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New Features

[HOME \(/S\)](#) > [NEW FEATURES \(/S/ARTICLESBYSUBTOPICS?TOPICNAME=NEW+FEATURES\)](#)

Collaborating on Lists, Searches & Market Maps

[Overview](#)

[Frequently Asked Questions](#)

Overview

Collaborative lists, searches and market maps enable you do your best work in less time and with more streamlined input from colleagues. Once time-consuming and difficult to maintain, PitchBook users can now save and share these important documents, invite feedback, set permission levels and see what updates have been made in real-time—all without leaving the platform.

Across saved lists, searches and market maps, collaborative features include the ability to:

- Invite team members to collaborate
- Set collaborative permissions
- Track changes with activity log and alerts

Frequently Asked Questions

[How do I make another user a collaborator?](#)

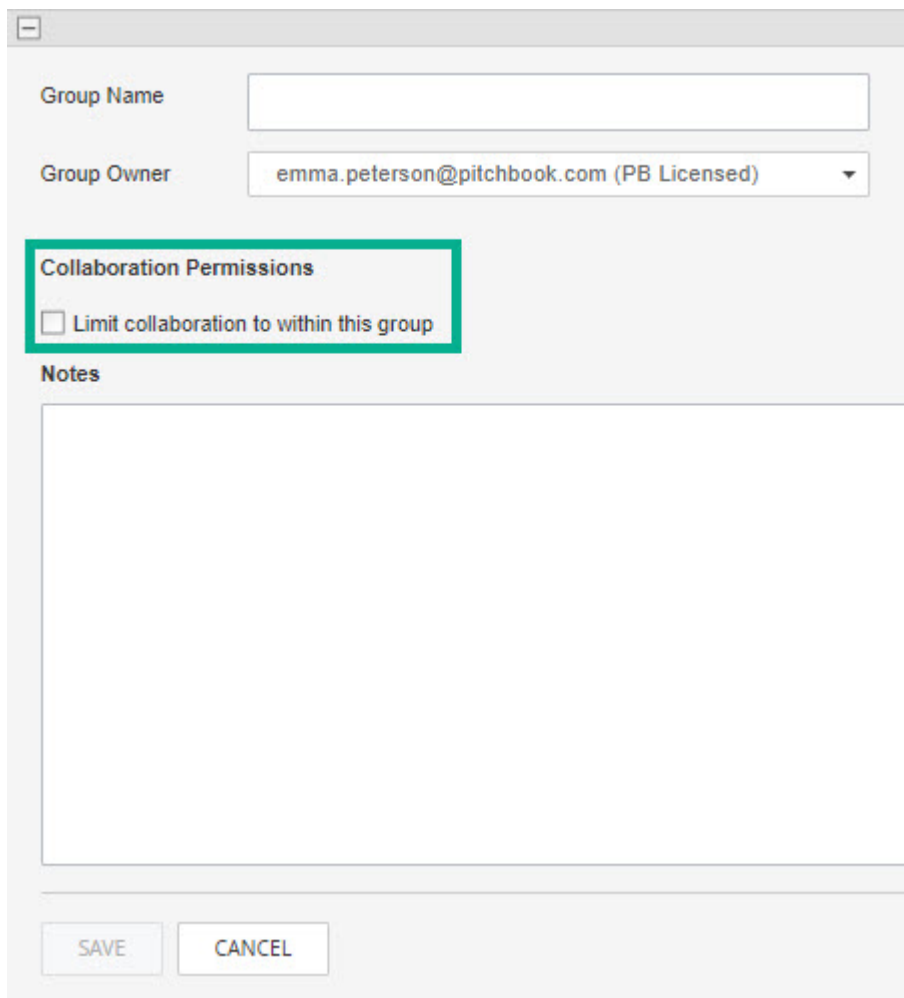
Click the **share icon** in the upper right hand corner of your screen near the blue **Modify Search** button.

Can users from different accounts collaborate on the same list/search?

No, collaboration is limited to within the account.

How do I control which users can be invited to collaborate?

You can use the Groups functionality in admin to control which users can collaborate. A new checkbox in PitchBook admin will give AM's the ability to limit collaboration to within groups in the account.



The screenshot shows a form for creating or editing a group. It includes a 'Group Name' text input field, a 'Group Owner' dropdown menu showing 'emma.peterson@pitchbook.com (PB Licensed)', and a 'Collaboration Permissions' section with a checkbox labeled 'Limit collaboration to within this group'. Below this is a 'Notes' text area and 'SAVE' and 'CANCEL' buttons at the bottom.

When this checkbox is checked, users can only collaborate with other users that are in their group. When this checkbox is not checked, then users can collaborate with anyone else in the account.

Are changes to collaborative content automatically saved?

No, you must click the 'apply changes' button for changes to be saved to the collaborative view.

What happens when two users are making changes at the same time?

The first user to click apply changes will have their changes pushed to the collaborative view. The second user will be notified via a 'pill' in the top center of their screen.

What happens if I 'Apply a Change' after another user already has and my change conflicts with theirs?

You will be notified that your change conflicts with the other users. You'll have the opportunity to overwrite their changes, discard yours, or press cancel. You can review their changes in the activity log to understand if their changes shouldn't be overwritten.

What user roles have permission to make changes to collaborative content?

Here is a list of permission by user role.

Role	Viewer	Editor	Owner
Can save changes to the criteria	No	Yes	Yes
Can manipulate criteria and collaborative without saving it	Yes	Yes	Yes
Can save changes to the collaborative layout	No	Yes	Yes
Can access "Manage Collaborators modal"	No	Yes	Yes
Can change permissions of other users	No	Yes	Yes
Can invite new collaborators	No	Yes	Yes
Can remove other collaborators	No	Yes	Yes
Can save a personal Copy	Yes	Yes	Yes
Can enable/disable/modify alerts on the Search/Lists for themselves	Yes	Yes	Yes
Can set Alerts for other users	No	No	No
Can leave/remove themselves from collaborative Search/List	Yes	Yes	Yes
Can delete Search/List for all users	No	No	Yes
Can edit name of list/workspace	No	Yes	Yes

Can a user with 'View Only' permissions request editor access?

Yes - you can request edit access by clicking the collaborator icon. When you do, an email will get sent to your teammate.

What do the new Collaborator Update Alerts Contain?

They notify users when:

1. Criteria changes have been made to their Saved Search or Market Map
2. A user has added/removed a Company from a list, market map, or search.
3. New Users have been added or removed from a Saved Search, Market Map, or List.

What is recorded in the Activity Log?

1. Criteria Changes (for Searches/Market Maps)
2. Layout Changes (sorting, filtering, etc)
3. Market Map Changes
4. Adding/Removing Collaborators
5. Editing of Collaborator permissions

Are Collaborative Lists on the Mobile App?

On release, Collaborative Lists will be viewable in Mobile for any Collaborators. Users will not be able to Add a Company or Remove a company from collaborative Lists on their mobile device. This is a limitation that will eventually get updated.

What happens when users with different Currency Preferences Collaborate on a Search or List?

The criteria currency of any Collaborative or Shared Search will be locked in the currency it was originally run in. This will be displayed in a new 'Search Currency' criteria field.

What happens when the Owner of a Collaborative item Leaves the item or is removed from an Account?

When an Owner leaves an account, or removes themselves from a collaborative lists/search/MM, the ownership rights automatically pass to the editor who has had access to the search/list/MM for the longest time.

Collaborative-Lists

Collaborating on Lists, Searches & Market Maps

[Ashfaq Ahmad \(/s/profile/005390000068WraAAE\)](#), 7/14/2020 6:36 AM

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