



ProTracker Advantage – How to get Active Prospects Emails List

1. Create a Dynamic Group of Contacts

Select the type of dynamic group you would like to create.**

Group Name* Prospect Emails

File As* Prospect Emails

Description

Membership* Contacts Clients Employees

Broadcast Group (short list)

** A dynamic group facilitates grouping Contacts, Clients or Employees together by shared characteristics, e.g. 'All investment management Clients with net worth between \$1 million and \$3 million.'

On the following tabs, select options that define the dynamic group's membership. Leave all the checkboxes unchecked for a given filter to include all of the options. Check one or more of the checkboxes to include only those options.

Cancel < Back Next > Finish

2. Set the Type to Prospect and Status to Active

Contact Types

- Former Employee
- Former Trustee
- Inactive
- Library
- Media
- Municipality
- Partner
- Prospect
- Resource
- Restaurant
- Selectman
- Seminar
- Terminated
- Treasurer

Status

- Active
- Inactive
- Terminated

Priorities

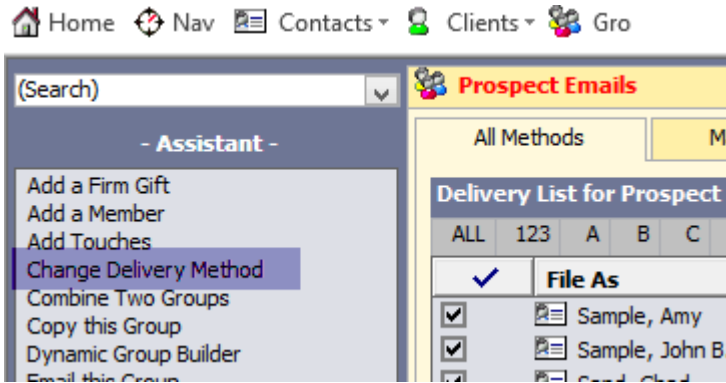
- Emergency
- FFDS Sent
- Group Pri 1: Scheduled
- Group Pri 2: Processing/Program
- Group Pri 3: Awaiting Response
- Group Pri 4: Contact/Query
- High
- Hot Prospects

Cancel < Back Next > Finish

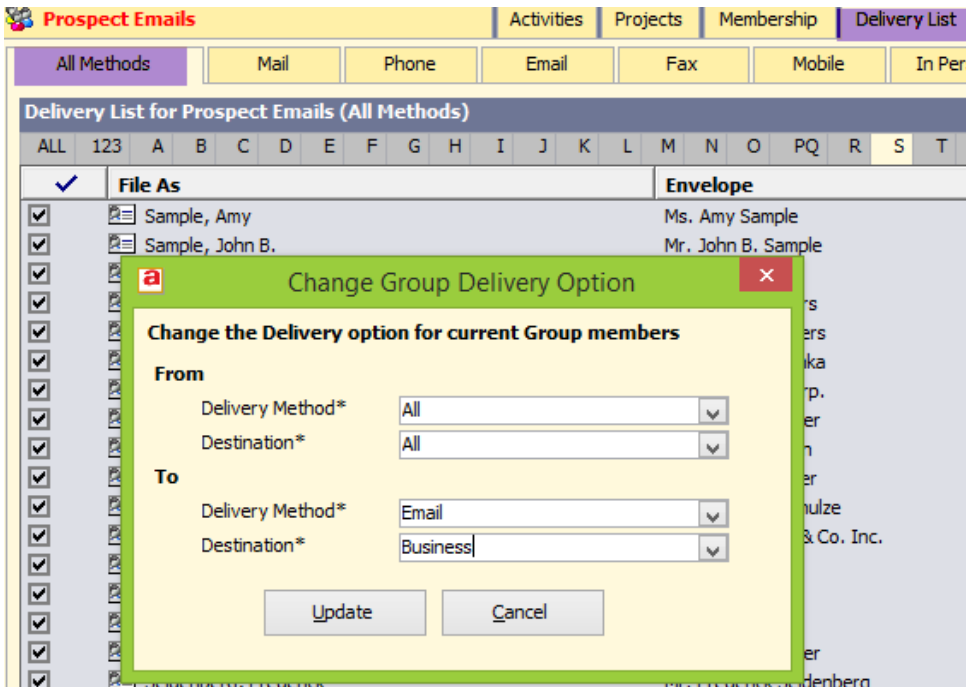


ProTracker Advantage – How to get Active Prospects Emails List

3. Click on the **Delivery List** then **All Methods** or **Email** tab.
4. In the Assistant area on the left, select **Change Delivery Method**.



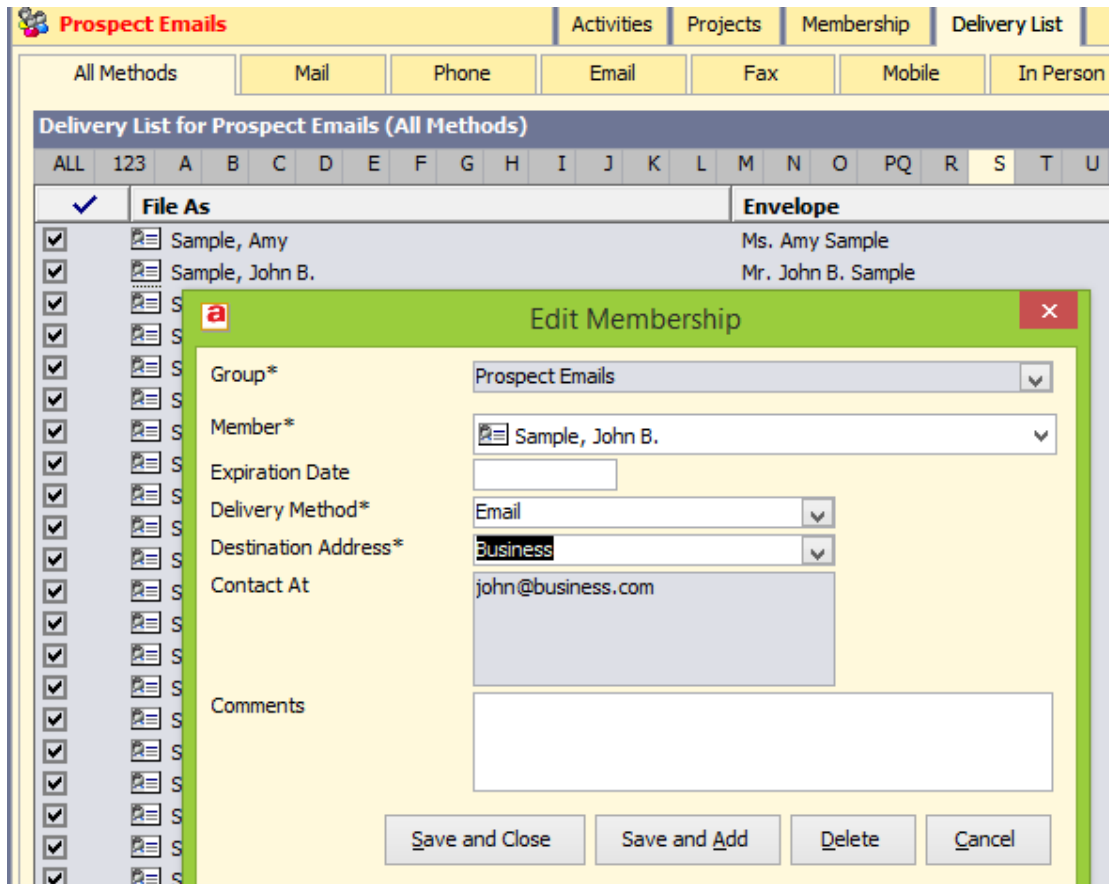
5. **Change Delivery to Email** and whatever Destination Address would give you the most email addresses.



7. The Delivery List will get updated.
8. For any prospects that do not show an email address, double click their record in the delivery list. Select a different a Destination address until an email is displayed.



ProTracker Advantage – How to get Active Prospects Emails List



9. Use the down-arrow in the upper right to export to Excel.

