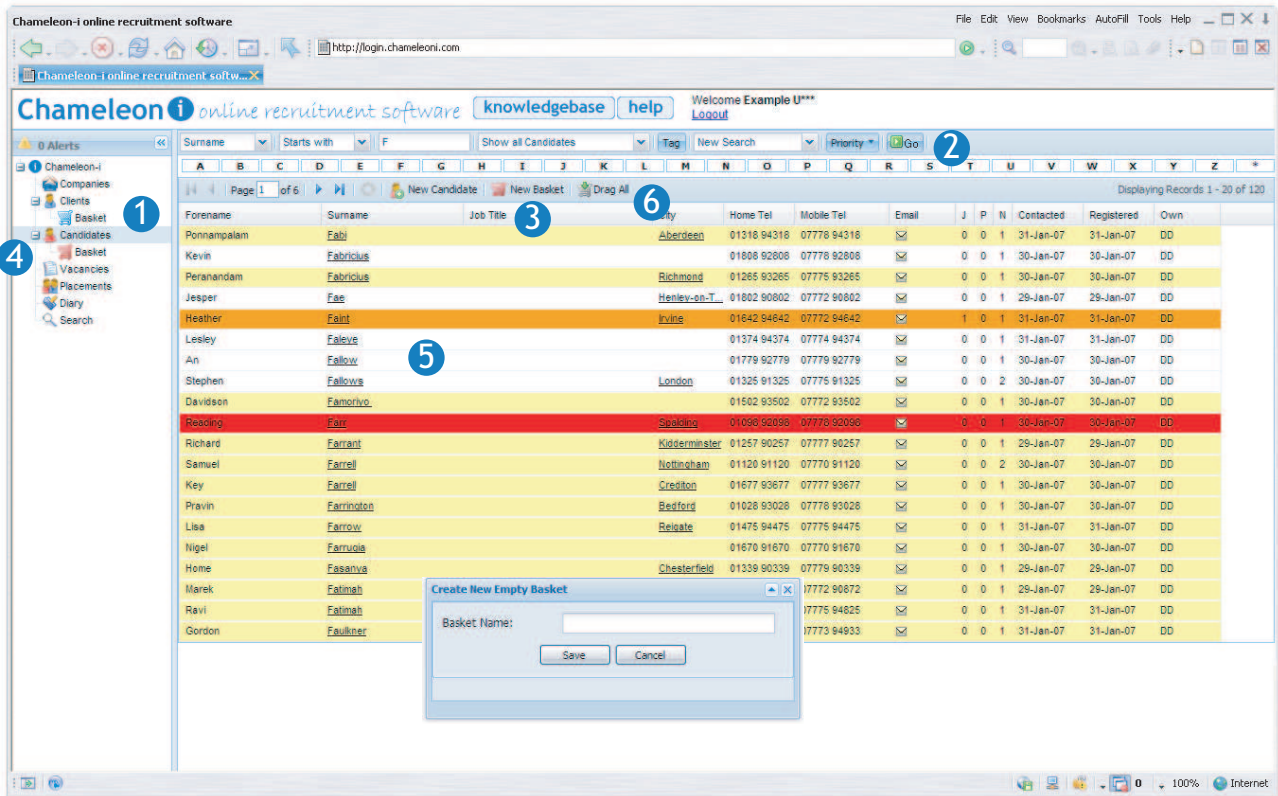


## Creating baskets

Easily create and store an unlimited amount of baskets that can be used to build contact lists for bulk Email, SMS or Mail merge; group candidates suitable for short listing; database cleansing (bulk delete records) and to bulk assign Tags.



**1** Baskets are stored in the Smart Navigation and can be created for Companies Clients, Candidates, Vacancies, and Placements.

**2** Run and refine a search based on the criteria you want to use to target your contacts and press **Go** to return your results.

*Tip: Further details on how to use the quick search grids can be found in the Knowledgebase.*

**3** From the search results page select the **New Basket** button and enter a unique basket name in the 'create new empty basket' pop-up window, and **Save** the entry.

**4** From the left-hand smart navigation toggle between the open and closed basket list using the +/- icon.

**5** Using drag-and-drop technology you can select and drag contacts.

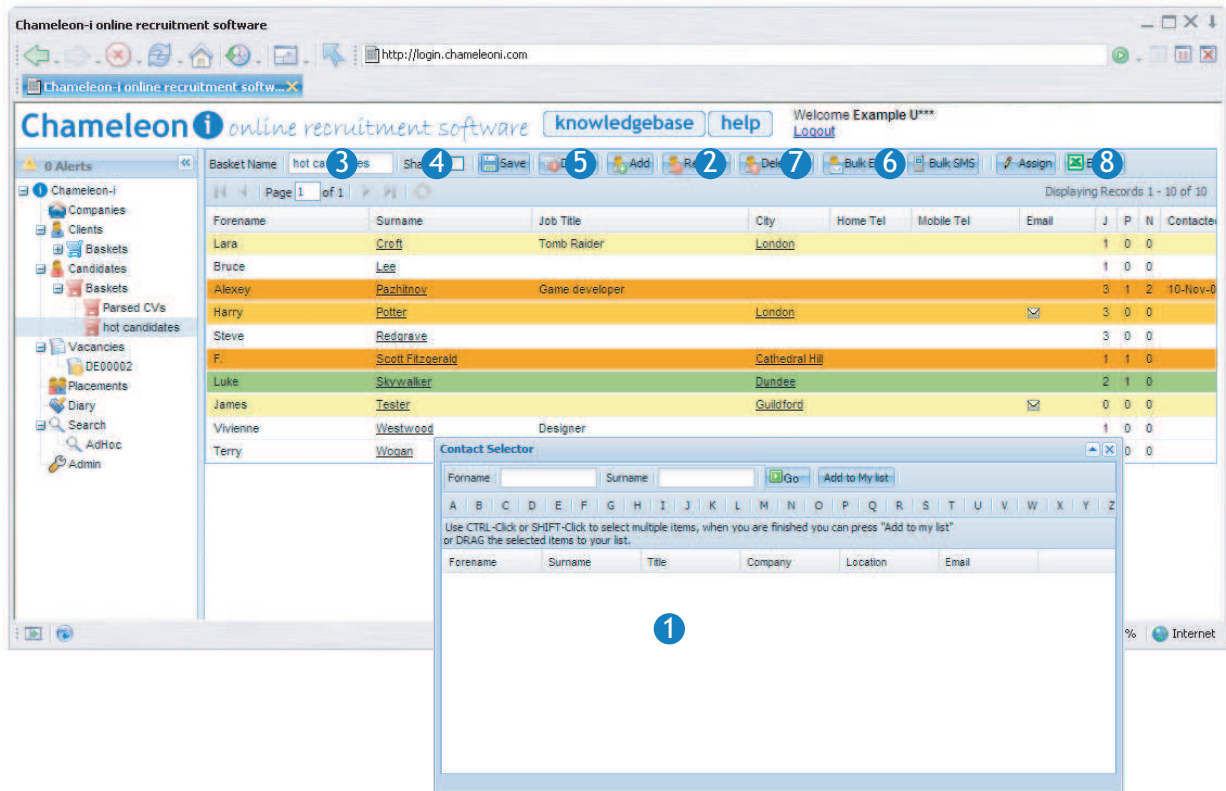
Holding the **Shift** key while selecting contacts allows you to drag-and-drop multiple contacts in a group.

Holding the **Ctrl** key allows you to pick individual contacts from the grids so you can drag-and-drop groups of selected contacts into your named basket.

**6** The **Drag All** button enables you to drag-and-drop all of your contacts displayed in the quick search grid results into a named basket. Select and drag the **Drag All** button into your named basket.

## Editing a basket

Edit each basket contact list from within the basket itself. Open your named basket by selecting the basket in the left-hand navigation. Toggle between the open and closed basket list using the +/- icon in the navigation.



- 1 The **Add Contact** button opens up the Contact Selector pop-up window that allows you to pin point and add specific contacts using a simplified search. Search on **Forename** or **Surname** or alternatively use the **A-Z** quick-start letters to jump straight to matching results. Select single or multiple contacts from the results listed and either drag-and-drop to your basket or select the **Add to my list** button.
- 2 To remove individual contacts from the basket, click on the required contact (Ctrl + click to select multiple lines) in the grid and press the **Remove Contact** button. A pop-up alert will display asking you to confirm your request.
- 3 To rename a basket, overwrite the existing name in the text box marked **Basket Name** and press **Save**.
- 4 By selecting the **Shared** tickbox your baskets can be viewed in company-wide user accounts. Ensure you press the **Save basket** button to save your changes.
- 5 To delete the basket entirely, select the **Delete Basket** button. A pop-up alert will display asking you to confirm your request.
- 6 To bulk email the contacts listed in the basket select the **Email** button this will open a popup. Please note you must supply details of your SMTP server before you can use this feature.
- 7 The **Delete all** button will **permanently remove** the contacts in the basket from your database.  
**NB: There is an administrator charge to retrieve any contacts accidentally deleted.**
- 8 Press the **Export** button to export all the contacts from a basket to Excel (.CSV file) as a data source for mail merging. The list will be sent to the email address logged in the system.

**Tip: The Export basket button is only enabled if the user is permissioned in the Admin panel in the Users tab.**