

Create a List

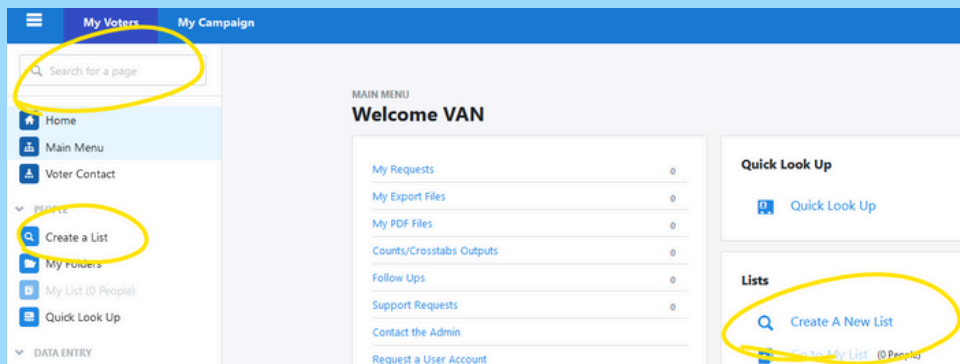
The Basics

What is the Create a List Function?

Creating a list in Votebuilder will allow you to segment and target specific groups of voters or contacts based on various criteria. This function is essential for organizing and executing different aspects of a campaign, including canvassing, phone banking, and direct mail campaigns.

Navigate

Click on "Create a List" from the menu on the left, on the dashboard, or search.



Build your list Criteria

- 1: Define the geographic area for your list. You can narrow this down by selecting state, county, city, or district.
- 2: Add demographic filters such as age, gender, and ethnicity.
- 3: Add voting history criteria, such as past election participation.
- 4: Include specific survey responses or voter issue interests.
- 5: Apply any additional criteria relevant to your campaign, such as party affiliation or volunteer status.

For some searches, you may want to add, subtract, or narrow different segments of the population. To do this, hit "Add Step" next to "Run Search".

Activist Codes

Purpose: **Track engagement and activities of supporters.**

Usage: Filter voters by their involvement in various activities (e.g., attended events, volunteered).

Example: Select supporters with specific activist codes like "Event Volunteer" or "Phone Banker."

Addresses

Purpose: Narrow down your list based on voter addresses.

Usage: **Filter by street, city, ZIP code, etc.**

Example: Target voters in a specific neighborhood or city.

Age • Registration Date

Purpose: Focus on voters based on **age** or **registration date**.

Usage: Set **age ranges** or select voters who **registered within a specific time frame**.

Example: Target young voters aged 18 to 24 or those who registered in the past year.

Canvass Status

Purpose: Identify voters based on their canvass status.

Usage: Filter by canvass results like "Not Home," "Refused," or "Support." **It is highly recommended that campaigns filter out negative canvass responses in their mobilization universes.**

Example: Create a list of voters who were not home during the last canvass.

Early Voting

Purpose: Focus on voters who participated in early voting.

Usage: Filter by early voting status.

Example: Create a list of voters who voted early so far.

Email

Purpose: Narrow down your list based on email addresses.

Usage: Filter by email presence or specific email addresses.

Example: Target voters with valid email addresses for an email campaign.

Home Districts

Purpose: Filter by voters' home legislative districts.

Usage: Select voters based on their assigned districts.

Example: Target voters in a specific congressional or state legislative district.

Household Party Counts

Purpose: Identify households with a specific party composition.

Usage: Filter households by the number of partyaffiliated members.

Example: Target households with a majority of registered Democrats.

Household Sex Counts

Purpose: Focus on households based on the gender of the voters there.

Usage: Filter by the number of men or women in a household.

Example: Target households with a higher number of women voters.

Likely Ethnic Subgroup

Purpose: Narrow down your list based on likely ethnic subgroups.

Usage: Filter by predicted ethnic subgroups.

Example: Target likely Hispanic or Asian voters.

Likely Ethnicity

Purpose: Focus on likely ethnic background.

Usage: Filter by likely ethnicity.

Example: Target likely African American or Caucasian voters.

Likely Religion

Purpose: Identify voters based on likely religious affiliation.

Usage: Filter by predicted religion.

Example: Target likely Christian or Muslim voters.

Party

Purpose: Focus on voters' party affiliation.

Usage: Filter by party registration.

Example: Target registered Democrats or Republicans.

Phones

Purpose: Narrow down your list based on phone numbers.

Usage: Filter by presence of phone numbers or specific phone data.

Example: Target voters with valid phone numbers for a phone banking campaign.

Scores

Purpose: Utilize predictive scores from the DNC.

Usage Filter by voter scores like turnout propensity.

Example: Target voters with a high likelihood of supporting your candidate.

Source File Sex

Purpose: Identify voters based on sex data from source files.

Usage Filter by sex data from voter registration files.

Example: Target men or women.

Suppressions

Purpose: Exclude specific voters from your list.

Usage Filter out voters marked for suppression.

Example: Exclude voters who requested no contact.

Survey Questions

Purpose: Focus on survey responses.

Usage Filter voters based on their answers to campaign surveys.

Example: Target voters who expressed support for key issues in surveys.

Voting History

Purpose: Focus on past voting behavior.

Usage Filter voters based on their history of voting in elections.

Example: Target voters who participated in the last two general elections.

Run Your Search

After setting all desired criteria, click 'Preview My Results' to see how large your search is

Click 'Run Search' once you have finalized your targeting.

The screenshot shows the 'Create A New Search' interface. A yellow circle highlights the 'OTHER SEARCH CRITERIA' section on the left, which includes 'Activist Codes', 'Addresses', 'Age - Registration Date', 'API Saved Lists', 'Applicant Status', and 'Canvass Status'. Another yellow circle highlights the 'Preview My Results' button. A third yellow circle highlights the 'Run Search' button. A fourth yellow circle highlights the 'Add Step' button. A yellow box highlights the 'Step 1: New Search' section on the right, which includes 'Voter Status' (Registered Active or Registered Inactive or Other), 'Suppressions' (exclude Deceased), and 'Include' (include Current or Previous Voting Address, include Current or Previous Mailing Address only, include Do Not Walk, include Do Not Call, include Do Not Text, include Do Not Email, include Do Not Mail).

Review and Refine Your List

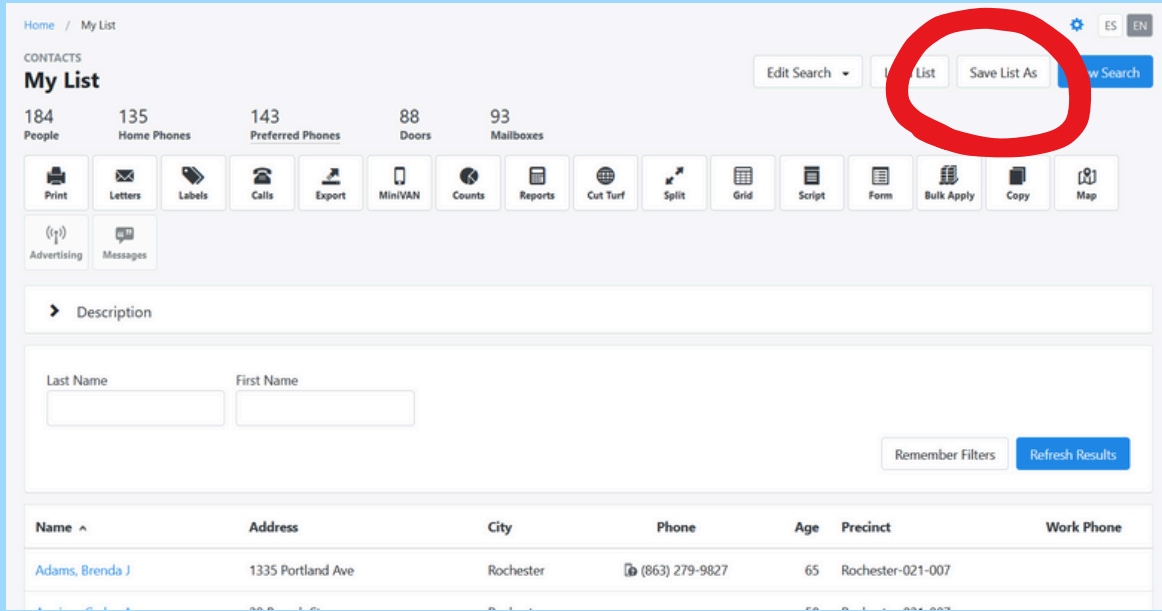
Review the results to ensure they meet your criteria. If necessary, refine your filters and run the search again.

The screenshot shows the 'My List' interface. At the top, there are buttons for 'Edit Search', 'Load List', 'Save List As', and 'New Search'. Below these are statistics: 184 People, 135 Home Phones, 143 Preferred Phones, 88 Doors, and 93 Mailboxes. A toolbar contains icons for Print, Letters, Labels, Calls, Export, MiniVAN, Counts, Reports, Cut Turf, Split, Grid, Script, Form, Bulk Apply, Copy, and Map. Below the toolbar is a 'Description' section with fields for 'Last Name' and 'First Name'. At the bottom, there is a table with columns: Name, Address, City, Phone, Age, Precinct, and Work Phone. The first row shows: Adams, Brenda J, 1335 Portland Ave, Rochester, (863) 279-9827, 65, Rochester-021-007.

Name	Address	City	Phone	Age	Precinct	Work Phone
Adams, Brenda J	1335 Portland Ave	Rochester	(863) 279-9827	65	Rochester-021-007	

Save Your List

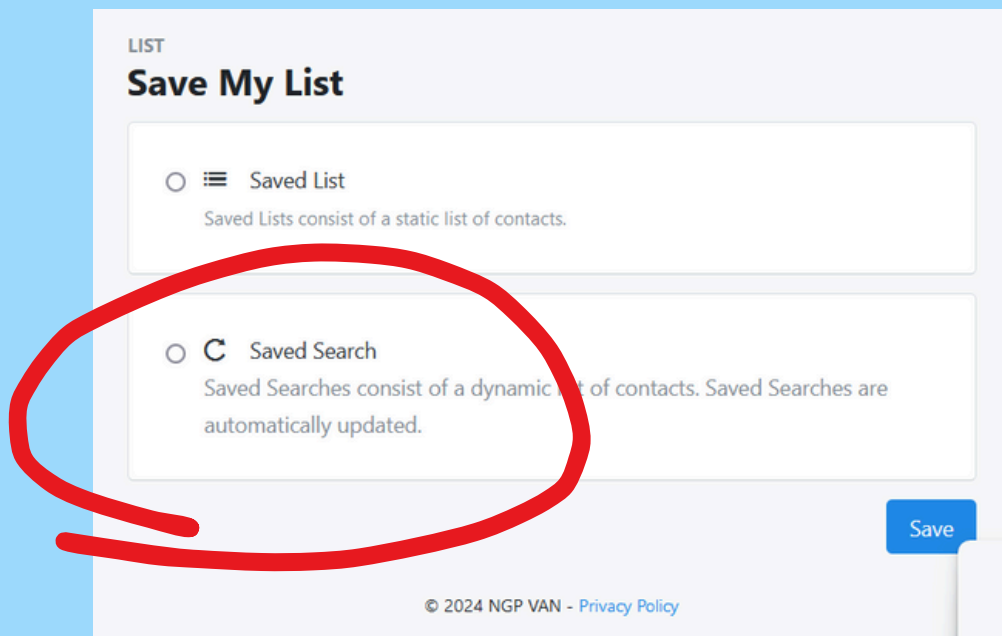
Once satisfied with the results, click 'Save List As'.



The screenshot shows the 'My List' interface. At the top, there are buttons for 'Edit Search', 'Save List As' (circled in red), and 'New Search'. Below these are statistics for 'People' (184), 'Home Phones' (135), 'Preferred Phones' (143), 'Doors' (88), and 'Mailboxes' (93). A row of icons for various actions like Print, Letters, Labels, Calls, Export, MiniVAN, Counts, Reports, Cut Turf, Split, Grid, Script, Form, Bulk Apply, Copy, and Map is visible. Below the icons is a 'Description' section with input fields for 'Last Name' and 'First Name'. At the bottom, there is a table with columns: Name, Address, City, Phone, Age, Precinct, and Work Phone. The first row of data shows 'Adams, Brenda J' with address '1335 Portland Ave', city 'Rochester', phone '(863) 279-9827', age '65', and precinct 'Rochester-021-007'.

Saved Search

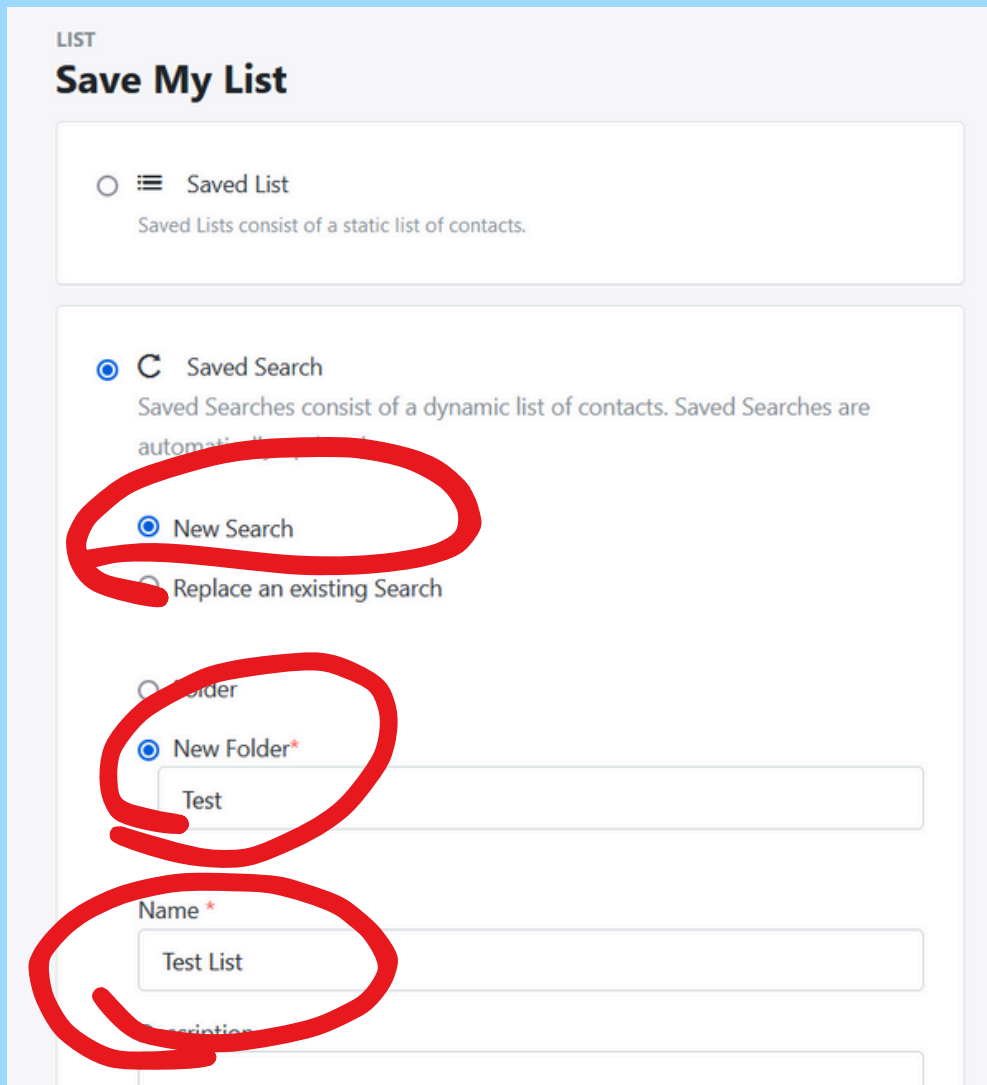
Select Saved Search, which will save the specific steps of the search you created.



The screenshot shows the 'Save My List' dialog. It has two radio button options: 'Saved List' and 'Saved Search'. The 'Saved Search' option is circled in red. Below each option is a description: 'Saved Lists consist of a static list of contacts.' and 'Saved Searches consist of a dynamic list of contacts. Saved Searches are automatically updated.' A 'Save' button is at the bottom right. At the very bottom, there is a copyright notice: '© 2024 NGP VAN - Privacy Policy'.

Labeling

Create a folder with a name that reflects the search, and then name the list. You can then access this search in MyFolders.



LIST

Save My List

☐ Saved List
Saved Lists consist of a static list of contacts.

☒ Saved Search
Saved Searches consist of a dynamic list of contacts. Saved Searches are automatically updated.

☒ New Search

☐ Replace an existing Search

☐ Folder

☒ New Folder*

Test

Name *

Test List

Description

Your list is now ready for use in various campaign activities such as phone banking, canvassing, or mailing programs.