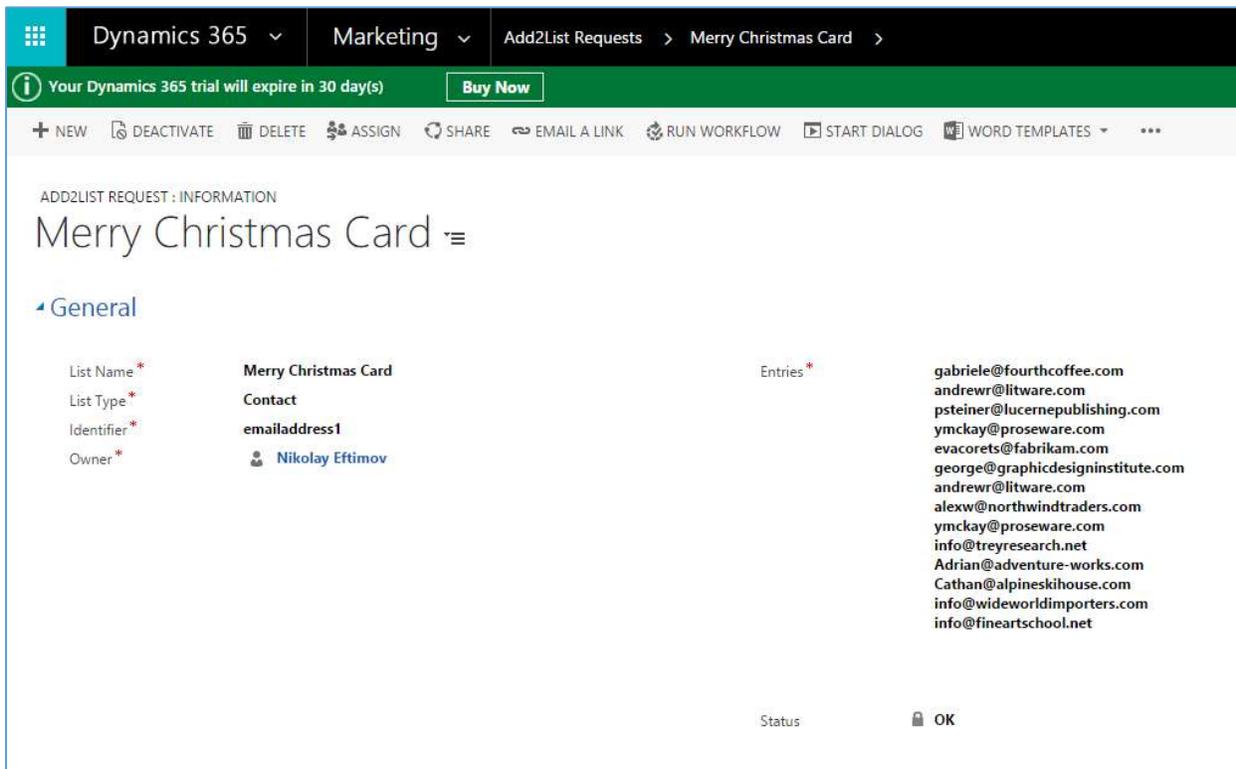**Add2List** is a simple but powerful solution, designed to help marketing users when dealing with segmentation outside Dynamics CRM (e.g. Power BI or Excel). The solution provides an easy to use interface built in Dynamics CRM which allows marketing users to submit **Add2List Requests**. These requests search for existing customers (**Accounts**, **Contacts** or **Leads**) by a given identifier (such as email, mobile phone or social security number) and create **Marketing Lists** automatically populated with all the matching customers. The concept is demonstrated below:

A new request is submitted (**Marketing** – **Add2List Requests** – **New**):

The marketing user fills out the name of the **Marketing List** to be created, the customer type to search for (**Account**, **Contact** or **Lead**) and the field name to search in – the **Identifier** (the schema name - in this case emailaddress1).

In the **Entries** multiline text field the user can copy / paste a list of identifiers (such as email addresses) directly from Excel, PowerBI or any other external system – even as an output of a custom SQL query.

Upon request submission (Save button), the **Add2List** solution creates the specified **Marketing List** and executes a number of search queries (depending on the number of entries) against the CRM database to find the matching customers and add them to the list.

After the processing is complete, Status indicator shows the number of entries added and the list is created:

Features at a glance:

- Create Marketing Lists populated with existing customers from external systems such as Excel
- Search for Accounts, Contacts or Leads
- Provide any identifier field such as email, phone. Supports custom fields.
- Overcomes the limit of 2000 search conditions / entries

Note: *Trial version is limited to 19 entries per request.*

After installing the solution you need to restart your browser in order update the navigation menu in Marketing with Add2List Requests.