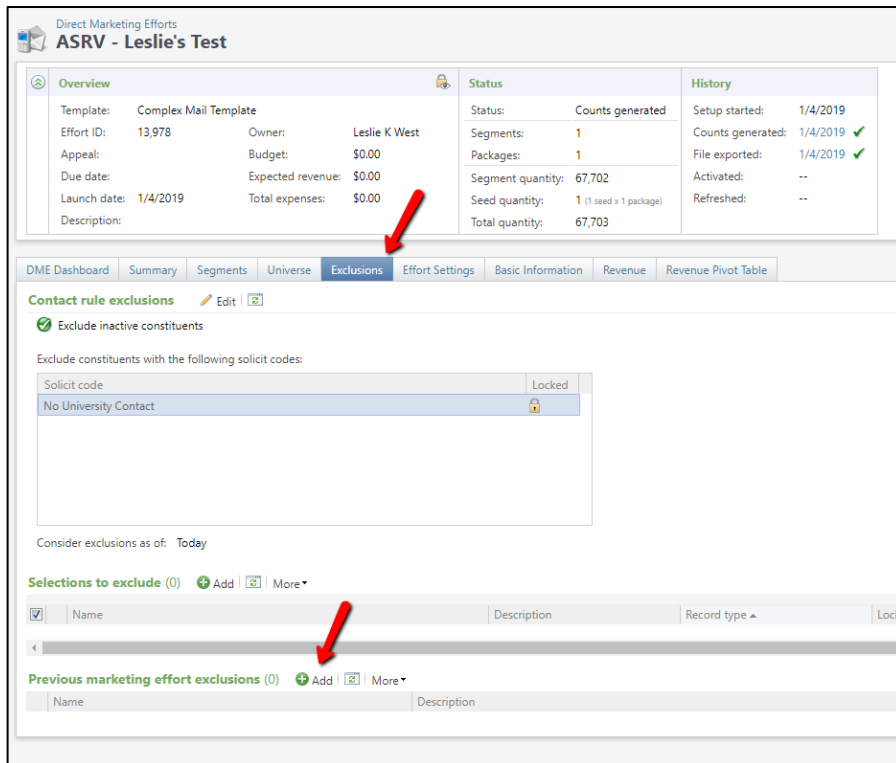


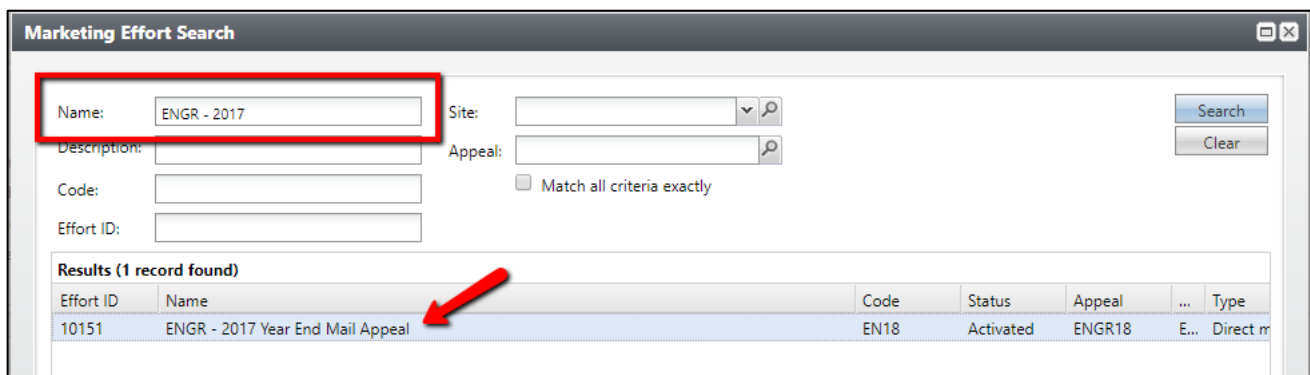
How to Exclude Previous Marketing Effort Recipients from a Current Marketing Effort

**You will need to complete these steps before calculating your marketing effort.*

1. Within your marketing effort, select the **Exclusions** tab and click **Add** next to Previous marketing effort exclusions.



2. Search for and select the name of the *previous* marketing effort. This will be the marketing effort whose recipients you want to *exclude* from receiving your current marketing effort. (You can exclude multiple marketing efforts by repeating Steps 1 and 2.)



3. Click **Calculate segment counts** within your Tasks area and then click Start. (Make sure to check the box labeled *refresh all selections*.) This will compare the constituents in your current segments to the constituents who received the previous marketing effort and remove them.

The screenshot shows the 'Direct Marketing Efforts' interface for 'ASRV - Leslie's Test'. The left sidebar contains a 'Tasks' section with 'Calculate segment counts' highlighted by a red arrow. The main content area displays an 'Overview' table with the following data:

Overview		Status	History
Template:	Complex Mail Template	Status:	Counts generated
Effort ID:	13,978	Segments:	1
Owner:	Leslie K West	Packages:	1
Budget:	\$0.00	Segment quantity:	--
Total expenses:	--	Seed quantity:	1 (1 seed x 1 package)
Expected revenue:	--	Total quantity:	--
Due date:	--	Setup started:	1/4/2019
Launch date:	1/4/2019	Counts generated:	1/4/2019 ✓
Description:	--	File exported:	1/4/2019 ✓
		Activated:	--
		Refreshed:	--

At the bottom of the interface, there are several tabs: 'DME Dashboard', 'Summary', 'Segments', 'Universe', 'Exclusions', 'Effort Settings', 'Basic Information', 'Revenue', and 'Revenue Pivot Table'.

The 'Calculate segment counts' dialog box contains the following text:

Calculate segment counts to update the various counts for a communication including the total number of records, expenses, and expected revenue. Run this process periodically to reflect any changes made to the universe, segment, exclusions, contact rules, and address processing options since the last calculation process.

Processing options	Last run
<input checked="" type="checkbox"/> Refresh all selections used in the communication <i>Refreshes all selections used in the segments, universe, and exclusions for the communication. This process requires additional time, but produces the most up-to-date results for the communication criteria.</i>	1/4/2019 2:59:11 PM
<input type="checkbox"/> If the marketing effort includes advanced name format options (conditions for excluding a spouse from the joint name format), you must generate data for the marketing exclusions report. To turn off this process, select different name format options for the marketing effort.	
<input checked="" type="checkbox"/> Capture source analysis rule (SAR) data for all recipients <i>Overwrites any source analysis rule (SAR) data previously captured for the communication.</i>	1/4/2019 3:01:23 PM

At the bottom of the dialog box, there are 'Start' and 'Cancel' buttons, with a red arrow pointing to the 'Start' button.