Creating a Dynamic Target

This guide will cover:

- Creating a target for a group of contacts for the purposes of communications.
- In this example, you are wanting a target of contacts who are: Graduate Prospects living in Ohio but do not live in Cincinnati.

**Step One**

To begin, select Targets under the Marketing module.

**Step Two**

Click on New Target.

The criteria builder tool (similar to the one for creating list views) will open. Provide the target with a name for easy identification.

Choose a target owner based upon office needs.

Leave the Status as Active.

Enter a description for further explanation of the target.

Be sure that Criteria Type is selected as Dynamic.

**Step Three**

In the first row of logic:

- Enter an open parenthesis “(“ to the left of “Contacts”.
- Leave the Module selected as Contacts.
Under **Field** select **Lifecycle Role**. (Note: you may have to click the triangle next to **Lifecycle Role/Stage** in order to display **Lifecycle Role**.)
- Leave the **Comparator** selected as **Is**.
- Under **Value** select **Graduate Prospect**.

Click the **+** or **Add Row** button to begin a new row of logic.

In the second row of logic:
- Under **Join** select **And**.
- Leave the **Module** selected as **Contacts**.
- Under **Field** select **Primary Role**.
- Leave the **Comparator** selected as “=”.
- Under **Value** select the checkbox. (This will indicate to the system that you only want to include those contacts whose primary lifecycle role is “Graduate Prospect.”)

In the third row of logic:
- Under **Join** select **And**.
- Leave the **Module** selected as **Contacts**.
- Under **Field** select **Contact State - Picklist**.
- Leave the **Comparator** selected as **Is**.
- Under **Value** select **OH**.
- Enter a close parenthesis “)” to the right of “OH”.
In the fourth row of logic:

- Under **Join** select **Minus**. (This will indicate to the system to exclude any records from the list that fall under this row of logic.)
- Leave the **Module** selected as **Contacts**.
- Under **Field** select **Contact City**.
- Leave the ** Comparator** selected as **Is**.
- Under **Value** type “Cincinnati”.

### Step Four

Now that all rows of logic have been entered to create the view, click **Preview** to see which contacts will currently show on this list view when it is saved.

Close the preview window.

Click **Save**.