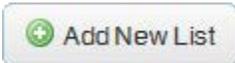


## Appendix A: Creating Lists Using Rules

In this section, you will learn how to create a list using rules, including some popular list types. These lists can be made either in the Subject & Recipients step of creating a New Broadcast (just like you did in the main tutorial in this document) or from the “Lists” section of the “Broadcasts” tab.

### Create a List Using Rules

From the *Lists* menu of the *Broadcasts* tab, clicking the  **Add New List** button on the right will bring you to the “List Editor”.

The “List Content” section is used to create rules that filter the contacts from your database imports down to specific groups of people. Selecting which field of data to use (such as Grade or School), adding a criteria (such as “is/is not” or “equals/does not equal/starts with”), and then selecting the appropriate value allows you to create almost infinite combinations to target very specific contact groups. Once you’ve created a list using rules, you can save the list for future use.

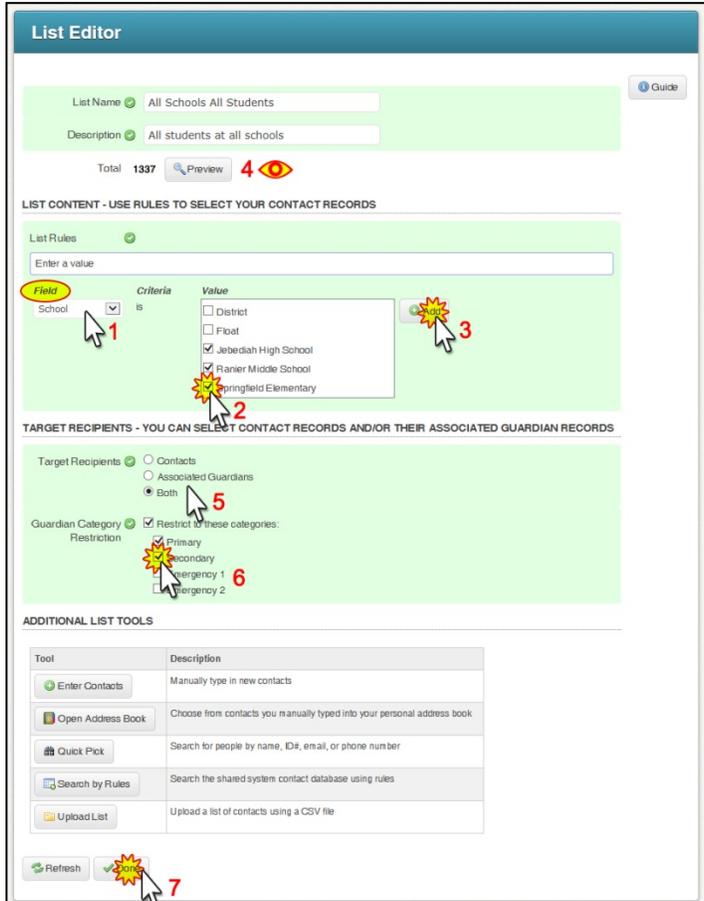
**Important:** When you create lists using rules, you are using contact information in your database which is frequently being updated automatically. This means you can save and reuse rule based lists and trust that they will always be up to date.

Here are some detailed examples of using rules to create a few popular lists.

All lists begin with giving them a **name** and **description** that identify the contacts they will contain. This list will contain all of the contacts in the whole school district.

#### All School Student List

1. Select *School* from the *Select a Field* dropdown menu.
2. Click the checkbox next to all your schools.
3. Click the “Add” button.
4. Check the “Total” next to the *Preview* button to ensure that the number reflects approximately what you expect.
5. Select whether you want this list to broadcast to **Contacts** (students), their **Guardians**, or **Both**.
6. Select which **Guardian Categories** should be included.
7. Click **Done** at the bottom.



**List Editor**

List Name: All Schools All Students  
 Description: All students at all schools  
 Total: 1337 Preview 4

**LIST CONTENT - USE RULES TO SELECT YOUR CONTACT RECORDS**

List Rules

Field: School  
 Criteria: is  
 Value:  District,  Float,  Jebediah High School,  Ranier Middle School,  Springfield Elementary

**TARGET RECIPIENTS - YOU CAN SELECT CONTACT RECORDS AND/OR THEIR ASSOCIATED GUARDIAN RECORDS**

Target Recipients:  Contacts,  Associated Guardians,  Both  
 Guardian Category Restriction:  Primary,  Secondary,  Emergency 1,  Emergency 2

**ADDITIONAL LIST TOOLS**

Tool	Description
Enter Contacts	Manually type in new contacts
Open Address Book	Choose from contacts you manually typed into your personal address book
Quick Pick	Search for people by name, ID#, email, or phone number
Search by Rules	Search the shared system contact database using rules
Upload List	Upload a list of contacts using a CSV file

Refresh Done

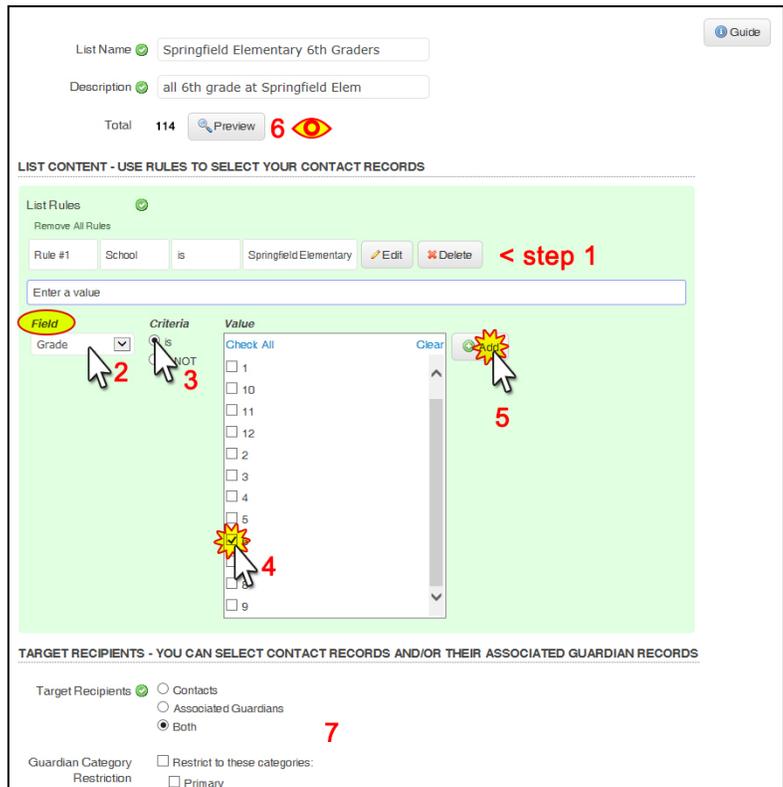
## Staff List

1. In the **List Content** section of the List Editor, select “**Contact Type**” from the **Field** dropdown menu.
2. Select “**equals**” or “**contains**” from the **Criteria** menu (if your contact type field data potentially has more than one value, use “contains”).
3. In the **Value** field, type “Staff” or whatever your school uses to identify them.
4. Click the **Add** button.
5. Confirm that the number of recipients is what you expected.
6. Click the Done at the bottom.

## Grade Level List

Each rule you add to a list lets you further refine or add more recipients. You can add as many rules as you need to define a particular list. This example will give us a list of all the 6<sup>th</sup> graders at a specific elementary school.

1. After giving the list a name and description, select “**School**” from the **Field** menu, check off the school (or schools) you want to select, and then click “**Add**”.
2. Select “**Grade**” from the new **Field** menu.
3. Select “**is**” under **Criteria**.
4. Check the desired grade(s) from the **Value** list.
5. Click the **Add** button.
6. Check the recipient **Total** above.
7. Set the options for **Target Recipients & Guardian Category**.
8. Click the **Done** button.



The screenshot shows the 'List Editor' interface. At the top, the 'List Name' is 'Springfield Elementary 6th Graders' and the 'Description' is 'all 6th grade at Springfield Elem'. Below this, the 'Total' is 114, with a 'Preview' button and a red eye icon. The main section is titled 'LIST CONTENT - USE RULES TO SELECT YOUR CONTACT RECORDS'. It shows a 'List Rules' section with a table for Rule #1: School is Springfield Elementary. Below the table is an 'Enter a value' input field. The 'Field' dropdown is set to 'Grade', the 'Criteria' dropdown is set to 'is', and the 'Value' list has checkboxes for grades 1 through 9, with grade 6 selected. The 'Add' button is highlighted with a red star and the number 5. The 'Target Recipients' section at the bottom has radio buttons for 'Contacts', 'Associated Guardians', and 'Both', with 'Both' selected and highlighted with a red star and the number 7. The 'Guardian Category Restriction' section has checkboxes for 'Restrict to these categories:' and 'Primary'.

## More List Building Options

While rules are a very powerful and often all you need, they are not the only way to create lists. For additional information on creating lists, please review the **Advanced Training Guide** in the online help by clicking the the blue “**Help**” link in the top right of the screen. There you will find additional information on advanced list building. This includes steps to add/remove individuals from your list rules, steps for uploading files, and more.