



July 12, 2024

New! Slack Lists! Track Projects and Tasks in Slack

Lists are now available in QualityNet Slack! Lists are designed to align organization and collaboration on work happening in Slack. Use lists to keep track of tasks, stay aligned with your teammates in the flow of your conversations, and save time on your work with less switching between apps. No need to link to a Slack thread in a Jira comment for further context when you use Slack Lists.

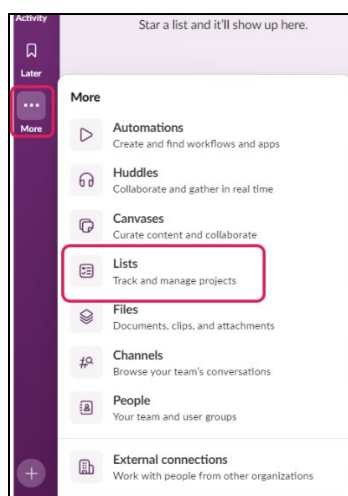
There are lots of ways to use lists. To get started, you can create your own or use one of the many templates available. With lists you can:

- Manage a project
 - Plan and assign tasks, then track their status in a list shared with your project team.
 - As you discuss project work with your team in the channel, use a list to track key tasks and action items.
- Triage requests
 - Collect messages and triage them as requests in a list.
 - Create a list to collect and track requests in a help channel and avoid the need to switch between programs.
- Plan team priorities
 - Collaborate with your team to prioritize your quarterly projects.
 - Remediate the problem of your team's ideas and goals scattered across channels, docs, and spreadsheets. Instead, create a catalog of planned projects in a list that you and your team can prioritize and organize.

How to Create a List

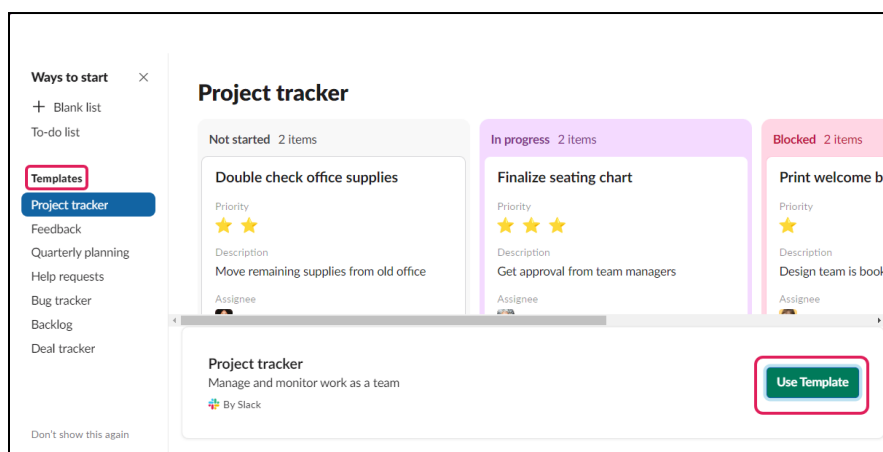
Start from scratch:

1. From your desktop, hover over the **More** button in the left-hand Bookmark bar, then select **Lists**.
2. Click **New**, then select **List**.



Use a template:

1. From your desktop, hover over the **More** button in the left-hand navigation bar, then select **Lists**.
2. Click **New**, then select **New List**.
3. Choose a template from the column on the left, then click **Use Template**.

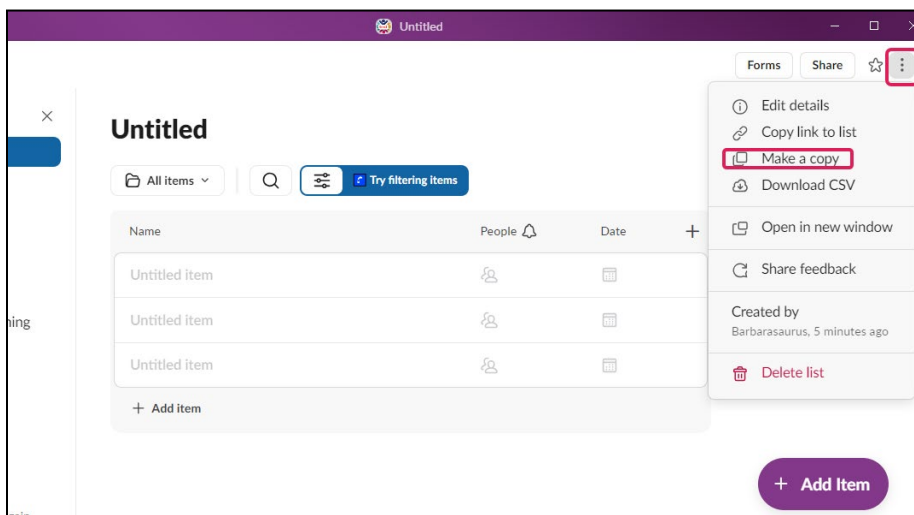


8 Different Templates

The eight templates from which to select are:

1. To-do list
2. Project tracker
3. Feedback
4. Quarterly planning
5. Help requests
6. Bug tracker
7. Backlog
8. Deal tracker

****Tip:** To reuse a list you've already created, open the list, then click the **three dots icon** in the upper right corner and select **Make a copy**.

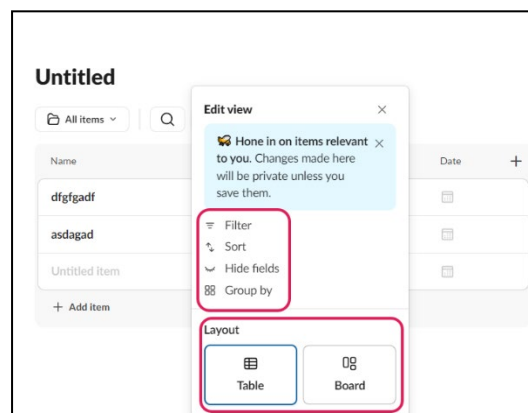
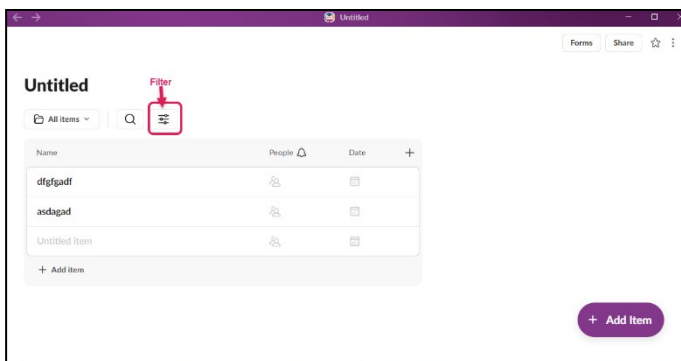


What You Can Do With a List

- Customize fields
 - Add or edit fields like due dates, assignees, priority and more.
- Add items
 - Each row in a list is a separate item. Items are individual tasks you need to track.
- Add messages to a list
 - Add any Slack message to a list without navigating away from the conversation.
- Visualize list data
 - Whether you created a list or you're viewing someone else's, you can adjust how list data appears to make it most relevant to you. **Group**, **sort**, and **filter** items by field, and choose if items are displayed in a **table** or a **board** view. **Note:** You need edit access to save views on a list you didn't create.

To enable any of these commands:

1. Click the **Filter** icon underneath the list name.
2. Select your command from the **Edit view** dropdown.



Collaboration

You can share lists anywhere in Slack, assign tasks to people, and add comments to items in a thread. Share a list in a channel or directly with team members to start collaborating. You can also set general access permissions to decide if people who find your lists when searching in Slack can view or edit them.

Add assignees

Create a **People** field to track who is working on each task. Assignees receive notification in **Activity** when the item is updated.

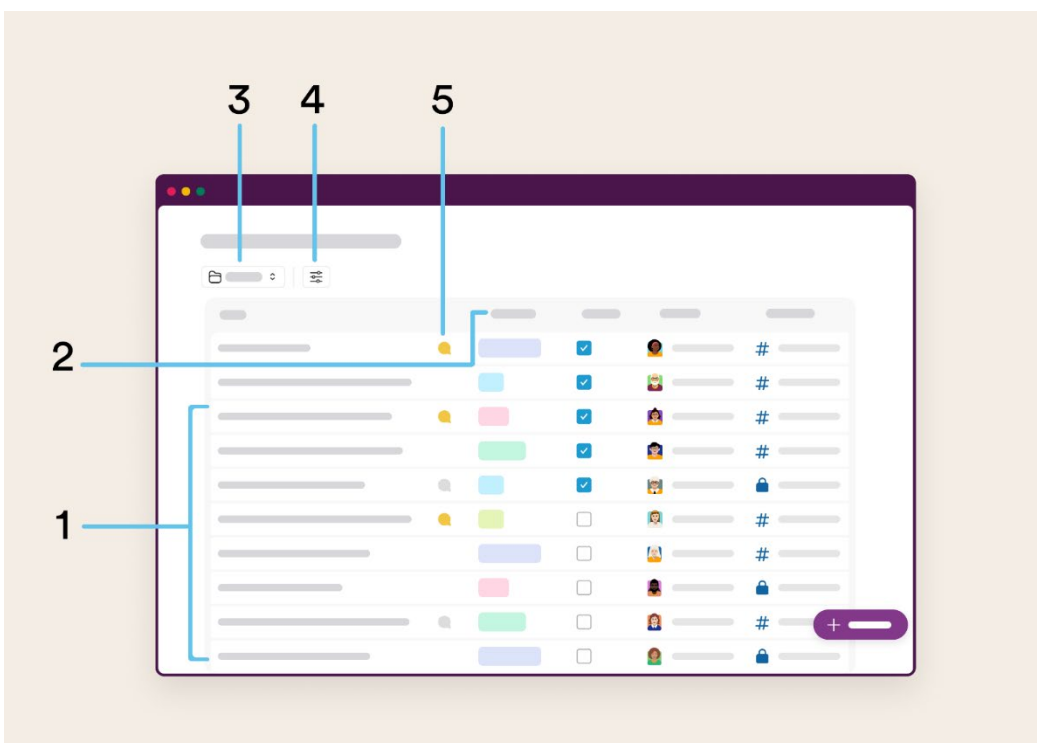
Add comments to items

Each item in a list has a dedicated message thread no matter where the item is shared. Open an item to add questions, comments or updates in the thread.

The Extras

- **Automate lists with Workflow Builder**
- **Collect form responses** - Create forms to share without requiring edit access
- **Enable alerts for updates**

Components of a List



1. Items - Items are tasks you're working on or keeping track of in a list. Click items to add or view task details.

2. Fields - Fields contain the item information that can be entered in a variety of ways including text, drop-down menu, checkboxes, and more.

3. Views - Save your filtering, sorting and layout preferences as a view.

4. Filters and layouts - Sort, filter, hide, and group items by any of the fields you've created, and apply different layout options:

- **Table layout**
In the table layout, items are organized by rows and fields by columns.
- **Board layout**
In the board layout, items are grouped by field, and you can click and drag items between columns.

5. Threads - Organize discussions around specific items and **@mention** people to get their attention.

Want to learn more about the power of lists? Be on the lookout for live trainings!

Contact Us

For further questions or help, please reach out in the [#help-slack](#) channel.

Slack. It's a snap!



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Questions? Submit questions and comments in Slack at [#help-slack](#).

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If you need additional information, contact us:

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