

What

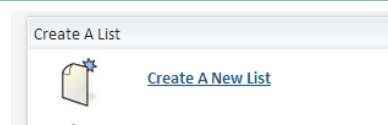
The 'Create a List' tool enables you to put together a list of voters on any criteria that you want. You can filter by all data held on individuals, like demographics, voting intention or postal votes.

Why

Creating a list is the starting point for a number of tasks, like printing canvass cards, printing letters or setting up a Virtual Phone Bank. Whenever you want to do something with a selection of voters, you'll need to put them in a list first.

Where

The 'Create a List' tool is accessed from Main Menu screen. Just click on 'Create a New List' in the centre column.



Creating a list

When you open the Create a List screen, you will see displayed a number of grey sections each with a name on the top.

You can expand any section by clicking on the '+' symbol on the left hand end. When expanded, you can they collapse it again using the '-' symbol.

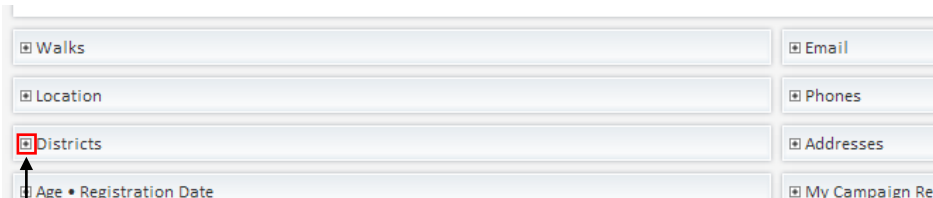
Collapsing the section doesn't lose any entries you make - it just hides them to make it easier to work around the screen.

Selecting a district

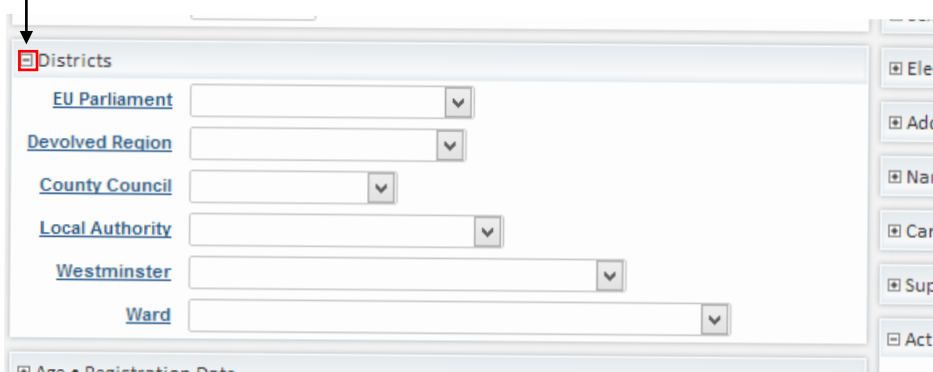
The districts section will display all the types of district you have in your area.

You will definitely see EU Parliament, Westminster, Local Authority and Ward. You will only see County Council or Devolved Region if you have these in your area.

Use the drop down menus to select an individual district of any type. You will only see districts listed that you have



Click on the '+' sign to expand the section. Once it is open, it will turn in to a '-' sign that will then hide the section if clicked.



access to in Connect.

Narrowing your choices

Once you have selected a district, the other drop down menus will change to reflect your choice.

For example, you may have two different Local Authorities in your constituency. Once you have selected one of them, the Ward drop down menu will contain only the wards in the selected Local Authority.

Extra Choices

Some of the District drop downs will cause additional drop down menus to be displayed:

- Selecting a Local Authority will enable you to select by Polling District
- Selecting a County Council will enable you to select by County Electoral Division
- Selecting a Devolved Region will enable you to select by Devolved Constituency.

Selecting Questions

To create a list of people based on answers to questions you have asked them, first expand the 'Questions' section.

You can then select your chosen question from the drop down menu. You can choose from national questions, your own local questions or master questions.

Connect will then load all the possible answers to this question. Select all the answers that you would like to include.

You can also select any associated data if you wish to further narrow your results, e.g. specify a date range or contact type.

At the bottom of the section there is a tick box to 'Include most recent response only'. This is most useful for canvassing questions, where a voter might have given multiple different responses.

Questions

Question 2014 Party: Past Party ID (Eng) ▼

Responses ☐ Lib Dem ☐ Conservative ☐ Labour ☐ UKIP ☐ Green ☐ Not Lib Dem ☐ Did not vote

Input Type ▼ Contact Type ▼

Canvassed By

Entered By ▼

Canvassed From To

Date Entered From To

Party Organisation ▼

☐ Include most recent response only

Origin

Tags

Tags

Tag Job: Self-employed (Public) ▼

My Saved Lists

List ☐ Job: Scientist / Engineer (Public) ☐ Job: Self-employed (Public) ☐ Job: Shift Worker (Public) ☐ Job: SME (Public)

Turfed In Region

Selecting Tags

To search by Tags, simply expand the Tag section and select the one you want.

Once you have selected your Tag, the section will expand to allow you to restrict your search by date, data entry type etc.

Making Multiple Selections

Four of the data sections on the 'Create a New List' screen - Districts, Questions, Tags and Origins - allow multiple selections.

You can see where this is possible because the label of the drop down

menu will be a blue underlined link. Clicking on this link will open a multiple selection screen. Simply select all your options and click

'Save'. You will then be returned to the main 'Create a new List' screen where you can make the rest of your selections.

Click the link here, then make your selections on the page that opens

Tags

Tag Job: Self-employed (Public) ▼

My Saved Lists

List ☐ Job: Scientist / Engineer (Public) ☐ Job: Self-employed (Public) ☐ Job: Shift Worker (Public) ☐ Job: SME (Public)

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Suppressions

There are some people who you will want to exclude from your lists based on their contact options. For example, if you are going to use our list to print letters, you will need to exclude everyone marked as 'Do Not Mail'.

The Suppressions section is on the right hand side of the Create a List screen. There are four drop down menus for exclusions.

The first is for deceased residents, and is set as exclude by default.

Those for Do Not Doorstep, Do Not Phone and Do Not Mail are set to include by default. Simply change the drop down menu for whichever set you wish to exclude.

You can review who you have marked as 'Do Not Mail' etc at any time, by making a list using the 'Do Not Mail Only' option'.

Make My List

When you have entered all your search criteria, simply hit the 'search button' found at the top right of

the page to create your list.

Connect will then load the 'My List' screen and display your search results.

Save My List

In Connect, you can only ever have one list open at any time.

To avoid repeating work, you can save your lists in to folders.

On the My List screen, simply click on the 'Save As' button.

You can save your list as either a fixed list of people, or a set of

search criteria.

For more details, see Quick Sheet 3.4 - Saving & Folders.

Keep on learning - these Quick Sheets will build on what you have learnt here:

3.2 - Building complex lists

Use the Add People, Remove People and Narrow People tools to build up more complicated lists of voters.

3.3 My List Screen

Learn how to use the My List Screen to do useful things with your lists of voters.

4.1 Canvass Cards

Use the list you have created to produce canvass cards.

4.2 Letters

Use the list you have created to print target letters.

Watch training videos at Member.LibDems.org.uk/Skills
Get support on Facebook - search for Connect Users