

# **Crash Course in Google Sheets & NGP**

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**Date: August 8, 2018**

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Google Sheets



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## Concatenate Function

**Use:** Append two strings to each other. Most often used when creating a mail name column when given a first and last name column.

### Step by Step:

**Step 1:** Identify the two columns to be added together

| First    | Last    |
|----------|---------|
| ERNEST   | ADAMS   |
| ISABEL   | BACON   |
| JUDITH   | BARNETT |
| JEREMY   | BASH    |
| RUTH     | BELL    |
| ANTONY   | BLINKEN |
| LAWRENCE | BUC     |

**Example:**

**Step 2:** Merging these cells to create a mail name: A) Create a new column B) In the first row of the new Column use the Concatenate Function

**Step 3:** Exact Syntax and results - Note: the Syntax must be exactly as shown (including desired quotes) **Syntax** =Concatenate(String 1, String 2): In the example below B2 is String 1; and C2 is String 2 while the area in quotes is what creates the spacing and the prefix.

=CONCATENATE("Mr. ", B2, " ", C2)

**Step 4:** Results **Mr. ERNEST ADAMS** - Verify that the Mr/Ms. Is the appropriate prefix then drag the bottom right corner of the cell down the column to apply the formula to each row

### Final Product:

|                    |          |         |
|--------------------|----------|---------|
| Mr. ERNEST ADAMS   | ERNEST   | ADAMS   |
| Ms. ISABEL BACON   | ISABEL   | BACON   |
| Ms. JUDITH BARNETT | JUDITH   | BARNETT |
| Mr. JEREMY BASH    | JEREMY   | BASH    |
| Ms. RUTH BELL      | RUTH     | BELL    |
| Mr. ANTONY BLINKEN | ANTONY   | BLINKEN |
| Mr. LAWRENCE BUC   | LAWRENCE | BUC     |

## SumIf Function

**Use:** The SumIf function is useful when calculating the total dollar amount of donations giving a certain criteria (like political party). The function identifies if the values are equal to a certain criteria, then takes the sum of those values.

### Step By Step:

**Step 1: Identify the range & criteria** where you want to find the sum of a given column:

Example, let's say there is a list of democratic and republican donations and we want to find the sum of the democratic donations.

| Name   | Party | Amount  |
|--------|-------|---------|
| Maddie | Dem   | \$1,000 |
| Tina   | Dem   | \$250   |
| Karen  | Dem   | \$1,700 |
| Lucas  | Rep   | \$2,000 |
| David  | Dem   | \$42    |
| Nolan  | Rep   | \$7,000 |

**Step 2:** In the next row of the "Amount" column, use the SumIf Function to find the total amount of donations to Democrats. The functions takes a given range, in this case "Party", and takes the sum **ONLY IF** the value in the "Party" column is equal to "Dem". The second range is the values that will be summed.

```
=SUMIF(B2:B7, "Dem", C2:C7)
```

**Step 3: Verify the result** for a small set of data to ensure that the formula is working properly - the final answer will look as follows- The sum of all the donations to Democrats is \$2,992

### Final Product

| Name   | Party     | Amount  |
|--------|-----------|---------|
| Maddie | Dem       | \$1,000 |
| Tina   | Dem       | \$250   |
| Karen  | Dem       | \$1,700 |
| Lucas  | Rep       | \$2,000 |
| David  | Dem       | \$42    |
| Nolan  | Rep       | \$7,000 |
|        | Total Dem | \$2,992 |

### If(CountIf( )) Function:

**Use:** The If CountIf function is used to determine if there are duplicate values between two columns and is often used when determining which donors have already been called.

**Step 1:** Set up the columns so the name format is the same: Meaning, **if there is a first name and last name column make them all one column to prevent possible errors.** In this list we want to find which prospects have been called, and which have not been called.

| A                | B                 | C                    |  |
|------------------|-------------------|----------------------|--|
| Prospects        | Already Called    | Called or Not Called |  |
| Maddie Cahill    | John Darman       |                      |  |
| Tina Stoll       | Annie Lowrey      |                      |  |
| Karen Darkes     | Abe Lincoln       |                      |  |
| Lucas Lytel      | George Washington |                      |  |
| David Rubenstein | Tina Stoll        |                      |  |
| Nolan Bush       | David Rubenstein  |                      |  |
| Jake Rubenstein  | Mac Miller        |                      |  |
| Amanda Marks     | LeBron James      |                      |  |
| Andrew Cyphers   | Lucas Lytel       |                      |  |
| Ashley Martins   | Donald Trump      |                      |  |
| Michael Dwyer    | Teddy Marks       |                      |  |
| Teddy Marks      | Mike Sellers      |                      |  |
| Alexander Bac    | James Smith       |                      |  |
| Joe Biden        | Jamie Houton      |                      |  |
| Barack Obama     | Bob Brown         |                      |  |
|                  | Mary Small        |                      |  |
|                  | Patrick Dead      |                      |  |
|                  | Alexander Bac     |                      |  |

**Step 2:** In column C use the “If(CountIF())” function as follows where the first range is the names that have already been called and the second is the name to be checked against. The “**Called**” is when the function returns “true” and the “**Not Called**” is when the function returns “false”

```
=If(CountIf(B:B, A2), "Called", "Not Called")
```

**Step 3:** The “Command F” feature can be used to verify the results of the function

**Final Product:** This function successfully shows that Teddy Marks, Alexander Bac, Tina Stoll, David Rubenstein, and Lucas Lytel are names that have all been previously called and can be deleted.

| A                | B                | C                    |  |
|------------------|------------------|----------------------|--|
| Prospects        | Already Called   | Called or Not Called |  |
| Maddie Cahill    | John Darman      | Not Called           |  |
| Tina Stoll       | Annie Lowrey     | Called               |  |
| Karen Darkes     | Abe Lincoln      | Not Called           |  |
| Lucas Lytel      | George Washing   | Called               |  |
| David Rubenstein | Tina Stoll       | Called               |  |
| Nolan Bush       | David Rubenstein | Not Called           |  |
| Jake Rubenstein  | Mac Miller       | Not Called           |  |
| Amanda Marks     | LeBron James     | Not Called           |  |
| Andrew Cyphers   | Lucas Lytel      | Not Called           |  |
| Ashley Martins   | Donald Trump     | Not Called           |  |
| Michael Dwyer    | Teddy Marks      | Not Called           |  |
| Teddy Marks      | Mike Sellers     | Called               |  |
| Alexander Bac    | James Smith      | Called               |  |
| Joe Biden        | Jamie Houton     | Not Called           |  |
| Barack Obama     | Bob Brown        | Not Called           |  |
|                  | Mary Small       | Not Called           |  |
|                  | Patrick Dead     | Not Called           |  |
|                  | Alexander Bac    | Not Called           |  |

## Split Function

**Use:** The Split function is used to split a column into two or more unique columns given a criteria

**Step 1:** Identify what column needs to be split. Often it will be a column of last, first names taken from Political Money Line

**Step 2:** Use the Split function to split the last, first column into a first and a last column like so with the **A2:A16** being the range of data and the “,” being the criteria to split around

```
=SPLIT(A2:A16, ", ")
```

**Notes:** The criteria for the split is “,” there is a space after the “,” to prevent a space at the start of each last name

| A                  | B            | C           |
|--------------------|--------------|-------------|
| <b>Last, First</b> | <b>First</b> | <b>Last</b> |
| Cahill, Maddie     |              |             |
| Stoll, Tina        |              |             |
| Darkes, Karen      |              |             |
| Lytel, Lucas       |              |             |
| Rubenstein, David  |              |             |
| Bush, Nolan        |              |             |
| Rubenstein, Jake   |              |             |
| Marks, Amanda      |              |             |
| Cyphers, Andrew    |              |             |
| Martins, Ashley    |              |             |
| Dwyer, Michael     |              |             |
| Marks, Teddy       |              |             |
| Bac, Alexander     |              |             |
| Biden, Joe         |              |             |
| Obama, Barack      |              |             |

## Final Product

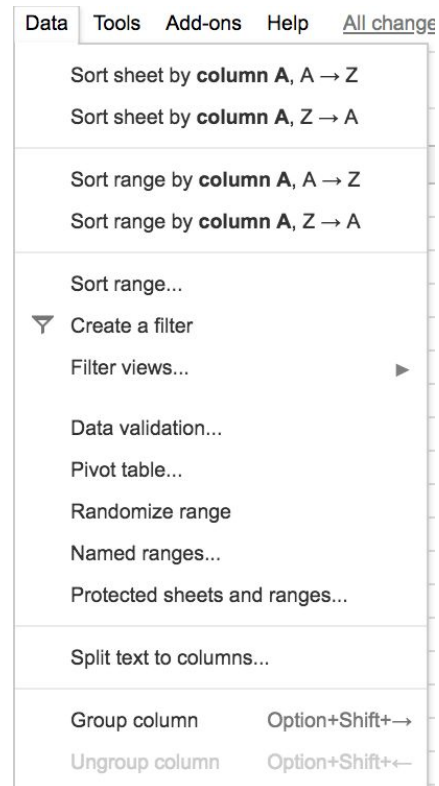
| A                  | B            | C           |
|--------------------|--------------|-------------|
| <b>Last, First</b> | <b>First</b> | <b>Last</b> |
| Cahill, Maddie     | Cahill       | Maddie      |
| Stoll, Tina        | Stoll        | Tina        |
| Darkes, Karen      | Darkes       | Karen       |
| Lytel, Lucas       | Lytel        | Lucas       |
| Rubenstein, David  | Rubenstein   | David       |
| Bush, Nolan        | Bush         | Nolan       |
| Rubenstein, Jake   | Rubenstein   | Jake        |
| Marks, Amanda      | Marks        | Amanda      |
| Cyphers, Andrew    | Cyphers      | Andrew      |
| Martins, Ashley    | Martins      | Ashley      |
| Dwyer, Michael     | Dwyer        | Michael     |
| Marks, Teddy       | Marks        | Teddy       |
| Bac, Alexander     | Bac          | Alexander   |
| Biden, Joe         | Biden        | Joe         |



**Alternative for splitting** - Most of the time, a faster way to split up data like this is to use the build in **split text to columns** function located under the **data** tab

**Step 1:** Identify the range of data needed to be split up

| A                 | B     | C    |
|-------------------|-------|------|
| Last, First       | First | Last |
| Cahill, Maddie    |       |      |
| Stoll, Tina       |       |      |
| Darkes, Karen     |       |      |
| Lytel, Lucas      |       |      |
| Rubenstein, David |       |      |
| Bush, Nolan       |       |      |
| Rubenstein, Jake  |       |      |
| Marks, Amanda     |       |      |
| Cyphers, Andrew   |       |      |
| Martins, Ashley   |       |      |
| Dwyer, Michael    |       |      |
| Marks, Teddy      |       |      |
| Bac, Alexander    |       |      |
| Biden, Joe        |       |      |
| Obama, Barack     |       |      |



**Step 2:** Select the range of data to be split up. Then, follow the menu to the **Split text to columns**

**Final Product:** Note: this way to split data will delete the original column of data which results in...

| A          | B         |
|------------|-----------|
| Last       | First     |
| Cahill     | Maddie    |
| Stoll      | Tina      |
| Darkes     | Karen     |
| Lytel      | Lucas     |
| Rubenstein | David     |
| Bush       | Nolan     |
| Rubenstein | Jake      |
| Marks      | Amanda    |
| Cyphers    | Andrew    |
| Martins    | Ashley    |
| Dwyer      | Michael   |
| Marks      | Teddy     |
| Bac        | Alexander |
| Biden      | Joe       |
| Obama      | Barack    |



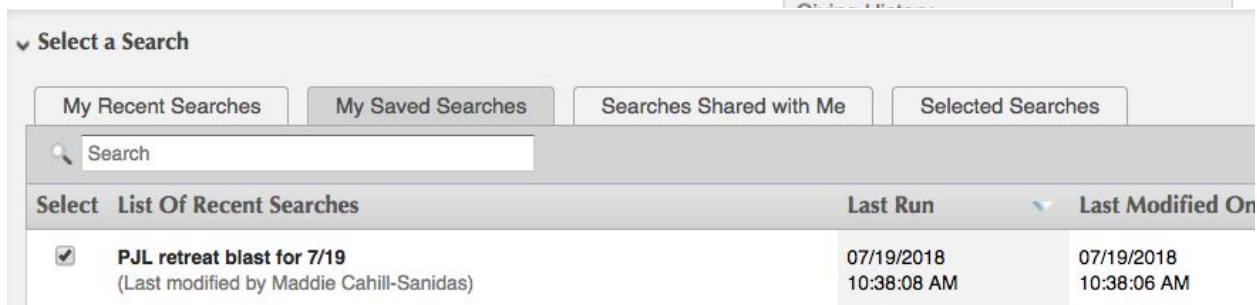
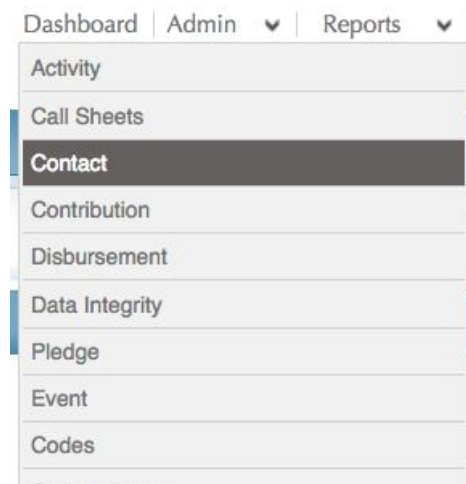
## How to download contacts in NGP as an .xls or .xlsx file

**Use:** There are **two methods** for downloading contacts from NGP in an .xls or .csv format. This is useful when transferring contacts between NGP's. **Either method works.**

**Method 1:** The first method is the **Contact Report**

**Step 1:** Find **Reports** → **Contacts**

**Step 2:** **Define the report parameters:** Meaning decide **which contacts the report will use**. This can either be from a saved search or done with the given menus.



**Step 3:** After selecting the group for the report: **Select the fields to display or remove:** These are the fields that will eventually be included in the .xls or .csv download.

▼ Select Fields to Display in Report

| Available Fields  | Search fields | Add all | 20 Fields Selected   | Remove all |
|-------------------|---------------|---------|----------------------|------------|
| Primary Country   |               | +       | Contact Type         | —          |
| Home Address      |               | +       | Contact ID           | —          |
| Main Address      |               | +       | Contact Name         | —          |
| Abroad Address    |               | +       | Mail Name            | —          |
| Military Address  |               | +       | Salutation           | —          |
| School Address    |               | +       | Primary Address Type | —          |
| Vacation Address  |               | +       | Primary Address 1    | —          |
| Work Address      |               | +       | Primary Address 2    | —          |
| Billing Address   |               | +       | Primary Address 3    | —          |
| Assistant Address |               | +       | Primary City         | —          |
| Other Address     |               | +       | Primary State        | —          |

**Step 4:** Click **Export & Download** and the data located in the **Notifications Tab** in the bottom left.

**Save Report**
[Modify Report](#)

Export large result set: **Export**

A column can be re-ordered by dragging and dropping it into a new location.

**Notifications**

**Contact Report Export**

Requested on: 8/7/2018 2:16:25 PM

**Download**

**Tasks (0 Due)**
**Notifications (1)**

## Method 2: Export Contacts for Mailing -

This is another method to export contacts as an .xls or .csv sheet

**Step 1:** Search for the contacts that will be exported

**Step 2:** Under the heading **Take Bulk Action** click **Export Contacts for Mailing**: **DO NOT CHANGE THE household results or additional follow-up for mailing actions**

**Bulk Action**

**Take an Action on the Current Results**

Choose to edit, export or link the existing list.

- ☒ Select One
- Add Call Logs
- Export All Contacts for Mailing**
- Find Duplicates
- Update Codes
- Update Email Lists
- Update Employers/Occupations
- Update Event Activity
- Update Mail Names and Salutations
- Update Marks

**Step 3:** Select which **additional information to include** in export: These are drop down menus where selections about data can be made: Click **Run Export**

**Additional information to include in export**

|                  |                |
|------------------|----------------|
| Addresses:       | Select options |
| Phone numbers:   | Select options |
| Email addresses: | Select options |

**Step 4: Download** the export from the notifications bar

## How to do a Merge with Excel and NGP

**Use:** Taking a large excel spreadsheet and upload it to the voter profile software NGP

**Step 1: Download & Clean Up** the chosen excel sheet in order to match the types on NGP:  
Notice how the names of the **First Row** are exactly the same names of the fields in NGP

| A                       | B        | C          | D                                      | E                       | F          | G     |
|-------------------------|----------|------------|--|-------------------------|------------|-------|
| Mail Name               | First    | Last       | Employer                               | Occupation              | City       | State |
| Mr. Teal Baker          | Teal     | Baker      | Invariant Llc                          | Chief Operating Officer | Washington | DC    |
| Ms. Kim Bayliss         | Kim      | Bayliss    | Dutko Grayling Consultant              | Consultant              | Washington | DC    |
| Mr. David Block         | David    | Block      | Self-employed                          | Child Psychiatrist      | Washington | DC    |
| Mr. Nicholas Boyle      | Nicholas | Boyle      | Williams And Connolly Llp              | Attorney                | Washington | DC    |
| Mr. Michael Collins     | Michael  | Collins    | Mehlman Castagnetti Rosen Thomas       | Lobbyist                | Washington | DC    |
| Mr. John Devaney        | John     | Devaney    | Perkins Coie                           | Attorney                | Washington | DC    |
| Mr. Otho Eskin          | Otho     | Eskin      | N/a Retired                            | N/A                     | Washington | DC    |
| Ms. Olivia Golden       | Olivia   | Golden     | Clasp                                  | Executive Director      | Washington | DC    |
| Mr. Jeffrey Hayes       | Jeffrey  | Hayes      | Self-employed                          | Consultant              | Washington | DC    |
| Mr. Harold Ickes        | Harold   | Ickes      | Ickes & Enright Group                  | Partner                 | Washington | DC    |
| Mr. Eugene Ludwig       | Eugene   | Ludwig     | Promontory Financial Group Llc         | Managing Partner        | Washington | DC    |
| Mr. Joseph Onek         | Joseph   | Onek       | Raben Group Principal                  | Principal               | Washington | DC    |
| Mr. Arnold Polinger     | Arnold   | Polinger   | Pollinger Shannon & Luchs Real Estate  | Owner                   | Washington | DC    |
| Mr. Steven Ross         | Steven   | Ross       | Akin, Gump, Strauss, Hauer & Feld, Llp | Partner                 | Washington | DC    |
| Ms. Isabel Sawhill      | Isabel   | Sawhill    | Brookings Inst                         | Economist               | Washington | DC    |
| Ms. Patricia Stonesifer | Patricia | Stonesifer | Marthas Table                          | CEO                     | Washington | DC    |
| Mr. Henry Terhune       | Henry    | Terhune    | Akin Gump                              | Attorney                | Washington | DC    |
| Ms. Natalie Wexler      | Natalie  | Wexler     | Self-employed                          | Writer                  | Washington | DC    |
| Mr. Frank White         | Frank    | White      | DuSable Capital                        | Management              | Washington | DC    |

**Note:** Donor histories and bios can be added in a **Notes & Bio's** columns

**Step 2:** In NGP under the **Contacts** → **Import Contacts** tab;

| Contacts                | Fundraising            | Engagement                      | Events |
|-------------------------|------------------------|---------------------------------|--------|
| <b>Add Contacts</b>     | <b>Search Contacts</b> | <b>Manage Contacts</b>          |        |
| Create a Contact        | View All Contacts      | Merge Duplicate Contacts        |        |
| Create With Quick Entry | Create Search          | <a href="#">Import Contacts</a> |        |
|                         | Quick Find             | Contact Reports                 |        |
|                         | View Marked Contacts   |                                 |        |
|                         | Manage Searches        |                                 |        |

**Step 2:** After clicking on **Import Contacts** this is the screen that comes up

**Dashboard** **Import Wizard** History

## Start An Import Job

### Select Import Type

Your import file can only include one type of contact at a time. Please select the type below.

☒ **Individuals**

☐ **Organizations**

☐ **Saved Mapping or Template**  
When using a saved mapping or template, the uploaded file must contain all the same columns.

### What Does Your File Include?

Importing transactions requires a two-step process: the first maps contact info and the second maps transactions.

☒ **Contact Information Only**

☐ **Contacts with Contributions**

☐ **Contacts with Giving History**

**Continue**

**Note:** It is also possible to import contacts with prior giving histories if they are included columns. By Default: Don't change anything

**Step 3:** Upload & Name:

## Step 1: Upload File and Name Import

### Import Type

Contact Information Only

### Upload Import File

Maximum file size is 10MB. Contact customer support for files that exceed the limit.

Supported file types are: Excel and comma delimited TXT or CSV.

Cells containing multiple values should be separated with a pipe ("|"). Examples: Blue | Green | Red.

Select a File:

**Upload a file**

☒ **Yes, my file contains a Header Row?**

We recommend that your file contains a header naming convention such as Col1, Col2, Co

### Name Import

Name your import to track contacts that were added or updated from this import.

**Import Name:**  Maximum of 50 characters.

**Step 4:** Map the fields to the desired NGP fields: **Mapped fields appear Green** - Once mapped **press continue**: It is also possible to save mapping to eliminate the need to change the spreadsheet header.

Suffix: \*\* no match \*\*

Salutation: Salutation

Mail Name: Mail Name

Employer: Employer

Occupation: Occupation

Note: Notes

Bio: Bio

**Note:** It is possible to import contact codes or **create new contact codes** with each import. There must be either a **primary/disclosure** address, email, or phone number

[ Total Number of Import Fields Mapped: 10 of 24 ]

Continue

Save

or Cancel

**Step 5: Run a Pre-import check:** There is a field with four main options:

- 1) Update duplicate records with priority for data **already existing** in NGP
- 2) Update duplicate records with priority given to **data in the .xls**
- 3) Do not import duplicate records
- 4) Create new records regardless of duplicates - **ALMOST NEVER PICK THIS OPTION** as it results in tons of duplicates being created

### Step 3: Duplicate Merge Option

How do you want us to handle your data when duplicate records are found?

If your file contains a contact ID or external ID then we will always use it to find exact matches. This is the most reliable way to find existing contacts and updating their info find matches.

If duplicates are found, do you want your existing data to take priority or the data from your import file?

- ☒ **Update duplicate records**  
(Recommended)
  - ☒ **Only update database values that are blank; if a field has a value, do not replace with imported data.**  
(Existing data from the database takes precedence.)
  - ☐ **Update all existing values with imported data; regardless if it has a value or is blank.**  
(Data from your import takes priority.)
- ☐ **Do not import duplicate records**  
When a duplicate is found, we will not import the row. The row will be included in an exception file for you to export. After reviewing, you can import the exception file.
- ☐ **Create new records; regardless if there are duplicate records found.**  
This will create a new record for all your imported data. Use this option sparingly as it ignores any duplicate matching. Thus, it may create a lot of extra records.

Run Pre-Import Check

Save

or Cancel



**Step 6:** After the pre-import check. Review the contacts update or created and look for any exceptions (contacts that could not be imported). **Download the .zip for the exceptions then open the .txt file** and look for the error message. Finally press **import now**

## Step 4: Pre-Import Checklist Review

### Review before finalizing your import

If the following is correct, click "Import Now" or click "Cancel" to disc fields.

Total Number of Rows in the Import File: **39**

**0** Duplicate contacts found in the import file.

**32** New contacts will be created

**7** Existing contacts will be updated

**0** Exceptions (Rows that cannot be imported.)

**Import Now**

or [Cancel](#)


**Final Product:** Under the **History** tab you can see the **total contacts** in the import by clicking on the blue number



Click on Import Name link to view import results. The original ir

### History Of Imports

Date Imported ▼ Import Name

| Contacts Created | Contacts Modified | Total Contacts | Original File   |
|------------------|-------------------|----------------|---|
| <u>4</u>         | <u>67</u>         | <u>71</u>      |  |



**Concept:** NGP uses what is called a **Dynamic Search Feature**, meaning that the **criteria** of any given search is saved not the **results**. The implications of this are that, for example, by changing the contact code for a contact, they will be subsequently removed from the search. NGP can also support **multi-step searches** meaning that it will search for one criteria **AND THEN** the other criteria. Searches on NGP can also be **saved**, meaning that the criteria for the search will be saved if needed again. This can be useful if there is a saved search for all the marked contacts because it speeds up the creation of call sheets.

**Example:** I have a list of prospective donors in NGP from DC and had a contact code **dead end & good donor**. Everytime I find a donor that does not meet the requirements for Leahy I can add dead end to their file and visa versa. Therefore, I can do a search for all DC donors to Leahy and then as second step remove all the people with the contact code dead end.

### Step by Step

**Step 1: Find** what you want to search for: In the example we will use it will be Ellen Lipton Prospective Donors

#### Ellen Lipton Prospect List

15 results from 40180 total contacts.

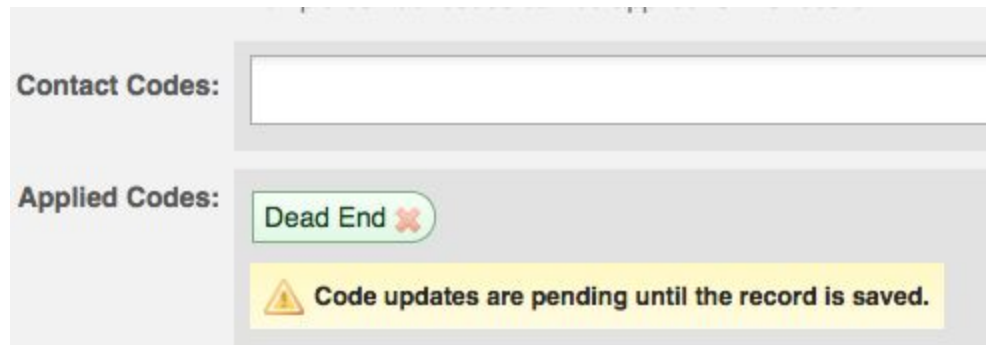
|                                   |                  |   |
|-----------------------------------|------------------|---|
| <b>Step: Filter Results (AND)</b> |                  | <a href="#">Edit</a> <a href="#">Delete</a> |
| <b>Step Details</b>               |                  |   |
| <b>Contact Codes</b>              | EllenLiptonDonor |   |

|                                   |          |   |
|-----------------------------------|----------|---|
| <b>Step: Remove Results (NOT)</b> |          | <a href="#">Edit</a> <a href="#">Delete</a> |
| <b>Step Details</b>               |          |   |
| <b>Contact Codes</b>              | Dead End |   |

**Explanation:** Here this is a **multi-step search** where the first step is find any contact with the contact code “EllenLiptonDonor” and the second step is to remove contacts the contact code Dead End. These criteria can be edited in the **edit** tab.

**Step 2:** When going through the contacts if one is found that is not a good prospect add the contact code **dead end**



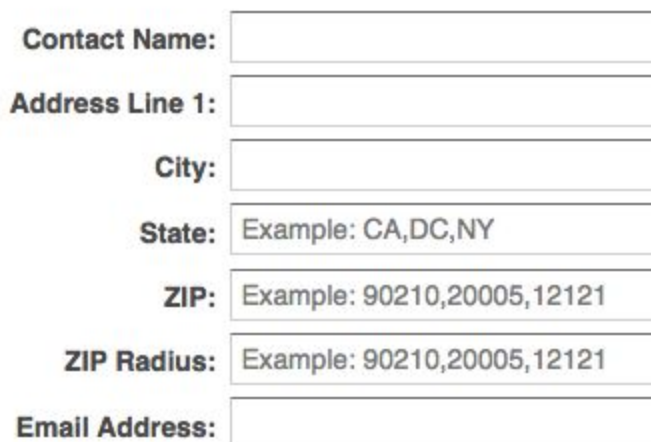
The screenshot shows a web interface for applying codes to contacts. It has two main sections: 'Contact Codes:' with an empty text input field, and 'Applied Codes:' which contains a green button labeled 'Dead End' with a red 'X' icon. Below this is a yellow warning box with a triangle icon and the text 'Code updates are pending until the record is saved.'

**Step 3:** The result is the contact with the code “Dead End” will not longer show up in the search for Ellen Lipton Prospects

## Multi-step Searches

**Step 1: Select initial search criteria:** for example, anyone who lives a 5 mile radius of the zip code 20016

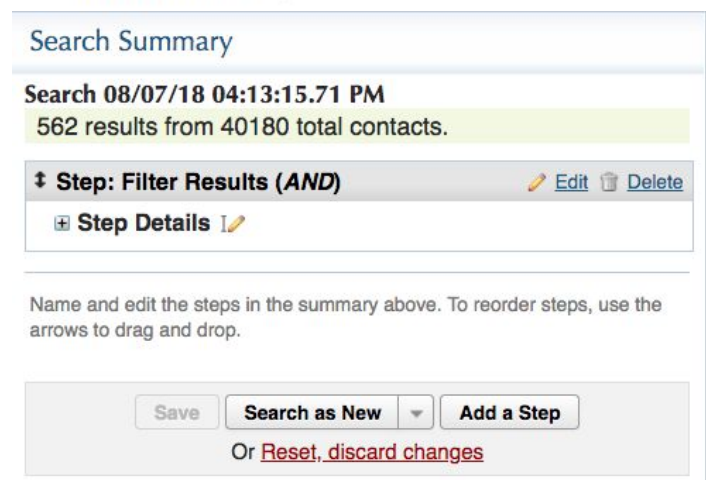
### 2. Then Select Your Search Criteria:



The screenshot shows a form for selecting search criteria. It includes the following fields: 'Contact Name:', 'Address Line 1:', 'City:', 'State:' (with an example 'CA,DC,NY'), 'ZIP:' (with an example '90210,20005,12121'), 'ZIP Radius:' (with an example '90210,20005,12121'), and 'Email Address:'.

*However, let's say that I want to filter out anyone who lives in Maryland but still maintain my original search. We must add a step that filters out anyone living Maryland*

**Step 2:** In the top right, press **Add a step** then filter either **and**, **or**, **not**: This decides whether to add two criteria DC **and** Maryland Donors only; add to my results DC **or** Maryland **or** Virginia; or remove DC **not** Maryland.



The screenshot shows the 'Search Summary' interface. It displays the search date and time: 'Search 08/07/18 04:13:15.71 PM' and the results: '562 results from 40180 total contacts.' Below this is a section for the current step: 'Step: Filter Results (AND)' with 'Edit' and 'Delete' icons. A 'Step Details' link is also present. At the bottom, there are buttons for 'Save', 'Search as New', and 'Add a Step', along with a link to 'Reset, discard changes'.

This will remove anyone from the last list who has a state listed as Maryland

### 1. Begin Refining Your Results by Selecting a Search Type:

☐ Filter Results (AND) ☐ Add to results (OR) ☒ Remove from Results (NOT)

### 2. Then Select Your Search Criteria:

|                 |                                 |
|-----------------|---------------------------------|
| Contact Name:   | <input type="text"/>            |
| Address Line 1: | <input type="text"/>            |
| City:           | <input type="text"/>            |
| State:          | <input type="text" value="MD"/> |

**Final Product:** Once again, we can view our search summary in the top right to verify that NGP has search all donors in the 20016 area but who **do not** live in Maryland.

## Search Summary

Search 08/07/18 04:13:15.71 PM

379 results from 40180 total contacts.

#### ⬆ Step: Filter Results (AND)

 [Edit](#)  [Delete](#)

##### [-] Step Details

ZIP Radius 20016,20375,20394,20393,20046,...

#### ⬆ Step: Remove Results (NOT)

 [Edit](#)  [Delete](#)

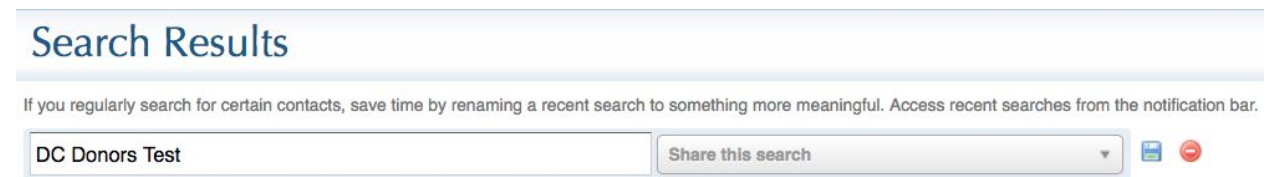
##### [-] Step Details

State MD

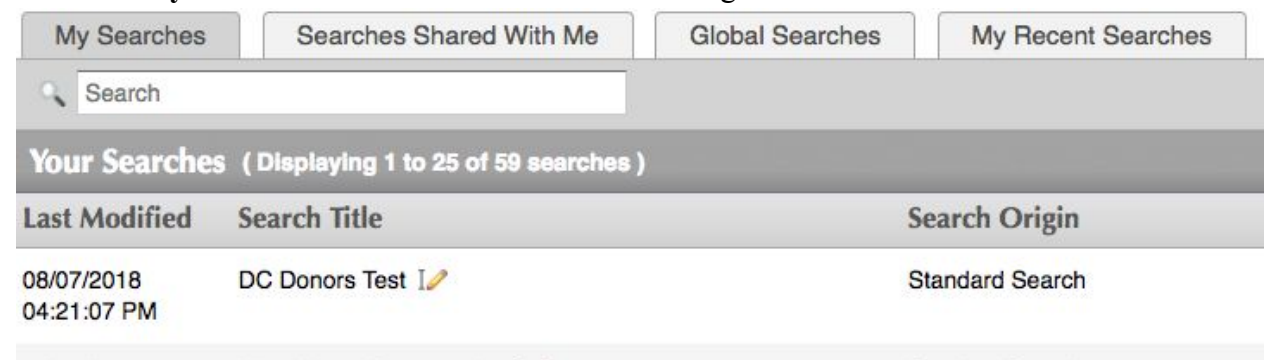
## How to Save a Search

**Use:** Saving a search and be extremely useful when we need to refer back to the search at a later time. Let's continue with the previous example. We just found the donors in the 20016 zip area but who do not live in Maryland. We want to save this search

**Step 1:** Saving a search is relatively simple. Click the little blue save icon next to the search name and **name** the search.



**Step 2:** In order to view the search again go to **Contacts** → **Manage Searches** the search will be under the **My Searches** tab with whatever name it was given.



**Step 3:** If we want to run the search or edit it press the options on the right side of screen

