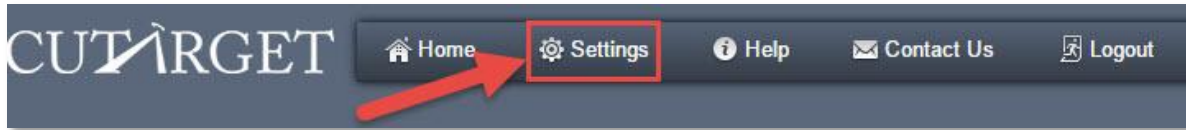


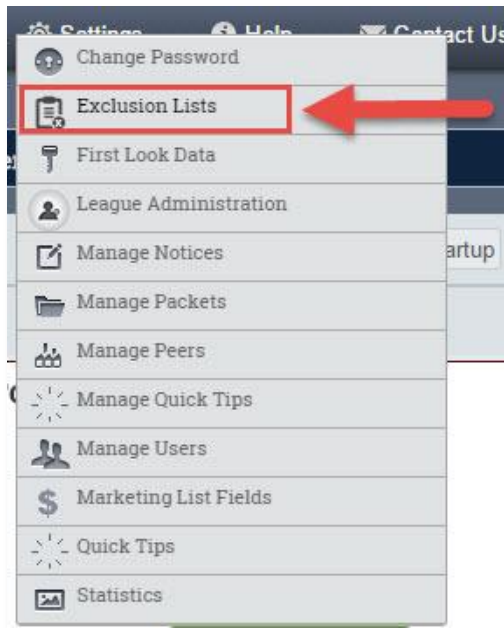
HOW-TO CREATE AN EXCLUSION LIST: 6 STEPS TO BUILD AN EXCLUSION LIST

Creating an exclusion list allows you to compile a group of credit unions that you may not want to include in a given marketing list.

Step 1: Hover over **Settings** near the top of the screen.



Step 2: In the drop down menu that appears, click on **Exclusion Lists** (second option).



Step 3: Locate the Exclusion Lists text box in the upper left corner of the pop up. Click on **-add new list-**.



HOW-TO CREATE AN EXCLUSION LIST: 6 STEPS TO BUILD AN EXCLUSION LIST

Step 4: Use the **State** drop down to filter by state. Select the credit union(s) you want to exclude from your marketing list

- Use the blue arrows to move them to the right hand list. Excluded credit unions will appear in the right hand list titled **Excluded credit unions**.

The screenshot shows the 'Exclusion Lists' window with the following components:

- Exclusion lists:** A list of existing lists (Arkansas list, CO List, Yellowstone) and an option to add a new list.
- State:** A dropdown menu currently set to 'FL'.
- All credit unions (not already excluded):** A table listing various credit unions in Florida.
- Excluded credit unions (10):** A table listing credit unions that have been moved to the exclusion list.
- Navigation:** Blue arrows between the two tables allow moving items back and forth.
- Save:** A button at the bottom to save the current list.

St	Name
FL	121 Financial
FL	1st Credit Union of Gainesville
FL	Achieva
FL	Alive
FL	Anchor Seven
FL	Bay
FL	Buckeye Community
FL	Campus USA
FL	Central Credit Union Of Florida
FL	Central Florida Postal
FL	City & Police
FL	City County
FL	City-county Employees
FL	Clay Electric Employees
FL	Coastline
FL	Community
FL	Community First Credit Union of Florida
FL	Community South

St	Name
AZ	APC Employees
AZ	Coconino
AZ	Desert Schools
AZ	U-Haul
FL	Baptist Health South Florida
FL	Calhoun-Liberty Employees
FL	CFE
FL	Broward Healthcare
FL	Electricians' Local 349
FL	BrightStar

Credit Unions in the exclusion list

HOW-TO CREATE AN EXCLUSION LIST: 6 STEPS TO BUILD AN EXCLUSION LIST

Step 5: Give the exclusion list a name in the **List name** text field.

The screenshot shows the 'Exclusion Lists' window. On the left, there is a list of existing exclusion lists: Arkansas list, CO List, Yellowstone, and an option to '+add new list-'. Below this is a 'State' dropdown menu set to 'FL'. The main area is divided into two columns. The left column, titled 'All credit unions (not already excluded)', contains a table with columns 'St' and 'Name'. The right column, titled 'Excluded credit unions (10)', contains a table with columns 'St' and 'Name'. A red box highlights the 'List name' text field at the top right, which contains the text 'Test Exclusion List - How-To Doc'. A red arrow points to this field.

St	Name
FL	121 Financial
FL	1st Credit Union of Gainesville
FL	Achieva
FL	Alive
FL	Anchor Seven
FL	Bay
FL	Buckeye Community
FL	Campus USA
FL	Central Credit Union Of Florida
FL	Central Florida Postal
FL	City & Police
FL	City County

St	Name
AZ	APC Employees
AZ	Coconino
AZ	Desert Schools
AZ	U-Haul
FL	Baptist Health South Florida
FL	Calhoun-Liberty Employees
FL	CFE
FL	Broward Healthcare
FL	Electricians' Local 349
FL	BrightStar

Step 6: Click the **Save** button.

NOTE: You may activate your exclusion list(s) when you build a marketing list. To learn how-to build a marketing list, please see the *How-To Build A Marketing List* document.

This screenshot is similar to the previous one, showing the 'Exclusion Lists' window. The 'List name' field now contains 'Test Exclusion List - How-To Doc'. A red box highlights the 'Save' button at the bottom center of the window, with a red arrow pointing to it.