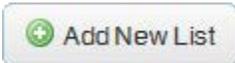# Appendix A: Creating Lists Using Rules

In this section, you will learn how to create a list using rules, including some popular list types. These lists can be made either in the Subject & Recipients step of creating a New Broadcast (just like you did in the main tutorial in this document) or from the "**Lists**" section of the "**Broadcasts**" tab.

Create a List Using Rules

From the *Lists* menu of the *Broadcasts* tab, clicking the [⊕ Add New List] **Add New List** button on the right will bring you to the "**List Editor**".

The "**List Content**" section is used to create rules that filter the contacts from your database imports down to specific groups of people. Selecting which field of data to use (such as Grade or School), adding a criteria (such as "is/is not" or "equals/does not equal/starts with"), and then selecting the appropriate value allows you to create almost infinite combinations to target very specific contact groups. Once you've created a list using rules, you can save the list for future use.
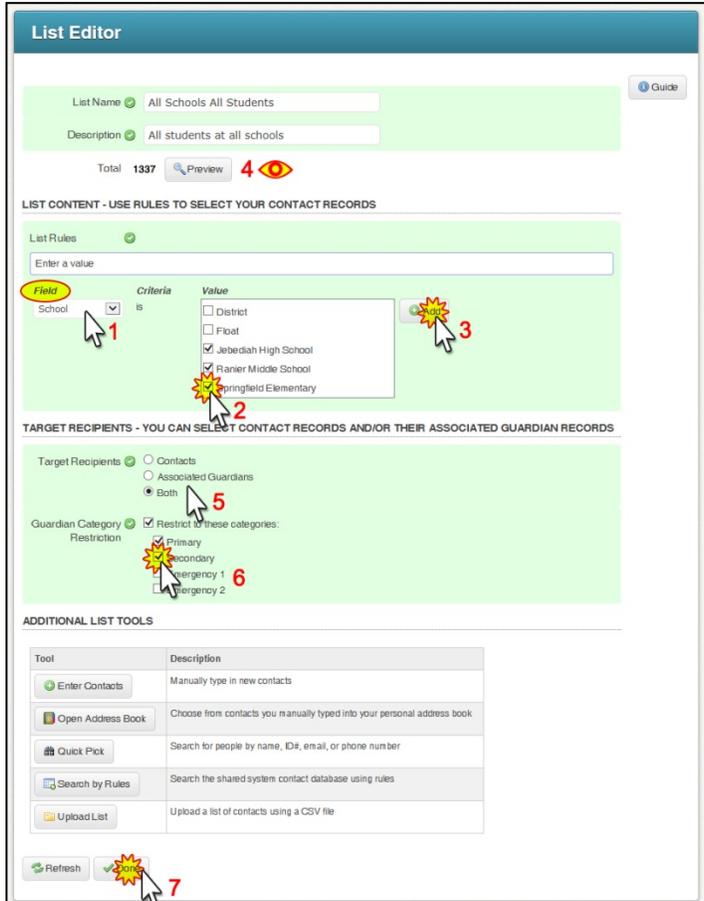
🛑 *Important: When you create lists using rules, you are using contact information in your database which is frequently being updated automatically. This means you can save and reuse rule based lists and trust that they will always be up to date.*

Here are some detailed examples of using rules to create a few popular lists.

All lists begin with giving them a ***name*** and ***description*** that identify the contacts they will contain. This list will contain all of the contacts in the whole school district.

All School Student List

1. Select *School* from the *Select a Field* dropdown menu.

2. Click the checkbox next to all your schools.

3. Click the "**Add**" button.

4. Check the "**Total**" next to the *Preview* button to ensure that the number reflects approximately what you expect.

5. Select whether you want this list to broadcast to **Contacts** (students), their **Guardians**, or **Both**.

6. Select which **Guardian Categories** should be included.
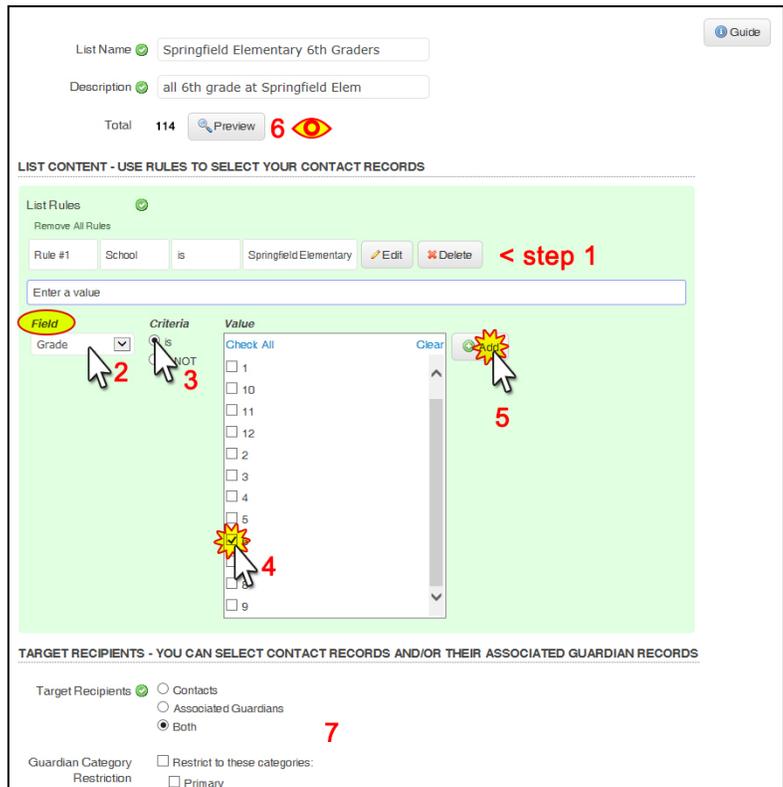
7. Click **Done** at the bottom.

Staff List

1. In the **List Content** section of the List Editor, select "**Contact Type**" from the **Field** dropdown menu.

2. Select "**equals**" or "**contains**" from the **Criteria** menu (if your contact type field data potentially has more than one value, use "contains").

3. In the **Value** field, type "Staff" or whatever your school uses to identify them.

4. Click the **Add button**.

5. Confirm that the number of recipients is what you expected.

6. Click the Done at the bottom.

Grade Level List

Each rule you add to a list lets you further refine or add more recipients. You can add as many rules as you need to define a particular list. This example will give us a list of all the 6th graders at a specific elementary school.

1. After giving the list a name and description, select "**School**" from the **Field** menu, check off the school (or schools) you want to select, and then click "**Add**".

2. Select "**Grade**" from the new **Field** menu.

3. Select "**is**" under **Criteria**.

4. Check the desired grade(s) from the **Value** list.

5. Click the **Add** button.

6. Check the recipient **Total** above.

7. Set the options for **Target Recipients** & **Guardian Category**.

8. Click the **Done** button.

More List Building Options

While rules are a very powerful and often all you need, they are not the only way to create lists. For additional information on creating lists, please review the ***Advanced Training Guide*** in the online help by clicking the the blue "**Help**" link in the top right of the screen. There you will find additional information on advanced list building. This includes steps to add/remove individuals from your list rules, steps for uploading files, and more.