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SEARCH



Getting Started?

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Tutorials

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Creating, Saving, and Using Lists

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Overview

In this tutorial, we'll cover how to use the **Save List** function. This allows you to keep track of companies you've searched for and receive email updates about their activity.

What is the difference between a saved search and a saved list?

A **saved list** is a static collection of companies while a **saved search** is a collection of companies that will continue to change as new companies are added to the PitchBook platform that meet the search's criteria.

Both features can be used to create alerts which allow you to stay informed of any changes to the companies

on your list or saved search. To learn more about saved searches, visit our article on [How to Save a Search \(https://help-pitchbook-com.proxy.library.emory.edu/s/article/How-to-save-a-search-and-manage-email-alerts\)](https://help-pitchbook-com.proxy.library.emory.edu/s/article/How-to-save-a-search-and-manage-email-alerts).

How do I create a list?

To create a list, start by creating an advanced search and navigating to the search results view. From search results, select all the companies listed by clicking the checkbox above the search results. If you do not want the whole list of companies, you can click the checkbox to the left of a company's name to add it to your selection.

Companies & Deals Search | 39 Companies Criteria (4) ^

Ownership Status: Publicly Held x Location: United States x Search HQ Only x Verticals: AdTech x

Overview Companies Deals Investors Pivot Table v Charts v

39 Companies View Edit Columns Suggestions Download to Excel Export to S

0 Selected

Select All Invert Selected
 Select Page Remove Selected
 Select Top 25 Deselect All
 Show Selected Only

Layout: Default (default) Save Layout

Multiple Sort C

#	<input type="checkbox"/>	Company Name		Last Known Valuation	Last Financing Size	Rev
1	<input type="checkbox"/>	Facebook (NAS: FB)	x	81,247.23		
2	<input type="checkbox"/>	The Nielsen Company (NYS: NLSN)	x	10,649.11	15,400.00	
3	<input type="checkbox"/>	Havas Group (FRA: HAV)	x	4,486.39		
4	<input type="checkbox"/>	OUTFRONT Media (NYS: OUT)	x	3,360.00	560.00	
5	<input type="checkbox"/>	The Trade Desk (NAS: TTD)	x	2,068.98	311.53	

After selecting the companies you want to include in your list, click the **Save As** icon in the upper right hand corner of your window, near the blue **Modify Criteria** button.

Click **Save Companies to List** and name the list so you can find it later. Also decide if you'd like to receive email alerts when there are updates to the entities in your list. You will be able to select your alert frequency after hitting **Continue**.

Save List ×

Saving your list stores the entities listed in your results. To create a dynamic list based on your criteria, [save as a saved search](#).

Save New List

Do you want to receive email alerts when there are updates to entities in your list?

Receive Alerts
 No Alerts

Add to Existing List

Once you have determined how often you'd like to receive alerts and what you would like the alerts to contain, save the list.

How do I find my saved lists?

Saved lists are stored in the sidebar. Click on the **Person** icon and you will find **Saved Searches & Lists** in the drop down. The **Saved Searches & Lists** page has two tabs, navigate to **My Lists** to access all of your saved lists.

PitchBook Search PitchBook...

Saved Searches & Lists ⓘ

My Searches (12) **My Lists (9)**

All Lists (9) Type Saved Lists Name

My Lists

Name
> Example List
> Example List 2
> Followed Companies
> interior design cos
> ...ed in the US

- My PitchBook
- Workspaces
- Alerts & Subscriptions
- Saved Searches & Lists**
- Notes & Files
- Plugins & Apps

How can I update my list alerts?

All **Alerts & Subscriptions** related to your PitchBook account can be found in the side bar under the **Person** icon. From here you can edit or delete any of your alerts, including list alerts. You can also update the alerts for Saved List in the **Saved List** section by clicking on the **bell icon**.

PitchBook

All Categories ▾ Search PitchBook...

Alerts & Subscriptions

Alerts (1) Subscriptions

Search Alerts Name...

Alert	↑ Item Type ▾	Search / List Type ▾	Alert Type ▾
VR United States Clos	Saved Search	Company	General

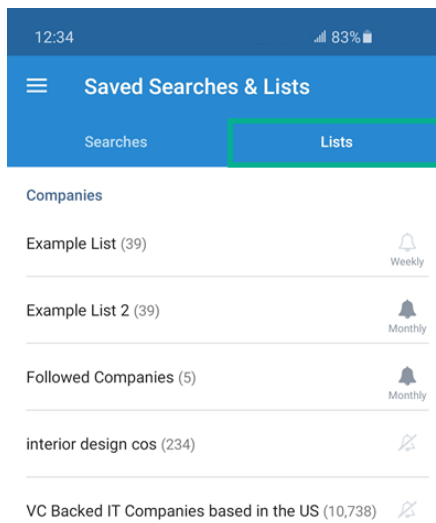
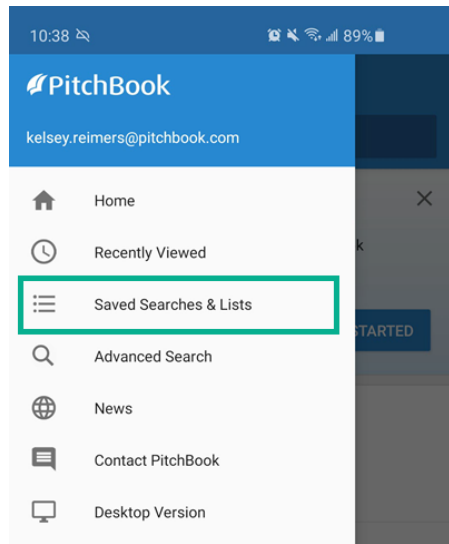
Can I use my saved list in future Advanced Searches?

Yes! Within **Advanced Searches**, you can include (or exclude) a list on any search tab. The **Lists** sub tab is at the bottom of the search criteria section as shown here. Once you have a list (or multiple lists) selected, you can add in other search criteria to filter your results to find exactly what you are looking for.

The screenshot shows the PitchBook interface for a search results page. At the top, there is a search bar and user information for Kelsey Reimers. The main heading is 'Companies & Deals Search 1 Result'. Below this, there are filters for 'Include Active Positions', 'Excluded Lists' (Example List 2), and 'Included Lists' (Example List). A sidebar on the left lists various search criteria, with 'Lists (2)' highlighted. The main content area is titled 'Lists and Saved Searches' and contains two dropdown menus: 'Include a Saved List or Search' (Example List) and 'Exclude a Saved List or Search' (Example List 2). Both dropdown menus have a '+ Add another list or search' button below them.

Can I access lists from the mobile app?

Lists are automatically synced across all devices. To view a list via [PitchBook Mobile \(https://help-pitchbook-com.proxy.library.emory.edu/s/article/PitchBook-Mobile-Introduction\)](https://help-pitchbook-com.proxy.library.emory.edu/s/article/PitchBook-Mobile-Introduction), open the left side menu and select Saved Searches & Lists. Then toggle over to the Lists tab for your lists. For more information about using lists in mobile app, visit our [Lists on PitchBook Mobile article \(https://help-pitchbook-com.proxy.library.emory.edu/s/article/Lists-on-PitchBook-Mobile\)](https://help-pitchbook-com.proxy.library.emory.edu/s/article/Lists-on-PitchBook-Mobile).



How-to-Create-Save-and-Use-Lists

Creating, Saving, and Using Lists

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