



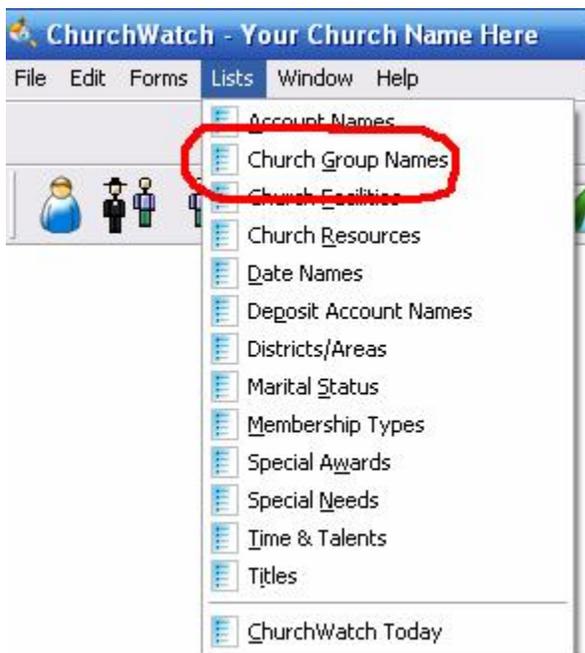
ChurchWatch Newsletter #9 March 2007

How to create complex filters for the Mail Manager

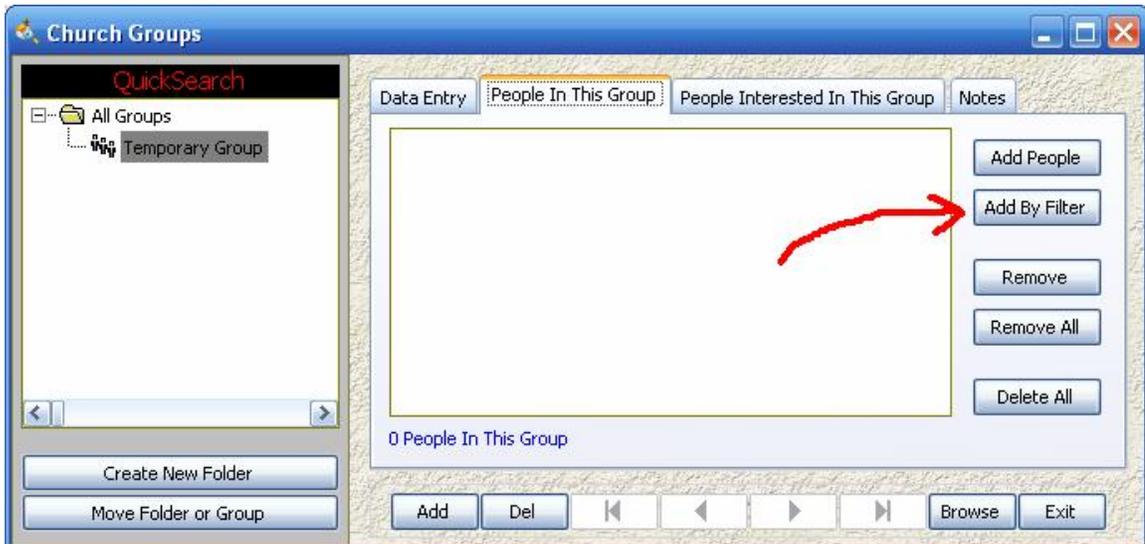
Have you ever wanted to do a mailing to a group of people but found that the filters in the Mail Manager just weren't sufficient? For example, suppose you want to send a mailing to all non-envelope holders who are also in the church directory. Since the filters in the Mail Manager do not reach this level of sophistication, can this even be done? The answer is yes, with a little bit of extra effort.

The trick is to create a group that the Mail Manager can use (filter = "Specific Group") to quickly create the mailing. It is possible to add people to a group using a filter in the Groups Editor. Here is a step by step example of how this would work. We'll begin by creating a temporary group in the Groups Editor.

1. Begin by opening the Groups Editor (Lists->Church Group Names).



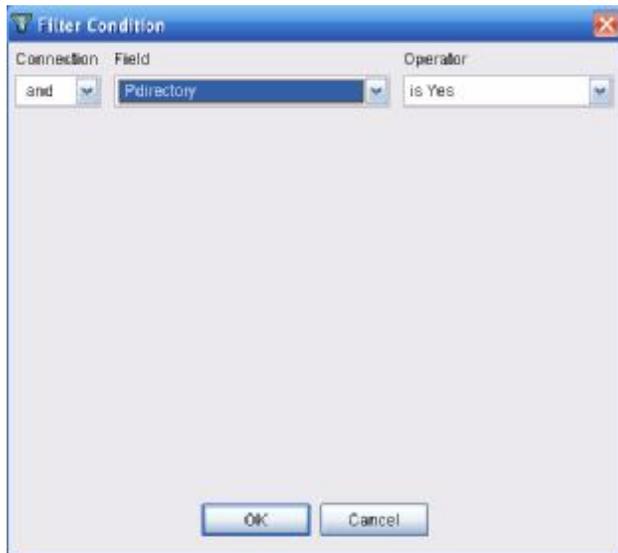
2. Next, create a group name by clicking the ADD button. You can create a temporary group and then delete it later so just name it “temporary group”.
3. Next, we’ll add people to the group by using a filter. Click the Add By Filter button on the “People In This Group” tab.



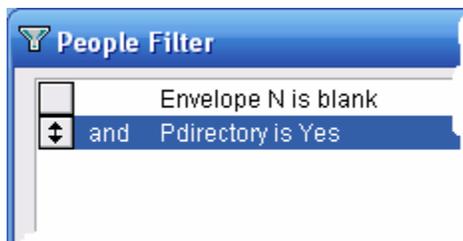
4. The filter builder window will open (see user’s manual for information on filter building). Click the ADD button. In the next window, set the “Field” to Envelope N (envelope number) and set the “Operator” to “is blank”. Click OK to close the window



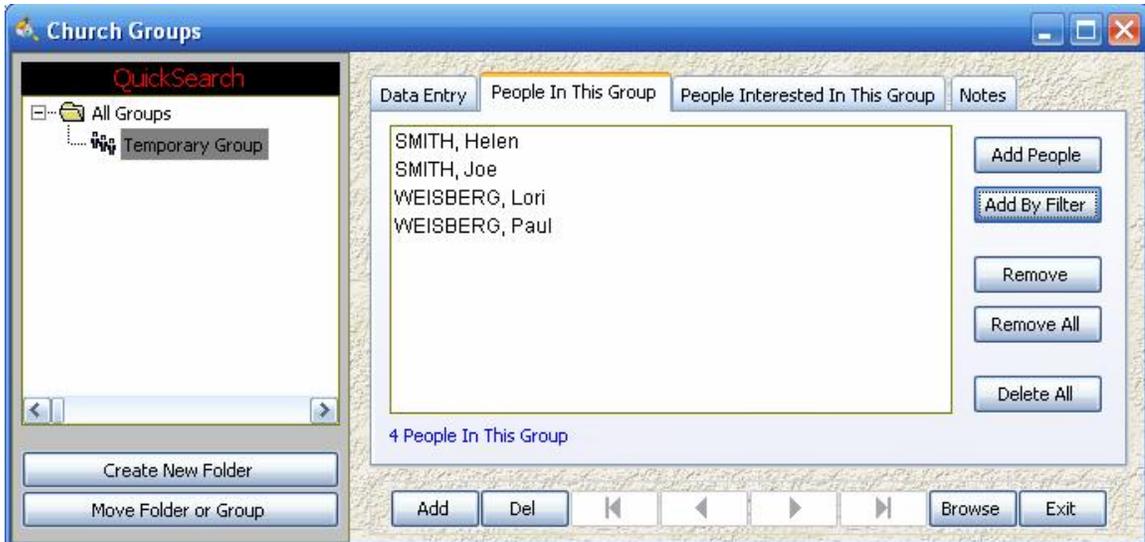
5. Now we need to repeat the process to add a condition for the directory. Remember, in our example we want all people without an envelope number AND listed in the church directory. Click the ADD button again. This time we need to add a “connection” – that is, how the two conditions are related. Choose “and” for the “Connection”, then chose “Pdirectory” for the “Field” and choose “is Yes” is the “Operator”. Once again click OK to close this window.



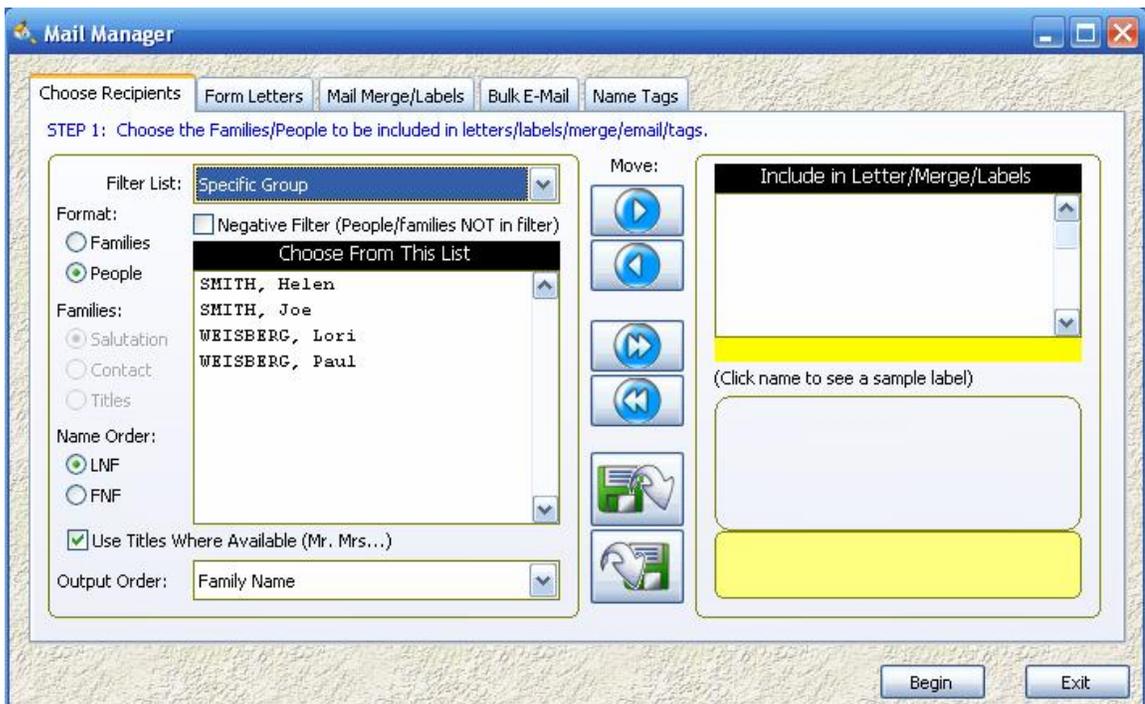
6. Notice how the resulting filter condition reads like English. “Envelope N is blank and Pdirectory is Yes”. Remember the original query conditions we wanted? We wanted “people with blank envelope numbers and in the church directory”. Click OK to close this window



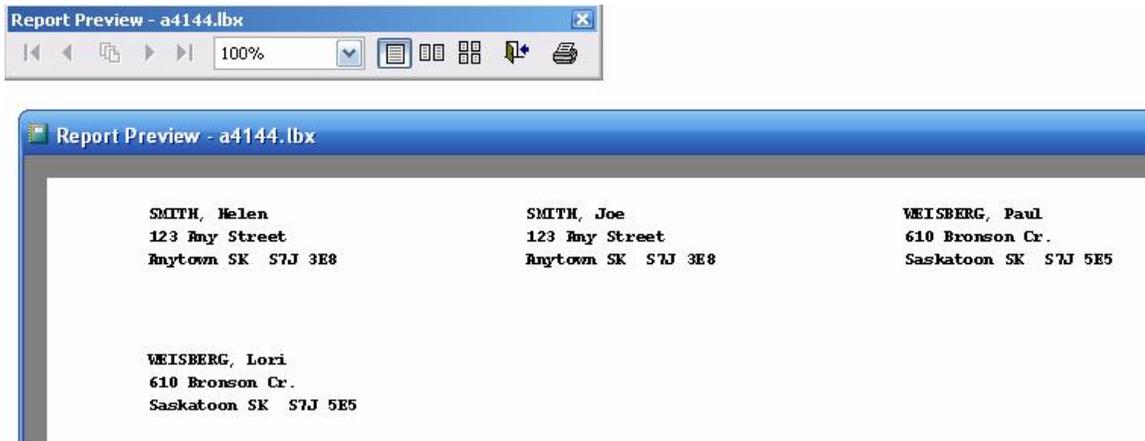
7. When you return to the Groups Editor, the group now contains all people with no envelope number but family is published in the directories. Here is an example:



8. Now that we have a group, we're all set. Go to the Mail Manager, select "Format = People" and select the filter "Specific Group". When asked for the group, select the "temporary group" we just created. In our example we end up with this:



9. Now the rest is quick and easy. Just click the double arrow right button (>>) to select all the people in the temporary group, then use the Mail Manager as you normally would to create mailing labels, form letters, mail merges, bulk email and/or name tags. Here's the mailing labels created by our example group:



There is one downside to this process but it's a small one. Since the group will not "auto update itself", if time has passed since you created the group, you'll need to delete the group in the groups editor and recreate it to make sure that it's current. One thing that will help in this regard is that you can save the filter, and then quickly re-use it next time (see the user's manual for information on how to do this).

Once you try and understand this process you will find that you can create mailings to almost anyone in just seconds.

And one last note: Since the Groups Editor only works with people; this trick cannot be used for mailings that are going out to families.