

The **Best Efforts List Select** generates lists of donors who need to be sent Best Effort letters for FEC Compliance.

How to Run the Best Effort List Select

1. Go to the **Compliance Dashboard** menu and click the **Run** action button above the **Itemized Best Efforts** pie chart to open the Best Efforts list select search window.
2. Use the drop-down menu to select the **Fund Code** to be used for the select.

The screenshot shows the 'Best Effort' search window with three tabs: 'Filters', 'Output Fields', and 'Result'. The 'Filters' tab is active. There are two filter buttons: 'Giving Aggregate' (selected) and 'Suppression'. A 'Selected Only' toggle is turned off, and a 'Search Filters' search bar is present. A 'Fund Code' dialog box is open, showing a dropdown menu with the text 'Choose a Fund Code' and an empty input field below it.



- Take note of the **Suppression** box filter. Click the box to see a series of search fields that allow you to exclude certain records (e.g. records flagged “DNM” for Do Not Mail).
- You can also use the **Output Fields** tab to select which data you want to include in the exported results. This is helpful in producing lists that will only have information you need and exclude information you do not need.

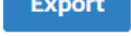
The screenshot shows the 'Best Effort' search window with the 'Filters' tab active. The 'Suppression' filter is selected. Below the filter buttons, there are ten suppression filter cards arranged in two rows of five. Each card has a title, a dropdown menu, and an input field. The cards are: 'Apply Channel Suppression Flags' (toggle), 'Supp: Flag' (Starts with), 'Supp: Keyword' (Starts with), 'Supp: Event Code' (Starts with), 'Supp: Total # of Gifts' (Equal to), 'Supp: Cumulative Total' (Equal to), 'Supp: Inception Date' (First Gift), 'Supp: Inception Gift' (First Gift), 'Supp: Most Recent Gift Date' (Last Gift Date), and 'Supp: Most Recent Gift' (Last Gift).

3. Once the search criteria has been entered, click the **Run** button at the bottom right corner.

Please note: The search is looking for all records that fit the criteria entered, but will only output those donors who have not previously been selected to receive a Best Efforts letter for that particular gift and those donors whose Occupation and/or Employer do not meet the FEC's requirements.

4. From your results:

- Click on any column header to sort results based on the data in that column.
- To change your search criteria after results have appeared, you can click the **Filters** tab to go back to the search fields.
- At any time, clicking the  button at the bottom right corner of the window will clear all of your selection criteria and allow you to start a new Best Efforts list search.
- To view the people record, click the  button to the left of the record.

5. To a list, click the  button in the bottom left corner of the **Results** section.

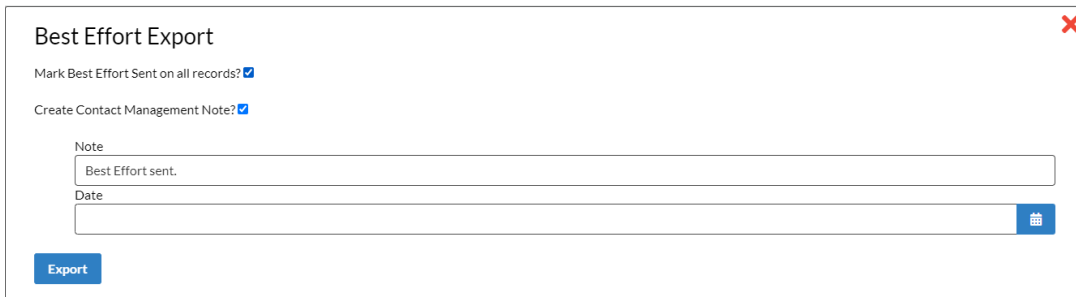
6. A new window will appear asking:

Best Effort Export

Mark Best Effort Sent on all records?



- Check the box and these donors will no longer pull in a Best Efforts List Select to receive a letter because of these contributions.
7. If you check the box, a new question will prompt you with the option to add a **Contact Management** note to all the records in the list. This option may be useful in noting what date Best Efforts letters were sent or where the list has been saved for the letters to be sent in the future. Select **Yes** and fill in the fields to save a note or just leave the prompt unchecked and click **Export**.



The screenshot shows a dialog box titled "Best Effort Export" with a close button (red X) in the top right corner. It contains two checked checkboxes: "Mark Best Effort Sent on all records?" and "Create Contact Management Note?". Below these are two input fields: "Note" with the text "Best Effort sent." and "Date" with a calendar icon on the right. An "Export" button is located at the bottom left of the dialog.

Under the **Data Maintenance Reports** list on the **Compliance Dashboard**, there is report #401, **Best Effort Itemized Donors w/o Occupation & Employer**. While the **Best Efforts List Select** only pulls

records that have not been marked as having a best efforts letter sent, the 401 report will include all records that match the report criteria used, regardless of whether they were marked as having a letter sent or not.