Overview

Lookups allow you to narrow down your list of contacts into usable groups. They help you identify contacts who meet certain criteria you choose.

There are 3 primary types of lookups:

1. By Field

Queries your database and returns all contacts who meet the single criteria chosen. Examples: Home State=MN, Pledge > 0, etc. **Many of the lookups on the Lookup menu are pre-written, *By Field* lookups.**

2. By List

Whatever group of contacts you are looking at, when you select By List, you are given a list—with checkboxes—of that group. You can then create a custom lookup by checking specific contacts.

3. Custom

By using database query language, you can write custom queries that will return very specific results. These types of queries are complex and are beyond the scope of this reference guide.

Although the *custom* lookups can be challenging until you learn how to write them, you can often get the results you want by doing successive *simple* lookups by field or by list.

For example, let's say you have 500 contacts in your database, and you want to find all 18 of your financial partners in Minnesota who give more than $100 per month. You could do this in three successive lookups, each one shrinking the list some (and they do not have to be in this order):

▲ Find financial partners (105)
▲ Find those from Minn. (47)
▲ Find those whose average is greater than $100 (18).

You can save any lookup as a favorite for future use.

Contact Lookup Dialog Box

Control center for TntMPD lookups.

1. Replace the current group

Creates a new group based on the results of this Lookup.

2. Lookup within the current group

Creates a new group from the current group based on your lookup criteria. Good for successive lookups.
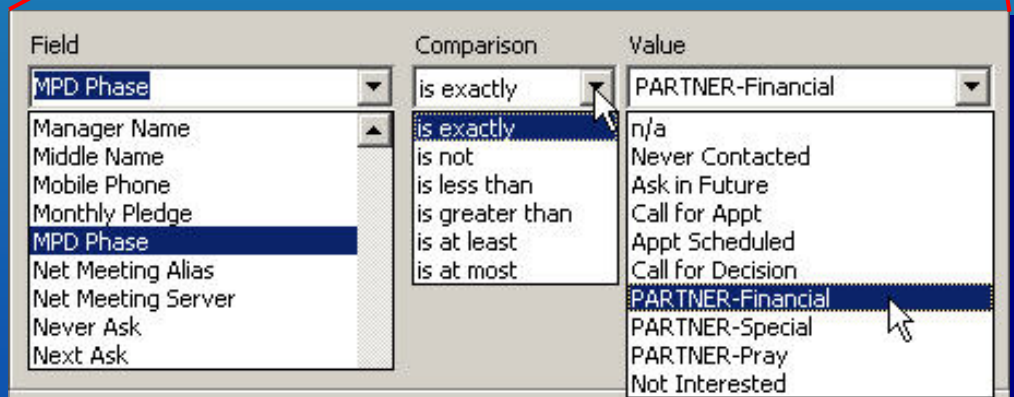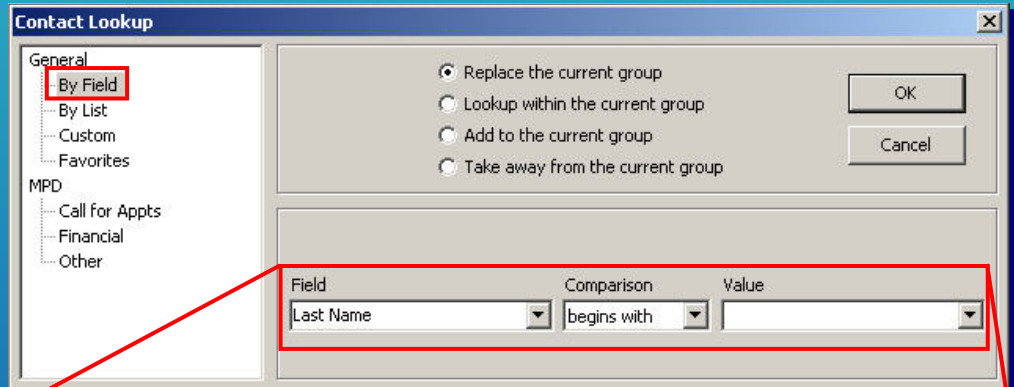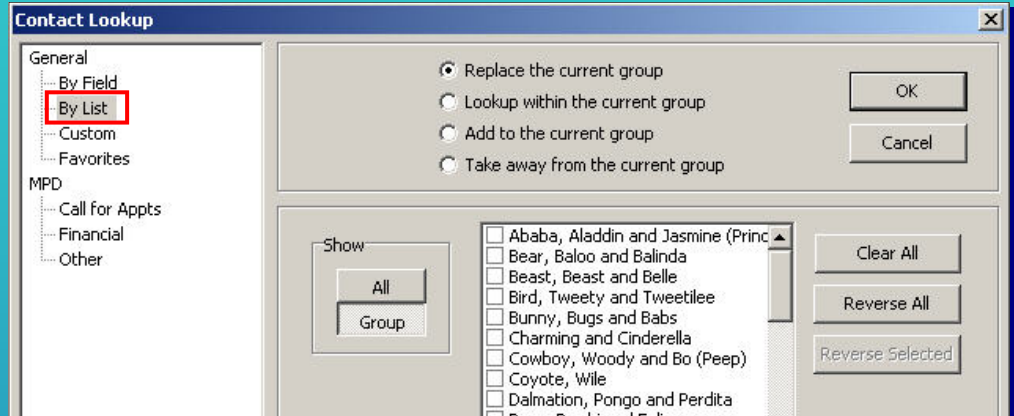
3. Add to the current group

Examines contacts *NOT* in the current group; those who meet the chosen criteria will be added to the group.

4. Take away from the current group

Removes those contacts from the displayed group if they meet the criteria you selected.

Contact Lookup box. Lookup By List (top) and By Field (bottom).


When you select a **Field**, the **Comparison** options will offer selections based on that field and the **Values** drop-down box will list all of the values for that field on the table. For example, if the field was "Send Newsletter", the comparison would be "is exactly" or "is not" and the available values only "TRUE" and "FALSE".

Lookups FAQs

Use Lookups to change the displayed group of contacts. The default group is **Everyone,** which is your entire list of contacts. Lookups are a database query TntMPD runs for you on your database. This is covered in Chapter 3 of *Exploding TntMPD.*

What are the basics of doing lookups?

TntMPD allows you to do a lookup either on your whole contact list or starting with the group you have displayed. You often have to do multiple lookups to get the final group you want.
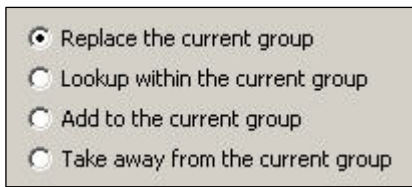
Replace the current group: Looks at all your contacts and creates a new group based on the results. For example, you could look up all contacts who live in Minnesota.

Lookup within the current group: Only finds contacts within the current group who meet the desired criteria (explained below). Example: With your contacts from Minnesota, you lookup only those who are financial partners.

Add to the current group: Only looks at contacts *not* in the current group who meet the desired criteria, then adds those contacts to the existing group of contacts. Example: You decide to add Wisconsin partners as well, so you do a lookup that asks for all contacts in Wisconsin. Your current group now has financial partners for Minnesota and <u>all</u> contacts from Wisconsin.

Take away from the current group: Looks at the existing contacts, then removes those who meet the desired criteria. Example: You remove all contacts who are not financial partners. You now have all financial partners from Minnesota and Wisconsin. (By the way, this same result could be achieved multiple ways.)

What are the basic types of lookups?

All TntMPD lookups fall into three categories: By Field, By List, and Custom. Most of the lookups on the Lookup menu are actually just pre-written "By Field" lookups.

By Field: You ask TntMPD to look at the set of contacts (current group or not in current group as explained above) and ask a question about them. For example, you could look up all partners by State.

By List: When you select this lookup, a dialog box will show you a list of all contacts in the current group. You can then check each one you want. This is a handy way to take a group and create a special lookup of just selected people.

Custom: You can write complex queries with multiple criteria. An example is shown in the Custom Lookup box. This takes some trial and error. Incidentally, to learn more about lookup query syntax (that is, the language TntMPD uses to do custom lookups), edit a lookup favorite and see how TntMPD wrote the lookup.

When I do certain lookups, the results appear in a random order instead of in alphabetical order. How do I change that?

If you save the lookup as a favorite, you can then modify the favorite to sort in alphabetical order.
1. Save lookup as a favorite (**Lookup | Favorites | Add Current Lookup to Favorites**).
2. Select **Lookup | Favorites | Edit Lookup Favorites.**
3. Select the lookup you want and click "Edit".
4. On the dialog box in the Order field, type "FileAs". This will make the contacts' FileAs field the one that is sorted.
5. Click **OK.**

How do I keep my list of partners separate from people I am working on challenging to join my team?

Do a Lookup **By Field** to find everyone who has not made a decision. Choose:

Field: MPD Phase
Comparison: is less than
Value: PARTNER-Financial.

The current group doesn't show all that I need. Does "Group | Delete Group" eliminate that group so I can create a new one?

No! **Group | Delete Group** actually DELETES the contacts from your TntMPD database! That is why TntMPD requires you to type DELETE so you do not delete them accidentally. To view a different group, just do a lookup that "Replaces the Current Group". You may also find it easier, logically, to start with your Everyone group and then do lookups from there.

I made a mistake on my lookup and got bad results. Can I go back or do I have to start my lookups over again? Does TntMPD have a "back" feature to go backwards?

When doing multiple, successive lookups to get a specific group of contacts, it is not uncommon to select the wrong type of lookup (within current group / not in current group). As a result, your displayed group isn't right. This happens to a lot of people—even expert users. Your only option is to start over.

Does TntMPD have a way to show a default lookup when I open? I usually want to see my support team.

The default group is "Everyone". New users find that confusing because they are not used to seeing names of people who have not been on their list for years. You can get into the habit of immediately selecting your favorite when you open TntMPD.

(Tip: If you are looking for a specific contact in your contact list, you can click in the list of names and just start typing. TntMPD will automatically go to that letter of the alphabet.)

Can I lookup contacts who gave during a certain time period in the past?

Yes. For complex queries like this, you would have to use a "Custom" lookup. The following custom lookup would return all who gave in March 2005:
(ContactID IN (SELECT ContactID FROM Gift WHERE GiftDate >= #3/1/2005# AND GiftDate < #4/1/2005#)).
This example is given to show you that TntMPD can do very complex queries on your database if you know how to write them.