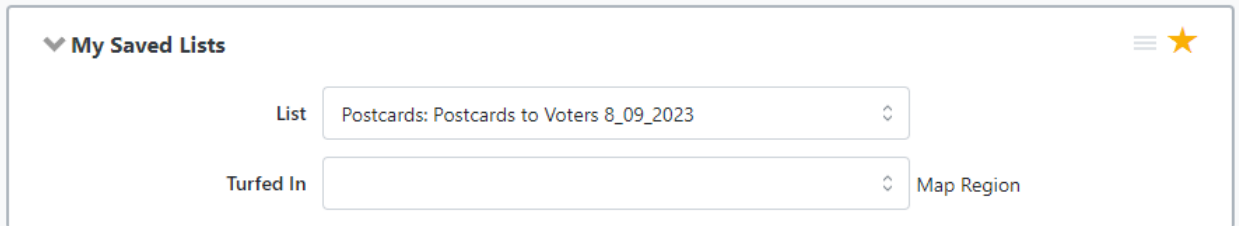# Lists:
Excluding a previous List

The situation here is you want to make a new list but exclude people from a previous list you've made. This uses an example of making postcard lists in batches of 500 addresses. You will need to make the first batch of 500 addresses and save it. Then exclude that list when making the second batch so you don't duplicate sending to them.

Saved Lists

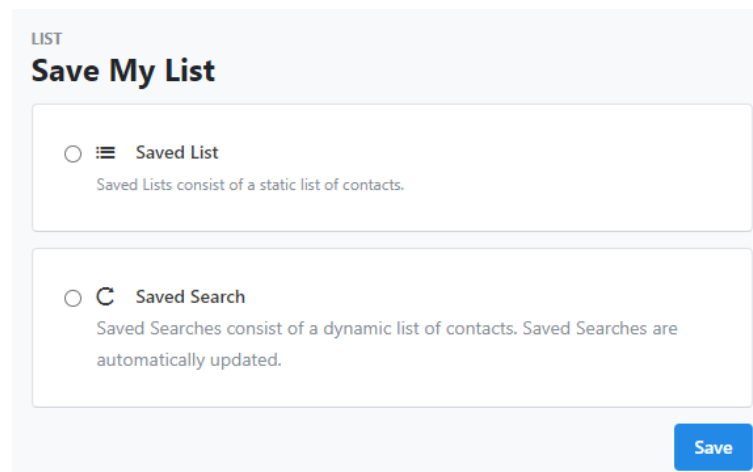In the *Edit Search* page, there is a section *My Saved Lists*

This section allows you to add/exclude voters from a previous list.

When used in a *Remove People* step, this will exclude anyone from the previous list.

When used in a *Add People* step, this will narrow the list to only people on the previous list

Search vs List

To do this, you need to save each batch off as a fixed *List* of voters that doesn't change with voter updates, rather than a *Search*, which will get updated each time you run it. List will be used to save a fixed copy of a mail or postcard list that you previously mailed to.

Process:

1. Create the *Search* criteria used for each batch of postcards
2. Create the first batch and save it as a fixed *List*.
3. Create the second batch adding a *Remove People* step and the *My Saved List* to exclude the first batch.

Step 1: Create the search criteria

This purpose of this step is to save the *Search* criteria you use for making each postcard batch. This way you are using the same search criteria for each batch, and then removing previous batches

1. See the instructions for **Create a New List**

Lists

Q Create A New List

🔲 Go to My List (87,474 People)

📁 View My Folders
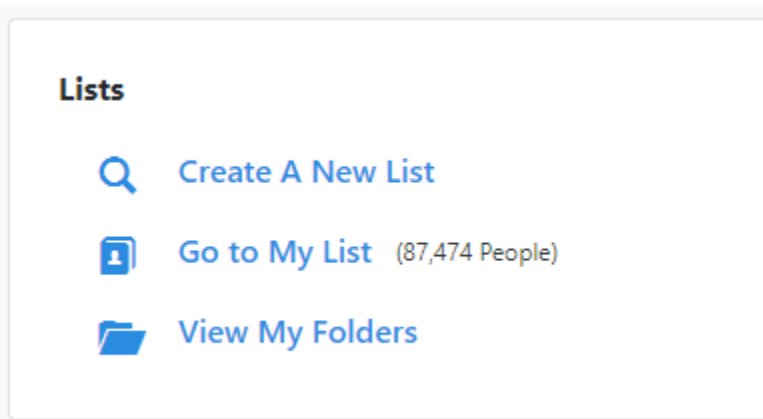
2. Save the criteria as a *Search* to reuse it for creating each batch.

Step 2: Create the first batch

3. Open the saved *Search* to get the voters you want to target.
4. Use **Edit Search** to narrow your list down.
5. Click **Add Step**
6. Select one of the *Narrow* steps to reduce you list to 500 people

SemDems
SEMINOLE COUNTY DEMOCRATIC PARTY

- **+** Add People
- **−** Remove People
- **▼** Narrow People
- **⚅** Narrow by Sample
- **▦** Narrow by Scores
- **♠** Householding

+ Add Step

Step 4: | Narrow by Scores ⇕ | **(Reduce results to a set of people, based on Score)**

⌄ Scores

Desired List Size | 500

Based on Score | 2022: FDP Dem Support Score ⇕

Keep People With | ● Highest Scores
                   ○ Lowest Scores

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7. Once you get the desired list click : **Save List As**

Edit Search ▾ | Load List | **Save List As** | New Search

8. Select **Saved List** to save it as a static list

LIST

Save My List

⦿ ☰ Saved List

Saved Lists consist of a static list of contacts.

⦿ New List

◯ Replace an old List

⦿ Folder*

Postcards 24 Cycle

◯ New Folder

Name*

Your Postcard List 04_22_23

Description

a. Select New List
b. Select the Folder to save it to
c. Give it a name, for a fixed list include the Date in the name to indicate when it was created
d. Click **Save**.

Main Menu / My List

CONTACTS

My List

252	208	200	202
People	Home Phones	Doors	Mailboxes

Print	Letters	Labels	Calls	Export	MiniVAN	Counts

Map	Advertising	SMS

Name ^	Address	City	Phone	Age	Precinct
Agsak, Tugce	1621 Katie Cv	Sanford	(321) 945-9804	38	002
Ahmad, Faisal	7416 Bella Foresta Pl	Sanford	(407) 878-2018	50	002
Amiri, Shahzad Naz	5700 Red Anchor Cv	Sanford	(703) 971-6361	21	002

9. After saving the list, it will return to the list view. You can print or export the list from here.
10. Click on the Print icon.

Print
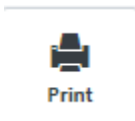
Step 3: Create the second batch

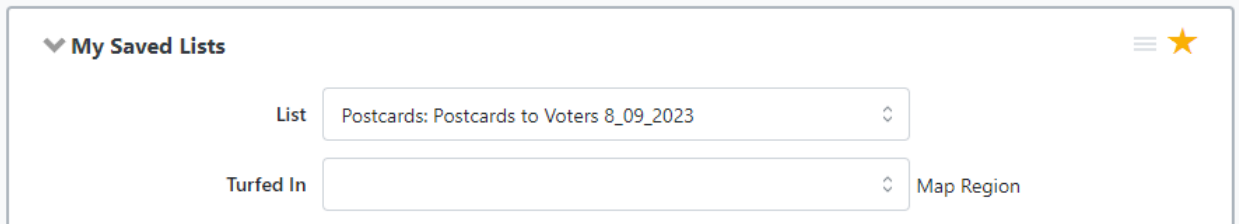This will follow the same steps as creating the first batch, but add a step for removing the first batch.

1. Open the saved *Search* to get the voters you want to target.

Removing people from a Saved List

2. Click **Edit Search** to edit the list.

3.

4. Click **Add Step** and select *Remove People* to remove the first postcard list
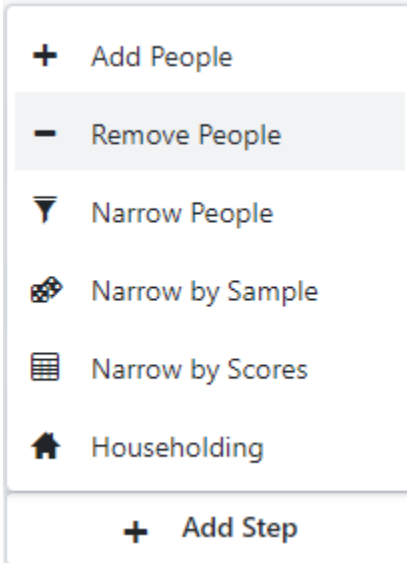
5. Look for the section *My Saved Lists*

6. In the *List* pulldown, find the saved list from the first postcard batch to exclude.
   a. The List pulldown will include all static *Lists* by folder.
   b. When added with the *Remove Step*, this will exclude anyone from the previous list