

How do I create filter statements to make User Defined Lists of my contacts?

Version 4.0

Lists are powerful tools to reach specific sections of your contacts database. The User Defined Lists section of the Lists & Labels screen enables you to pull contacts onto custom lists for a variety of purposes. You can hand select contacts to be placed on a list, or you can use a filter statement that will automatically pull all of your contacts that match specific criteria onto a list. This makes creating lists much faster.

To start a new User Defined List, go to the Lists & Labels screen, click on the next empty line under User Defined Lists, and click the Create or Modify User Defined List button at the bottom. On the Modify List screen, type in the name of your list. Then enter your filter statement in the Filter Statement window. Click "Add Matching Records to List Now" once you have entered your filter, then Exit to use your list for mailings.

Here are a few simple filter statement commands and their meanings:

State="PA" -selects all contacts who have PA in the State field of their primary address.

Memno>0 -selects all people connected to a membership, both current and expired.

Nextdue>ctod("09/30/2007") -selects all contacts who expire after September 30, 2007.

Billmember=1 -selects contacts who are the "Bill To" or primary member in a family membership.

!empty(email) - selects everyone who has an e-mail address in the Email field of their contact record.

type="Family" - selects everyone that has a membership type of Family.

donate2006>500 - selects everyone who has donated over \$500 for the calendar year 2006.

active=1 - selects everyone who is an active member (which means "Include on Overdue List" is marked as YES on their contact screen)

You can combine different commands to help further reach the specific people you are looking for.

For example, if you wanted to send out an e-mail to all active members that have a Family Membership that also have an e-mail address on record, you could use the filter statement: **active=1 and type="Family" and !empty(email)**

Here is how you can put them all together if you want to create a list of all of the Pennsylvania residents whose membership expires after September 30, 2007:

State="PA" and Nextdue>ctod("09/30/2007") and Billmember=1

To find all contacts that live in one of two states, (either PA or MD) it would be:

State="PA" or State="MD"

To find all members who live in PA or MD: **Memno>0 and (State="PA" or State="MD")**

To find all memberships (in all states) who expired in September 2007:

Nextdue>ctod("08/31/2007") and Nextdue<ctod("10/01/2007") and Billmember=1

Once you have the people on the list, you can click on the Continue button to reach the options to print out a contact list, send email, or print labels and letters for the people on your list.

Remember that User Defined Lists need to be updated each time you wish to use them. To update the list, go to the Modify List window and click the Clear List button and then click “Add Matching Records to List Now” to re-add matching records to the list. This will ensure that any new contacts will be added, and any records that no longer belong on this list will be removed.

If you have any questions, please contact our Support Office at (800)562-6080. Thank you for using PastPerfect!