



SECTION 08

Smart Lists

A table you design yourself.



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Smart Lists

A Smart List is a table you design yourself. You pick the columns, Nexus keeps the rows. Server inventories, vendor contacts, a hardware refresh plan, the movies you keep meaning to watch. If you'd otherwise keep it in a spreadsheet that only you can find, it probably belongs here.

When a list grows into real operational data, you can convert it into a **resource section**, where each row becomes a record with its own page. A list with a count column can become an inventory the same way.

Open it from **Smart Lists** in the left menu.

IN THIS GUIDE

- | | |
|--|--|
| 01 Three things Smart Lists are for | 08 Sharing a list |
| 02 The Smart Lists page | 09 List settings |
| 03 Making a list | 10 Converting to a resource section |
| 04 Designing the columns | 11 Turning a list into an inventory |
| 05 Working in a list | 12 Deleting and bringing back |
| 06 Importing rows | 13 Keyboard |
| 07 Exporting | 14 Common questions |



Three things Smart Lists are for

QUICK START

- 1 **Keeping track of anything.** Make a list, design its columns, start typing rows.
- 2 **Sharing it.** Share the whole list with the people who need it, at the access level they need.
- 3 **Growing it up.** When a list matters enough to need detail pages and record-by-record sharing, convert it into a resource section. Give it a stock count on the way and it becomes an inventory.

The Smart Lists page



The Smart Lists page

Each list you can see has a tile: its icon and color, its name and description, how many rows it holds and when it was last updated. A star means you've starred it. Click a tile, or its name, to open the list.

The **⋮** on a tile offers **List settings...** and **Delete list**, if you're allowed to change the list.

Recently deleted, at the bottom, holds the lists you've deleted. See *Deleting and bringing back*.

Making a list

- 1 Click **New list**.
- 2 Give it a **Name** and, if you like, a **Description**. The description shows under the name, here and on the list itself.



- Click **Create**, or press **Enter**. The list opens with **Columns** ready for you to design.

A new list is yours alone until you share it.

Designing the columns

Designing the columns

Columns (at the top of the list) opens the column designer. **Add column**, give it a name, and pick its type:

TYPE	HOLDS
Text	A short line of text.
Long text	Several lines. In a cell, Enter starts a new line and Ctrl+Enter saves.
Number	A number.



TYPE	HOLDS
Currency	An amount. Pick a currency for the column, or leave it as plain numbers. Amounts show in that currency. Nothing is converted.
Date	A date, picked or typed.
Checkbox	Yes or no. One click ticks it.
Dropdown (options)	One of a set of choices. Type the options separated by commas, like <i>Production, Staging, Test</i> .
Web link	A web address. It opens in a new tab.
Link to a record	A record from any resource section, built-in or converted.

TIP

The first text column is each row's title. It's what Nexus calls the row elsewhere, so put the name there.

Each column also has:

- **Required.** A row can't be added or saved without it.
- **Indexed.** Keeps the column sortable once a list passes 2,000 rows. A list can index only a limited number of columns of each type. Hover over the switch for the numbers.
- **↑ and ↓** to reorder, and the **bin** to remove it.

Click **Save columns** when you're done.

Changing columns on a list that has rows. If a change means some rows no longer fit (a column made required, say, while some rows leave it empty), the designer tells you how many and why, before saving. **Save anyway** keeps those rows exactly as they are and marks them as needing attention. Nothing is thrown away.

Removed columns stay at the bottom of the designer for a while, with **Put back**. Remove a column by mistake and you can have it back, values and all.

If someone else changed the columns while you were editing, nothing is saved. The designer tells you which of your new columns to add again and offers **Reload columns**.



Working in a list

Smart Lists / Helix server inventory

Helix server inventory 6 rows - Every server in the Helix estate, who owns it and when it was last patched.

Search this list...

Server	Environment	Owner	Patched this month	Last patched	Monthly cost	Runbook
+ Add to Helix server inventory...						
HLX-TEST-01	Test	Bill Everybody	☐	Aug 30, 2026	\$210.00	wiki.blackwolf.example/runbooks/hlx-test
HLX-SQL-01	Production	Kevin Haysmer	☐	Sep 14, 2026	\$2,400.00	wiki.blackwolf.example/runbooks/hlx-sql
HLX-STG-APP-01	Staging	Bill Everybody	☒	Oct 5, 2026	\$480.00	wiki.blackwolf.example/runbooks/hlx-app
HLX-APP-01	Production	Bill Everybody	☒	Oct 12, 2026	\$1,250.00	wiki.blackwolf.example/runbooks/hlx-app
HLX-WEB-01	Production	Bill Everybody	☒	Oct 13, 2026	\$840.00	wiki.blackwolf.example/runbooks/hlx-web
HLX-JUMP-01	Production	Kevin Haysmer	☒	Oct 14, 2026	\$95.00	wiki.blackwolf.example/runbooks/jump-host

A list, with the main areas numbered

- 1 The name, the row count and the description.**
- 2 The star.** Stars the list for you alone.
- 3 Columns, Import, Export, Share** and **:** (List settings, Convert to resource section, Delete list).
- 4 Search this list.**
- 5 Column headers.** Click one to sort by it. Click again to reverse. The arrow shows which way.
- 6 The new-row line.** Type in it and press **Enter** (or click **+**) to add a row.
- 7 ×** deletes a row.

Adding rows

The new-row line sits right under the column names, so you can add a row from anywhere in a long list. Each box matches its column: a dropdown for a dropdown column, a date picker for a date, and so on. Fill in what you have and press **Enter**.

If the row can't be added (a required column is empty, say), it isn't lost. The line keeps what you typed, outlines the problem column, and says *"Not added."* with the reason. Fix it and press **Enter** again.

New rows stay pinned at the top, under *Added just now*, until you change the search, filter or sort. That way they don't vanish into the middle of a sorted list the moment you add them.

Link to a record columns are filled after the row exists: add the row, then click the cell and pick.



Changing a cell

Click a cell to edit it. **Enter** saves, **Tab** saves and moves to the next cell, **Esc** leaves it as it was. Checkboxes save with one click.

If a change is refused, the cell says "Not saved." with the reason and the value that is actually saved, so you're never guessing which one stuck.

Rows needing attention

When a column change leaves some rows short of the rules, a chip appears beside the search box: *2 rows need attention*. Click it to show only those rows. Hover over a cell to see what's wrong. Click it again to show every row.

Deleting a row

The **×** at the end of a row deletes it straight away, with **Undo** in the message for ten seconds. Missed it? The row is also in the recycle bin.

Searching and sorting

Search this list... narrows the rows as you type. The count under the name then reads *3 of 6 rows*. Sort by clicking a column's name. **Link to a record** columns can't be sorted, because the names they show live on other records.

Big lists

A list holds up to **10,000 rows**. Rows load in blocks as you scroll, so a big list opens as fast as a small one. From 8,000 rows, the list suggests converting it to a resource section. At 10,000 it's full, and converting is how it keeps growing.

Importing rows

Import reads Excel (.xlsx), CSV (.csv), tab-separated text (.tsv, .txt), a table in a Word document (.docx) or a Microsoft Works database (.wdb), up to 10 MB.

- 1 Choose file.** If a workbook or document holds more than one sheet or table, pick which one.
- 2 Map the columns.** The first row is the headers. For each, choose an existing column, **Create new column**, or **Skip this column**. The first few values show under each header, so you can see what you're mapping.



- 3 **Import.** Rows go in with a progress bar and a **Stop** button. Stopping keeps the rows already added.

Afterwards Nexus lists any rows it skipped, by their row number in your file and why, and you can download them to fix and import again. **Undo import** takes back the whole import, as long as none of its rows have been edited since.

If a date column could be read day-first or month-first, Nexus asks rather than guesses. 03/04 is a date, not a coin toss.

Exporting

Export downloads the list as an **Excel workbook (.xlsx)** or a **CSV file (.csv)**. It exports what you're looking at: if a search, sort or *needing attention* filter is on, the export follows it.

Sharing a list

Sharing a list



Share opens the share panel. Sharing a list shares **all** of its rows. The levels:

LEVEL	CAN
View	Read the list.
Comment	Add and import rows.
Edit	Change cells and delete rows.
Admin	Design columns, change list settings, share, convert and delete.

Pick a person, pick a level, and check the **Preview** line, which tells you what will change before you click **Share**.

What a person can do shows in what they see. Someone with View access doesn't get a new-row line or a Columns button they can't use.

List settings

List settings... (in the ) changes the list's **Name**, **Description**, **Color** and **Icon**. The color and icon show on the tile and at the top of the list.

Converting to a resource section

When a list becomes real operational data, **Convert to resource section...** (in the ) moves it into the **Resources** hub. Any list can be converted, whatever its columns.

 Convert "Spare parts" to a resource section?

It moves out of Smart Lists and into the Resources hub. Its 5 rows become records, each with a page of its own and file attachments, and other lists can link to them.

Sharing changes. Today the whole list is shared at once. Afterwards each record is shared on its own: everyone who can see this list keeps access to the 5 records that exist now, but records added later are shared one by one.

 This is one-way. A section cannot turn back into a list.

☒ Track stock after converting

Not now Convert to section

The convert dialog



HEADS UP

Read the dialog before you click, because two things change for good:

- **Sharing changes.** Today the whole list is shared at once. Afterwards each record is shared on its own. Everyone who can see the list keeps access to the records that exist now, but records added later are shared one by one.
- **It's one-way.** A section can't turn back into a list.

Click **Convert to section**. **Not now** leaves the list as it is. On a big list, converting can take a minute. Keep the page open until it's done. If it fails, the list is not converted and nothing in it changes.

What you get

You land on the new section in **Resources**. The list is gone from Smart Lists, and the section takes its name: the list *Helix server inventory* becomes the section *Helix server inventory*, with a **New Helix server inventory** button.

The screenshot displays the NERTHOS NEXUS interface for a converted row, now a record. The record is titled "HLX-APP-01" and is part of the "Helix server inventory" section. The record details include: Server: HLX-APP-01, Environment: Production, Owner: Bill Everybody, Last patched: 10/12/2026, Monthly cost: USD 1250, and Runbook: https://wiki.blackwolf.example/runbooks/hlx-app. The right sidebar shows options for My groups, Comments, Notes, Files, Shares, and Assignments.

A converted row, now a record

Each row is now a record with a page of its own. Your columns become its **Details**, with the same names, types and values. Beside them, every record gets what a row never had: **Comments**, **Notes**, **Files**, its own **Shares**, **Assignments**, and **Used in**, which lists the tasks, projects and programs that link to it.



The section shows its records as **Cards**, a **List**, a **Grid** or a **Kanban** board (Kanban needs a dropdown column to sort by). Its columns are fixed at conversion. There's no column designer on a section, so get the columns right while it's still a list.

Turning a list into an inventory

Any list with a number column can become an inventory: a stock count per record that work draws down, with reorder alerts. This is for things you keep and use up, like spare parts, consumables, loaner laptops. Tracking stock is part of the Pro plan's inventory.

Design the list for stock

Give the list a **Number** column for the count, and any of these you want:

COLUMN	TYPE	BECOMES
On hand	Number	The opening count. Required.
Min level	Number	Below this, the record shows <i>Below minimum</i> .
Max level	Number	Above this, it shows <i>Over maximum</i> .
Reorder point	Number	At or below this, it shows <i>Reorder</i> .
Unit cost	Currency or Number	What one costs. A record with a unit cost adds its cost to the work that uses it.

The names are up to you. You match them up in the next step. Other columns (part name, SKU, shelf) come across as ordinary details.

Convert with Track stock

- 1 Open the list's  and pick **Convert to resource section...**
- 2 Tick **Track stock after converting**. It appears when your workspace has inventory and you can manage it.
- 3 Click **Convert to section**. You land on the section with **Track stock** open.



Track stock

Choose the columns that hold your stock. Each record gets a stock card with its On hand as the opening balance; from then on the card keeps the count, and work that uses a record reserves and uses it.

On hand
On hand

Min level (optional)

Max level (optional)

Reorder point (optional)
Reorder point

Unit cost (optional)
Unit cost

A record with a unit cost adds its cost to the work that uses it.

5 records. Every record has a number in On hand.

Cancel
Turn on

Mapping the columns that hold stock

- 4 Pick which column is **On hand**, then any of **Min level**, **Max level**, **Reorder point** and **Unit cost**. Nexus picks the first number column as On hand, so check it. Each column can fill only one role.
- 5 Read the line at the bottom. *5 records. Every record has a number in On hand.* means every count came across. If some records have no number there, it says how many, and those start at 0.
- 6 Click **Turn on**. The message reads *Stock is tracked for 5 records.*

What changes

Resources / Spare parts

Spare parts
5 records

Export
New Spare part

Search spare parts...

All stock
Needs reorder
Below minimum
Negative
Over maximum

Spare part	Part	SKU	On hand	Reorder point	Unit cost	Available	Stock
24-port PoE switch	24-port PoE switch	SW-POE-24	3	2	\$389.00	3	
Cat6 patch cable 2m	Cat6 patch cable 2m	CAB-C6-2M	60	25	\$4.25	60	
SFP+ 10G transceiver	SFP+ 10G transceiver	SFP-10G-SR	12	6	\$42.50	12	
UPS battery pack	UPS battery pack	UPS-BAT-12V	2	2	\$188.00	2	Reorder
USB-C laptop charger 65W	USB-C laptop charger 65W	PSU-65W-C	4	5	\$39.00	4	Reorder

A tracked section in table view

- The section gains a stock filter (**All stock**, **Needs reorder**, **Below minimum**, **Negative**, **Over maximum**), an **Available** column and a **Stock** column with a chip such as **Reorder**.



- **Each record** gets a **Stock** card. The card now owns the count. On hand, Min, Max and Reorder point leave the Details form, so nobody types over a count by accident.

The stock card interface is titled "Stock" and includes a "Reorder" button in the top right corner. It displays three stock levels: "On hand" (4), "Reserved" (0), and "Available" (4). Below these, it shows "Unit cost \$39.00, stock value \$156.00". There are two buttons: "+ Receive" and "Adjust count". The "Levels" section contains input fields for "Min", "Max", and "Reorder point" (set to 5). A "Stock contact" dropdown menu is present, with a note: "Who hears when this item runs low. Blank: the Stock keepers, then the workspace Owner." Below this, it says "Notices go to: the workspace Owner". The "Recent movements" section shows an "Opening balance" of +4 on "You, Oct 16, 2026 - 2:13 PM", with a "See all" link and "Balance 4" at the bottom right.

A record's stock card

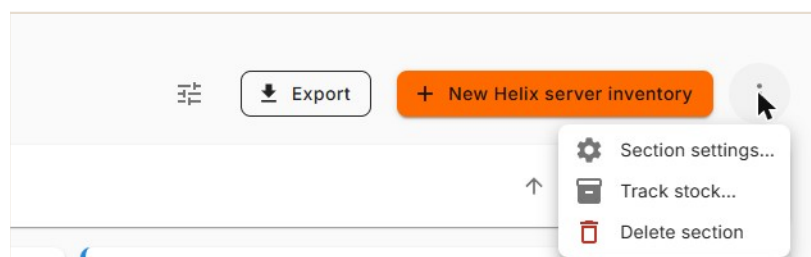
The card shows **On hand**, **Reserved** (held by open work) and **Available**, the unit cost and the stock value. From here you **Receive** stock or **Adjust count**, set the **Levels**, and choose a **Stock contact**, the person who hears when it runs low. **Recent movements** starts with one *Opening balance* per record: the number that was in the On hand cell.

Unit cost stays in Details and can still be changed there, or by receiving stock at a new price.

How stock moves from here (receiving, reserving for a task, using it up) is in the **Stock** guide under Resources.

A section you've already converted

Converted without ticking the box? Open the section's and pick **Track stock....** It's the same dialog.



Track stock in a section's menu



If the section has no number column, **On hand** offers **Add an On hand column**, and every record starts at 0. Since a section's columns can't be redesigned, this is the only way to add one after converting.

Turning it off

Track stock... on a tracked section offers **Turn off**. Nexus asks once more (*Stop tracking stock for this list? Counts are written back into the On hand column and the history is kept.*) and **Stop tracking** does it. The cells can then be edited again. Turn it on again later and Nexus records an opening balance for any difference.

Deleting and bringing back

Delete list (in the **:**, or on the tile) asks first and says how many rows go with it. The list moves to **Recently deleted** at the bottom of the Smart Lists page, where it stays for 30 days.

Each entry there says who deleted it, when, how many rows it held and how many days are left. **Restore** brings it back with its rows. **Delete for good** erases it now, after asking. That one really can't be undone.

Keyboard

- **Tab** reaches the grid once. Inside it, the **arrow keys** move between cells.
- **Enter** or **F2** edits a cell. **Enter** saves, **Tab** saves and moves on, **Esc** cancels.
- In a **Long text** cell, **Enter** starts a new line and **Ctrl+Enter** saves.
- In the new-row line, **Enter** adds the row.

Common questions

Who can see my list?

| Only you, until you share it.

Why can't I add rows to a list someone shared with me?

| You have View access. Adding rows needs Comment or higher. Ask whoever shared it.



Why won't a column sort?

It's a **Link to a record** column. Those can't be sorted. On lists over 2,000 rows, turn on **Indexed** for the columns you sort by.

I deleted a column by accident.

Open **Columns**, find it under **Removed columns**, and click **Put back**.

When should I convert a list?

When rows need their own pages, files or record-by-record sharing, when you want to track stock, or when you're heading for 10,000 rows. Not before. A list is quicker to work in.

I converted a list and need another column.

A section's columns are fixed. Add every column you'll need while it's still a list. The one exception is On hand, which **Track stock...** can add.

Can I build an inventory from scratch?

Yes, that's what a list is for. Design the columns you want (count, levels, cost, plus anything else, like SKU or shelf), add the rows, then convert with **Track stock after converting** ticked.

