

Lists Tab

The **Lists Tab** stores all of the reports that have been generated as part of a Subscription as well as lists that have been uploaded by users into the Platform for further analysis. These reports are saved within Fundraiser Performance Management for 365 days after being uploaded and not accessed 30 days after they've been created. By default you will see All Lists, both your Subscriptions and Uploaded lists. To view just one list type, click on the folder name in the menu bar on the left.

The fields provided in the table include:

- **List Name** – This is the name of the list that is automatically generated based on the name of the Subscription plus the date. It can also be the name of the List that you created by uploading your own list using the Add List button.
- **Created Date** – The Created Date column displays the date the report was initially created.
- **Available Through** – This report will be made available through the date displayed in this column. It will be deleted from the Platform after this date. To extend the lists availability an additional 365 days, just click on the **extend** link.
- **Delete** – Use this button to delete any list of which you are the owner.

Related Videos

- [Introduction to Targeter](#)



Viewing a List

Clicking on the title of the list will allow you to view the constituent list. From here, you will also be able to add additional columns to the list, analyze the list in [Crosstab](#), or look at the results using the [Map View](#). The same columns that are available in Targeter will be available by clicking on **Add Columns** from the list view. You can also export this list from this page by clicking on the blue **Export** button.

Once you are viewing a list you can get back to all of your lists by clicking on **Back** at the top left of the page.

Add List

The **Upload List** button within Lists Tab allows you to upload any list of constituents to Fundraiser Performance Management, so that you can append columns to the list, analyze the list in [Crosstab](#), or look at the results using the [Map View](#). For example, if you have an event attendee you want to see the MG EVI score on, you could upload the list (all we need is the constituents' Entity IDs) and append MG EVI to the list. All columns that are available in Targeter can be appended to your list. Your entire list (including all the unique column names) will be viewable when you choose to view the list. You can then append the columns you need and export the list back to your local environment.

To upload a file, click on the **Add List** button at the top left of the window. Click **Browse** to select your file and enter the name that will appear in your Report Archive list. Note that the constituent ID must be the first column in the file you are uploading. The header on the constituent ID column must be labeled Entity ID or ID. You may upload Excel or CSV files. Once uploaded, you will be emailed when the list is available in the List Tab. You can then choose to add or remove columns and export the appended list to your local environment.

View the [FAQ](#) for uploading tips.

Frequently Asked Questions

- [What kind of files can I upload?](#)
- [I've uploaded my file and received a successful message, but no constituents appear when I view the results?](#)
- [How do I add leading zeros to the Entity ID column in Excel?](#)

What kind of files can I upload?

You may upload Excel or CSV files.

I've uploaded my file and received a successful message, but no constituents appear when I view the results?

There are a few ways to try and solve this issue. You can try re-uploading your file as a CSV. Make sure that the entity ID is in the first column and "ID" is contained in the header row. You also want to make sure that you have the correct number of leading zeros in your Entity ID column. To add leading zeros to your column, follow the instructions below.

How do I add leading zeros to the Entity ID column in Excel?

1. Click the cell in an Excel worksheet that you want to display leading zeros in. To select an entire column or row, click a letter or number along the top or side of the worksheet, or press "Ctrl" and "A" together to select the entire worksheet.
2. Right-click the cell you selected in Step 1, or on one of the highlighted cells of a selected group, and click "Format Cells" to bring up a dialog box.
3. Click on the "Number" tab, then click "Custom" in the Category pane on the left side of the Format Cells box.
4. Click the number "0" in the Type pane on the right side of the box. In the text box at the top of the pane directly below the Type heading, enter a series of zeros that indicates the maximum number of digits you plan to enter for a single item in your worksheet. For example, type "0000000000" if you want each number to be ten digits long. In this case, if you type the number "123" into a cell, Excel adds leading zeros to make it "0000000123."
5. Click "OK" to save the custom format.