

Setting up your List Categories

When you have more than a handful of lists you will need to organize them into categories. You will be promoted to do this once you create more than 16 lists.

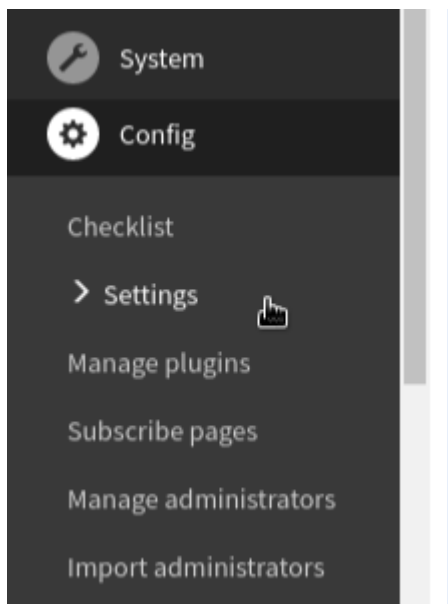
You can create categories to help you organize your lists at any time, and so the exact method you should use depends on your situation. In this chapter there are two suggested workflows.

1. Categories are set up before any lists are made (**categories before lists**).
2. Categories are set up to help organize pre-existing lists (**lists before categories**).

You should follow the section most appropriate to your situation.

Categories before lists

To create your categories go to **Config > Settings**



Scroll down until you find **list-organisation settings**

Categories for lists. Separate with commas.

Display list categories on subscribe page

No

Enter the names of your categories, separated by a comma.

Editing **Categories for lists. Separate with commas.**

Releases,Updates,New features

Save changes

Undo

In the image above you can see I have made a list category called **Releases**, for example. This is because I know I will have several lists about the new phpList releases in the future.

*NEXT, See the section about **Using categories** at the bottom of the page.*

Lists before categories

If you use phpList a lot and you are using list segmentation you will soon end up with more lists than you can easily manage without categorising. To start categorising your lists go to **Subscribers > Subscriber lists**.

Categorise lists

| Categorise lists | Name | Category |
|------------------|--------------------|----------------------|
| 9 | test | -- Choose category ▼ |
| 4 | phpList newsletter | -- Choose category ▼ |

SAVE

Then click **Categorise lists**.

Subscriber lists

Categorise lists

If you have no categories at all yet, you will see the following screen:

Categorise lists

No list categories have been defined

Once you have set up a few categories, come back to this page to classify your lists with your categories.

Configure categories

Click **Configure categories**.

*If you already have a few categories you will see a similar screen with the **Configure categories** button (which you still must click).*

Create your categories

Add your categories, one by one, with commas between them.

Settings

Editing **Categories for lists. Separate with commas.**

Releases x Updates x New features x

Save changes

Undo

Click **Save Changes**.

Add lists to categories

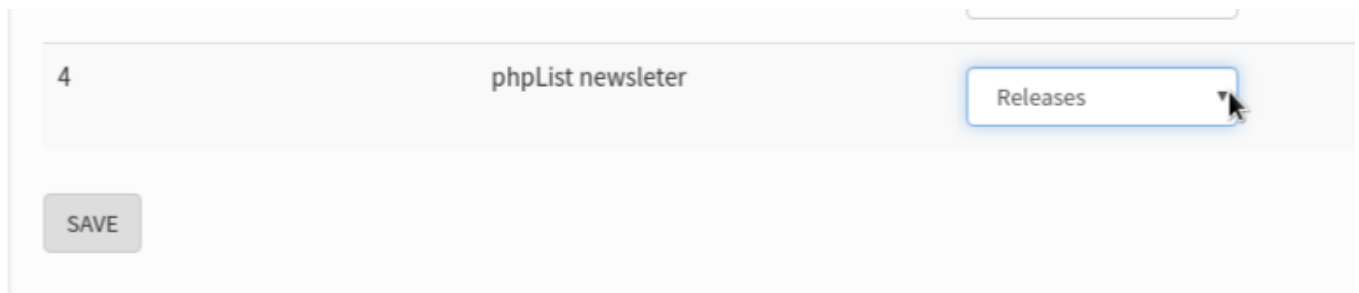
Go back to **Subscribers > Subscriber lists**. Click the **Categorise lists** button.

Subscriber lists

Categorise lists

Select the correct category from the drop-down beside each list.

If a list is already categorized, it will not be displayed.



The screenshot shows a form titled "Categorise lists". It contains a single row with a list entry. On the left is a small box with the number "4". In the center is the text "phpList newsletter". On the right is a dropdown menu currently showing "Releases". A mouse cursor is pointing at the dropdown arrow. Below the row is a "SAVE" button.

Carry on till all the lists are matched with a category if possible.

| Categorise lists | Name | Category |
|------------------|--------------------|----------------|
| 9 | test | New features ▼ |
| 4 | phpList newsletter | Releases ▼ |

If you find a list that does not fit into a category you can keep it in **Uncategorized** by leaving -- **Choose category** in the dropdown and make a new category later.

When you have finished click **Save**. Then, if you want to create more categories click the **Configure categories** button at the top of the page again and repeat the cycle.

If a list has already been categorised and you want to change the category, you can do this by editing the list from the main lists page.

Using your categories

Once you have finished setting up categories, they should become part of your everyday workflow with phpList.

For example, when you create a new list, you can assign it to a category during the creation stage. In this image we have created a list called **Just a list** and we can categorize it under "Releases".

Edit a list

List name:

Just a list

☐ Public list (listed on the frontend)

Order for listing

0

Owner

admin ▼

Category

Releases ▼

Also, as a second example of categories in use; when you send a campaign you can look for your lists by using categories too.

Send a campaign



1

Content

2

Format

3

Scheduling

4

Lists

5

Finish

Lists

Please select the lists you want to send your campaign to:

@

New features

Releases

☐ Select all

☒ Just a list **Private list**

☐ phpList newsletter **Public list**

Feedback

Discuss this chapter here.

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