How Do I... Exclude Do Not Solicit Type Codes?

Problem

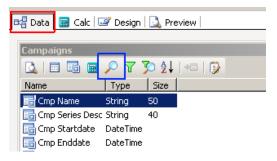
TCM stores all my contacts and their history. Unfortunately, I do not want to solicit all of my contacts. Many are coded as Do Not Solicit in different ways, as well as my deceased contacts should not be solicited. I need to exclude these contacts.

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.
- Go to File → Save As and give it a new name. This will prevent any accidental loss of the standard reports.



Contacts

Contacts

Contacts Contacts

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AutoSearch Mandatory Show All

3. In the report, click on the data tab [RED] and then the search button [BLUE].

Ind Udf2

Field

Ind Webaddress

Modifiedbysystemuse Modifiedbyuserid

Campaigns.cmp_name

Contacts.ind_do_not_dist_info

Contacts.ind_do_not_solicit_emai Contacts.ind_do_not_solicit_fax Contacts.ind_do_not_solicit_mail

Contacts.ind_do_not_solicit_phon

Contacts.ind_active Contacts.ind_do_not_solicit Contacts.ind_udf2

Operato

Contacts.ind_webaddress Contacts.ModifiedBySystemUser

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Contacts.ModifiedByUserId

- 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 *COALSECE* 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].

