

What is it?

The Create a List function allows you to search for groups of individuals that meet a given set of criteria. You define the criteria to meet your current needs. Once you click Create a List from the Main Menu, you'll enter a search interface that allows you to define the parameters of the list you want to generate – for example, all registered voters over 40 in a given county or all people tagged with a certain Activist Code. The parameters can be as narrow or as broad as you desire.



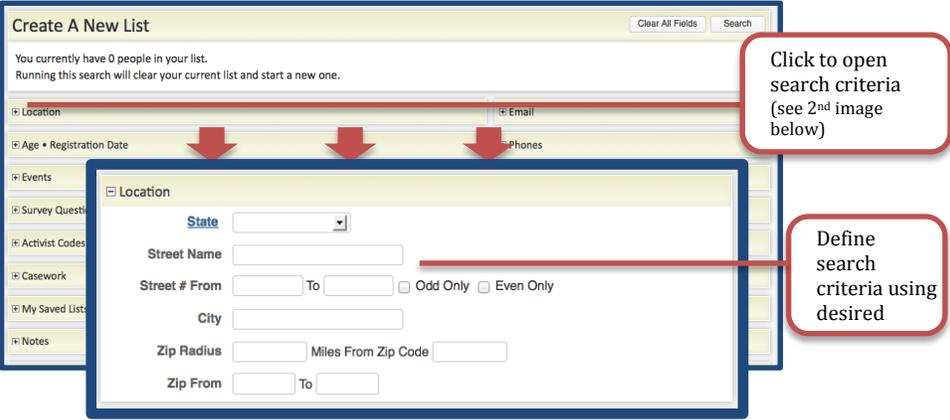
When to use it?

Use the Create a List function when you want to reach out to a defined list of individuals. This could be in the context of a phonebank or door-to-door canvass, a volunteer recruitment campaign, a Blast Email, a donor outreach effort, a mass mailing, or for any other programmatic purpose. In some cases, your organization may have already defined your targets for you and you simply need to limit the list to your geographical turf, for example, or to people not contacted recently.



How to use it?

Simply click the '+' signs at the left of each category to open the search fields for that category. Fill in the fields you want to use to define your search. For example, in the location category, you can define your search using counties, media markets, congressional districts, ZIP codes, or any combination of these.



Once you run your search you can refine it using the Add, Remove, and Narrow icons located at the top of the page. This allows you to build a list step by step or to build upon existing saved lists or searches.

Once you've completed your list you can save it, print it or share it with other users. You can also apply a host of more advanced functions located in the menu at the top of the list. See the NGP VAN Wiki or the How-To documents specific to those features.



Expert Tips:

- Save your list periodically as you continue to refine it so that you don't have to start over if you make a mistake.
- Saved Lists loaded as My List are static. Saved Searches will process each time you load them so that the records contained therein may change on a periodic basis when you load the list. For example, if your Search includes Early Voting History, the composition of your list will change as this data is applied.