Creating the query requires some planning and foresight. To start, you must decide what criteria you want the patrons to meet. If you are looking for very specific patrons, you must know what makes them unique from the rest. You may also narrow down your search by removing certain data from a returned query. See the online help page: http://theatremanagerhelp.com/theatre-manager-help/mail-lists-complex-query-criteria for information on complex criteria.

To create a Query, you would perform the following steps:

1.   Open the Mail List - List window.
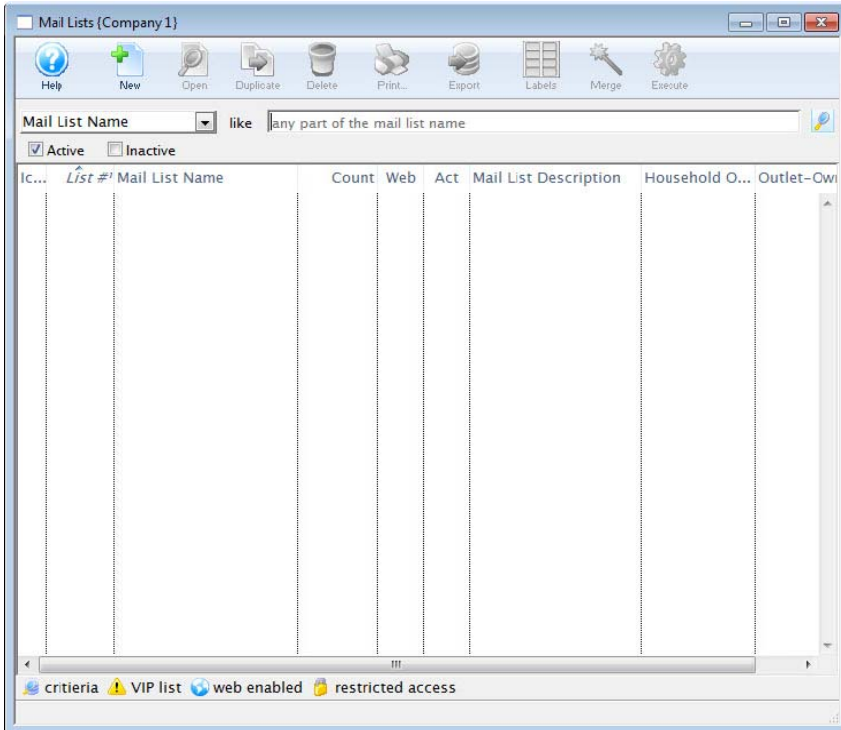
2.   Click the New button. The Mail List Criteria (inserting) window opens.

3. Enter the following information:
   - Mail List Name - enter a short name for the Mail List.
   - Select – from the drop down list, the names to be included on the list.
   - In the Description tab
   - Select the appropriate flags – External, VIP
   - Description - enter a detailed description for the Mail List.

4. Click the Save [Save] button.

You can now enter the Criteria.

5. Click the Criteria Groups **Criteria Groups** Tab.

Click the Create Group [Create Group...] button and choose To Add Patrons To The Mail List.

The Mail List Data Selection window opens. To search for data, you must select a file for the primary source of information for the mail list. Theatre Manager will include information in related parent files.

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> *Patron Data is the PARENT for most data stored in Theatre Manager. When defining criteria, if you select any file as the main file, you can also set criteria for the patron record.*
>
> *However, the converse is NOT true. Selecting the patron file as the Merge File, it does not include the child information - such as donor information.*
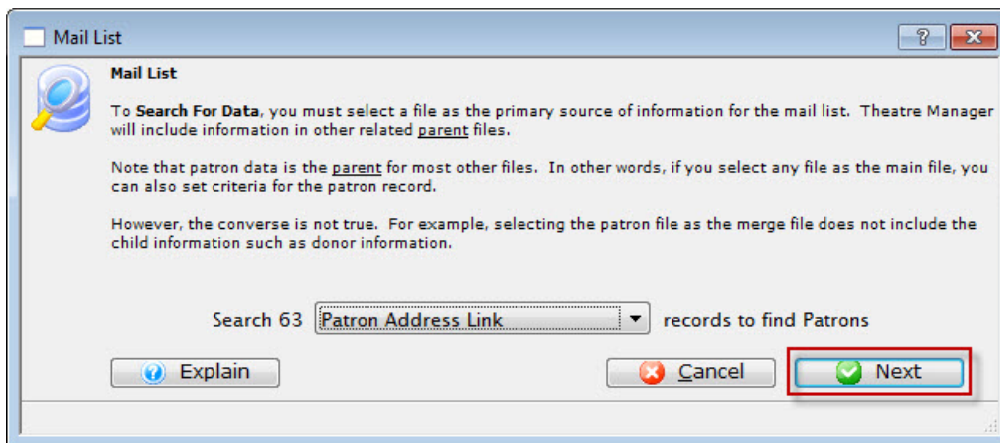

6. Select a file that contains the data you are searching for. As the example list is searching for patrons who have made donations; the file to use would be "Patron Address Link".

7. Click the Next [Next] button. The Parameter window opens.
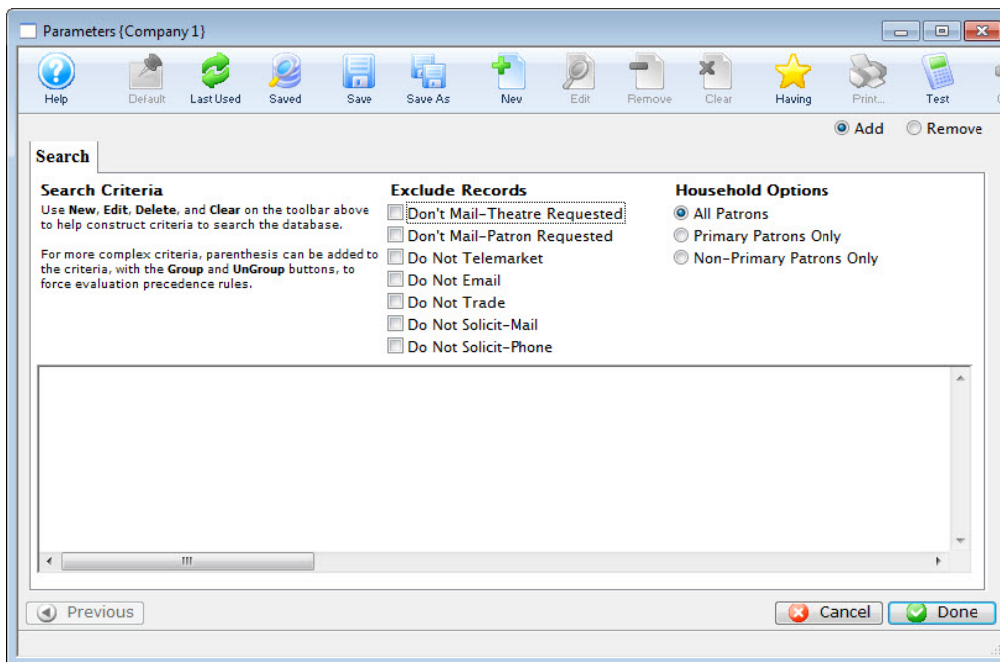
8. Click the New [New] button. The Add/Edit Parameter window opens.

The list contains all the possible searchable fields available in your selected file. The selections on the top left side of the window (and, or, not) are used for searching multiple fields when more than one line of criteria is added within the same file
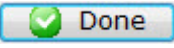
Creating a Mail List
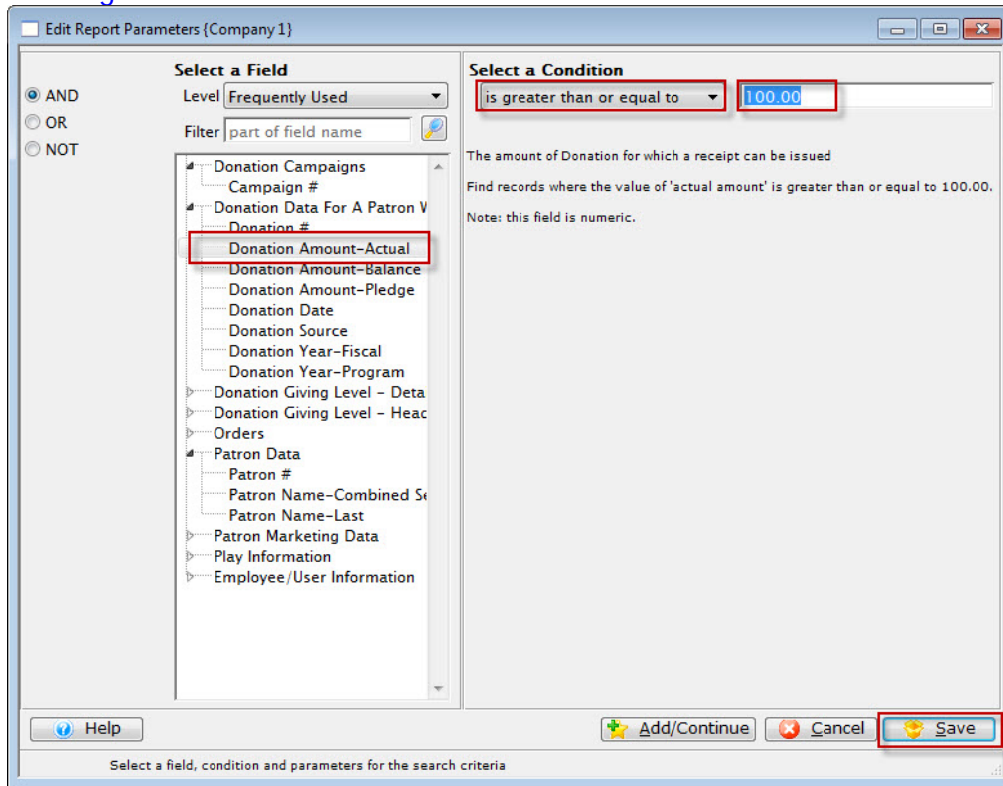
9.   Select the field to search. In this example "Patron Addresses>>Address Line 1", will be the selected search field criteria.

Select a condition, in this example "is not empty". The condition displayed above will find any patron has an entry in the street address section of the Patron Record.

10. Click Save   Save   .

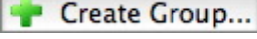The Parameter window returns and the entered criteria will appear in the list.

11. Under Exclude Records, enable the "Don't Mail-Theatre Requested" and the "Don't Mail-Patron Requested" flags, and click the Done   Done button.
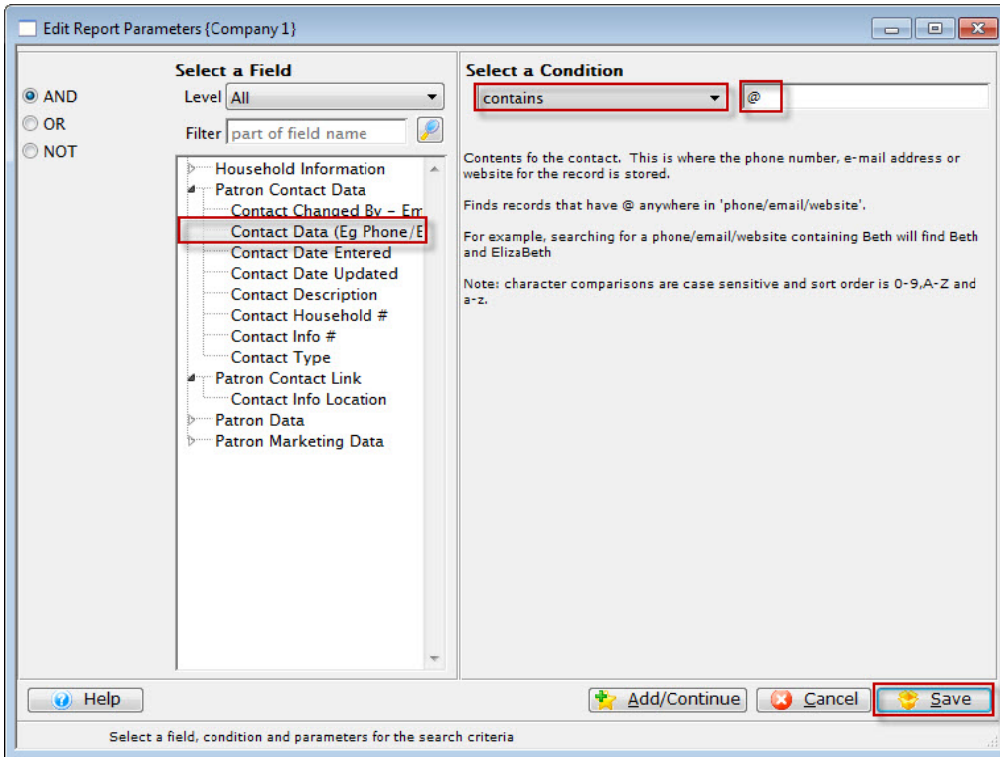
Creating a Mail List
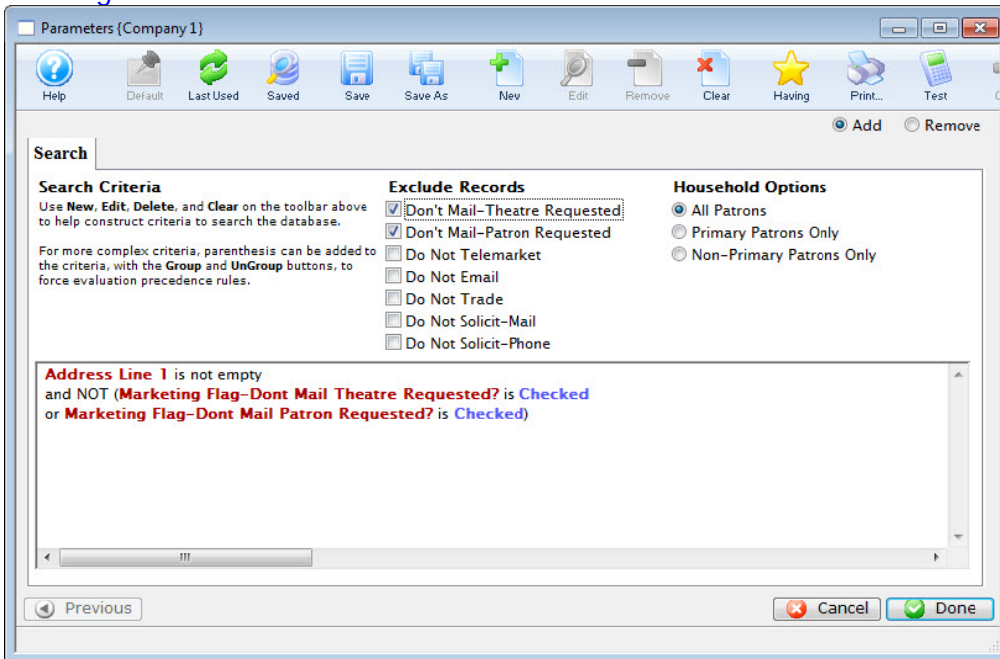
Now the group and its criteria have been added to the main query. For this example, another group needs to be added to include the patrons who have email addresses.
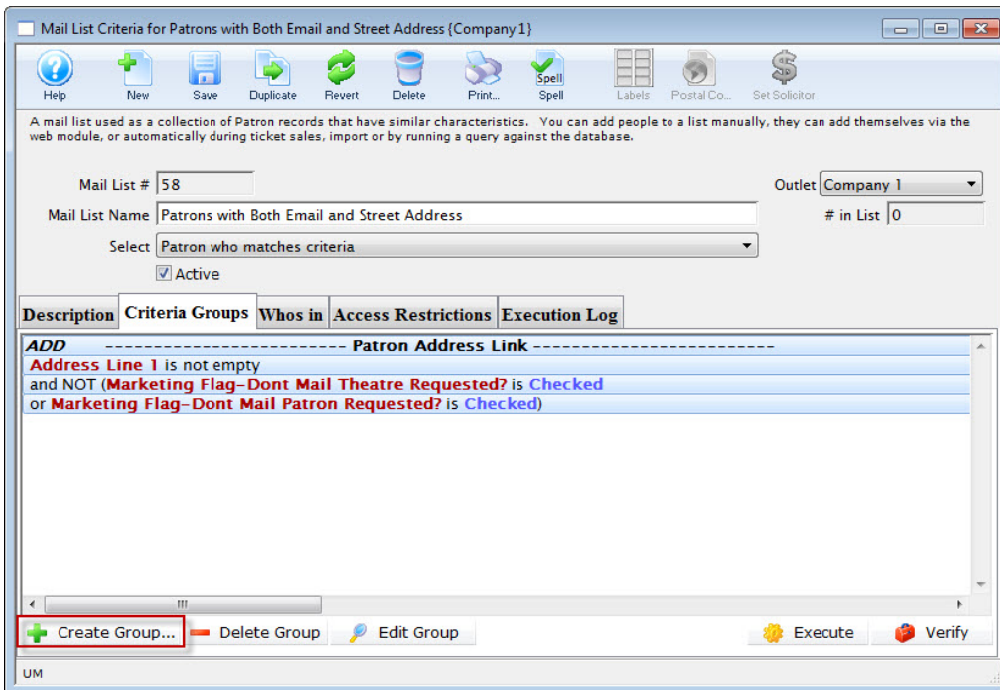

12. Click the Create Group [Create Group...] button.
13. Choose To Add Patrons To The Mail List.
14. Choose a file containing the required data. This example requires the "Patron Contact Link" file.
15. Click the Next [Next] button.
16. Click the New [New] button in the Parameters window.

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In the Edit/Add Parameters window, leave the And ⊙ AND button selected. The field for this example would be "Patron Contact Data>>Contact Data (eg Phone/email/website)" while the condition would be "contains" and parameter would be "@" (to search for an email address).
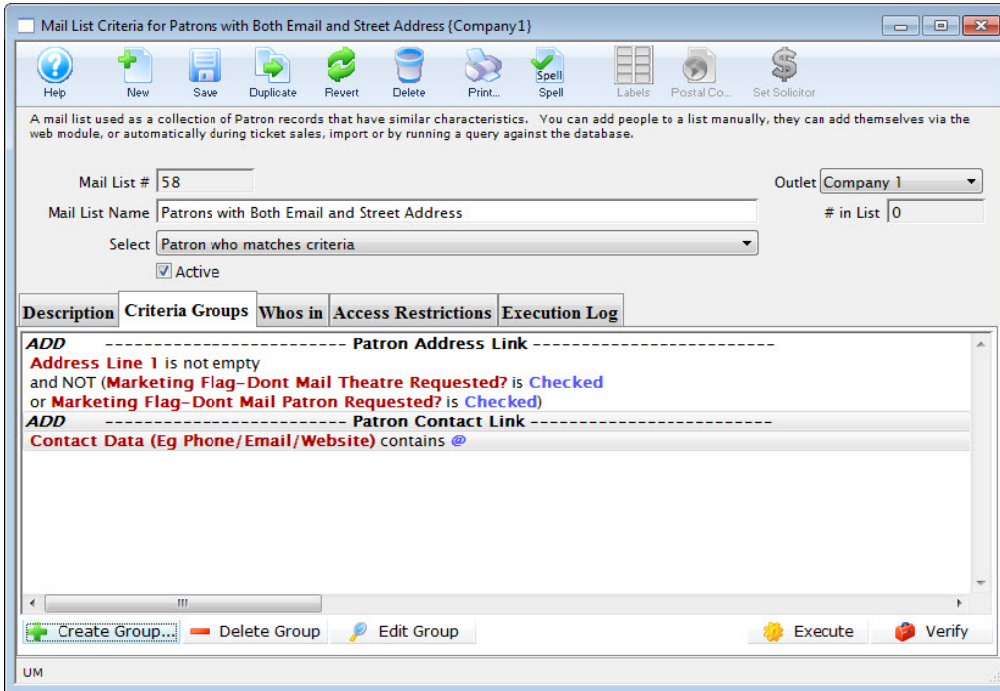

Click the Save ☺ **Save** button.
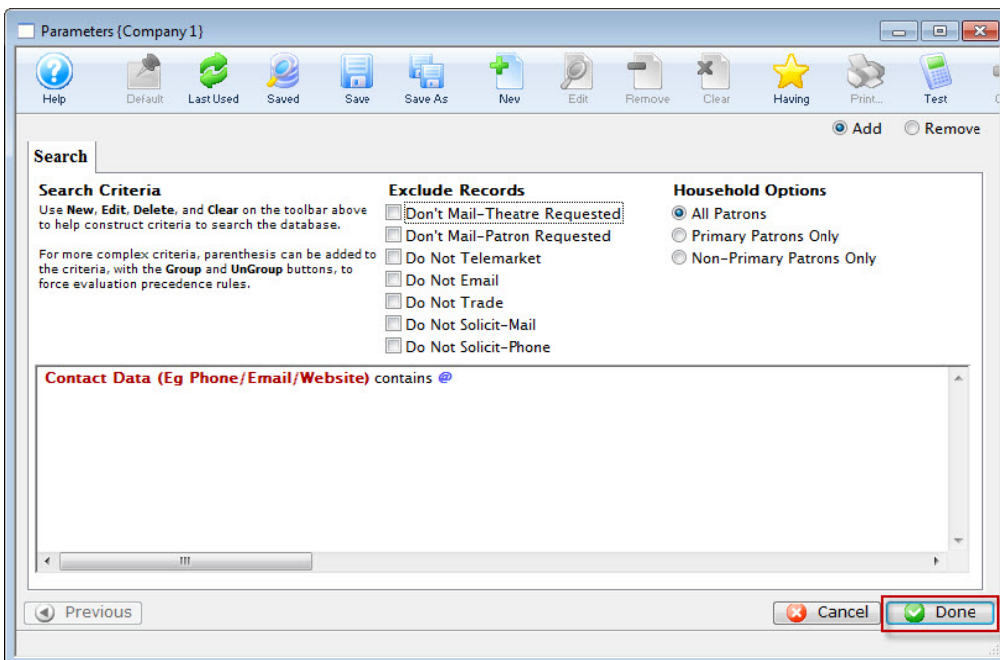
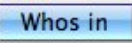You are returned to the Parameters window.

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Click the Done [Done] button.

Both of the Search Criteria are added to the query. The group criteria says add any patron who has volunteered their time as well as any patron who has made a donation to the list. Now, all the criteria have been added to satisfy the description, the database can be searched.

17. Click the Execute [Execute] button to begin the Query.

The patrons satisfying the first criteria will be found and added to the list. Once complete, the second criteria will be performed and any patrons matching the second criteria will be added. Any patron matching both criteria will only be displayed once. The Mail List will default to the Who's In [Whos in] tab displaying all patrons who match the criteria and are in the list.

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