Creating an email list with the Customer Relationship Management Tool (CRMT)

1. With Anthology open go to Reports / Customer Relationship Marketing Tool



2. To pull an email list of customers that have purchased a book by a certain author, first specify the date range you will pull from, under the Select Customers -Sales Areas tabs.

elect Custor	ners	Output Op	tions								
Sales Areas	Post	tal Codes	Custome	r Types	New / Lost	Customers	UDF 1	UDF 2	UDF 3		
Sales:					Mailing	list only					
From		1/1/2021		To	11/8/2021		\checkmark	More Tha	n	\$0 ≑	
If	no da	tes are sne	cified then	all cust	omers will be	included su	biect to o	ther cond	itions		

3. Still under Sales Areas, you will go to the next set of tabs and click Authors. From there you can move over any list of authors you would like to include in your customer report. Additionally, you may change the specified purchase amount by checking the More Than box and choosing an amount.

	mers (Dutput Op	otions							
Sales Areas	Posta	l Codes	Customer Types	New / Lo	st Customers	UDF 1	UDF 2	UDF 3		
Sales: F	From	1/1/202	1 To	Mail 11/8/2021	ing list only	ibiect to a	More Tha	1	\$0 💠	
Sections 4	Authors	Titles			be included, a		and cond	liona		
	Drighto Drimme Driscol Driscol Driskell Drnaso Drndic, Drndic, Dronfie Drori, J Drouet,	n, Ann r, Stepha , Laura I, Michael , David , Nick Dasa Daša Id, Jerem onathan Aurelie	nie nie Warren Y	~	>> - - - -	neien			~	
f no Author	rs are s who ha	elected	, all customers hased books by	will be inc those Au	cluded. If on uthors will be	e or mor e selecte	e Author ed.	s are se	lected, the	en only

4. Move from the Select Customers tab over to the Output Options tab. This screen will allow you to choose what information will be shown on your report. For this report, the basics to include are email address, first name, and last name.

elect Customers Output Options	
Fields to include	Sort by
ShipCity ShipState ShipRegion ShipPostalCode ShipCountry BillAddress BillAddress BillAddress BillState BillPostalCode BillCountry BillPhone BillWorkphone BillFax Inactive Userdef1 Userdef2 Userdef3 DollarTotal NumberOfTrans	Email First Name Code Billing Postal Code Shipping Postal Code DolarTotal NumberOfTrans Output format ObF OxLS spreadsheet HTML Comma delimited Text file Report Labels
	MENTS\TEST PREVIEW QUERY.XLS

- 5. In the Sort by column choose how the results of your report will be sorted.
- 6. In the File field choose the name of your document and the destination it will be saved to.
- 7. Select F12 Run.