TM: Tip of the Week
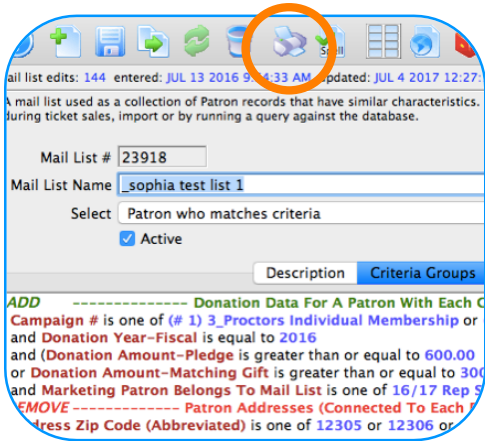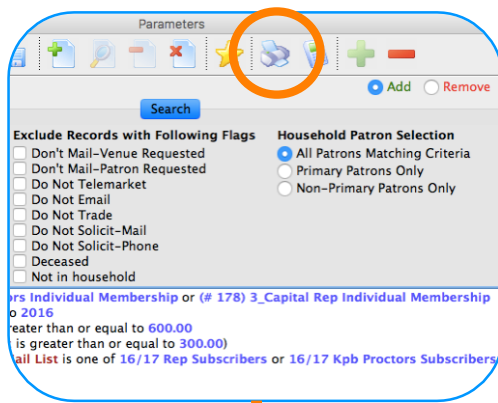
PRINT CRITERIA REPORT

EASILY KEEP RECORDS OF CRITERIA USED WITH CORRESPONDING RESULTS
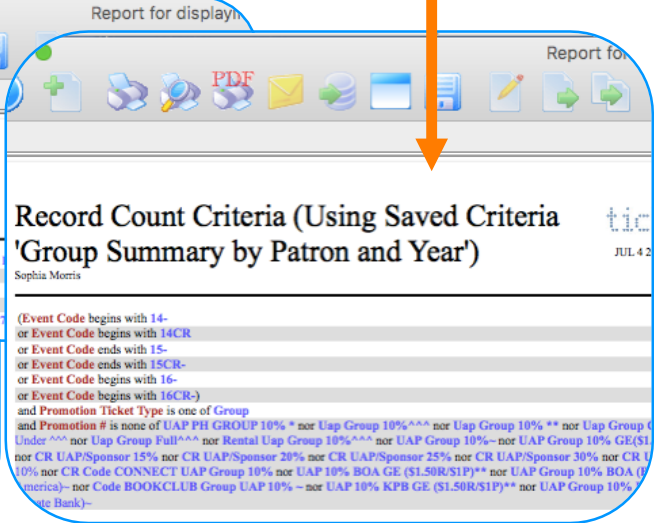
MAIL LIST WINDOW

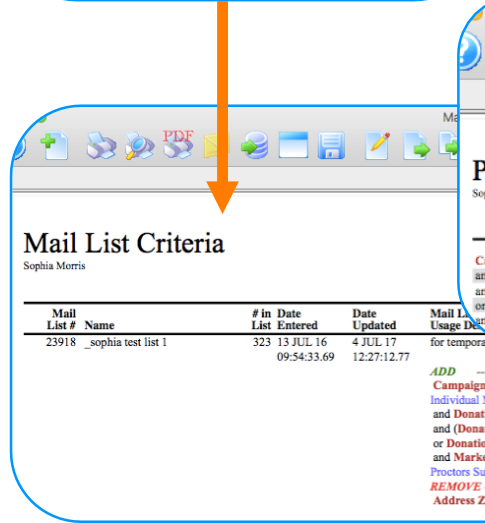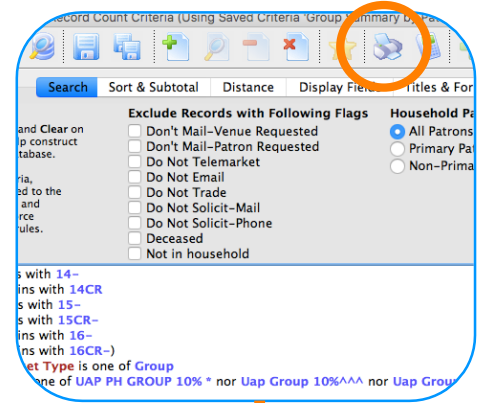ail list edits: 144 entered: JUL 13 2016 9:54:33 AM updated: JUL 4 2017 12:27:

A mail list used as a collection of Patron records that have similar characteristics.
during ticket sales, import or by running a query against the database.

Mail List # 23918
Mail List Name _sophia test list 1
Select Patron who matches criteria
☑ Active

Description | Criteria Groups

ADD -------------- Donation Data For A Patron With Each G
Campaign # is one of (# 1) 3_Proctors Individual Membership or
and **Donation Year-Fiscal** is equal to 2016
and (**Donation Amount-Pledge** is greater than or equal to 600.00
or **Donation Amount-Matching Gift** is greater than or equal to 300
and **Marketing Patron Belongs To Mail List** is one of 16/17 Rep S
REMOVE -------------- Patron Addresses (Connected To Each P
dress Zip Code (Abbreviated) is one of 12305 or 12306 or

Mail List Criteria
Sophia Morris

Mail List #	Name	# in List	Date Entered	Date Updated	Mail
23918	_sophia test list 1	323	13 JUL 16 09:54:33.69	4 JUL 17 12:27:12.77	Usage D
					for temporary stuff

ADD -------------- Donation Data For A Patron With Each Gift --------------
Campaign # is one of (# 1) 3_Proctors Individual Membership or (# 178) 3_Capital Rep
Individual Membership
 and **Donation Year-Fiscal** is equal to 2016
 and (**Donation Amount-Pledge** is greater than or equal to 600.00
 or **Donation Amount-Matching Gift** is greater than or equal to 300.00)
 and **Marketing Patron Belongs To Mail List** is one of 16/17 Rep Subscribers or 16/17 Kpb
Proctors Subscribers
REMOVE -------------- Patron Addresses (Connected To Each Patron) --------------
 Address Zip Code (Abbreviated) is one of 12305 or 12306 or 12309 or 12304

PARAMETER WINDOW

Parameters

○ Add   ○ Remove

Search

Exclude Records with Following Flags
☐ Don't Mail-Venue Requested
☐ Don't Mail-Patron Requested
☐ Do Not Telemarket
☐ Do Not Email
☐ Do Not Trade
☐ Do Not Solicit-Mail
☐ Do Not Solicit-Phone
☐ Deceased
☐ Not in household

Household Patron Selection
◉ All Patrons Matching Criteria
○ Primary Patrons Only
○ Non-Primary Patrons Only

ors Individual Membership or (# 178) 3_Capital Rep Individual Membership
o 2016
reater than or equal to 600.00
is greater than or equal to 300.00)
ail List is one of 16/17 Rep Subscribers or 16/17 Kpb Proctors Subscribers

Parameters
Sophia Morris

Campaign # is one of (# 1) 3_Proctors Individual Membership or (# 178) 3_Capital R
and **Donation Year-Fiscal** is equal to 2016
and (**Donation Amount-Pledge** is greater than or equal to 600.00
or **Donation Amount-Matching Gift** is greater than or equal to 300.00)
and **Marketing Patron Belongs To Mail List** is one of 16/17 Rep Subscribers or 16/17

REPORT SEARCH TAB

Record Count Criteria (Using Saved Criteria 'Group Summary by Pa

Search | Sort & Subtotal | Distance | Display Field | Titles & For

Exclude Records with Following Flags
☐ Don't Mail-Venue Requested
☐ Don't Mail-Patron Requested
☐ Do Not Telemarket
☐ Do Not Email
☐ Do Not Trade
☐ Do Not Solicit-Mail
☐ Do Not Solicit-Phone
☐ Deceased
☐ Not in household

Household Pa
◉ All Patrons
○ Primary Pat
○ Non-Prima

s with 14–
ins with 14CR
s with 15–
ins with 15CR–
ins with 16–
s with 16CR–)
et Type is one of Group
one of UAP PH GROUP 10% * nor Uap Group 10%^^^ nor Uap Group

Record Count Criteria (Using Saved Criteria 'Group Summary by Patron and Year')
Sophia Morris

JUL 4 2

(**Event Code** begins with 14–
or **Event Code** begins with 14CR
or **Event Code** ends with 15–
or **Event Code** ends with 15CR–
or **Event Code** begins with 16–
or **Event Code** ends with 16CR–)
and **Promotion Ticket Type** is one of Group
and **Promotion #** is none of UAP PH GROUP 10% * nor Uap Group 10%^^^ nor UAP Group 10% ** nor Uap Group
Under ^^^ nor Uap Group Full^^^ nor Rental Uap Group 10%^^^ nor UAP Group 10%~ nor UAP Group 10% GE($1
nor CR UAP/Sponsor 15% nor CR UAP/Sponsor 20% nor CR UAP/Sponsor 25% nor CR UAP/Sponsor 30% nor CR
10% nor CR Code CONNECT UAP Group 10% nor UAP 10% BOA GE ($1.50R/S1P)** nor UAP Group 10% BOA (
merica)– nor Code BOOKCLUB Group UAP 10% ~ nor UAP 10% KPB GE ($1.50R/S1P)** nor UAP Group 10%
ate Bank)~

CRITERIA TOO LONG TO FIT AT BOTTOM OF REPORT?
MANUALLY RECORDING WHAT CRITERIA GOES TO WHAT?
STORE WITH LOCALLY SAVED LIST / REPORT EXPORTS!

Want to Share a TM Tip or Cool Feature? E-Mail Sophia:
smorris@proctors.org