



Welcome to ListBuilder.

To get started, find the
steps below to build your
universe.

Contents

GETTING STARTED

RUNNING COUNTS

FILTERS

DATA FIELDS AND DATA TABLE

ORDER UNIVERSES

ONBOARDING DESTINATIONS

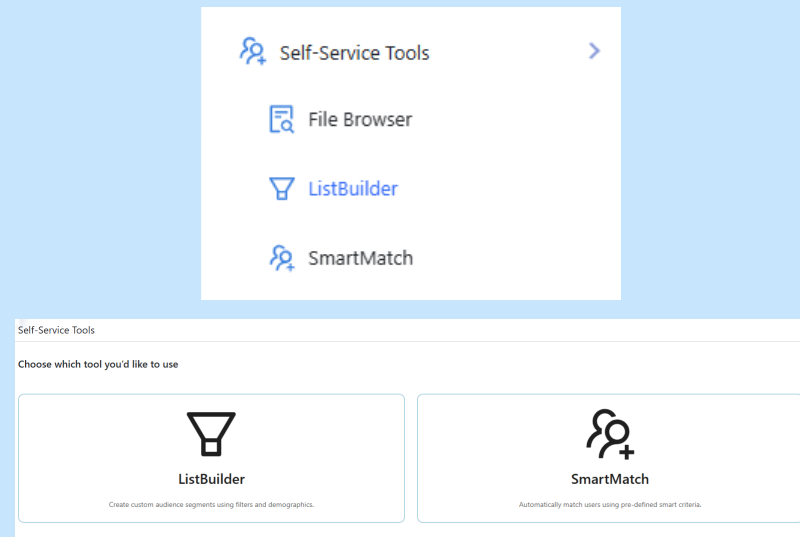
ASSISTANCE

First Things First

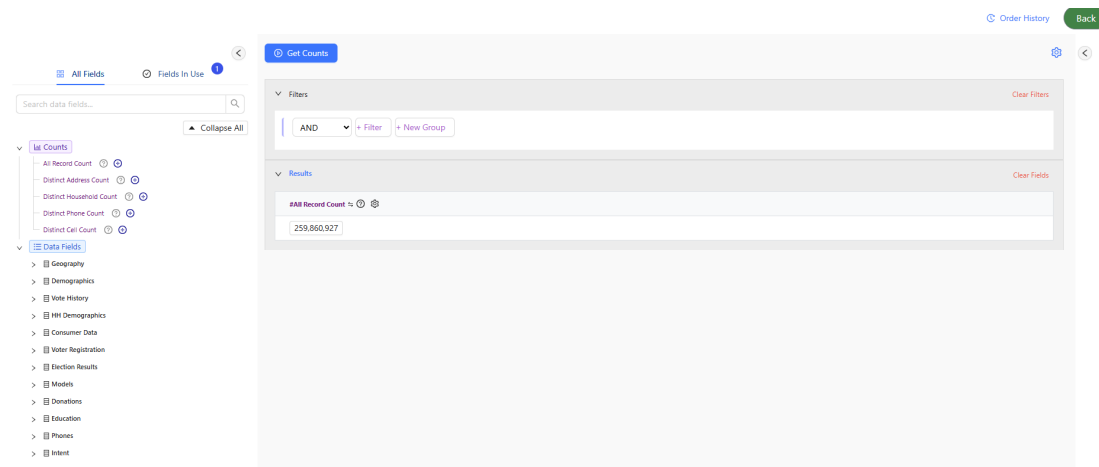
To log in to ListBuilder, go to <https://my.targetsmart.com>.

Once you have logged in, use the **Navigation Bar** on the left side to click **Self-Service Tools**. Then, select **ListBuilder** to build your custom universe.

Alternatively, you can click ListBuilder straight from the navigation menu.



Running Counts

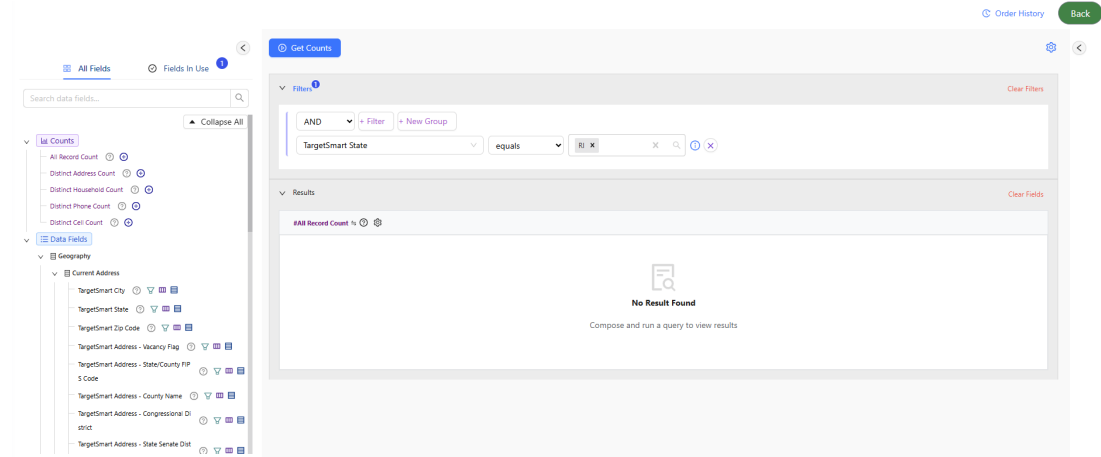


1. To run a count or order a List with ListBuilder, you must start by selecting a **Count**. A **Count** is what quantifies your universe. Under **Counts**, select the type of count which is whether you want all the All Record Count, or a Distinct Address, Household, Phone or Cell count. If you select the All Record Count, it will show the number of every individual record that meets your criteria.
2. Click the plus icon next to the count you want to add.
3. Click **Get Counts** once you have all the filters, rows, and columns you want selected.

Filters

			
Shows more info about the Data Field	Adds Data Field as a Filter	Adds Data Field as a Column	Adds Data Field as a Row

1. To make your data more targeted, you can add **Filters**. You can search through the **Data Fields**, or you can type in the search box what you're looking for to make it quicker.
2. For example, to filter the records based on a specific state, select **All Record Count**, then, select **Geography**. Next, select **Current Address**, and click the Filter icon next to **TargetSmart State**. Select a state(s) from the dropdown box.
3. Click **Get Counts** to see the new counts for the newly filtered data.



Data Fields and Data Table

The screenshot shows the ListBuilder interface. On the left is a sidebar with a search bar and a tree view of data fields. The tree view includes categories like Geography, Demographics, and Voting. Under Voting, there is a 'Voter Registration' section with various fields like 'VoterBase Voter Registration Status', 'Voter Status', 'Voter Registration Date', etc. The main panel shows a filter rule: 'TargetSmart State' equals 'RI'. Below the filter is a table with the following data:

	Registered	Unregistered
Geography/Current Address/TargetSmart Address - Congressional District	#All Record Count	#All Record Count
002	412,372	48,185
001	376,637	48,456
Not Available	6,134	3,759

1. To create a data table to create a custom count of how many registered and unregistered voters are in each Congressional District for a certain state, select **All Record Count**, next select **Geography**, then select **Current Address**, and click the Filter icon next to **TargetSmart State**.
2. Next, click **Voting**, then **Voter Registration**, then **VoterBase Voter Registration Status**, and select the Column icon next to it.

CONTINUED ►

3. The next step is to select **Geography**, then, select **Current Address**, scroll to **TargetSmart Address-Congressional District** and click the Row icon next to it.

4. To see which fields you have selected, click **Fields in Use** then you can remove your selections by clicking the gear icon next to the selection and choosing to remove it.

5. Click **Get Counts** to see the new counts for the newly filtered data.

6. You can choose to download this data table by clicking the gear icon on the top right and select **Download Count as CSV**.

You can select additional options for your download. Choose **Add Totals** to include column and row totals, and **Add Percentages** to include the column and row percentages. Then click **Download**.

The screenshot shows the ListBuilder interface. On the left sidebar, under 'Fields in Use', 'Geography/Current Address/TargetSmart State' is selected. The main area is titled 'Get Counts' and shows a filter for 'TargetSmart State' with a dropdown menu. Below the filter, there is a table of results. The table has columns for 'Registered' and 'Unregistered' counts. The data is as follows:

Geography/Current Address/TargetSmart Address - Congressional District	Registered	Unregistered
002	412,372	48,185
001	376,637	48,456
Not Available	6,134	3,759

The screenshot shows the 'Download CSV' dialog box. It asks 'Are you sure you want to download the current results as a CSV file?'. It includes 'Export Details' (Rows: 2, Dimensions: 1, Measures: 1, Pivot Dimensions: 1) and 'Additional Options' (Add Totals, Add Percentages). The 'Add Totals' and 'Add Percentages' options are currently unchecked.

Export Details:

- Rows: 2
- Dimensions: 1
- Measures: 1
- Pivot Dimensions: 1

Additional Options:

- ☐ Add Totals - Include column totals & row totals
- ☐ Add Percentages - Include Column % & Row %

Note: The CSV will include all current data with proper multi-level headers. Pivot dimensions will be included as separate header rows.

Buttons: Cancel, Download

CONTINUED ►

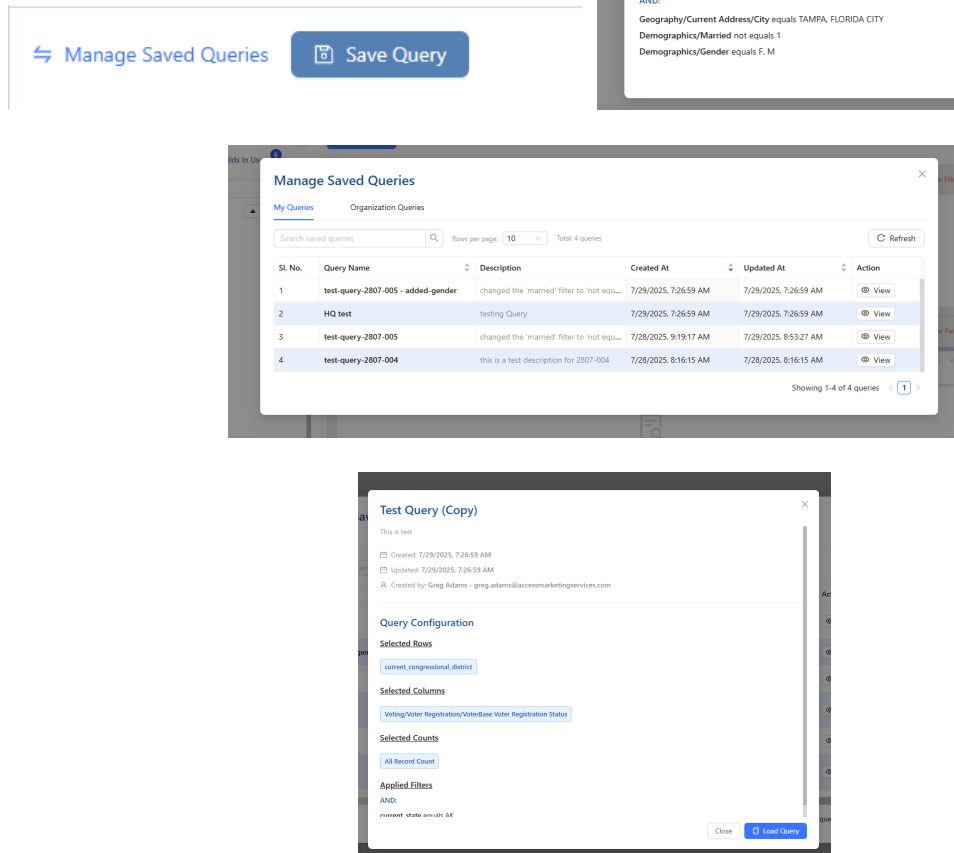
7. You can also choose to clear your results, by selecting **Remove Fields and Filters** from the gear icon on the top right.

8. If you would like to save the query to revisit, or have others in the Agency view it, click the button at the top left that says Save Query. Enter a name for the Query, and description if you like. Then click **Save Query**.

9. To pull saved queries, click the link that says **Manage Saved Queries**. The first tab shows Queries you have created, and the second tab that says **Organization Queries** shows all Queries for the Agency.

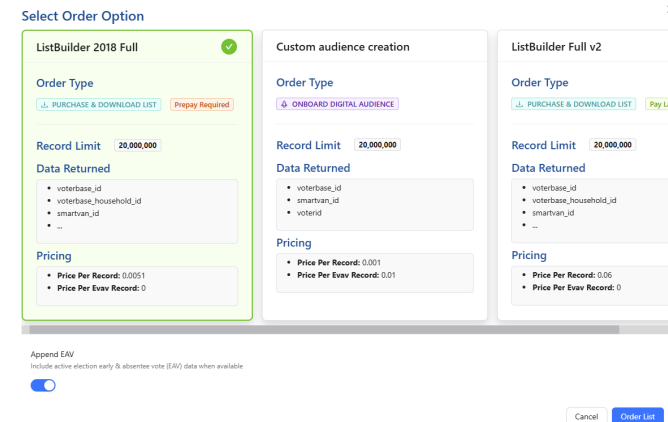
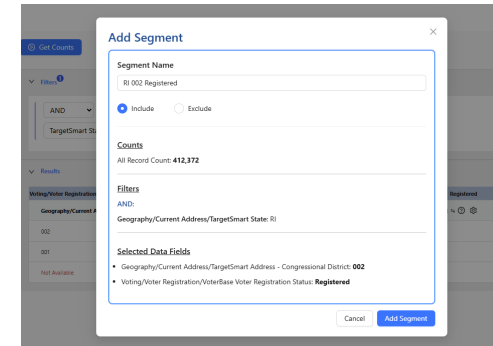
10. To edit a query you created, go to the query under **My Queries** and select click View, then **Edit Query**.

11. To see a query, click **View**. Then select **Load Query**. Then confirm by clicking “Yes, Load Query.”



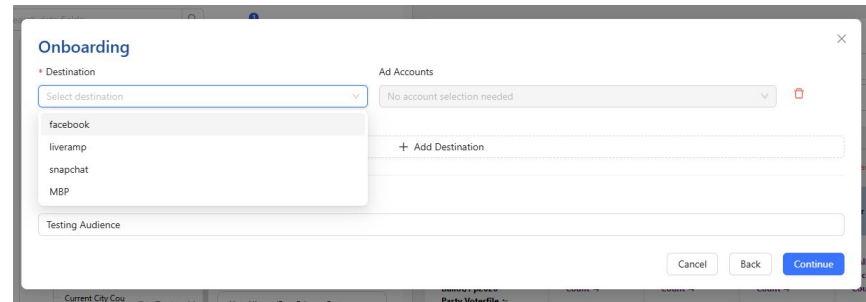
Ordering Universes

1. Once you have your universe built, you can choose which universe you want by clicking the number representing that universe from the table.
2. Click **Add Segment**.
3. When all your universes are selected that you want to order, click the button that says **Place Order** on the bottom right side of the screen.
4. Then, select the Order Option: Purchase and Download or Onboard Digital Universe.
5. For Purchase and Downloading, you have the option to toggle on the “**Append EAV**” button to include active election early and absentee vote (EAV) data when available.
6. Click **Order List**.



CONTINUED ►

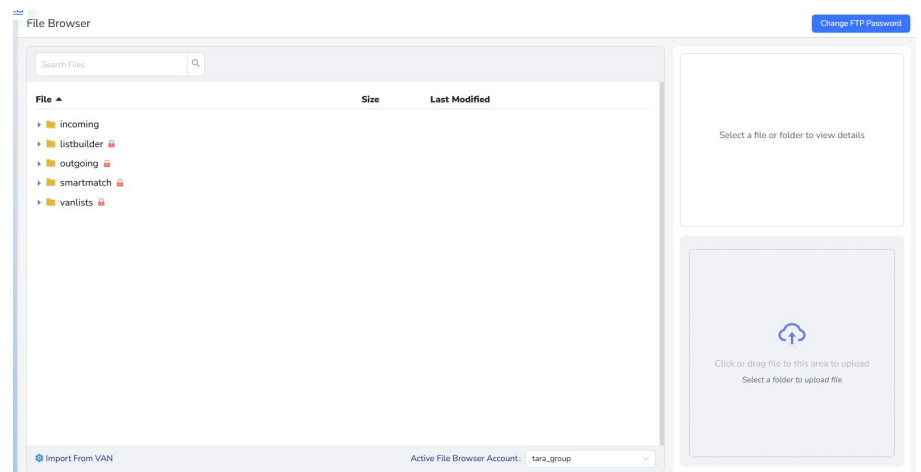
7. For Onboarding a Digital Universe, type in a **Universe Name**. Click **Add Destination**. Select the Digital Destination for your universe then select the Ad Account, or you can select MBP to onboard your universe straight into our Media Buying Platform and serve ads straight from there. Then, click **Continue**.



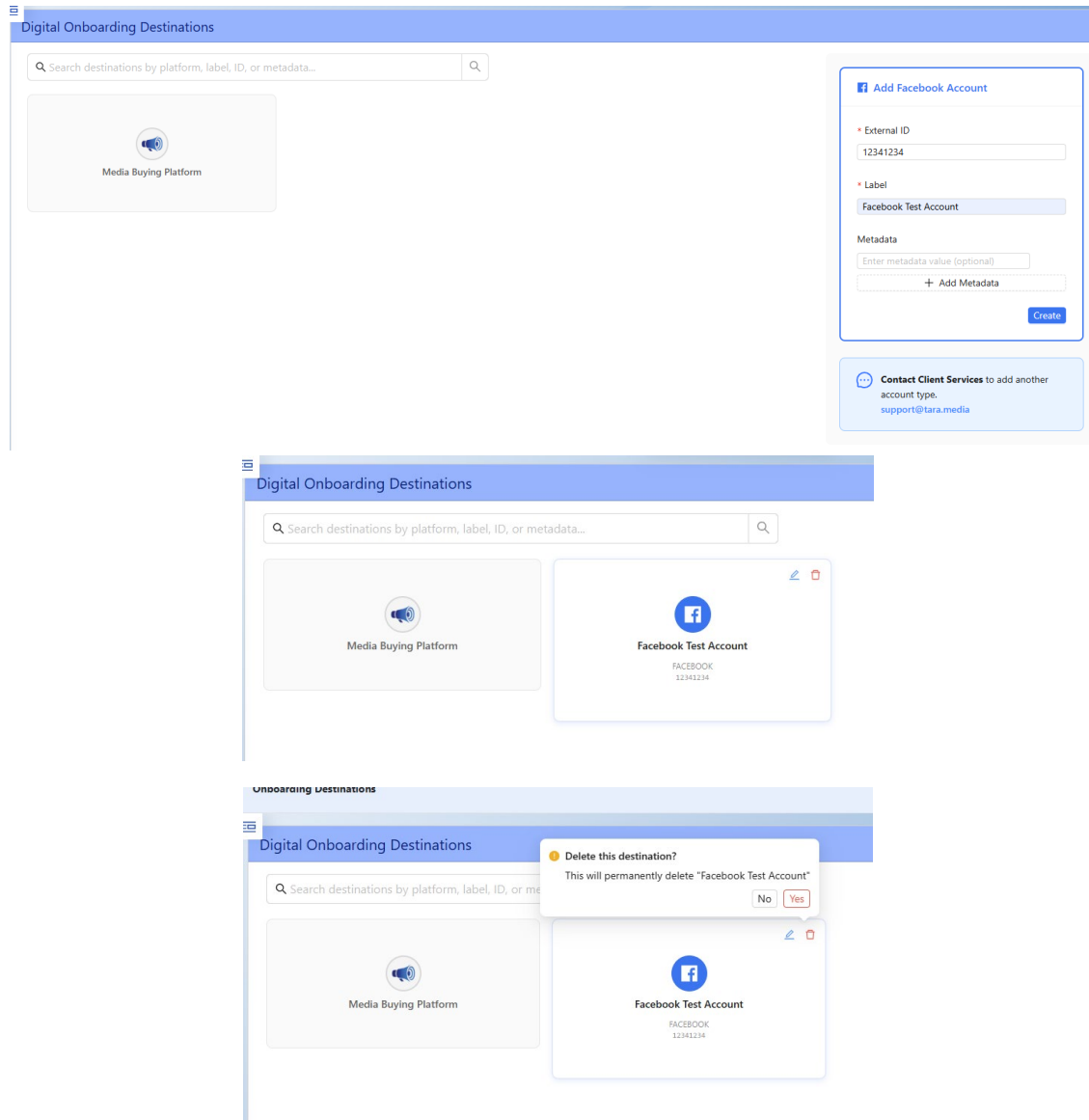
8. Review your order, and fill out the credit card form if needed, to complete your transaction.

9. You will receive an email notification when your order is processing and another email when your order is complete.

10. If you chose an order option for download, you can download the universe from a link in the notification email or you can navigate to **Audience** and select **File Browser**. Then you will see a folder that says **ListBuilder**. That will have your universe as well to download. The file will expire after 30 days so we recommend downloading and saving it on your internal servers as soon as possible. For more information on navigating the File Browser, visit the File Browser Guide located under Resources in the left menu.



Onboarding Destinations



1. On the left menu, select **Onboarding Destinations**.
2. To **add a Facebook account**, type in the External ID for the Facebook Account.
3. Enter a Descriptive **Label**.
4. Add **Metadata Values** (optional).
5. Click **Create**.
6. To **delete destination**, select the red trash can icon, and confirm deletion.
7. If you have another Account type as a destination you would like to add, contact support@targetsmart.com.

Assistance

If you have any questions or would like a demo, please contact your TargetSmart Account Manager or email

support@targetsmart.com.