

Tessitura



**EUROPEAN
CONFERENCE 2015**

**5 & 6 NOVEMBER
NOTTINGHAM**

LIST MANAGER

BEYOND THE BASICS

PRESENTER

Paul Callas: Tessitura Network



Agenda

- Overview of Basic List Building
- Search Household
- Advanced Relationship Options
- Lists Not Associated with Criteria Sets
- Resources
- Q & A



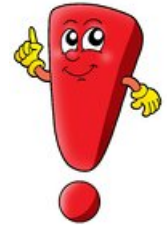
You should leave here with

- The knowledge to create lists from List Manager and other Tessitura sources
- An understanding of Household Search and Advanced Relationship Options
- The courage and confidence to work with lists and extractions in the future
- An understanding of List Functions





Disclaimer



- This is a **BASIC** session targeted to new users and those inexperienced with lists
- The focus is primarily on criteria sets and lists
- Experienced list users might want to attend **Basic Extractions** or **Advanced Extractions**



LIST MANAGER





List Manager Screen

Clickable headers

Search Filter

- Box Office
- Demo
- Development
- Education
- IT
- Karen's Folder
- Marketing
- Testing
- Visitor Services

Categories (folders)

The Lists

My Lists Only

Action buttons

Created By	Create Date	Description	Count	SQL	Dynamic	TMS	TStats	Inactive	Swap HH	Rel Opt	Control Group	Category
134 ksterk	4/4/2013 16:57	Const 1036									(Default Control Group)	(unassigned)
134 ksterk	4/4/2013 17:19	Const 1036 & 1005									(Default Control Group)	(unassigned)
86 ksterk	6/14/2012 14:56	Corporate Accounts									(Default Control Group)	(unassigned)
155 ksterk	8/2/2013 15:39	Custom Elements									(Default Control Group)	(unassigned)
73 ksterk	5/10/2012 13:40	Dynamic All									(Default Control Group)	(unassigned)
50 ksterk	6/24/2011 12:40	ExtractionTest									(Default Control Group)	(unassigned)
138 ksterk	5/1/2013 15:26	HB Testing									(Default Control Group)	(unassigned)
114 ksterk	8/22/2012 13:47	Household Search Test	15								(Default Control Group)	(unassigned)
	2011 15:38	Inactive Contribution Campaign	4								(Default Control Group)	(unassigned)
	14/2013 11:31	KGs T-Stats 25	8								(Default Control Group)	Testing
94 ksterk	7/12/2012 14:18	Like Test	0								(Default Control Group)	(unassigned)
75 ksterk	5/23/2012 17:24	List in List	1003								(Default Control Group)	(unassigned)
137 ksterk	4/8/2013 12:40	List In List 2	0								(Default Control Group)	(unassigned)
147 ksterk	6/23/2013 21:46	ListRemove	16								(Default Control Group)	(unassigned)
129 ksterk	11/30/2012 11:57	m2_Millard_BRAND NEW	0								(Default Control Group)	(unassigned)
130 ksterk	11/30/2012 11:57	m2_Millard_Reminder	0								(Default Control Group)	(unassigned)
126 ksterk		Manual List-House&Corp	2								(Default Control Group)	(unassigned)
		New Const ID List	1								(Default Control Group)	(unassigned)



The Three Pieces

- **Criteria:**
 - Pointers to constituent data
- **Value:**
 - What constituent data is evaluated against
- **Operators:**
 - How constituent data is evaluated against the value





Selecting Criteria

4 Steps to Satisfaction

1. Know what you want
2. Translate your wants into data points
3. Identify the criteria for that data
4. Determine how to evaluate the data





IN Example

- “I want a list of everyone who purchased a ticket in response to our last email appeal.”

Criteria	Operator	Value	Search Household
Promotion Response	In	(1 value selected)	<input type="checkbox"/>
Promotion Appeal	In	(1 value selected)	<input type="checkbox"/>



HAS Example

I Want Them All!

- Add the criterion multiple times but select only one value each time

Criteria	Operator	Value	Search Household
Ticket History Season	Has	(1 value selected)	<input type="checkbox"/>
Ticket History Season	Has	(1 value selected)	<input type="checkbox"/>
Ticket History Season	Has	(1 value selected)	<input type="checkbox"/>
Ticket History Season	Has	(1 value selected)	<input type="checkbox"/>
		Mainstage 2013-2014	
		Mainstage 2012-2013	
		Mainstage 2010-2011	
		Parking 2010-2011	
		Children's 2009-2010	

- Keep in mind, this only works with HAS



Apples and Oranges



Apple



Orange

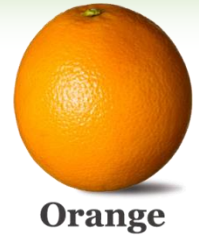
- To put two different groups of constituents on the same list, use the top and bottom panes

The screenshot shows a 'New List' window with a tree view on the left and a criteria table on the right. The tree view includes folders for 'All', 'Activities', 'Address Information', 'Attributes - Corp/Foundation', 'Constituent', 'Contribution', 'Customer Service Issues', 'EAddress Information', and 'Membership'. Under 'Membership', various membership-related fields are listed, such as 'Membership Benefactor', 'Membership Benefit Holder', 'Membership Current', etc.

Criteria	Operator	Value	Search Household
Constituency	In	(1 value selected)	<input type="checkbox"/>
OR			
Membership Current	In	(1 value selected)	<input type="checkbox"/>

The 'OR' operator is circled in red. The 'Value' field for 'Membership Current' is open, showing a dropdown menu with 'No' and 'Yes' options, where 'Yes' is currently selected.

Apples and Oranges



- To put two different groups of constituents on the same list, use the top and bottom panes

Criteria	Operator	Value	Search Household
Constituency	In	(1 value selected)	<input type="checkbox"/>
OR			
Criteria	Operator	Value	Search Household
Membership Current	In	(1 value selected)	<input type="checkbox"/>
		No	
		Yes	

- Criteria in each pane are joined by OR
 - A constituent must meet all of the criteria in one pane
 - But not all the criteria in both panes

What if you want fruit salad?



- For more than two groups use...
- Extraction Manager
- Extraction Manager is a compilation of stacked lists called segments
- Want to know more about Extractions?
 - More on the website Basic Extractions Session from TLCC15
 - Check out the T-Classes on www.tessituranetwork.com



CRITERIA SET WINDOW





The Criteria Set Window

New List

Criteria	Operator	Value	Search Household
Contribution Amount	>=	1000	<input type="checkbox"/>
Contribution Date	Between	01/01/2013 and 12/31/2013	<input type="checkbox"/>

Selected Criteria **Operators** **Values**

OR

Criteria	Operator	Value	Search Household
----------	----------	-------	------------------

Replace Individuals Add Associations Add Individuals Add Groups *Keep/Replace Original* Delete

Replace Individuals with Primary Household

- Leave the individual constituents as selected by the list criteria
- Replace individual constituents with their primary household, if one exists
- Replace individual with household and add all primary affiliates

Reset Show Query Validate Query Manual Edit Close



Relationships

New List

Criteria	Operator	Value	Search Household
Contribution Amount	>=	1000	<input type="checkbox"/>
Contribution Date	Between	21/20	<input type="checkbox"/>

OR

Criteria	Operator	Value	Search Household
----------	----------	-------	------------------

Replace Individuals Add Associations Add Individuals Add Groups *Keep/Replace Original* Delete

Replace Individuals with Primary Household

- Leave the individual constituents as selected by the list criteria
- Replace individual constituents with their primary household, if one exists
- Replace individual with household and add all primary affiliates

Reset Show Query Validate Query Manual Edit Close

Search Household

Advanced Relationship Options



SEARCH HOUSEHOLD





Search Household

- The Search Household box includes data from a primary household when evaluating an individual
- Use when:
 - You want individuals
 - Some data is with the individual and some is with the household





Example 1 – Search Household

- “I want all patrons who attended the season preview reception and had tickets to Show 1 in the 2014-15 Season.”

<input checked="" type="checkbox"/> Criteria	<input type="checkbox"/> Operator	Value	Search Household
Ticket History Season	<input type="checkbox"/> In	(1 value selected)	<input checked="" type="checkbox"/>
Ticket History Perf Name	<input type="checkbox"/> Like	Show 1%	<input checked="" type="checkbox"/>
Activity Name	In	(1 value selected)	<input type="checkbox"/>
Activity Status	In	(1 value selected) <input type="button" value="v"/>	<input type="checkbox"/>



Example 2 – Search Household

- “I want all board members who gave £5000 or more to this year’s campaign.”

Criteria	Operator	Value	Search Household
Constituency	In	(1 value selected)	<input type="checkbox"/>
Contribution Campaign	In	(1 value selected)	<input checked="" type="checkbox"/>
Total Giving	>=	5000	<input checked="" type="checkbox"/>



Why Not Always Check the Box?

- You could get both the household and the individual
- You don't have any control over which affiliates are added and which ones to drop or keep





Aggregate Criteria

- Special aggregate criteria to add data values for an entire household
 - Total Household Giving
 - Ticket History Total Amount HH
 - Ticket History Unique Perfs HH
- Adds up data from the household and primary affiliates



Example 1 – Aggregate Criteria

- “I want all board members who’s total household giving to this year’s campaign is \$5000 or more.”

Criteria	Operator	Value	Search Household
Relationship Type	In	(1 value selected)	<input type="checkbox"/>
Contribution Campaign	In	(1 value selected)	Aggregate
Total Household Giving	>=	\$5,000.00	Aggregate



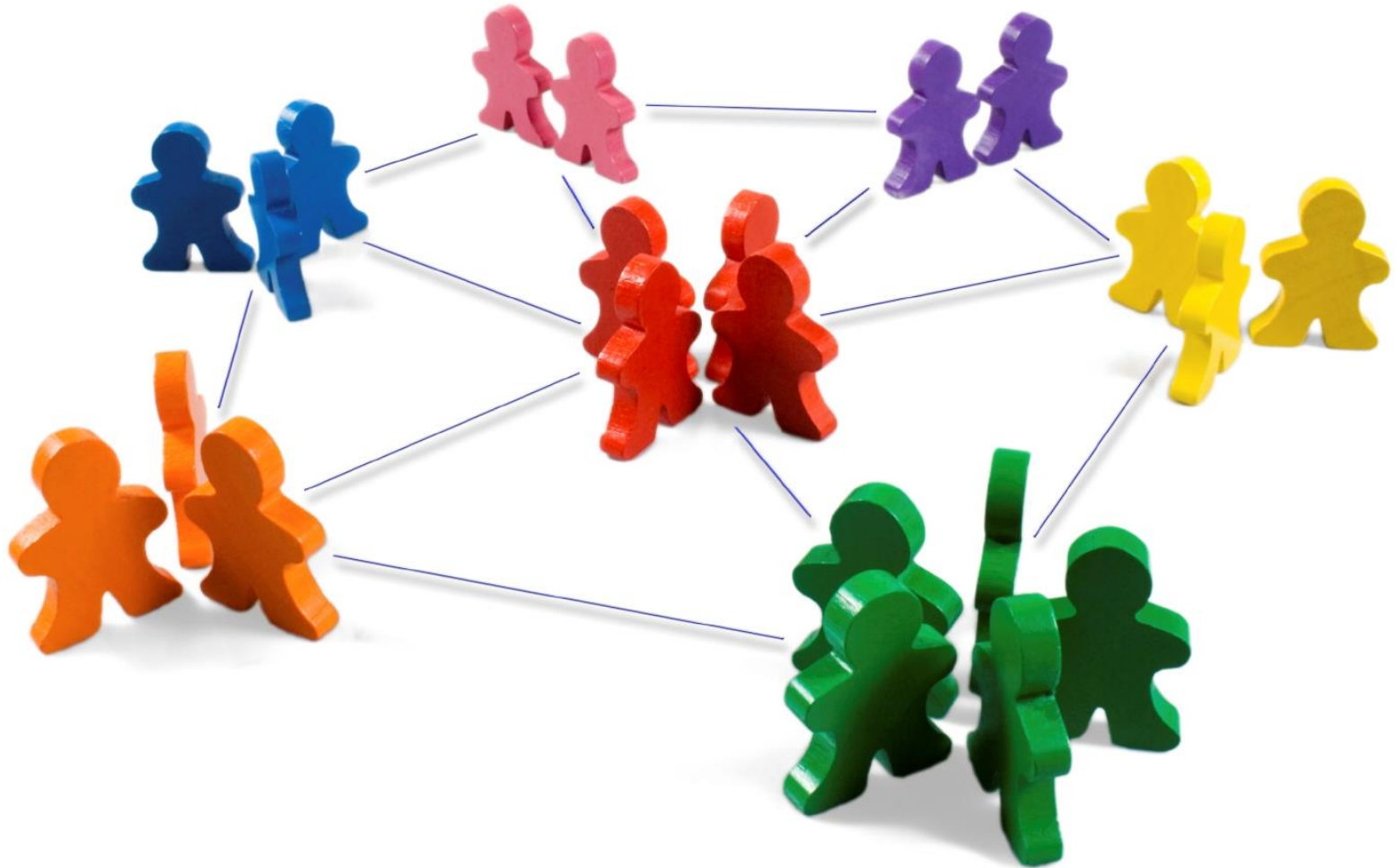
Example 2 – Aggregate Criteria

- “I want VIP prospects who have tickets for the 2014-15 Season and have a total household ticket amount of \$3000 or more for all tickets ever purchased.”

Criteria	Operator	Value	Search Household
Constituency	In	(1 value selected)	<input type="checkbox"/>
Ticket History Season	Has	(1 value selected)	<input type="checkbox"/>
Ticket History Total Amount HH	>=	\$3,000.00	Aggregate



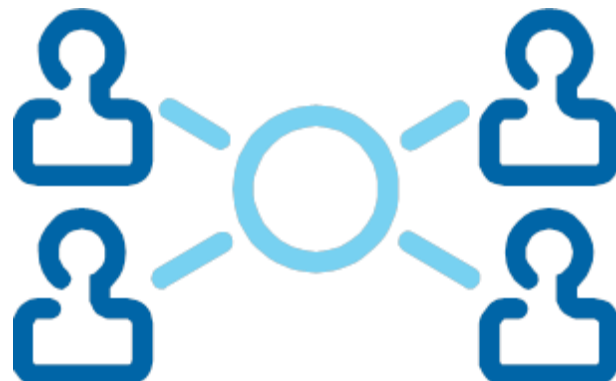
ADVANCED RELATIONSHIP OPTIONS





Advanced Relationship Options

- The advanced relationship options allow you to add or swap in affiliates
 - Replace individuals with their households
 - Add affiliates of a group
 - Replace corporations with contacts
 - Add affiliated groups





Replace Individuals

- Leave the selected constituents (default)
- Replace individuals with their affiliated household if one exists
- Replace individuals with the household and then add all primary affiliates

The screenshot shows a software interface with a tabbed menu at the top. The 'Replace Individuals' tab is selected and highlighted with a red border. Other tabs include 'Add Associations', 'Add Individuals', 'Add Groups', and 'Keep/Replace Original'. To the right of the tabs are buttons for 'Delete', 'Show Query', 'Validate Query', 'Manual Edit', and 'Close'. Below the tabs, the main area is titled 'Replace Individuals with Primary Household' and contains three radio button options: 'Leave the individual constituents as selected by the list criteria' (which is selected), 'Replace individual constituents with their primary household, if one exists', and 'Replace individual with household and add all primary affiliates'. A 'Reset' button is located at the bottom left of the main area.



Add Associations

- Add associated constituents based on association type
- Option to filter by list, inactive status and start/end date

Replace Individuals **Add Associations** Add Individuals Add Groups Keep/Replace Original Delete

Add Associated Constituents

Add Associated Constituents of These Types:

Filter Associations By List: (none) ...

Include Inactive Associations:

Use Association Start and End Dates:

Reset

Show Query

Validate Query

Manual Edit

Close



Add Individuals

- Add affiliated individuals based on affiliation type
- Option to filter by list, inactive status and start/end date

Replace Individuals | Add Associations | **Add Individuals** | Add Groups | Keep/Replace Original

Add Affiliated Individuals

Add Individuals with these Affiliation Types:

Filter Affiliations By List: (none) ...

Include Inactive Affiliations:

Use Affiliation Start and End Dates:

Reset

Delete

Show Query

Validate Query

Manual Edit

Close



Add Groups

- Add affiliated groups based on affiliation type
- Option to filter by list, inactive status and start/end date

Replace Individuals | Add Associations | Add Individuals | **Add Groups** | Keep/Replace Original

Add Affiliated Groups

Add Groups with these Affiliation Types:

Filter Affiliations By List: (none) ...

Include Inactive Affiliations:

Use Affiliation Start and End Dates:

Reset

Delete

Show Query

Validate Query

Manual Edit

Close



Keep/Replace Original

- Determine who stays and who goes
 - Original list + Adv. Rel. Option Results
 - ~~Original list~~ + Adv. Rel. Option Results
 - Original list UNLESS Adv. Rel. Option Results

Replace Individuals | Add Associations | Add Individuals | Add Groups * | **Keep/Replace Original** | Delete

Keep Original Constituents if related constituents were requested

Keep the originally selected constituents and the added related constituents

Only keep the related constituents that were added

Keep original constituent only if no related constituents are found

Reset

Show Query

Validate Query

Manual Edit

Close



Example – Replace Individuals

- “I want to send a special offer to all subscriber households, even if the subscription is on an individual record.”

Criteria	Operator	Value	Search Household
Package History Season	In	(1 value selected)	<input type="checkbox"/>

Replace Individuals * Add Associations Add Individuals Add Groups Keep/Replace Original

Replace Individuals with Primary Household

Leave the individual constituents as selected by the list criteria

Replace individual constituents with their primary household, if one exists

Replace individual with household and add all primary affiliates

Reset

Delete

Show Query

Validate Query

Manual Edit

Close



Example – Add Individuals

- “I want to mail the individual members of subscriber households with invitations to a special reception.”

Criteria	Operator	Value	Search Household
Package History Season	In	(1 value selected)	<input type="checkbox"/>

Replace Individuals | Add Associations | **Add Individuals *** | Add Groups | Keep/Replace Original

Add Affiliated Individuals

Add Individuals with these Affiliation Types: (1 value selected)

Filter Affiliations By List: Default Affiliation Type (Default Relationship Ca

Include Inactive Affiliations: Employee (Employment)

Use Affiliation Start and End Dates: Primary Contact (Employment)

Extended Family (Family)

Adult Member (Household)

Reset

Delete

Show Query

Validate Query

Manual Edit

Close

Replace Individuals | Add Associations | Add Individuals * | Add Groups | **Keep/Replace Original ***

Keep Original Constituents if related constituents were requested

Keep the originally selected constituents and the added related constituents

Only keep the related constituents that were added

Keep original constituent only if no related constituents are found

Reset

Delete

Show Query

Validate Query

Manual Edit

Close



New Advanced Relationship Option

Replace Individuals * Add Associations Add Individuals Add Groups Keep/Replace Original Delete

Replace Individuals with Primary Household

Leave the individual constituents as selected by the list criteria

Replace individual constituents with their primary household, if one exists

Replace individual with household and add all primary affiliates

Reset Show Query Validate Query Manual Edit Close

- Individuals selected are removed and replaced with primary HH
- All affiliates of the HH are added to the results
- Universal suppression or inclusion



Example – Board Suppression

- “I need to exclude all my board members, their households and all affiliates of the household from an upcoming mailing.”

Criteria	Operator	Value	Search Household
Constituency	In	(1 value selected) Board Member Constituency Test Donor Friend's Circle Gold Circle	<input type="checkbox"/>

Replace Individuals *	Add Associations	Add Individuals	Add Groups	Keep/Replace Original	Delete
Replace Individuals with Primary Household					Show Query
<input type="radio"/> Leave the individual constituents as selected by the list criteria					Validate Query
<input type="radio"/> Replace individual constituents with their primary household, if one exists					Manual Edit
<input checked="" type="radio"/> Replace individual with household and add all primary affiliates					Close
Reset					



LIST TYPES

Bullets to avoid

- ❑ Empty-box bullet
- ❖ Four-in-one bullet
- Boomerang bullet
- ➡ Arrow-circle bullet
- ☠ Scary X-Files bullet
- ☞ Angry pointing bullet
- ✚ Ugly picture bullet

PPT Ninja Bullets

- (normal text) code 2022
- Wingdings 2 code 151
- Arial code 2013
- Wingdings code 167
- ▶ Webdings code 52
- Wingdings 3 code 132
- ➔ Wingdings 3 code 210

List Types

- There are essentially two types of lists:
 1. Lists associated with a criteria set
 2. Lists not associated with a criteria set





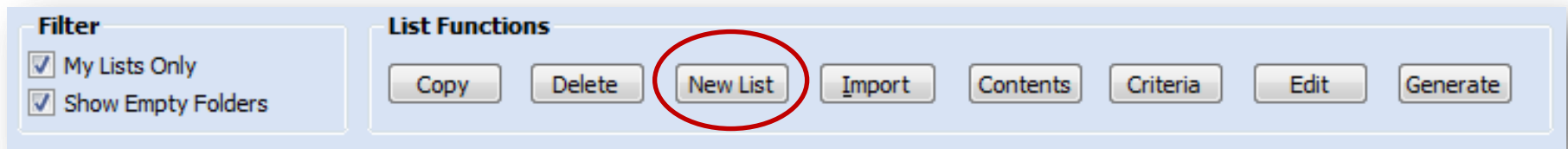
Lists Associated with Criteria Sets

- Created from List Manager only
- Also known as a “Standard” list
- Contents are generated based on the criteria set to which a list is associated
- Contents can be regenerated at any time
- Can be made Dynamic
 - Contents automatically regenerated whenever the list is used by a report, utility, or other system process

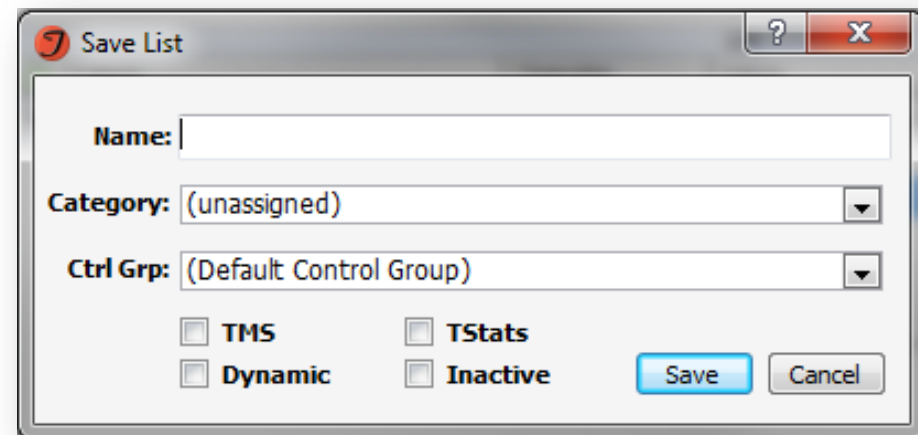


Creating a Standard List

- Go to List Manager and click the New List button.



- Select criteria and values
- Click Close and Save List window opens
- Enter name
- Save





List Naming Conventions

- Establish naming conventions that keep your Lists manageable and easy to find
- Recommendation: Include an indication of the department and creator i.e.
 - ‘TKT-KGS-Unrenewed Subs’
- Lists that will be used for “In-house” sources should use source naming conventions



List Properties

Save List [?] [X]

Name:

Category: (unassigned) ▼

Ctrl Grp: (Default Control Group) ▼

TMS **TStats**

Dynamic **Inactive**

Filter

- My Lists Only
- Show Empty Folders

List Functions



List Properties Category

- Used to group lists in folders
- Defined by your organisation
- Folders listed on the left side of List Manager
- Created in System Table **TR_LIST_CATEGORY**

Save List

Name:

Category:

Ctrl Grp:

TMS TStats
 Dynamic Inactive

List Manager

Search List Descript	
List No	Created B
133	ksterk
134	ksterk
54	ksterk
72	ksterk
167	ksterk
86	ksterk
155	ksterk
73	ksterk
50	ksterk
138	ksterk
114	ksterk



List Properties Control Group

Save List

Name:

Category: (unassigned) ▼

Ctrl Grp: (Default Control Group) ▼

TMS TStats
 Dynamic Inactive

Save Cancel

- Pre-populates with the control group specified for your user group
- You can choose to assign a specific control group



List Properties The Boxes

- **TMS:** Used in conjunction with Wordfly and Mail2 for Email Marketing
- **TStats:** Allows you to use the list in Tstats as a filter option
- **Dynamic:** Gives the list the ability to regenerate based on criteria when used in a report or system process
- **Inactive:** Inactivates the list

Save List

Name:

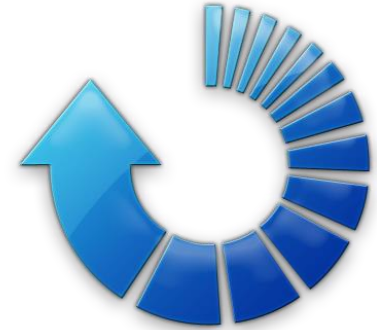
Category: (unassigned) ▼

Ctrl Grp: (Default Control Group) ▼

TMS TStats
 Dynamic Inactive

Save Cancel

Dynamic Lists



- A dynamic list is a standard list automatically regenerated when used by a:
 - Report or utility
 - Other criteria sets
- For lists used more than once and based on constantly changing data, such as:
 - Sales for a current show, donations for the current campaign, or renewals for the current renewal period



Dates and Dynamic Lists

- Criteria that use date values can be set to use dates relative to whenever the list is generated
- Operators allowed:
 - \geq , \leq , $=$, $\langle \rangle$
- Operators not allowed:
 - BETWEEN

Criteria	Operator	Value	Search Household
Membership Exp Date	=	00/00/0000	<input type="checkbox"/>
		<ul style="list-style-type: none">Report run dateBeginning of report run monthEnd of report run monthBeginning of: report run date +/- n monthsEnd of: report run date +/- n monthsReport run date +/- n daysReport run date +/- n months	

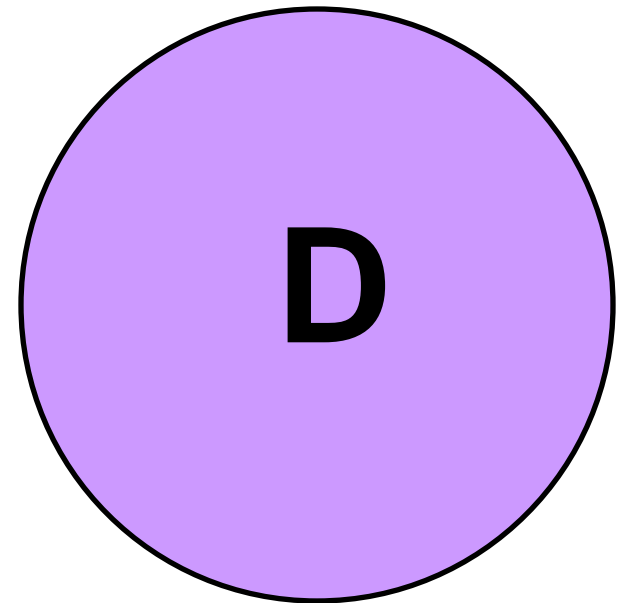
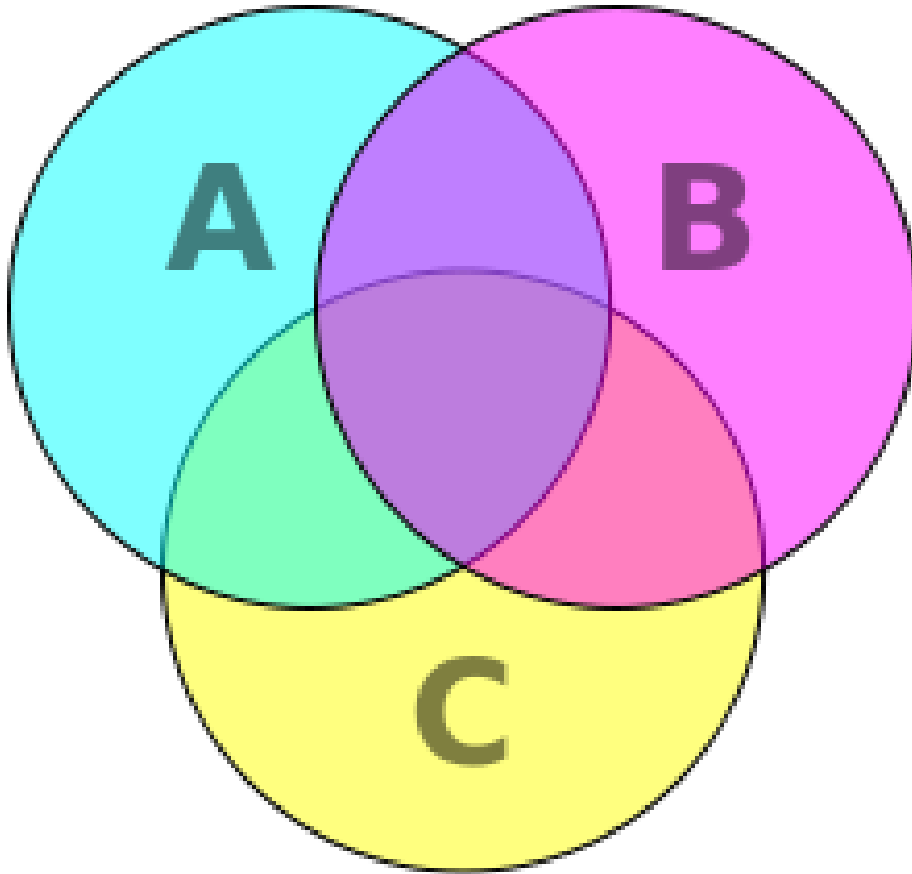


Example Relative Dates

- “I want all constituents whose memberships will expire within the next two weeks for a list that will be refreshed regularly.”

Criteria	Operator	Value	Search Household
Membership Exp Date	>=	RunDate	<input type="checkbox"/>
Membership Exp Date	<=	DayRunDate +14	<input type="checkbox"/>

LISTS NOT ASSOCIATED WITH CRITERIA SETS





Lists Not Associated with a Criteria Set

- Manual Lists
- Report Lists
- Order Search Lists
- Copied or Combined Lists
- Extraction Set Lists
- T-Stats Lists
- Imported Lists



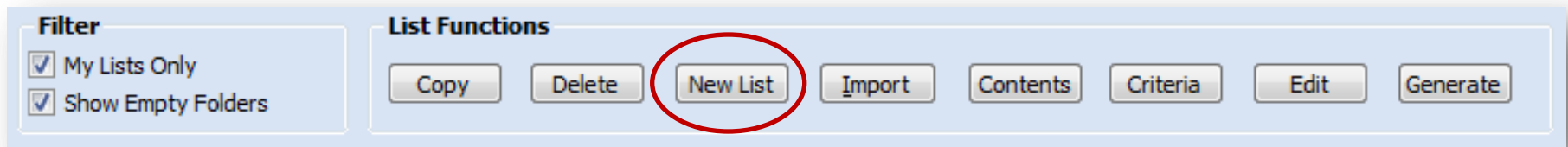
MANUAL LISTS





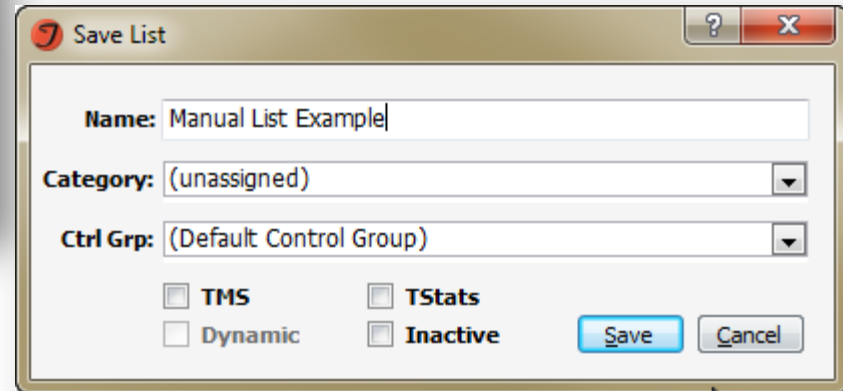
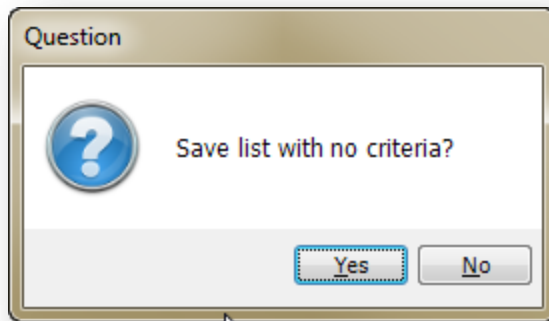
Manual Lists

- Manual lists are lists created in List Manager with empty criteria sets
- Constituents are manually added to the list
- To create a manual list, begin by clicking new list in the list functions menu



Manual Lists

- Close and Save the Criteria Set window without selecting any criteria



- Enter the name of the list and click Save
- Now manually add constituents to the list



Viewing and Editing List Contents

- Select the list and then click the Contents button

The screenshot displays a list of items with the following data:

ID	Author	Date	Name	Count	Status	Actions
218	ksterk	8/3/2014 14:16	TN_HAS Ticket Seasons	0	✓	⋮
75	ksterk	5/23/2012 17:24	TN_KGS_SubSitsWith	1003	✓	⋮
217	ksterk	8/3/2014 14:06	TN_Multiple Selection	35	✓	⋮

Below the list is a control panel with two sections:

- Filter:** My Lists Only, Show Empty Folders
- List Functions:** Copy, Delete, New List, Import, **Contents** (circled in red), Criteria, Edit, Generate



Adding List Contents

- Click the Add button to manually add a constituent to the list

Created By: ksterk List No: 235 Date: 8/5/2014 22:29 Dynamic SQL TMS TStats Inactive Swap HH Rel Opt

List Name: Manual List Example Category: Demo Count: 0 Ind: Ind-HH: HH: Org:

Constituent ID	Name	Street1	Street2	City

1 Constituents

◀ ||| ▶

Delete **Add** Close

- Enter the constituent ID or click the chicklet to open the Search window



List Contents

By: ksterk

List No:

235

Date: 8/5/2014 22:29

Dynamic

SQL

TMS

TStats

Inactive

Swap HH

Rel Opt

List Name: Manual List Example

Category: Demo

Count:

31

Ind:

24

Ind-HH:

3

HH:

3

Org:

1

Constituent ID	Name	Street1	Street2	City
10	Ms. Selby Jackson Parzel	9531 E Beverly Rd		Santa Rosa
11	Mr. Hubert Mike Stromboe	444 Market St Suite 2420		Salt Lake City
12	Mr. Adrienn Della Pitcole	1 Canon Plaza		Anaheim
30	Ms. Remer Raymond Barthel	8332 Commonwealth Ave		Greenville
32	Mr. Judy Helen Bowman	1320 N Manzanita St		Galesburg
40	Ms. Jill Mimi Maynard	12801 Crossroads Pkwy S		Washington
45	Mr. Angela Sushama Cray	1 Maritime Plaza Suite 2400		Watsonville
55	Mr. Lanny Key Adler	5439 E La Palma Ave		New York
66	Mr. Chris Dora Hibel	101 Park Ave 6th Fl		Seattle
72	Ms. Delmer Israel Veeneman	3 Parkway		New York
81	Ms. Murray Grant Farrelly	7 Reynolds Arcade		Friend
213	Mr. Elaina Anne Hylton	1111 Cedar Swamp Rd		Bloomington
265	Mr. Holly Georgina Cralino	12100 Wilshire Blvd Suite 250		El Monte
267	Ms. Cathi Kim Punke	1000 Hovey Hills Rd		Palos Hills
324	Mr. Kurt Booker Pietropola	5335 Reisner Way		Washington
532	Mr. Jack Hartley Fiske	461 Doughty Blvd		Edgewater
589	Mr. Margreta Twila Radabough	1500 Court St		Houston
624	Ms. Luis Merel Boyer	6 E 43rd St 28th Fl		Las Vegas
642	Ms. Clair Dona Feinstein	10100 Santa Monica Blvd Suite		Saint Louis

31 Constituents

Delete

Add

Close



List Contents

Created By: ksterk List No: 235 Date: 8/5/2014 22:29 Dynamic SQL TMS TStats Inactive Swap HH Rel Opt

List Name: Manual List Example Category: Demo Count: 31 Ind: 24 Ind-HH: 3 HH: 3 Org: 1

Constituent ID	Name	Street1	Street2	City
10	Ms. Selby Jackson Parzel			Santa Rosa
11	Mr. Hubert Mike Stromboe			Salt Lake City
12	Mr. Adrienn Della Pitcole			Anaheim
30	Ms. Remer Raymond Barthel			Greenville
32	Mr. Judy Helen Bowman			Galesburg
40	Ms. Jill Mimi Maynard			Washington
45	Mr. Angela Sushama Cray			Watsonville
55	Mr. Lanny Key Adler			New York
66	Mr. Chris Dora Hibl			Seattle
72	Mr. Delmar Israel Veeneman			New York
40	Ms. Jill Mimi Maynard			Santa Rosa
45	Mr. Angela Sushama Cray			Salt Lake City
# 45	Mr. Angela Sushama Cray			
	Last Contrib: 08/02/13 \$500.00			
	Ind General			
	Email: mymail@qwest.net			
324	Mr. Kurt Booker Pietropola			
532	Mr. Jack Hartley Fiske			
598	Mr. Mark ...			

- Click on Constituent ID or Name to open record
- Constituent ID is the only data on the list
- Name and address data for display only



Deleting List Contents

- Select the constituent
- Click the Delete button

Constituent ID	Name	Street1
10	Ms. Selby Jackson Parzel	9531 E Beverly Rd
11	Mr. Hubert Mike Stromboe	444 Market St Suite 2420
12	Mr. Adrienn Della Pitcole	1 Canon Plaza
30	Ms. Remer Raymond Barthel	8332 Commonwealth Ave
32	Mr. Judy Helen Bowman	1320 N Manzanita St
40	Ms. Jill Mimi Maynard	Pkwy S
45	Mr. Angela Sushama Cray	ite 2400
55	Mr. Lanny Key Adler	ve
66	Mr. Chris Dora Hibl	Fl
72	Ms. Delmer Israel Veeneman	
81	Ms. Murray Grant Farrelly	
213	Mr. Elaina Anne Hylton	
265	Mr. Holly Georgina Cralino	12100 Wilshire Blvd Suite 250
267	Ms. Cathi Kim Punke	1000 Hovey Hills Rd
324	Mr. Kurt Booker Pietropola	5335 Reisner Way
532	Mr. Jack Hartley Fiske	461 Doughty Blvd
589	Mr. Margreta Twila Radabough	1500 Court St
624	Ms. Luis Merel Boyer	6 E 43rd St 28th Fl
642	Ms. Clair Dona Feinstein	10100 Santa Monica Blvd Suit

31 Constituents

Delete Add

- Remember:
 - If the list has criteria, when it is regenerated the constituent may end up back on the list



REPORT LISTS





Lists From Reports

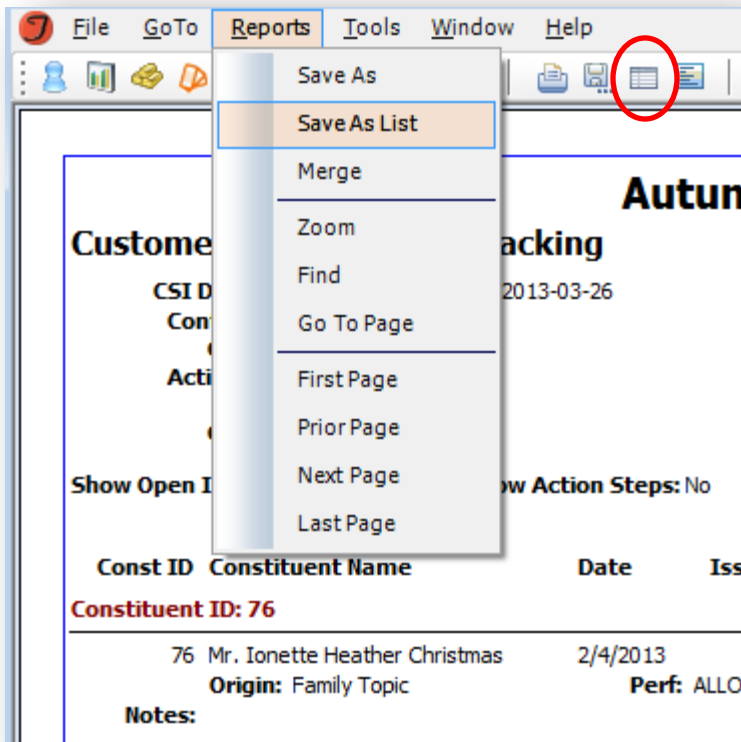
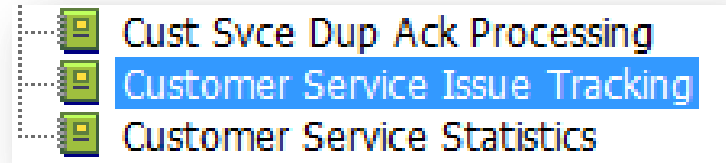
- A list can be created from any report that includes constituent ID in the output
- Saves you the trouble of constructing a criteria set to duplicate what a report already does





Lists From Reports – InfoMaker

Green Icon = InfoMaker

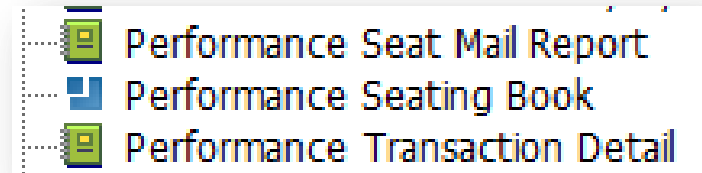


- Run desired Report in the Current Window
- Select Save As List from the Reports menu



Lists From Reports – SSRS

Blue Icon = SSRS



Autumn Ridge Performin

Performance Seating Book

Parameters

Season: Mainstage 2010-2011
Performance: Jul 31 2011 8:00PM M311073111
Section(s): (All)
Include General Public seats?: Yes
List: (None)
List Filter Acts Upon: (None)

ID	Name	Order No	Section	Seat	Status
B					
60	Ms. Lois Lois Benedict	252	Orchestra Front	D-15	Ticketed, Paid
S					
25	Ms. Blake Collin Spritzer	460	Mezzanine	M-102	Ticketed, Paid

- Run desired Report in the Current Window
- Click Export icon
- Select Save as List



ORDER SEARCH LISTS





Lists From Order Searches

- A list can be created from the results on the Order Search screen
- Saves you the trouble of creating a criteria set to duplicate what an order search already does





Lists From Order Search

- Run a search from order search screen

Filter

Category: (all) MOS: (all) Paid: (all) Seated: (all) Printed: (all)
Delivery: (all) Channel: (all) Future Dates Only Order Date Range: 01/01/2006 - 12/31/2014

Order No	Order Date	Owner ID	Owner Name	First Product	Prof Date	Total	Balance	Delivery	Mode of Sale
595	3/25/2013 13:54:11	51	M				\$48.00	Hold at Box Office	Subscription Or
594	3/25/2013 13:44:33	50	M				\$48.00	Hold at Box Office	Subscription Or
764	2/1/2013 00:00:00	1005	M				\$302.00	Hold at Box Office	Subscription Or
461	10/2/2012 12:20:52	58	M				\$0.00	Hold at Box Office	Subscription Or
297	7/13/2011 16:57:19	1005	M				\$0.00	Hold at Box Office	Subscription Or
206	3/21/2011 00:00:00	28	M				2,030.00	Hold at Box Office	Subscription Or
189	1/19/2011 11:02:06	1005	M				\$0.00	Hold at Box Office	Subscription Or
188	1/19/2011 11:01:08	1005	M				\$0.00	Hold at Box Office	Subscription Or
162	12/10/2010 13:53:09	30	Ms. Remer Raymond Barthel	SUBF22011		\$0.00	\$0.00	Hold at Box Office	Subscription Or

Save List

Name:

Category: (unassigned)

Ctrl Grp: (Default Control Group)

TMS TStats
 Dynamic Inactive

Save Cancel

Due on Selected Orders: 0.00 Pay Save Print Continuous
Payment entered: 0.00 Only Cut Tickets Between Orders

List Remove Details Search Open Clear Close
 Cumulative Search

- Click the List button, name and Save



COPY OR COMBINED LISTS





Copy or Combined Lists

- Copy allows you to copy one or multiple lists as a new list
- Contents will copy, but criteria will not

The screenshot shows a software interface with a list of items and a 'Save List' dialog box. The list contains the following data:

217	ksterk	8/3/2014 14:06	TN_Multiple Selection
214	ksterk	8/3/2014 10:53	TN_New Constituents
220	ksterk	8/3/2014 14:53	TN_OR Window
216	ksterk	8/3/2014 11:29	TN_Plan Gala
215	ksterk	8/3/2014 11:21	TN_Promotion Response
213	ksterk	8/3/2014 00:31	TN_Ticket Order and Perf D

The 'Save List' dialog box is open, showing the following fields and options:

- Name: [Empty text field]
- Category: (unassigned) [Dropdown menu]
- Ctrl Grp: (Default Control Group) [Dropdown menu]
- TMS
- TStats
- Dynamic
- Inactive
- Buttons: Save, Cancel

At the bottom of the interface, there is a 'List Functions' section with the following buttons: Copy, Delete, New List, Import, Contents, Criteria, Edit, Generate.



EXTRACTION SET LISTS





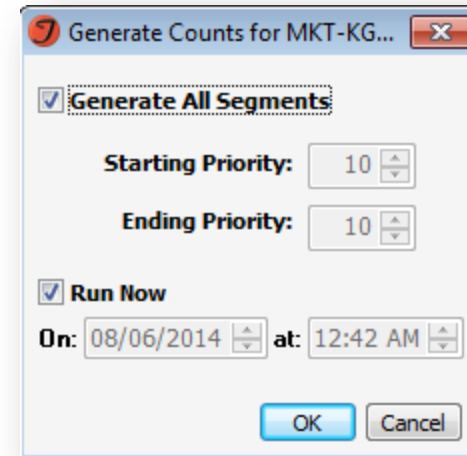
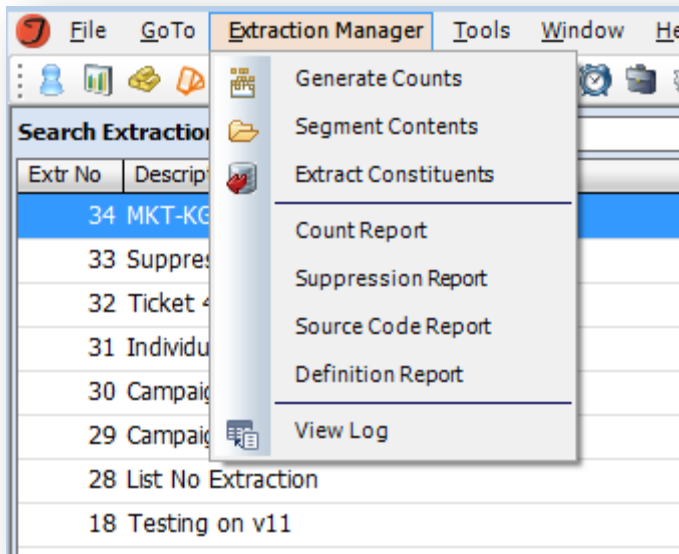
Extraction Set Lists

- Lists created from extraction sets are **NOT** associated with the criteria sets in the extraction set
- Constituents are selected for the extraction set based on the criteria sets (or segments) and then a list is created based on the constituents selected



Select Constituents For Extraction Set

- Go to Extraction Manager, select the extraction set, and select Generate Counts from the Extraction Manager menu.



- Click OK on the Generate Counts window



Creating a List from an Extraction Set Option 1

- Select the Extraction Set and then Extract Constituents from menu
- Select List for the destination
- Enter List name
- To generate a single source, check Create Promotions Now

Extract Constituents for MKT-KGS-2014 Activity (34)

Destination

File List Include Source File

List Name:

Category: (unassigned)

Output

Include Decoys Decoy Segment:

Generate Source Codes: Single Source Code

Create Promotions Now

Format Phones and Postal Codes

Tab-Delimited Fixed Length

Output Set: (none)

Communication Management

Contact Point Category:

Contact Point Purpose:

Delivery Date: 00/00/0000

Only select constituents if they have this contact point category Remove duplicate email addresses

Allow multiple contact points per constituent Eaddress Marketing Indicator

Only select constituents if they have this contact point purpose Use Label Postal Address

Data Selection

Salutation Type: Default

Memb Organization: (none)

Schedule

Run Now On: 08/06/2014 at: 12:47 AM

OK Cancel



Creating a List from an Extraction Set Option 2

- Open Extraction
- Click Save to List

Extraction Details

Description: MKT-KGS-2014 Activity
ID: 34 TMS: Type: Mass Mailing Control Group: (Default Control Group)
Created: 8/3/2014 22:15:23 by ksterk
Updated: 8/6/2014 00:57:16 by ksterk

Source Defaults

Appeal No: Usage: All Acquisition Cost: 0.0000
Media: Start Date: 00/00/0000 Delivery Cost: 0.0000
Source Group: End Date: 00/00/0000 Fulfillment Cost: 0.0000

Communication Management

Contact Point Category: Only select constituents if they have this contact point category Remove duplicate email addresses
Contact Point Purpose: Only select constituents if they have this contact point purpose Address marketing indicator
Delivery Date: 00/00/0000 Allow multiple contact points per constituent Use label postal address

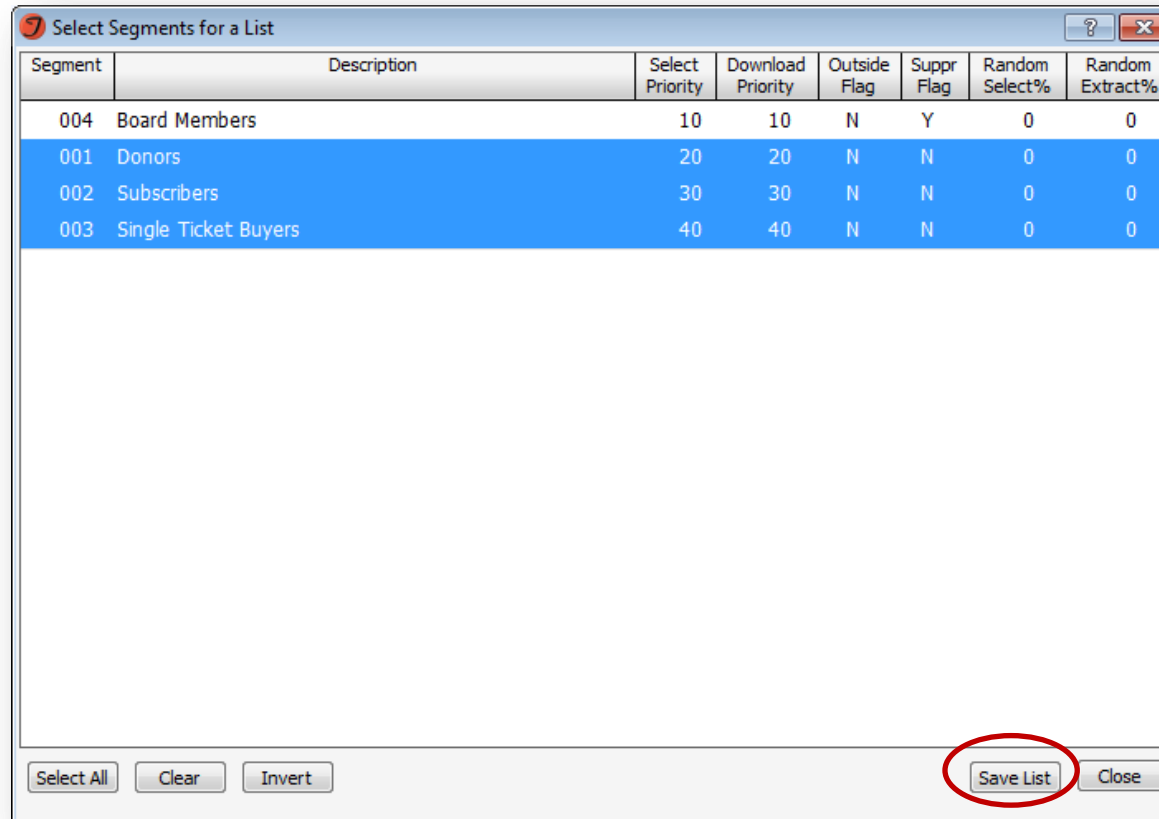
Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag	Maximum to DLoad	Random Select%	Random Extract%	Number Qualified	Number Assigned	Number Pieces	Appeal	Media	Source Group
001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Donors	10	10	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	16	16	16			
002	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Subscribers	20	20	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	16	10	10			
003	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Single Ticket Buyers	30	30	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	35	16	16			

Buttons: New, Delete, Copy Segment, Define Criteria, **Save to List**, Import, Save, Close



Creating a List from an Extraction Set Option 2

- Click the Save List button





Extraction Set List Notes

- A list created from an extraction set cannot be generated or made **Dynamic**
- The extraction set contents can be refreshed and used to make a new list



Standard List or Extraction List?

Use a standard list when:

- List contents will be refreshed regularly
- When a dynamic list is needed
- The criteria are simple

Use an extraction list when:

- The list will be used for an in-house source
- A set of constituents is being excluded from the list
- The criteria are complex and/or conflicting criteria are used



T-STATS LISTS

STATS DON'T LIE





Lists and T-Stats

- The Constituent data underlying a T-Stats report can be used to Create Tessitura List

The screenshot shows the Tessitura software interface. The 'Exporting' menu is open, and 'Create Tessitura List' is selected. The background shows a data grid with columns for Average Price per Pkg, Package Seats, and Package Name.

		Average Price per Pkg	Package Seats	Average Price per Pkg	Package Seats
		Full	Full	Flex	Flex
Children	Rumpus Package	\$36.00	12		
	Total	\$36.00	12		
	AR Opera/Jazz Flex (w/Fixed)			\$165.00	2



Lists and T-Stats

- Name your List
- Set a Category (this is the same as the List Categories)
- Click Create Tessitura List

Create a Tessitura List from Results

Create a Tessitura List

Click the "Create Tessitura List" button below to create a list in Tessitura from your results. This process may take several minutes.

List Name: T-Stats export Test

Category: Ticketing

T-Stats:

Create Tessitura List

List Results



Lists and T-Stats

- Your List is created and available in List Manager!

Create a Tessitura List from Results

Create a Tessitura List

Click the "Create Tessitura List" button below to create a list in Tessitura from your results. This process may take several minutes.

List Name:

Category: T-Stats:

25 Customers

	CustNo	Salutation1	Salutation2	Address1	Address2	City	State
▶	68	Mr Collin Letter		12 Jeffrey Street		CANTERBURY	NSW
	991	Ms Lee Geisler		17 Livingstone Road		PETERSHAM	NSW
	1021	Mr P...		5/2a Ithaca Road		ELIZABETH BAY	NSW
	1025	Mr. E...		12/178 Merewether Road		NEWCASTLE	NSW
	1028	Burr...		223 Burraneer Bay Road		CRONULLA	NSW
	2034	Mr K...		123/19 Anzac Parade		KINGSFORD	NSW
	2101	Mr A...		143 Pacific Highway		DENISTONE EAST	NSW
	2266	Mr J...		74a Pennant Hills Road		THORNLEIGH	NSW
	2397	Miss		17 James Street		ABBOTSFORD	NSW
	2400	Mr Peter Lin		10/12 Woodall Road		LEWISHAM	NSW

Your Tessitura List was created.

OK



IMPORTED LISTS





Imported Lists

- A list of constituents can be imported from a file into a new list or an existing list
- Importing a list imports constituent IDs only
- Only IDs for existing constituents are imported





Import File

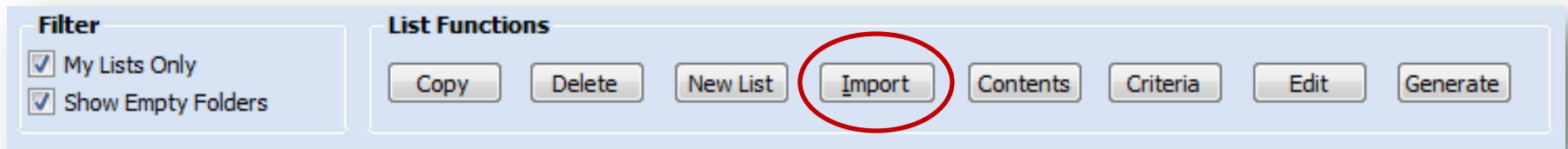
- Import file must be comma or tab delimited
- Must have a column of constituent ID numbers
- Text is not allowed in the ID column
- File extension must be .txt or .csv





Importing to a New List

- Go to List Manager
- Click the Import button



- Navigate to the desired file from the Select File window





Importing to a New List

- The Import List window opens
- Enter the First Data Row in the file
- Enter the Column number for the Customer Number in the file
- Create a name for the List
- Set any of the other properties for your list
- Click Save

Import List

First Data Row: 1 Customer No Column: 1

Create New List

List Name: MKT-PN-Sample Import

Category: Marketing

Control Group: (Default Control Group)

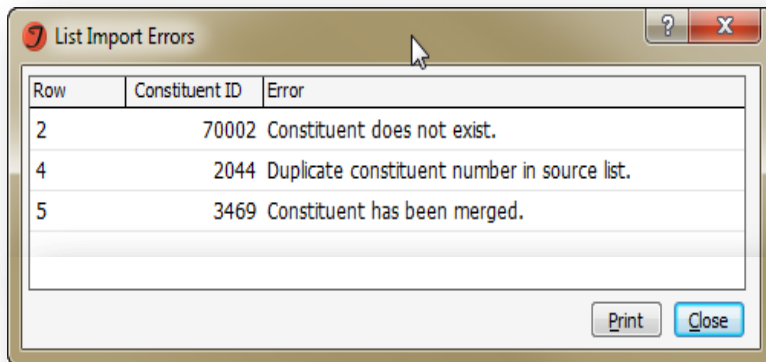
TMS TStats
 Dynamic Inactive

Save Cancel



Import Errors

- An ID does not correspond to any account in the database
- An ID is in the import file more than once or is already on the list to which the import is being added
- An ID is for an account that was merged into another account



Row	Constituent ID	Error
2	70002	Constituent does not exist.
4	2044	Duplicate constituent number in source list.
5	3469	Constituent has been merged.





Summing it Up

- List open up a world of possibilities
- Know what you are looking for
- Play around and experiment – practice and experience are the keys to becoming a list master
- Don't stop at the basics
- Use the resources available to you



RESOURCES





Tessitura Help System

Tessitura v12.1.0 6/16/2014 - [List Manager]

File GoTo Tools Window Help

Help icon (circled in red)

Tessitura Help

Help Keyword: List Manager Show General Links

Filter (like):

Description

Keyword Links:

- List Manager (Tessitura Help System)
- Standard List (Tessitura Help System)
- Dynamic Lists (Tessitura Help System)
- Generate Contents (Tessitura Help System)
- Edit List Criteria (Tessitura Help System)
- Manual List (Tessitura Help System)
- List Contents (Tessitura Help System)
- Copy List (Tessitura Help System)
- Import List (Tessitura Help System)
- Edit List Properties (Tessitura Help System)
- T-Class: Creating a List from a Report
- T-Class: Creating a List from an Extraction Set
- T-Class: Creating a List from an Imported File

Left sidebar folders:

- (all)
- (unassigned)
- Box Office
- Demo
- Development
- Education
- IT
- Karen's Folder
- Marketing
- Testing
- Visitor Services



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- Tessitura Help System v12.1
- Tessitura Help System v11
- Tessitura Help System PDFs

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Documentation & Help System

WELCOME TO TESSITURA DOCUMENTATION

The Tessitura Network maintains an extensive collection of comprehensive documentation on the Tessitura application and its supporting products.

Usage and setup documentation for the Tessitura application is collected into the online Tessitura Help System, which provides simple navigation (including extensive linking between cross-referenced topics and the ability to mark favorite topics for easy reference later), improved results when you need to run a search, and interactive controls that make reading the documentation easier and more engaging.

[Open the v11 Help System](#)

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 - Criteria Sets
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 - Extraction Manager
 - Output Sets
- Reports and Utilities
- Customer Service Issues
- Constituent Record Setup
- Ticketing Setup and Administration

Tessitura v12.1: [Lists, Extractions, and Output Sets](#) > Criteria Sets

Criteria Sets

One of the primary functions of Tessitura is to record a wealth of data about constituents so that customer contact can be used to comb through the data in the database to answer questions such as "Who purchased tickets last season?" "Who purchased tickets last year?" or "Who within the Lincoln Park area purchased tickets and made a contribution last year?" These questions are answered by evaluating constituent data - that are grouped in criteria sets. The criteria sets are then run and any constituents who match the criteria are returned.

Criteria sets are used in two areas of the application: [List Manager](#) and [Extraction Manager](#). In List Manager, lists of constituents are created based on a criteria set. Lists can be used to target marketing and fundraising [sources](#) and can be used in reports and utilities to limit the data returned. In the Extraction Manager, criteria sets are used to create extraction sets. An extraction set can consist of multiple criteria sets, which are run together to create an extraction set into subgroups and facilitates the easy selection of constituents based on complex and/or conflicting criteria. The extraction set can then be used to extract constituent name and contact data, and create and target sources.



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- Creating an InfoMaker Report in SSRS
- Customizations and Version 11
- Leveraging SSRS
- ▶ List Changes in Version 11
 - Server Configuration 11 Upgrade
 - Version 11 Advan

List Changes in Version 11

Description:

Learn to leverage the power of the new constituent model with lists and extractions. This session details how lists and extractions have changed to work with household and organization constituents, using practical examples to illustrate how to find the constituents you want and extract the correct contact data to go with them. This session is intended for users with an existing understanding of list and extraction concepts.

This session is broadcast periodically with a live Q&A period as part of the

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- Customizations and Version 12
 - ▶ Enhanced Communications Management in Version 12
- Ticket Pricing in Version 12
- Using Plans and Portfolios in Version 12
- Version 12 Overview and Upgrade Preparation
- Version 12.1 Training: QuickSale, Composite Tickets and N-Scan v6 Features

Enhanced Communications Management in Version 12

Description:

Version 11 laid the foundation for more refined customer communication with the new constituent model, and Version 12 will give you the tools to fully realize the power of the new model. In this session, we'll cover working with the new communications management features in Version 12, including enhanced contact data purposes, the option to link corporate addresses and salutations to individual affiliates, improved transparency in lists when using advanced relationship options and the ability to filter constituents by contact purpose and contact type (email, mail, phone) at the extraction level instead of through individual segment criteria. If you are responsible for communicating with constituents, preparing lists or segmenting constituent data you will want to view or attend this THT session.

This session is broadcast periodically with a live Q&A period as part of the Tessitura Hosted Training for Version 12 program. Q&A for this session will begin approximately 35 minutes after the session start time.

Session Presentation

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TESSSTATS

Lists and Extractions

LEARN ABOUT CREATING AND MANAGING LISTS AND EXTRactions

BASIC CONCEPTS OF LISTS AND EXTRactions

An introduction to lists and extractions in Tessitura including the basic concepts and terminology.

Level: Introductory

Interest Areas: MKT, TKT, DEV, IT

Lesson 1: What is a List? 7:35 min [Play Lesson 1](#)

Lesson 2: What is an Extraction? 7:11 min [Play Lesson 2](#)

CRITERIA AND CRITERIA SETS

An introduction to the criteria set and how to use criteria, operators, and values to build an effective criteria set.

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🕒 NEXT SESSION : 5PM – 6PM