

How Do I...

Exclude Do Not Solicit Type Codes?

Problem

TCM stores all my contacts and their history. Unfortunately, I do not want to solicit all of my contacts. Many are coded as Do Not Solicit in different ways, as well as my deceased contacts should not be solicited. I need to exclude these contacts.

Solution

By adding an additional filter to the report, Do Not Solicit codes as well as other codes can be excluded.

Process

1. Open your report for editing in TCM (Right click on the report and choose **Design**)
 - For this example, "F 4-Donor Listing" will be used.
2. Go to **File** → **Save As** and give it a new name. This will prevent any accidental loss of the standard reports.
3. In the report, click on the data tab [RED] and then the search button [BLUE].
4. There are a number of fields that could be a flag to solicit or not solicit.
 - Ind_active
 - Ind_deceased
 - Ind_do_not_dist_info
 - Ind_do_not_solicit
 - Ind_do_not_solicit_email
 - Ind_do_not_solicit_fax
 - Ind_do_not_solicit_mail
 - Ind_do_not_solicit_phone
5. For each of these fields that are flags in your database, click them down to the **Criteria** pane. [RED]
6. In the **Field** column [BLUE], click the field to edit the contents.
7. TCM does not always store a value in these fields; to filter on the field, a value will need to be added. A *COALESCE* statement will handle these values.
 - *COALESCE* (field_name, 0)
 - The *COALESCE* statement will return the first "not null" value. If *field_name* is populated, then that will be used, otherwise, the 0 will be used. In TCM, 0 represents FALSE and a 1 represents TRUE.
 - Depending on the flag, a defaulted 1 or 0 may be appropriate; Default to ACTIVE (1) but default to not DECEASED (0).
8. Set the **Operator** to = and the **Value** to 0 or 1 as appropriate [GREEN].

