How to Exclude a Selection from a Marketing Effort

Step 1. Once you have created your marketing effort, click on the Exclusions tab.

ME Dashboard	Effort Settirgs	Exclusions	Summary	Segments	Universe	Basic Information	Revenu
Contact rule e	xclusions	🕫 Edit 🛛 😰					
Exclude constitu	ents with the follo	wing solicit cod	des:				
Solicit code						Locked	
Do Not Email						6	
Do Not Email Do Not Solicit						6	

Step 2. Next to Selections to Exclude, click Add.

Step 3. Search for the name of the selection you want to exclude.

Name:	88 -		Site:		~	2	Search
Description:			Record type:			*	Clear
Category:		v		Match all cri	teria exactly		
Results (Mo	re than 100 records found; only t	the firs	t 100 rows are	shown)			🔂 Add 🝷
Name					Record type	Category	Cur
AA - \$1K+ D	onors FY16-18 (Ad-hoc Query)				Constituent		12
AA - \$1K+ F	Y14 Valdosta Area Donors (Ad-hoc	Query)			Constituent		4/
AA - \$5K+ L	ifetime Donors (Ad-hoc Query)				Constituent		11
AA - (Living) Current Executive Committee (Ad-hoc Query)					Constituent		6/
AA - 1961 Club Charter Members (Ad-hoc Query)					Constituent		7/
AA - 1961 Club Recurring Gift Donors for engagement (Ad-hoc Query)					Constituent		5/
AA - 1961 Society Club Members - All (Ad-hoc Query)					Constituent		4/
AA - 2008-13 Alumni in New York City (Ad-hoc Query)					Constituent		4/.
AA - 2014 Dawg Trot 5K Attendees (Ad-hoc Query)					Constituent		5/.
AA - 2016 4	0 Under 40 Honorees Email (Ad-ho	c Query	0		Constituent		7/
AA - 2016 B	ulldog 100 Registrants (Ad-hoc Qu	ery)			Constituent		2/
AA - 2016 C	hampions for Scholars Registrants ((Ad-ho	c Query)		Constituent		8/
AA - 2016 R	ing Ceremony Attendees (Ad-hoc C	Query)			Constituent		5/
AA - 2017 B	ulldog 100 Registrants (Ad-hoc Qu	ery)			Constituent		2/.
AA - 2017 U	GA in LA Attendees (Ad-hoc Query	0			Constituent		9/. •
4							

Step 4. Click on the name of your selection from the results. It will now show under the Selections to Exclude section of your marketing effort.



Step 5. Now Calculate and Export your marketing effort to view your audience list.

