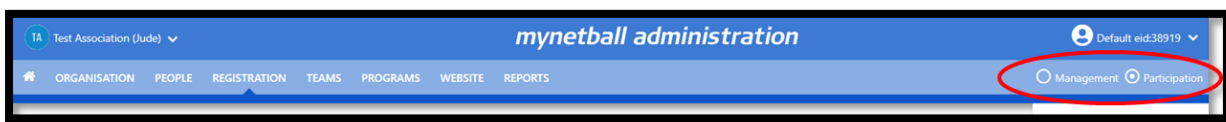
- Custom Lists Management
- Custom Filters Management

Custom Lists Management

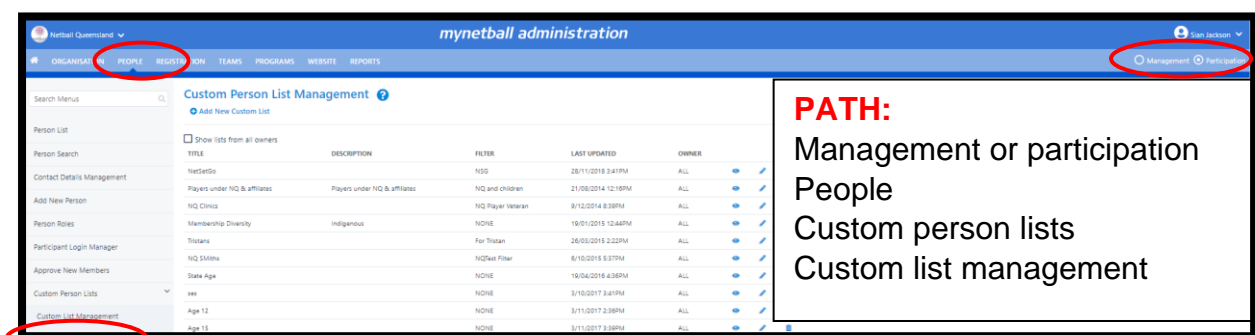
To create a list of members with roles or age ranges;

The below process is the same at Association or Club level. Associations complete this in either mode, Management or Participation, while Clubs complete it in Participation Mode.

Associations can create a custom list under Management or Participation.



Clubs will not have the option to choose between management or participation, they will just be in participation.

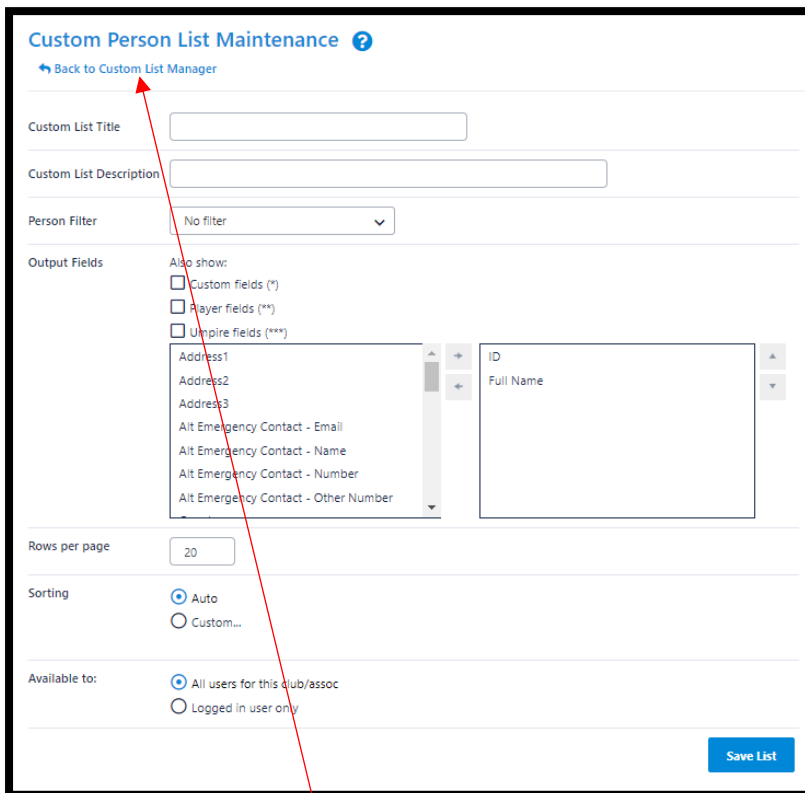
The screenshot shows the 'Custom Person List Management' page. The left sidebar has 'People' and 'Registration' circled in red. The main content area has a table of custom lists. A red box highlights the 'Custom List Management' link in the sidebar. A text box on the right provides the path to this page.

TITLE	DESCRIPTION	FILTER	LAST UPDATED	OWNER
NetSetGo		NSG	28/11/2016 3:41PM	ALL
Players under HQ & affiliates	Players under HQ & affiliates	HQ and children	21/08/2014 12:18PM	ALL
HQ Clinics		HQ Player Veteran	9/12/2014 8:39PM	ALL
Membership Diversity	Indigenous	NONE	19/01/2015 12:44PM	ALL
Tristans		For Tristan	26/03/2015 2:22PM	ALL
HQ SMINS		HQMax Filter	6/10/2015 5:37PM	ALL
State Age		NONE	19/04/2016 4:38PM	ALL
ies		NONE	3/10/2017 3:41PM	ALL
Age 12		NONE	3/11/2017 2:38PM	ALL
Age 15		NONE	3/11/2017 3:39PM	ALL

PATH:
 Management or participation
 People
 Custom person lists
 Custom list management

This will take you to the Custom Person List Management page.

Add A New Custom List on the top left-hand side or Edit a current one on the right-hand side.



Filter through the options to create the list of questions, select your filter and save the list.

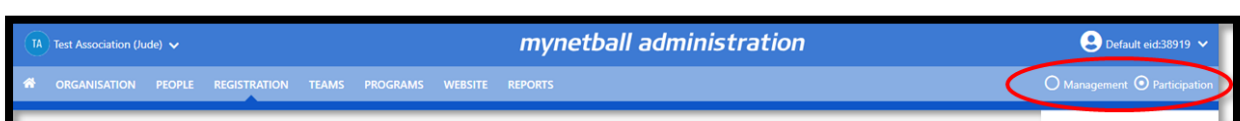
Go **Back to Custom List Manager** and then view your custom list on the left-hand side.

Custom Filters Management

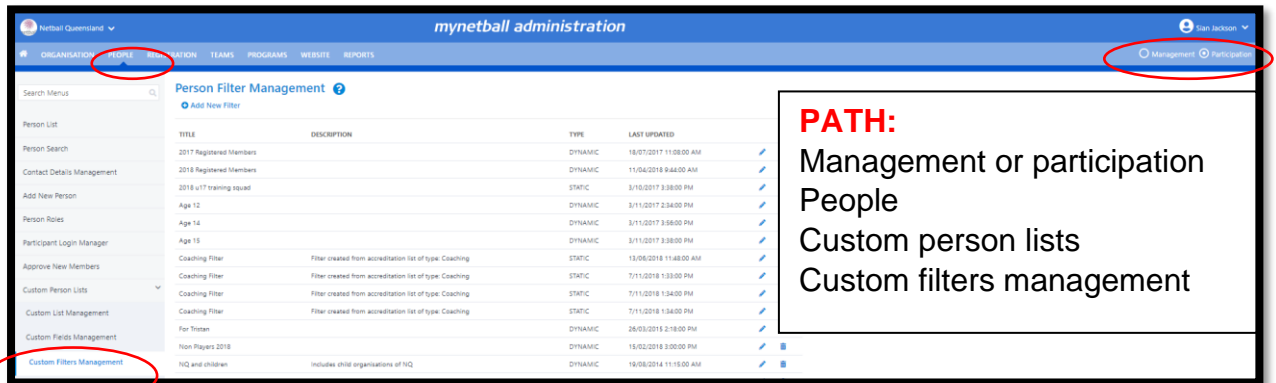
Created **custom person filters** allows the organisation to create lists of members either based on roles or responsibilities. These lists can be found in the communication section.

The below process is the same whether you are an Association or Club. Associations complete this in either mode, Management or Participation, while Clubs complete it in Participation Mode.

Associations can create custom filters under **Management** or **Participation**.



Clubs will not have the option to choose between management or participation, they will just be in participation.



This will take you to the **Custom Person Filters Management** page.

Either **Add a New Filter** on the left-hand side or **Edit** a current filter on the right-hand side.

Fill in the mandatory options, select advanced search options to assist with customising your filter. Then preview the filter on the right-hand side.

Person Filter Maintenance ?

[← Back to Person Filter Management](#)

Name:

Description:

Filter Type: Static Dynamic

Role:

Sub Role: Any Sub Role Select Sub Roles...

Advanced Search ^

Person Name or ID: Name contains text:

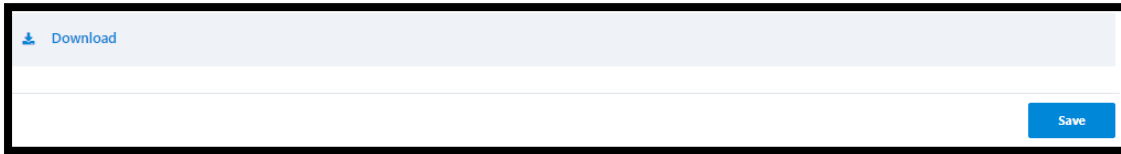
Date of birth range: From To

Gender: Male Female Undisclosed

Registration: Association: Registration Period: Registration Type:

Organisation: Include records within the current organisation: Netball Queensland
 Include records within the selected organisation:
 Also include records from child organisations of the selected organisation

Scroll to the bottom of the page to **Save** and you can download the data into an excel spread sheet.



Once a filter has been added, you can select your filter on a custom list.