

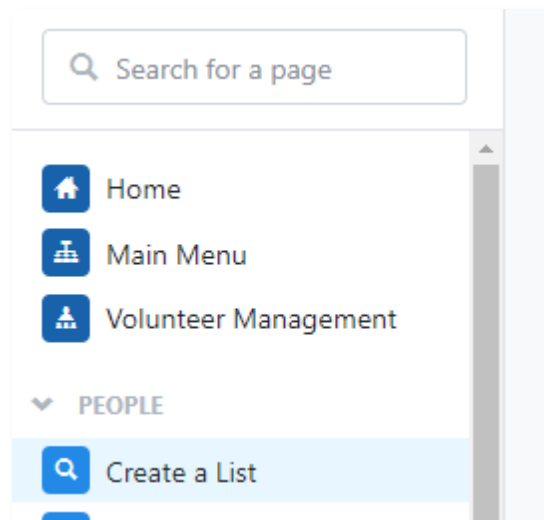
How to: Use Create a List for searching

Create a List is a powerful search tool that can help you build lists for segmentation, create searches that can be used dynamically with things like **Workflows**, create audiences for **Targeted Email**, help you track the results you get from your outreach efforts, and in many other ways.

[Read more about other ways you can use Create a List](#)

Getting started

To begin, select **Create a List** from the **Sidebar**.



The search criteria is broken down into page sections, which are organized alphabetically.

CONTACTS

Create A New Search

New Search Open Save

Step 1: (Start with anyone who meets the selected criteria)

FAVORITES
Click the stars below to move search criteria to the top.

OTHER SEARCH CRITERIA

- Activist Codes ★
- Addresses ★
- Attached Files ★
- Canvass Status ★

Suppressions
exclude Deceased
and include Bad Address
and exclude Do Not Walk
and exclude Do Not Call
and include Do Not Email
and exclude Do Not Mail
...less

Preview My Results

+ -- People

+ Add Step Run Search

Running this search will clear your current list of 0 people.

Each section can be expanded for you to select or enter specific criteria.

▼ **Activist Codes**

Activist Code

You can use the star icon to the right of a section to mark it as one of your **Favorites**, and that section will appear at the top of your **Create a List** page. Within your **Favorites**, you can drag and drop the sections to create a preferred arrangement, and **Create a List** will default to this arrangement for future searches.

Step 1: (Start with anyone who meets the selected criteria)

FAVORITES

- Activist Codes ≡ ★
- Email ≡ ★
- Addresses ≡ ★

As you make changes to your search, you can use **Preview My Results** to get a sense of how many people will be included without actually executing the search. This allows you to adjust your parameters without having to go back and forth between pages.

You can also expand the count at the bottom to expose numbers for phones, doors, and mailboxes with the plus sign.

When you're satisfied, select **Run Search**.

The screenshot shows a search configuration interface titled "Step 1: New Search". It includes sections for "Districts" (County = Berkshire, State = Massachusetts) and "Suppressions" (exclude Deceased, include Bad Address, exclude Do Not Walk, exclude Do Not Call, include Do Not Email, exclude Do Not Mail). A blue button labeled "Preview My Results" is visible. Below the search criteria, a summary shows "1 People" with a minus sign icon and a list of "1 Phones", "1 Doors", and "1 Mailboxes". At the bottom, there are two buttons: "Add Step" and "Run Search".

Keep in mind that there are some default suppressions in place. You can make adjustments in the **Suppressions** page section, where any necessary changes can be made.

If a field name appears in blue font, you can click on it and select multiple values at once. Once you've made your selections, be sure to click **Save** at the bottom, which will take you back to your search criteria.

▼ Districts ★

Congressional

State Senate

State House

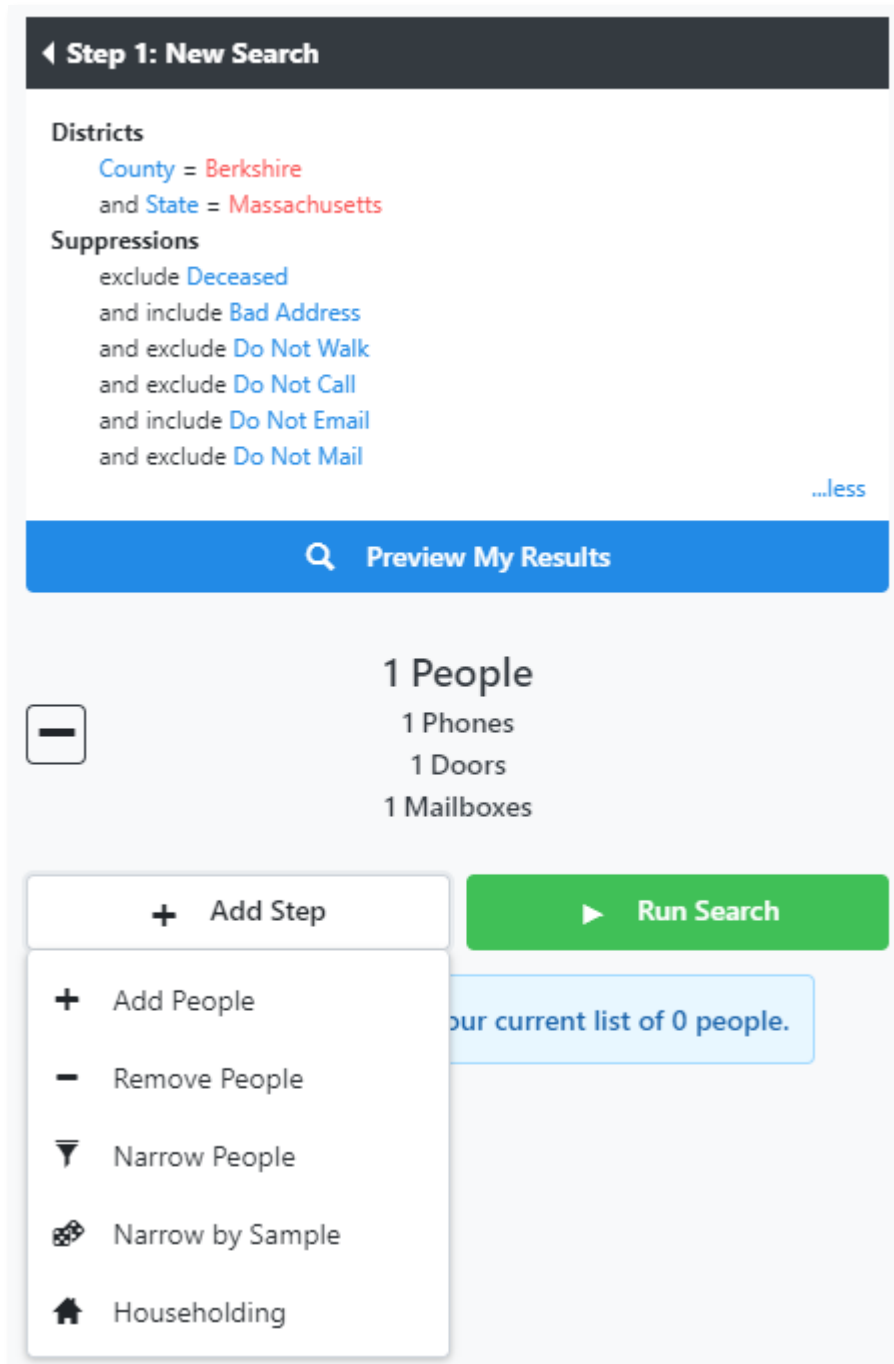
Congressional

[Check All](#)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 13
- 16
- 23
- 24

Adding a step

You can create a more complex search by using **Add Step** in the right column to add, remove, narrow, and household results based on additional criteria. You can delete steps by clicking the trash can icon, or edit the step by clicking the pencil icon next to the step name.



Creating a sample step

You can create a step called **Narrow by Sample**, which allows you to pull a random number of contacts from the search that you had just created. For instance, if you solely wanted 30 people that fit the set of criteria you had previously created, you could set your sample size in the **Narrow by Sample** step to 30.

CONTACTS

Create A New Search

Step 4: Narrow by Sample ⌵ (Reduce this list to a set number of contacts, based on a random sample)

▼ Sample

Sample Size

Now preview your results, run your search, or add a step.→

Using Wildcards

In certain scenarios, you may find it useful to search using the wildcard character, '%', which allows you to search for specific character strings that may exist within a larger string of characters. So if you wanted to search for all contacts with '.gov' in their email address, you could enter '%.gov' in the email domain field.

Selecting more options with links

Whenever a field name is in blue, it means you can click on the field name to select multiple values to use as criteria within the field. There is also the option to select all values within the field.

Activist Code

[\[Check All\]](#) [\[Check All Activists\]](#) [\[Un-Check All\]](#)

Donor [\[Check Type\]](#)

- Digital (Public)
- Donor:In District (Public)
- High Dollar (Public)
- Low Dollar (Public)
- Low Dollar Donors (Public)

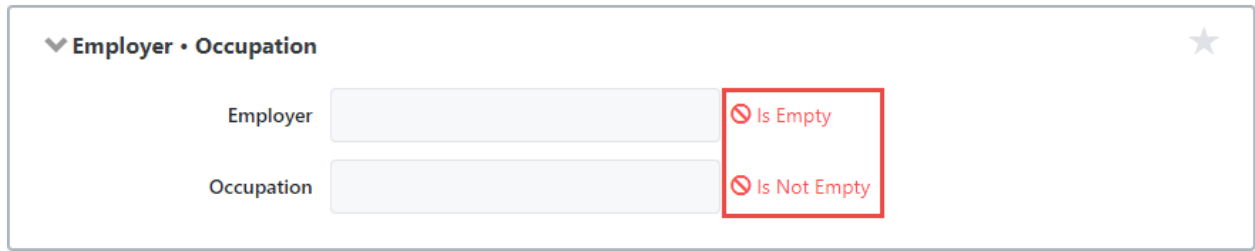
Choosing based on date ranges

Certain fields allow these 3 different types of date ranges to be selected. 'Between' allows you to specify an exact, static range of dates.

Using null or blank search criteria

Certain fields allow you to search on them based on whether or not there is a value stored within the field. For instance, if you want to search for anyone missing employer information, you can click the interdictory circle and select the **Is empty** option. Alternatively, you can select the **Is not empty** option by clicking on the interdictory circle again.

Between/In the range of/In the month of:



The screenshot shows a search filter interface for 'Employer • Occupation'. It features two input fields: 'Employer' and 'Occupation'. To the right of each field is a dropdown menu with two options: 'Is Empty' and 'Is Not Empty'. A red box highlights these two options, indicating the search criteria being discussed in the text.

Note: When using null/blank search criteria in the Address tab, searching 'is empty' on a specific address field will search for contacts that have SOME contact information, but not anything in that particular field itself. If you want to search for contacts with no address information, you'll want to use the 'bad address' status under the suppressions tab.

Saving a List

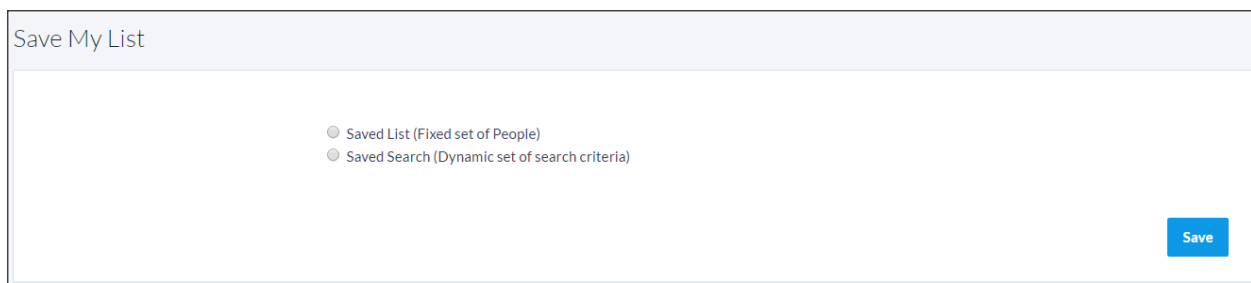
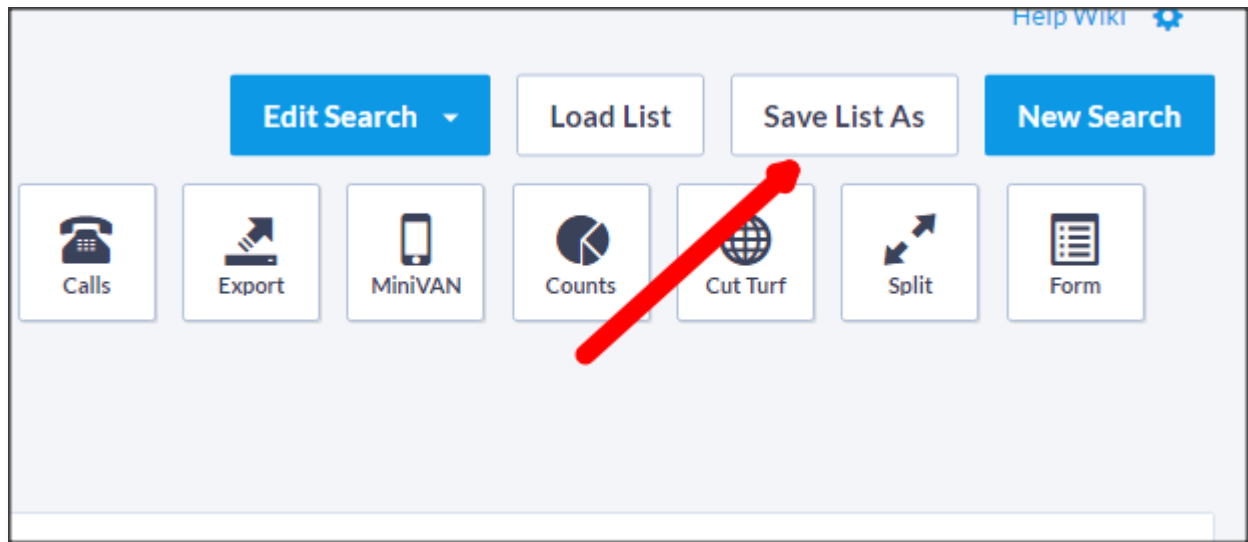
You can save the criteria after a query has been run using **Save List As**. You will have the option to save as a **List** (a fixed set of people) or save as a **Search** (a dynamic set of search criteria).

A **Saved List** is like a snapshot in time - it will always contain the same exact people as when you first saved it, unless a contact record is deleted.

A **Saved Search** is dynamic, meaning that each time you run it, the results will update to reflect any changes in data. If you're using **Targeted Email** and select a **Saved Search** as your audience, your email will only send to people who would be in the results at the time the email is sent - not the last time you ran the search yourself.

For example, if you run a search of everyone with the **Activist Code** "Volunteer" and the results contain 10 people, a **Saved List** would always contain those 10 people.

If instead, you created a **Saved Search** and later removed the **Activist Code** from two people who are no longer volunteering but added the **Activist Code** to five new people who recently got involved with your organization, your **Saved Search** would update to contain 13 contacts - the original people, minus the two who left, plus the five new people.



You can also save a list directly from the search criteria page using the **Save** button in the top right corner. The number appearing in the preview may not be the result you see later if you altered the criteria and did not rerun your search.

Accessing and using lists

You can access your most recently run search using **My List** in the sidebar menu.

To see all saved lists, select **My Folders**. You can open a specific folder, search by folder name, or by file name. You can also specify if you want to search **Active** or **Inactive** documents.

To open saved searches, go to **Create a New List** and select **Open** in the top right corner. Select the folder you saved the searches in, and then select the desired search. All search information will repopulate and you can make adjustments before you click **Run Search**.

If you want to share your list with others, you can also Export your list.

[Read more about exporting a List](#)

FAQs & Tips

I selected an option in a dropdown menu and now I can't change it.

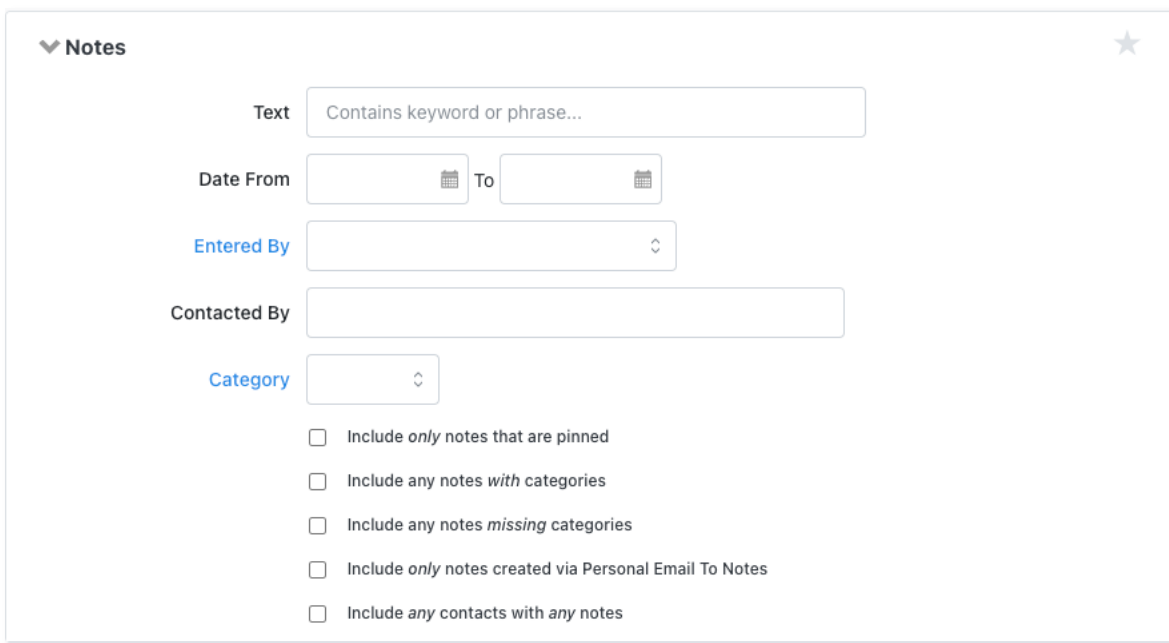
When this happens, select the blank box at the top. When you select the dropdown again, you should see all of the options appear again.

Do free-form text boxes search on my exact content or on similar content?

Free-form text boxes, or boxes where you can input unique text, will search on content *similar* to what is entered, not just an exact match for the content.

Can I use Pinned Notes as a criteria for searching?

Yes, in the Notes section you will find an option to **Include only notes that are pinned** so you can limit your search to records with a pinned note. If you are exporting a list and want to include a Pinned Note, it will only include the most recent one added to a particular contact.



The screenshot shows a search filter interface for 'Notes'. It includes several input fields and checkboxes:

- Text:** A text input field with the placeholder 'Contains keyword or phrase...'
- Date From:** A date input field with a calendar icon.
- To:** A date input field with a calendar icon.
- Entered By:** A dropdown menu.
- Contacted By:** A text input field.
- Category:** A dropdown menu.
- Checkboxes:**
 - Include *only* notes that are pinned
 - Include any notes *with* categories
 - Include any notes *missing* categories
 - Include *only* notes created via Personal Email To Notes
 - Include *any* contacts with *any* notes

Why do I get different results when I look at the same data in Create a List, Canvass Results and Counts & Crosstabs?

Create A List returns exclusively counts of people, regardless of how many times they've been canvassed or asked particular questions. So if a voter is asked three times whether they support a candidate and they say they support her three times, a search for that candidate's supporters will return that voter just once (whereas in **Canvass Results**, it would count the contact experience three times). Please note that for searching on **Survey Questions** using **most recent response** can yield different results.

Canvass Results returns counts of instances of people canvassing, intended to help manage the canvassing operation. The numbers will tend to be much larger than the numbers from **Create a List** because one or more canvassers may have asked the same voter the same question multiple

times. But we cannot arbitrarily roll any of those instances together without skewing the historical record. For example, if you are using the **Canvass Results** tool to compare a canvasser's performance (or team's performance, or perhaps the way the voters in a particular county answer questions) over time, then canvassing activity with the same voters must show up in week 14 as well as week 23. Sometimes our users expect that only instances of an interaction with a particular voter should show up. But then you would see an arbitrary erosion of people's past work over time. Instead, we assiduously keep all data locked into time and place here.

Like **Create a New List, Counts and Crosstabs** returns counts of people, but will differ from it for a couple of reasons:

- First, because **Counts & Crosstabs** is used for analytic purposes, we include various individuals in the totals who are suppressed in **Create a List**.
- Second, some people don't have relevant data, even for seemingly universal categories like sex or age. So if you use **Counts & Crosstabs** to get a breakdown of all ages, the total number will differ from all voters since there are always some voters for whom a date of birth is simply missing.

Can I add steps to my search after I've run my search?

Yes; from **My List > Edit Search**.