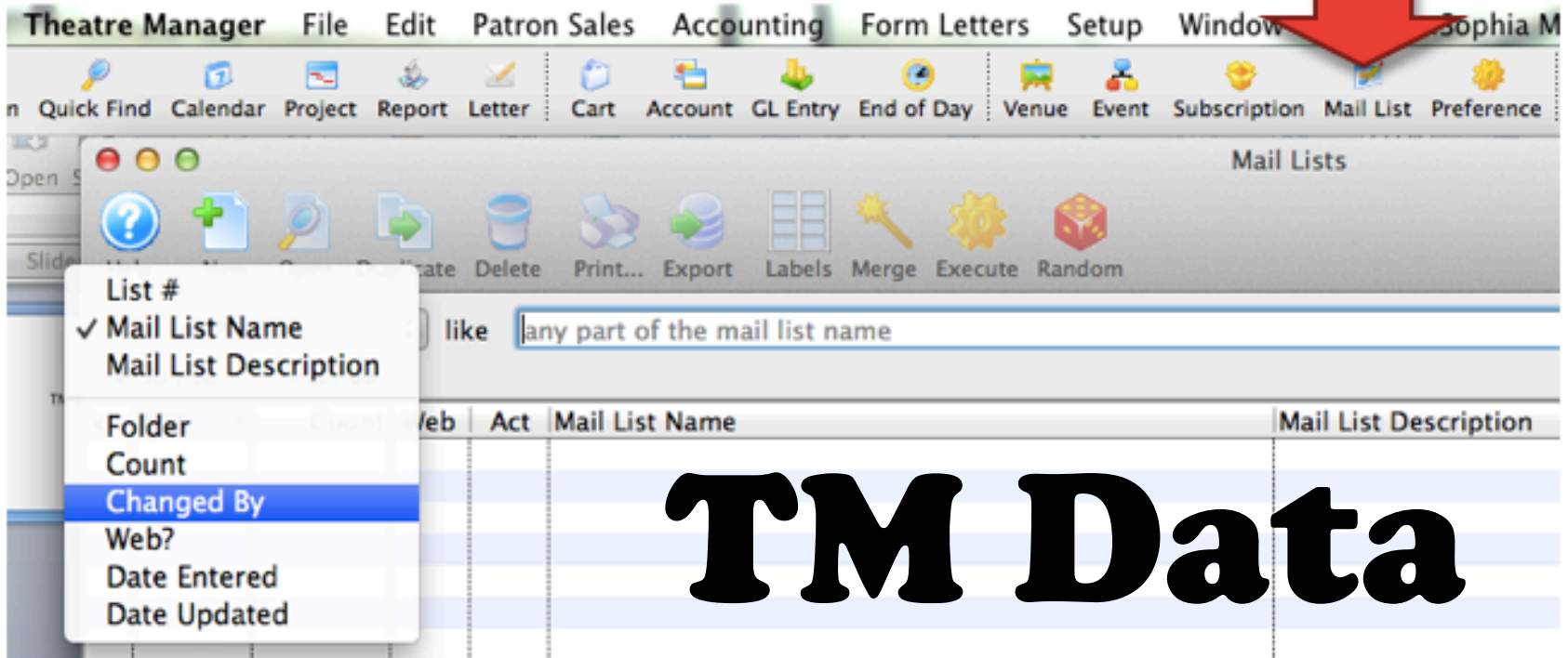


# WELCOME TO....



# TM Data Boot Camp

# How We Pull Info from TM

## AKA Is a Mail List actually what I need?

There are 3 ways to collect data from TM:

### REPORTS

Pulls different categories based on report type  
*(e.g. pulls number of subscriber seats sold)*

### MAIL LISTS

Specifically pulls **patrons** who meet specified criteria  
*(e.g. pulls number of purchasing subscribers)*

### DATA EXPORT

Allows direct access to most fields in TM, very granular  
*(e.g. shows details on every subscriber ticket)*

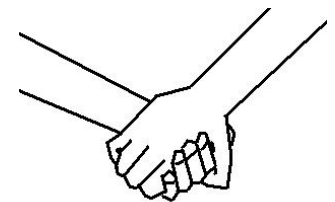
## IMPORTANT

These methods are not mutually exclusive.  
Sometimes combining them is your best bet.

# Start with the Right Mindset...

## *(seriously, don't skip this part)*

- Set aside everything else  
*(distractions = simple mistakes)*
- Write down exactly what you want to know  
*(Be specific – it will help you find TM criteria)*
- Assume it's possible  
*(If you can think of it, TM can probably do it)*
- Assume it's complicated (though it's probably not)  
*(really this is just to force yourself to slow down)*
- Need to Troubleshoot? Find a Friend.  
*(NOTHING trumps group brainstorming)*





# **Pull Better, Not Faster**

- **LEAVE YOURSELF TIME TO PLAY**

*Remember when you wanted to be an explorer? Now is your moment. You won't break the system by exploring it, I promise.*

- **LEAVE YOURSELF TIME TO TEST**

*Be patient – it will take some time to consider all the angles of your question and it is a GOOD thing that you don't automatically think like a computer.*



# Some Quick Don'ts

- IF FEASIBLE, DON'T COPY

*It's very easy to re-run something incorrectly (or not at all). MOST IMPORTANTLY, you can never understand someone else's criteria as well as you can criteria you setup yourself.*

- NEVER SEND OUT INFO WITHOUT CHECKING IT

*More on thorough checking later... stay tuned*

# **Let's Start With Mail Lists**

Why? Because they have the clearest output form and are therefore a good introduction to criteria.

PLEASE REMEMBER,  
THE SAME CRITERIA AND DATA SOURCES  
ARE USED IN REPORTS AND EXPORTS,  
SO DON'T BE AFRAID  
TO USE THOSE METHODS!\*

\*OK, I lied. It's a good idea to be a tiny bit afraid of exports – they are more complicated.

# Step-By-Step 1: Setup New List

Mail List # 10101

Mail List Name Sophia's Test List # in List 5

Select Patron who matches criteria Folder Sophia Stuff

Active

Description Criteria Groups Whos in Access Restrictions Execution Log

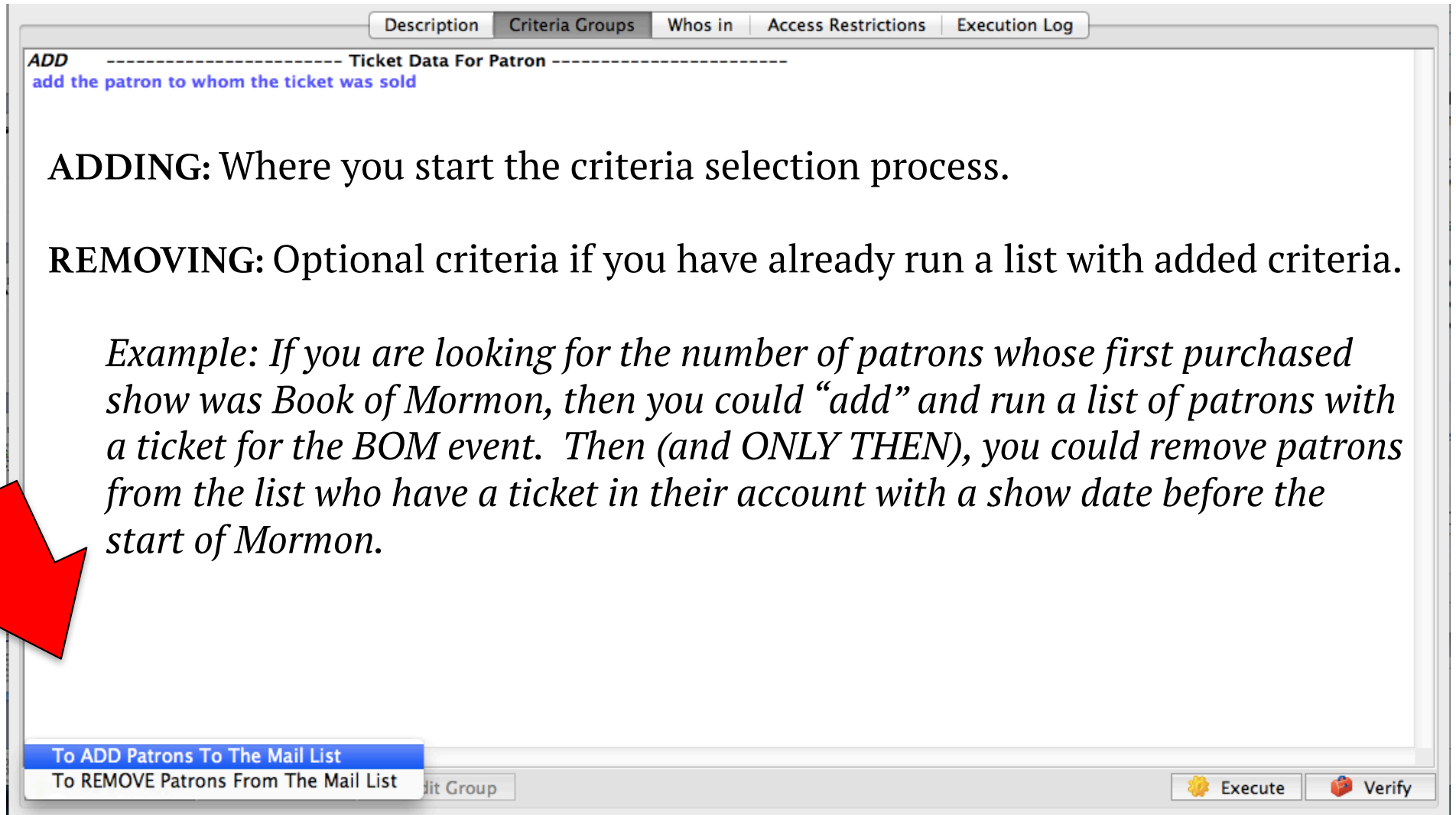
External List  Allow Patron to subscribe/unsubscribe via the internet

VIP List  Alert Employee if patron is on mail list

Description For experimenting...

- A. **NAME:** Use something specific that has keywords you can remember to search for later
- B. **SELECT:** You can choose all household patrons meeting criteria, primary patrons only or “patron who matches criteria,” which is the default we generally use
- C. **FOLDER:** Use Main unless you run a lot of lists and would like your own folder
- D. **DESCRIPTION:** Note how list is being used and/or what criteria means in English
- E. **DESCRIPTION:** Include your name so others referencing the list know who to talk to
- F. **EXTERNAL OR VIP LIST:** You probably don’t want either, but a Mail List can be public and/or connected to an internal notification system.

# Step-By-Step 2: Adding/Removing Criteria 101



The screenshot shows a software window with a title bar containing tabs: "Description", "Criteria Groups", "Whos in", "Access Restrictions", and "Execution Log". The "Criteria Groups" tab is active. Below the tabs, the text reads: "ADD ----- Ticket Data For Patron -----" followed by "add the patron to whom the ticket was sold" in blue. The main content area contains the following text:

**ADDING:** Where you start the criteria selection process.

**REMOVING:** Optional criteria if you have already run a list with added criteria.

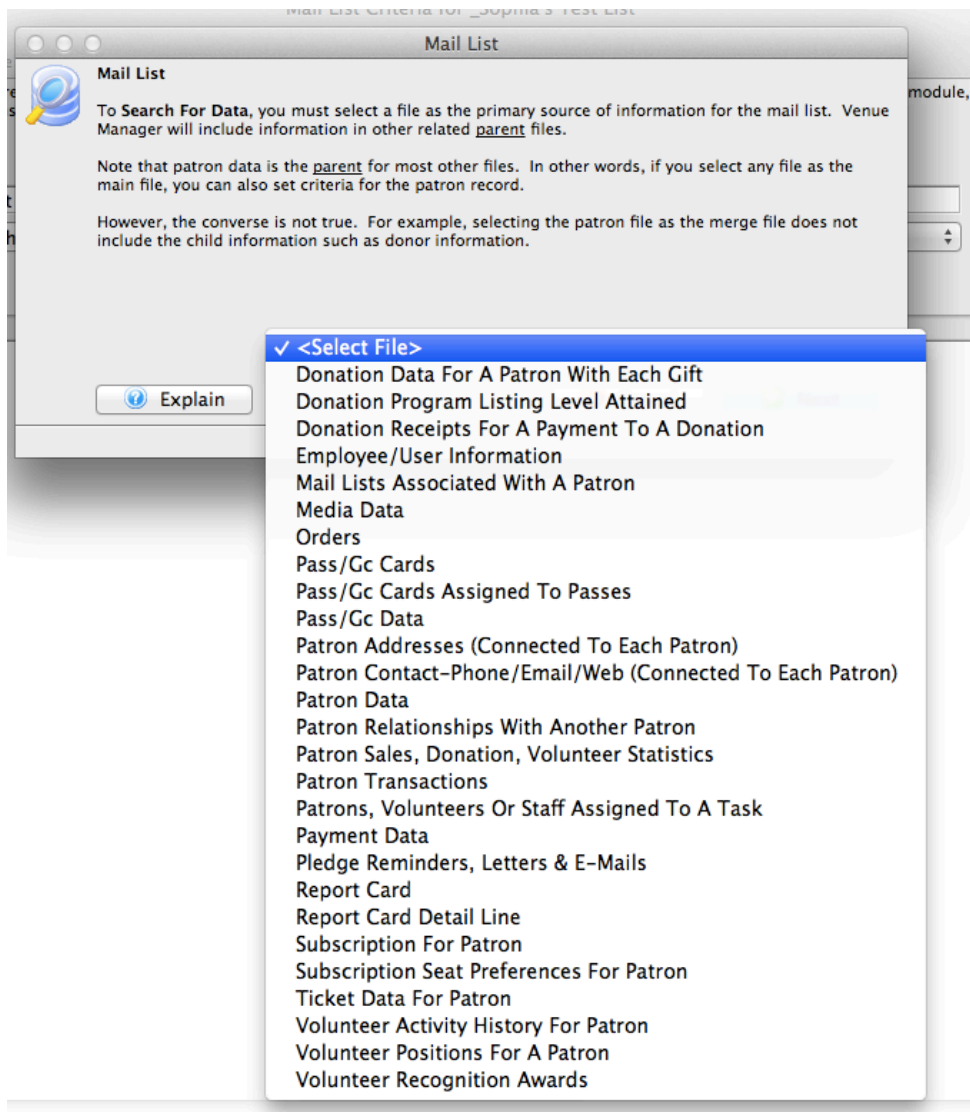
*Example: If you are looking for the number of patrons whose first purchased show was Book of Mormon, then you could “add” and run a list of patrons with a ticket for the BOM event. Then (and ONLY THEN), you could remove patrons from the list who have a ticket in their account with a show date before the start of Mormon.*

A large red arrow points to the example text.

At the bottom of the window, there is a blue button labeled "To ADD Patrons To The Mail List" and a grey button labeled "To REMOVE Patrons From The Mail List". To the right of these buttons is a "Criteria Group" dropdown menu. Further right are two buttons: "Execute" with a gear icon and "Verify" with a red cube icon.



# Step-By-Step 3: Choosing a Source File

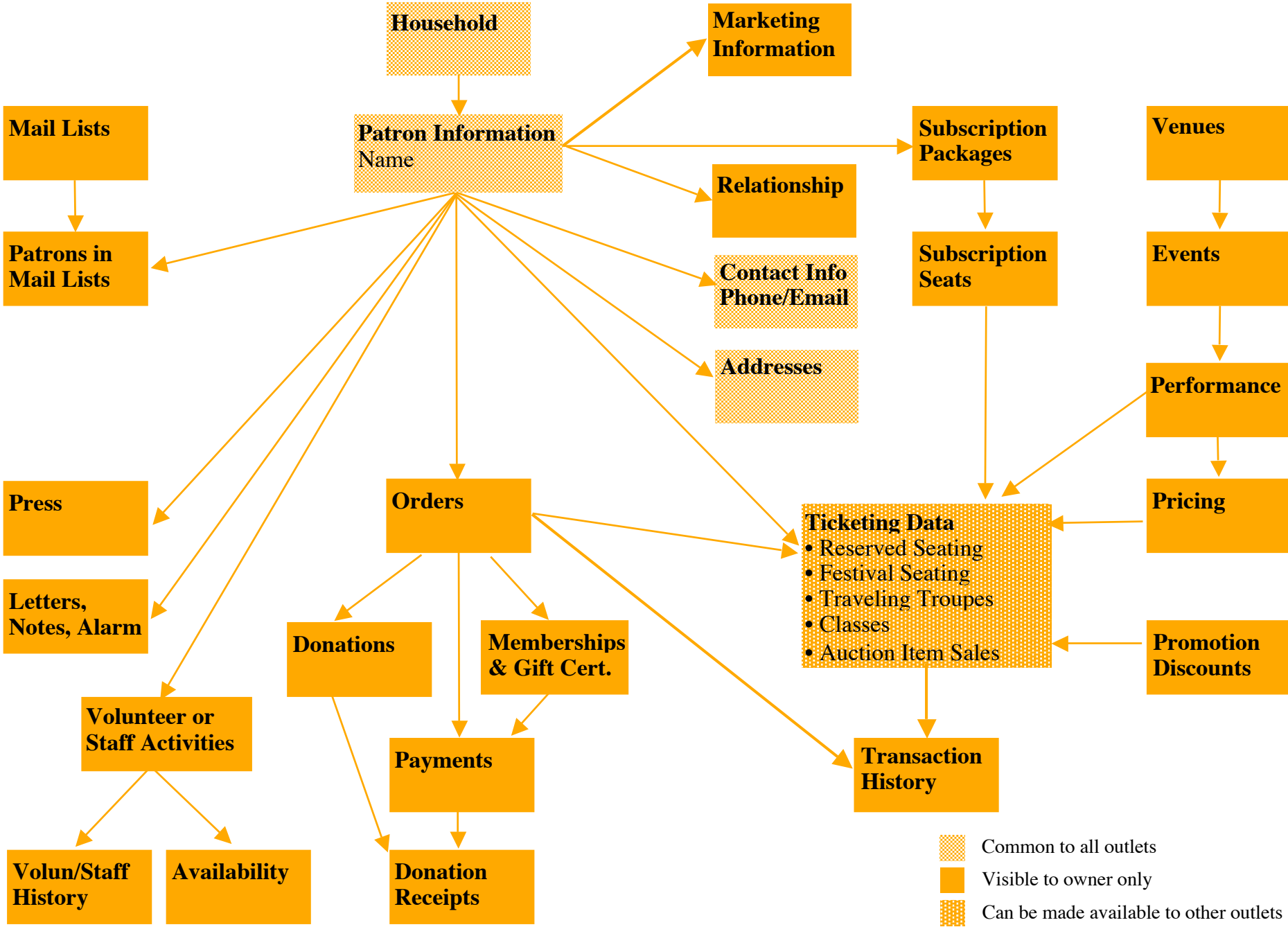


This looks more daunting than it is.

**UNLESS YOU ARE IN  
DEVELOPMENT, YOU PROBABLY  
WANT TICKET DATA FOR PATRON.**

*If TM is a hierarchical corporate organization, then essentially this is picking the right person with the right security clearance in the right department to know the answers to your questions...*

# The Most Useful Thing Doug Ever Gave Me...

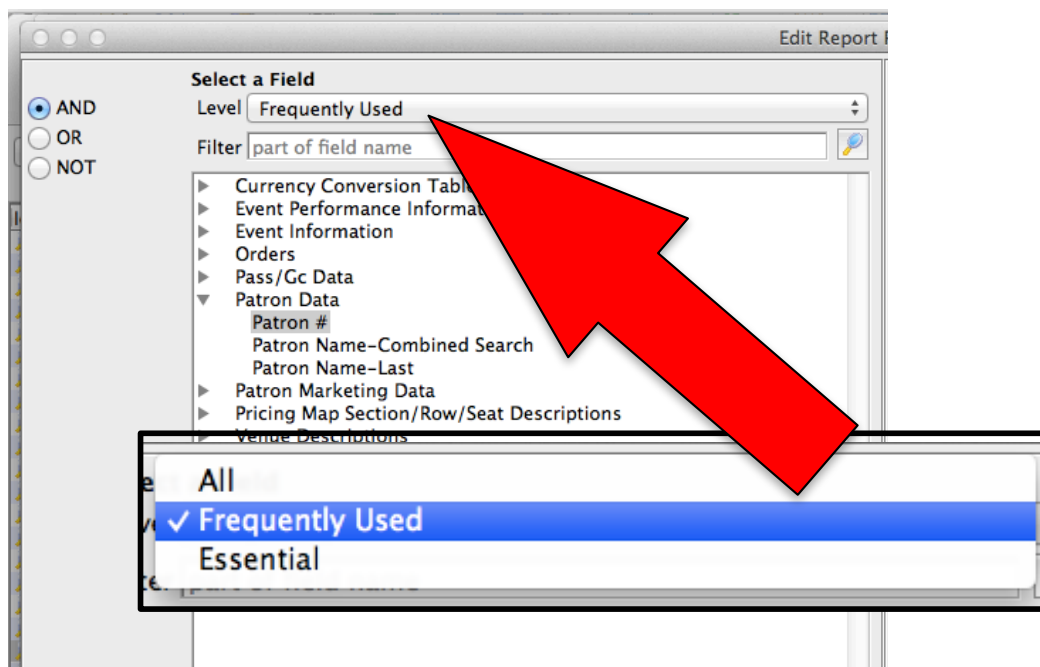


# **The Most Important Thing I Learned From the Most Important Thing that Doug Ever Gave Me...**

CHOOSE A SOURCE FILE BY THE SMALLEST  
PIECE OF INFORMATION YOU NEED TO ACCESS.  
GENERALLY, THE SMALLER YOU GO,  
THE WIDER YOU CAN SEE.

E.G. If you need to see donor pledge and payment history, then Donation Receipts will give you more access than Donations. *(FYI – Transaction History criteria is incredibly powerful, but very granular and easy to misuse. Probably best to avoid using this until you are more comfortable playing around.)*

# Step-By-Step 4: Selecting Fields



Each Source File has access to a limited set of fields in the database. You can access each of these available fields in the New Criteria pop-up screen.

You will only learn these by playing with them. As a general rule, be extra cautious about any field name you cannot place in a patron's account.

## WARNING

Not all fields are what they sound like at first. Carefully read the field description and notes on the right in Step 5.

And **DOUBLE CHECK YOUR RESULTS!**

*E.G. "Marketing Patron Bought For Event" doesn't mean a patron purchased a ticket – they simply needed to "look" at the event in their account at some point.*

# Step-By-Step 5: Completing Conditions

- Every Field has it's own set of “conditions.”

is between  
is greater than or equal to  
is greater than  
is less than or equal to  
is less than  
 is one of  
is none of

ALWAYS check the drop down to see what your options are. Select the appropriate one to filter results from the field.

is between  
is greater than or equal to  
is greater than  
is less than or equal to  
is less than  
does not equal  
is equal to  
contains  
does not contain  
begins with  
ends with  
is one of  
is none of  
is empty  
is not empty

---

- Don't worry – it will tell you how to format the conditions, just take the time to read the small print.

# Step-By-Step 6: Using Logic Operators to Connect Multiple Criteria

The screenshot shows a search interface with several sections:

- Search Criteria:** Includes instructions on using 'New', 'Edit', 'Delete', and 'Clear' buttons. It also notes that parentheses can be used for complex criteria and that 'Group' and 'UnGroup' buttons can be used to force evaluation precedence rules.
- Exclude Records with Following Flags:** A list of checkboxes for various flags, including 'Don't Mail-Venue Requested'.
- Household Patron Selection:** A radio button selection with 'All Patrons Matching Criteria' selected.
- Select a Field:** A dropdown menu showing 'Level' set to 'Frequently Used' and a 'Filter' input field containing 'part of field name'. Below this is a list of fields: 'Patron #', 'Patron Name-Combined Search', 'Patron Name-Last', 'Marketing Amount Last Pledge', 'Marketing Balance-Tickets', and 'Marketing Date Last Pledge'.
- Logic Operators:** A section with radio buttons for 'AND', 'OR', and 'NOT'. The 'OR' option is currently selected.
- Example Criteria:** A text box showing the example: 'Patron Title contains science or Patron Company contains science'.

Within each Add or Remove, you have to choose how to connect your filters. “AND” is the default and probably what you want most of the time. But don’t forget about “OR” and “NOT”!

# Step-By-Step 7: Double Checking Criteria

**ADD** ----- Ticket Data For Patron -----  
Performance Event # is one of (13-CON) 13-14 KP&B Broadway Control House  
and NOT Promotion Ticket Type is one of Season  
and add the patron to whom the ticket was sold

You might sound a little off your rocker, but after building search parameters, read your criteria list out loud. I've found many silly errors or typos this way

**ARE YOU STILL AWAKE?**

How many people will get from the above criteria?

# Step-By-Step 8: Double Checking Parameters

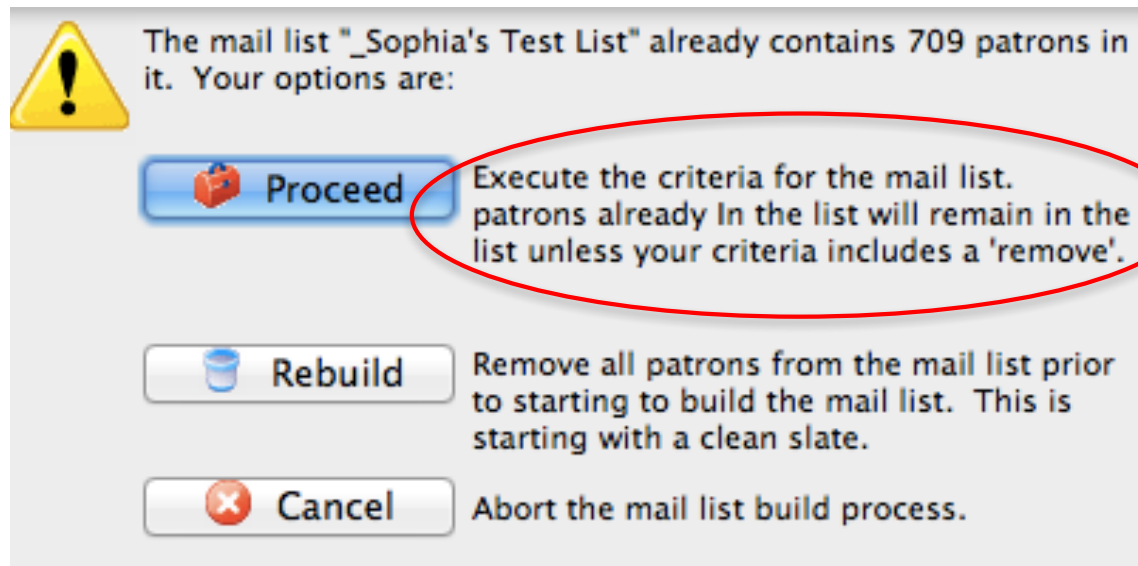
<b>Exclude Records with Following Flags</b>	<b>Household Patron Selection</b>
<input checked="" type="checkbox"/> Don't Mail-Venue Requested	<input checked="" type="radio"/> All Patrons Matching Criteria
<input type="checkbox"/> Don't Mail-Patron Requested	<input type="radio"/> Primary Patrons Only
<input type="checkbox"/> Do Not Telemarket	<input type="radio"/> Non-Primary Patrons Only
<input type="checkbox"/> Do Not Email	
<input type="checkbox"/> Do Not Trade	<b>Gifted Ticket Patron Selection</b>
<input type="checkbox"/> Do Not Solicit-Mail	<input checked="" type="radio"/> Find 'Sold To' Patron
<input type="checkbox"/> Do Not Solicit-Phone	<input type="radio"/> Find 'Gifted To' Patron
<input type="checkbox"/> Deceased	

- If actually sending something out of the building, ALWAYS USE THE PRE-MADE EXCLUDE RECORDS TO MAKE SURE WE AREN'T PISSING ANYONE OFF.
- Generally, let the right hand radio buttons stay on their default settings – a good place to start troubleshooting if your search results seem too small, though. I accidentally select gifted to on a regular basis.



# Step-By-Step 9: Executing and Saving

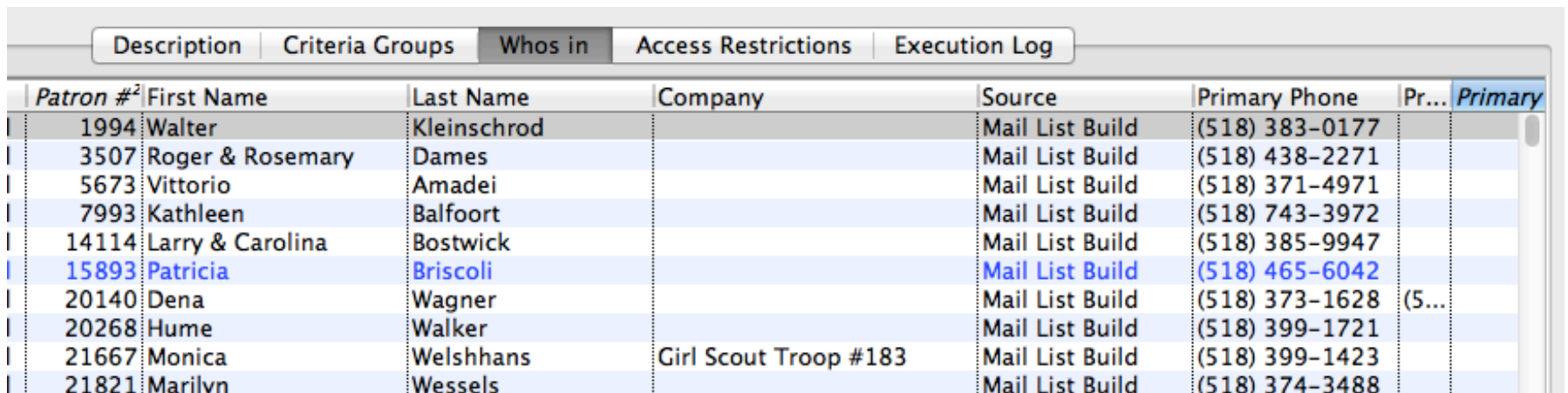
- You have to tell it to execute. If you already have people in the list and are re-running (to update it or because you have altered criteria), you have to select how to execute:



- Oh Yeah – And Save It 😊

# Step-By-Step 10: CHECKING IT TWICE

- NEVER TRUST YOUR FIRST RESULTS – CHECK PATRON LIST  
*How? Easy. Double click on patron record in the “Who’s In” Tab!*



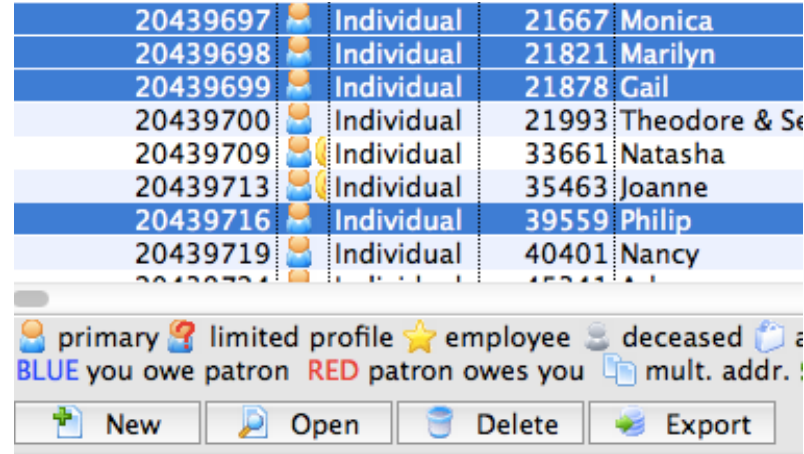
Patron #	First Name	Last Name	Company	Source	Primary Phone	Pr...	Primary
1994	Walter	Kleinschrod		Mail List Build	(518) 383-0177		
3507	Roger & Rosemary	Dames		Mail List Build	(518) 438-2271		
5673	Vittorio	Amadei		Mail List Build	(518) 371-4971		
7993	Kathleen	Balfoort		Mail List Build	(518) 743-3972		
14114	Larry & Carolina	Bostwick		Mail List Build	(518) 385-9947		
15893	Patricia	Briscoli		Mail List Build	(518) 465-6042		
20140	Dena	Wagner		Mail List Build	(518) 373-1628	(5...	
20268	Hume	Walker		Mail List Build	(518) 399-1721		
21667	Monica	Welshhans	Girl Scout Troop #183	Mail List Build	(518) 399-1423		
21821	Marilvn	Wessels		Mail List Build	(518) 374-3488		

- NEVER CHECK JUST ONE PATRON  
*Just because the first patron you click on to check may happen to meet your criteria, doesn't mean all of them will.*

*When you aren't getting an accurate list, checking lots and lots of patrons will tell you what TM is actually pulling and give you a place to start re-assessing what you asked for VS what you want.*

# Step-By-Step 11: Manual Changes to Who's In

There's a lot of reasons to manually remove people from a mail list (VIP, press account not attached to a real patron, etc.) Select patrons from Who's In and simply select "Delete."



20439697	Individual	21667	Monica
20439698	Individual	21821	Marilyn
20439699	Individual	21878	Gail
20439700	Individual	21993	Theodore & Se
20439709	Individual	33661	Natasha
20439713	Individual	35463	Joanne
20439716	Individual	39559	Philip
20439719	Individual	40401	Nancy

primary limited profile employee deceased  
BLUE you owe patron RED patron owes you mult. addr.

New Open Delete Export

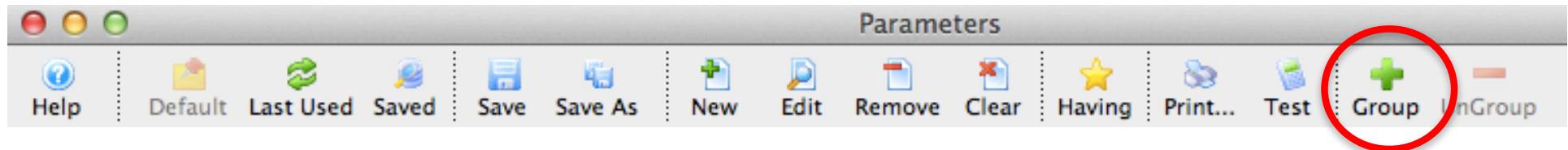
## RECOMMENDATION

List who you removed in the list description, not just for others to reference, but because deleted patrons will repopulate if you re-run the list!

Better yet, adjust your criteria to remove them permanently!

# Grouping

## = ( ) in order of operations



Returns 0

```
ADD ----- Ticket Data For Patron -----
Event # is one of (14-NEW) NEWSIES
and (Performance Series Code is equal to 1-SAT-M
or Performance Event # is one of (12F-MP) MARY POPPINS *F or (12-POP) MARY POPPINS)
and Performance Series Code is equal to 1-SUN
and add the patron to whom the ticket was sold
```

Returns  
1,388

```
ADD ----- Ticket Data For Patron -----
(Event # is one of (14-NEW) NEWSIES
and (Performance Series Code is equal to 1-SAT-M)
or (Performance Event # is one of (12F-MP) MARY POPPINS *F or (12-POP) MARY POPPINS)
and Performance Series Code is equal to 1-SUN)
and add the patron to whom the ticket was sold
```

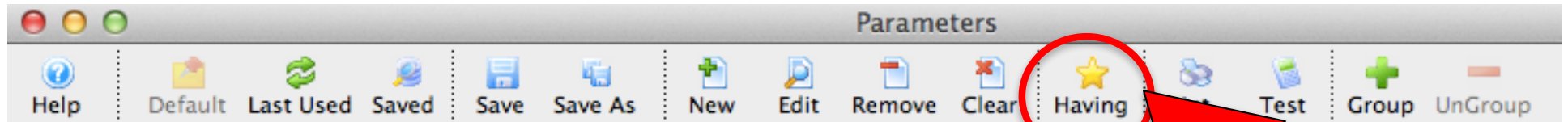
## REMEMBER THIS?

It's back! And not that hard, so don't panic.  
Just put together the things that need to go  
together and only with each other.

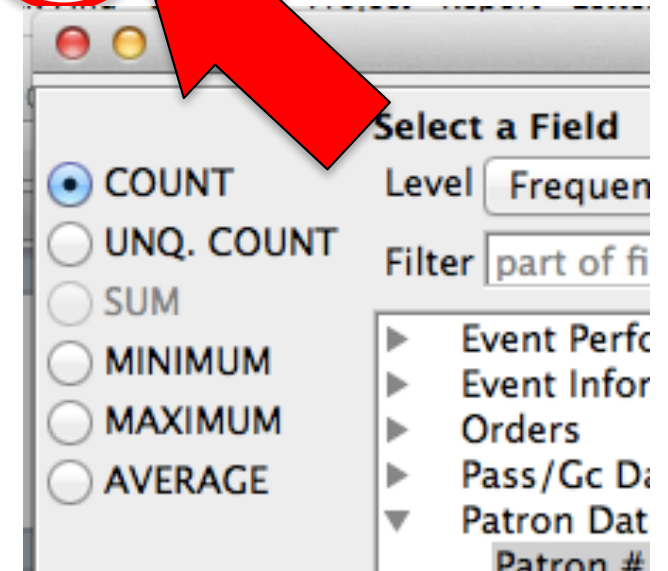
### ORDER OF OPERATIONS

- (P) **Parenthesis**
- E<sup>x</sup> **Exponents**
- M/D **Multiply or Divide**  
\*from left to right in the problem
- A/S **Add or Subtract**  
\*from left to right  
\*of course

# The “Having” Button



- “Having” applies a subordinate criteria search after primary criteria has been run. It’s useful for searching aggregates. Some fun use ideas to start playing with are:
  - Patrons who purchased at least X tickets to a show (unique count ticket numbers)
  - Patrons who bought between X-X unique events in a year (unique count event numbers)
  - Patrons who have donated more than X different years (unique count donation year)
  - Patrons with an average gift certificate value over X amount (average pass purchase amount)



# Misc. Usage Tidbits

- Need to know if someone specific is in the list? Well, you could sort the appropriate field from the column heading, or...

71058	Kurt	Kent	Mail List Build	(518) 482-4312
74442	Lori	Smart	Mail List Build	(518) 355-3075
76633	Carol	Mohrmann	Mail List Build	(518) 895-1015
78898	Amy	Salzman	Mail List Build	(518) 587-9668
84070	Norma	Rice	Mail List Build	(518) 577-5584
88160	Arthur & June	Kline	Mail List Build	(518) 326-0712

employee deceased active order/cart subscriber non-renewed  
owes you mult. addr. scheduled address/phone/email change

Delete Export First Name  from  to

- Window opening too large on the screen? Use Window – fit Window to Monitor to resize quickly. Or use Command T to toggle the toolbar on and off. Or, double click the toolbar to turn it into a floating window.

# Misc. Usage Tidbits

- Don't forget – you can always drag and drop patrons into a mail list from:
  - Other mail lists
  - The attendance tab of a performance
  - A patron search result
  - The patron tab of a gift certificate setup window
  - Most other places you can see a list of patrons!



# Common Pitfalls and Some Basic Troubleshooting

SO, YOU'VE CHECKED OUT YOUR PATRON LIST AND SOMETHING'S WRONG. GREAT NEWS! NOTHING NEW TO MEMORIZE - KEITH'S RULES STILL APPLY!

## – CLOSE VISUAL INSPECTION

- Read your criteria out loud
- Double check your parameter settings



## – SIGNAL FLOW

- Did your question translate correctly?
- Is there a pattern to what patrons were pulled “incorrectly”?
- Did you execute correctly or recently?
- **Does your criteria reference other mail lists? Are these correct and recent?**



## – READ THE MANUAL

- Retrace your steps and re-read all the small print (maybe your criteria isn't formatted correctly to the field requirements?)
- TM Help is chock full of pictures – don't forget to check it out!



## – CONSULT AN EXPERT

- Find the major TM user in your department. EG:
  - Development: Carrie
  - Box Office: managers and supervisors
  - Marketing: Peter and Rob
  - Finance: Chris/Danny/Sophia
  - Education: Jessica





**Now,  
Let's Get Our Hands Dirty  
and Build Some Mail Lists...**

