

## What is it?

The Save My List function allows you to save a search or search results in a folder so that you can access or modify them in the future without having to rebuild your search steps from scratch.



## When to use it?

Once you've created a list, you may want to save it for future use. Examples are:

- A large list that people will be using in smaller chunks over a long period of time.
- A baseline search that you'll want to modify and adapt for different purposes.
- A search you use to track progress (e.g. number of people contacted) by your organization.



## How to use it?

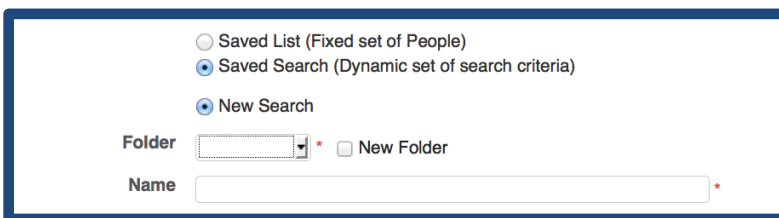
To save your list, click 'Save As' from the top of the My List page and a series of options will appear. First, decide whether to save your list as fixed or dynamic. The difference is simple:

- Saving as a fixed list saves the current set of people in your My List.
- Saving as a dynamic search means every time you open the search, it re-runs the set of search criteria you have saved, capturing any changes or updates that have occurred since the last time the search was run. For example, if your Saved Search excludes people contacted in the last week, the Saved Search results would change each time a new contact is recorded for a person.

Once you've decided which option best suits your situation, name your list or search, and save it in a folder. You can save it as a new list or search, or replace a previously saved list or search.

You can also save it in a new folder, or into an existing folder. To create a new folder, check the 'New Folder' option, then name your Folder and

name your list and click Save. For an existing folder, choose the desired folder from the drop down menu, then name the list, and click Save.



Once you've saved a list or search, you can find it anytime by going to My Folders, choosing the correct folder, and clicking on your list. See the printing lists video and the sharing folders video for information on how to print or share your lists with others.



## Expert Tips:

- Save My List as a search when you want to update your list each time you load it from My Folders. Save My List as a list when the contents will remain static. Also, saved lists can be used as search criteria when creating a list, to remove, add, or narrow My List by the records in the Saved List.
- To share lists and searches with members of your organization, save them to a folder and then give them access to that folder.
- Be aware that updates to your vote file can affect the content of your saved lists and searches. For example, if a voter is removed from the database, he will be removed from your saved lists/searches.