# Guide for:

# ALI LIST BUILDER

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|---|---|
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| Anticipated Audience(s): | UNF STAFF AND UNIVERSITY PARTNERS<br>WHO SEND COMMUNICATIONS,<br>PLAN EVENTS AND<br>BUILD LISTS OF CONSTITUENTS (ALUMNI, DONORS AND<br>FRIENDS OF THE UNIVERSITY OF NEBRASKA) |

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## Overview

### What is Ali List Builder?

Ali List Builder (ALB) is a tool designed to permit users to build constituent lists that may be utilized for purposes such as email blasts, event invitations, mailing lists, trip lists and more. It is designed to provide on-demand list-building ability but does not replace work done by prospect research analysts (PRAs) who will continue building complex custom lists. Custom lists may also be added to ALB.
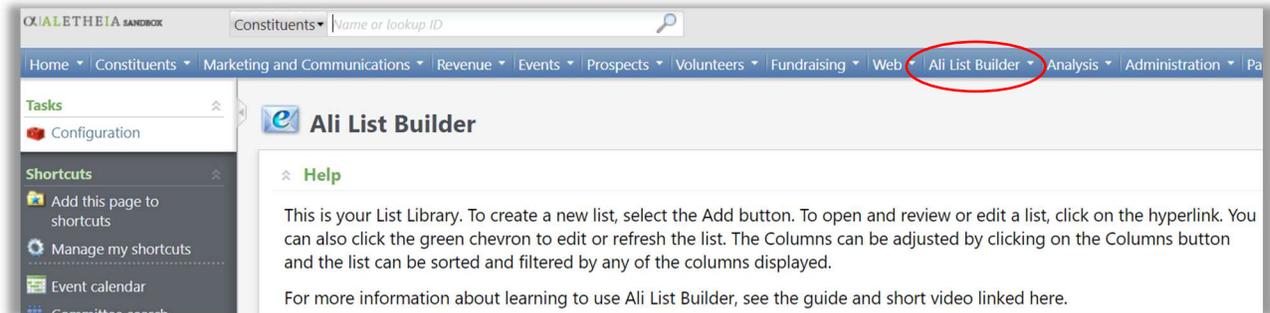


Most lists can be derived from ALB, though any requiring more complex criteria, such as athletics, clubs or giving ranges, will continue to need a PRA to build a selection for use with ALB.

ALB is also a library, serving as the source for all lists that will be used with integrated email and events tools.

### Users and Access

ALB is a dedicated, custom-built functional area to which select Ali CRM users are granted individual access based upon job duties. Foundation staff and university partners who send communications and event invitations are the primary users. While foundation staff have access to all lists, university partners have access to a specific Site in ALB and for ease of use will only see list(s) relevant to that specific part of the university system. ALB lists may also be downloaded and used in mail merges with Microsoft Word for physical mailings.

### Key Concepts

In addition to the glossary of key terms to know (below), users should understand these fundamentals about how ALB functions:

- This tool walks you through list-building step by step. Best practice is to walk through the steps in order of the tabs rather than in random order.
- How it works:
  - ALB starts with the broadest results list possible.
  - Each subsequent tab allows you to further refine and narrow your results.
  - Constituents may manually be added or excluded individually.
  - Solicit (opt-out/opt-in) codes will be applied behind the scenes to exclude constituents based on options chosen in ALB.
  - The final step provides a preview of results.

o The results of the list may be exported and imported into forthcoming email (Emma) and events tools.

## Glossary of Key Terms

Before proceeding to use the tool, familiarize yourself with these key terms:

| Term | Definition |
| --- | --- |
| Alumni | Constituents who attended or graduated from one of the University of Nebraska campuses or programs. |
| Attended | Constituents who attended and completed at least one class at the University of Nebraska. |
| Communication purpose | The type of communication, such as newsletter, event invitation, personal contact or survey. The communication purpose is set up corresponding to the Site selected for the audience. |
| Constituent | People in the Ali CRM database and lists. These are alumni, donors and friends of the University of Nebraska. The purpose of Ali CRM is advancement, and although faculty, staff and some students are in the database, it is not intended to be used for those audiences. They are included due to their roles as alumni, donors, fund authorities, scholarship recipients and advancement participants. |
| De-dupe | Pronounced *"DEE-doop";* to de-duplicate or remove duplicate constituents from a list. Constituents may be manually removed from a list (on an individual basis if duplicates are discovered by the list builder end user). By contrast, Ali will automatically de-dupe a list so that when it generates results for a householded physical mailing list, one constituent in a household will be removed so the same address doesn't receive a duplicate mailing whenever both spouses qualify and appear on the list. See also **Householding.** |
| Delivery campus | The campus that the student attended. This may be different from the campus that awarded their degree. For example, a student may attend UNL's campus but receive a degree from the UNO College of Engineering. |
| Download output | When downloading the prepared list export, the output format needs to be selected. Options are CSV or XLSX. A CSV exports the data so that it can be opened in multiple applications. XLSX downloads with formatting (may include links or images, although those are not part of ALB exports) and opens in Excel. |
| Exclusion | Exclusions are the constituents who should *not* be included in the results list. When running a business process in Ali, such as the event invitation process or a communications process, exclusions may be specified for the output. Solicit codes are an example of exclusions that could be used. |
| Export | A list can be exported as several different formats, all of which are editable in Excel. First, prepare the export by selecting the desired export definition, then download output. See also **Export definition.** |

| Term | Definition |
|------|-----------|
| **Export definition** | An export definition is a pre-defined list of fields that will be made available in the output when it is used; each field will appear as a column on an exported spreadsheet of results. An export definition also allows you to select the desired Address Processing Option and Name Format Options, but this type of selection requires a manual de-duping of any duplicate households within the list. Examples include LastName, FirstName, LookupID, Salutation, Addressblock, etc. This is used when creating a mail package for a mail merge. |
| **Graduated** | Constituents who completed a degree, certificate or program awarded by the University of Nebraska system. |
| **Householding \| Householded** | "Householding" records within a selection refers to Ali CRM's ability to identify households within a selection and combine the output so that only the primary individual in the household receives communication. This feature is only available if using Output Format/Formatted mail correspondence output (and it will not work if using an Export Definition).<br>If a list is **householded** it means that Ali has de-duped (removed duplicates from) the results when it detects more than one constituent at the same address in the list. For example, if you were building a list of alumni and both spouses in a household meet graduation criteria and appear in your list, Ali will automatically remove one spouse from the results list of a physical mailing but include both spouses for an email message as long as both constituents have different email addresses in Ali. See also **De-dupe, Output Format, Export Definition.** |
| **Inactive** | Lists that are no longer needed can be set as inactive. The inactive lists can be set as active again, if needed. |
| **Incomplete (education status)** | Constituents that attended and completed a class but did not graduate. |
| **Institution** | The campus level of the university system. There are four institutions: UNL, UNO, UNK and UNMC. |
| **Manual exclusions \| Manual inclusions** | Constituents who do not qualify for the list based on the selected criteria but have been manually added or removed from the list. |
| **Naming convention** | A set of rules followed when list names are created that allows users to deduce useful information, provide standardization and enhance searchability and organization of items in a list.<br><br>A good list name will describe the population of the list, not the subject or specific instance of a mailing. Think of how the list will be used in the email (Emma) or event tool.<br>For example: UNO All Living Alumni *or* UNKAA Arizona Alumni for Event Invite. |
| **Opt-in \| Opt-out** | Constituents may opt in or opt out of specific modes of communications. For example, constituents who do not want to receive email of any type will have the "Do not email" solicit code. This information is located on the constituent's **Communications** tab, |

| Term | Definition |
|------|-----------|
| | **Preferences** sub-tab. Opt-ins are stored on the Attributes tab as an opt-in attribute type. *See also Solicit code.* |
| **Refresh the list** | A list should be refreshed after changes are made to the list criteria, before exporting the list or sending a communication. Doing so updates the constituents who appear on the list (and will add in anyone newly qualified and remove anyone recently deceased, for example). |
| **Prepare the export** | Before downloading the output, the list must be prepared so that the appropriate export fields are included. *See Export Definition.* |
| **Segment results** | The count displayed under Segment results is the number of constituents that qualified based on the criteria set minus those who opted out. This number does not include any Manual Inclusions but does account for those Manually Excluded. |
| **Site** | The system by which records are organized to align within the foundation and campus hierarchy.  This system is used to segment records for the purposes the user identifies. In ALB, Site is also used to assign lists to users and identify the population of recipients for a user's lists.<br><br>Important: It is crucial to select the correct Site! A Site selection of:<br>    • UNO Arts and Sciences is "upper tier" (higher in the hierarchy) and truly includes ALL departments; whereas<br>    • UNO AS All Departments limits the search to funds intended to benefit all departments in the College of Arts and Sciences at UNO and thus is quite limited in results. |
| **Solicit code (opt-out or opt-in)** | Solicit codes allow constituents to globally opt out of solicitations and communications. For example, for constituents who do not want to receive email of any type, a "Do not email" solicit code can be assigned. This information is located on an individual constituent record's **Communications** tab, **Preferences** sub-tab. Opt-ins are stored on the Attributes tab as an opt-in attribute type. *See also Opt-in/Opt-out.* |

# List Library (front page)

The List Library is the home screen of the ALB tool. It displays all existing lists to which you have access. The columns of the List Library can be customized to your preferences by clicking the green plus **Columns** button. The lists can be sorted and filtered by any column. To resize the columns, click the **More** button or adjust the column manually by dragging the column border in the desired direction.
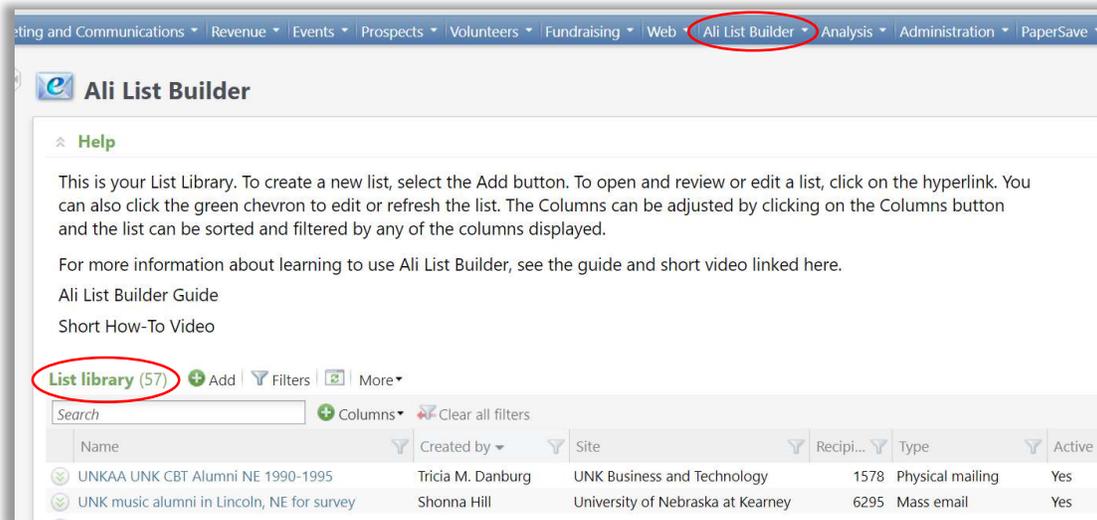


The columns available to display are:
- **Name.** The list's name. *Once the list is added and saved, the Name cannot be changed,* because it is integrated with other applications, such as email and event tools.
- **Created by.** Name of Ali user who built the list.
- **Site.** Defines which group of constituents is the base source of the list and who is to receive communications from it. More than one Site can be applied to a list. University partners see only lists within the Site to which they are assigned. This means that if you build a new list of your Site, other current or future Ali users on your team who have ALB access may view, edit and use your list.
- **Type.** The list's intended purpose, either: physical mail, mass email, event planning (emailed *or* mailed invitations) or general list for planning purposes.
- **Date created.** Date the list was first created. Some lists may be reused, while others may function better if you build them from scratch each time.
- **Date updated.** Date the list criteria was last changed/edited and saved. This is *not* the date the list was most recently used by email or events tool(s).
- **Date sent.** Date the user specified the list would be used for its intended purpose. This date does not update when a process/refresh is run; it is the user-defined date.
- **Active.** List is currently available to be used. Lists may be set as inactive by users when they are no longer needed. Lists may be set as active again if needed.
- **Recipients.** Number of records that are included in the list. This number may fluctuate when the list is refreshed if:
  - the list involves adding constituents from a dynamic selection;
  - new solicit codes are applied to any constituent records; or
  - other criteria on constituent records change (e.g., new graduates, donors or deceased constituents).

## Add a New List

To add a new list, go to the **ALB** main page and click the green **Add** button, which appears in the List Library section. *Note that any required fields will show in yellow.*
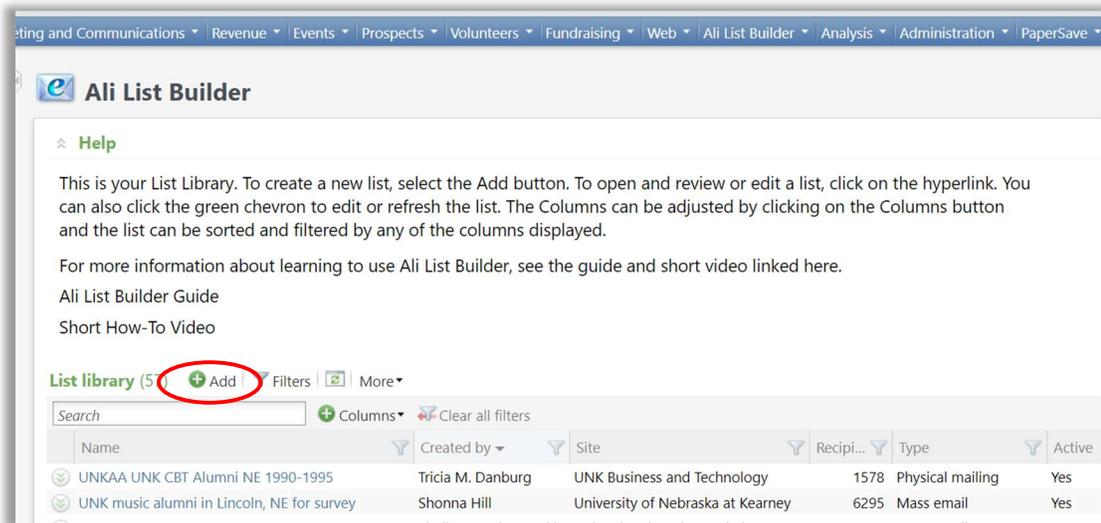


If there is already a similar list created, it can be copied, edited and saved as a new list easier than creating a new one from scratch. From the list library, click the green double chevron and then **Copy**. Once the copy is saved, click **Edit list criteria** from the left side menu.
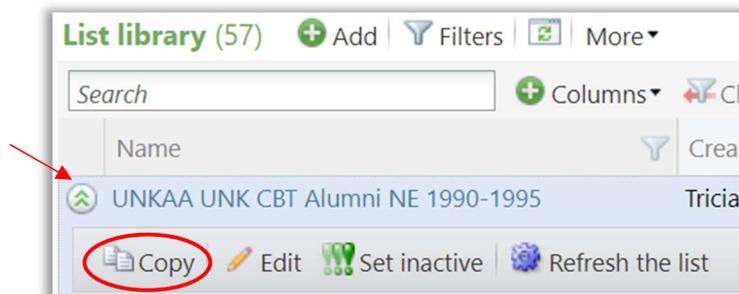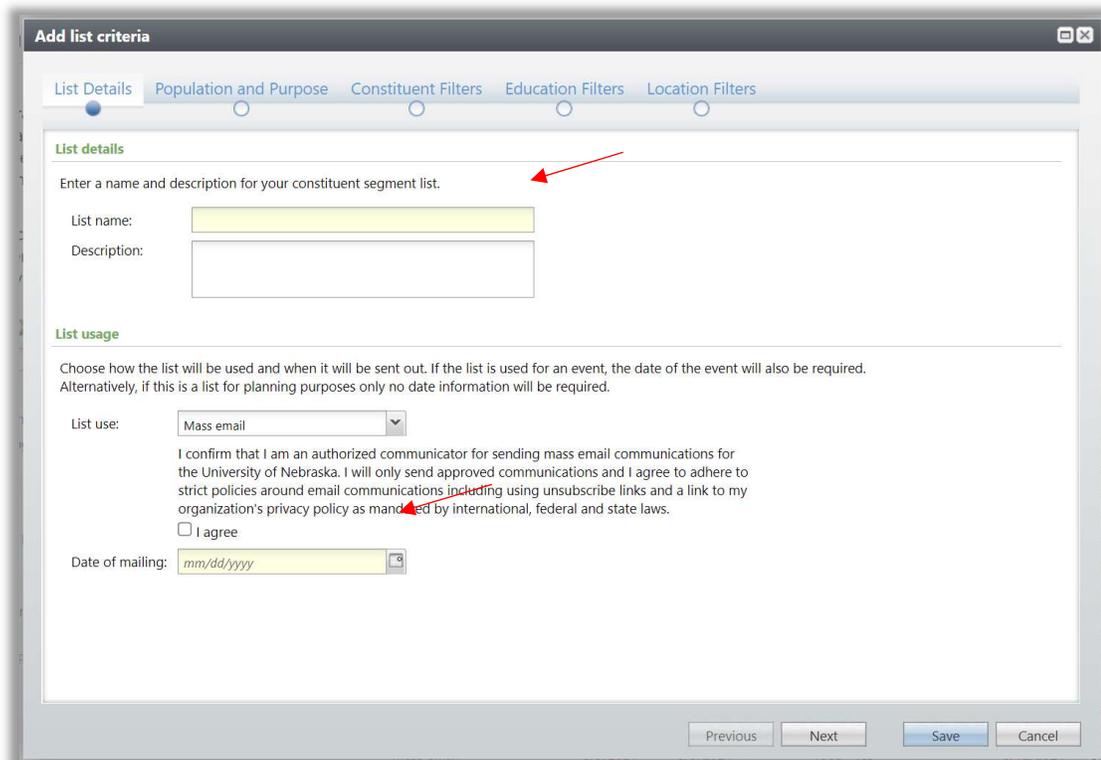
## List

## Details

1. Enter a **List name**. A good list name will describe the population of the list, not the subject or specific instance of a mailing. For example, a good naming convention would be: "UNKAA Arizona Alumni for Event Invite."
2. Fill in the **Description** of the list with any relevant criteria (optional).
3. Use the drop-down menu to select the **List use** type. This helps to apply the proper opt-out codes so that the correct constituents are included in the list. For example, if you are creating an email list, the list builder only includes constituent records that have an email address.
   a. Mass email
   b. Physical mailing
   c. Event planning – mailed invitations
   d. Event planning – emailed invitations
   e. General list for planning purposes
4. Check the box "**I agree**" if you are an authorized communicator for your area.
5. Fill in the **Date of the mailing** unless the list is for general planning purposes. If the list is for general planning purposes, enter today's date.
6. Click the **Next** button or select the Population and Purpose tab at the top. If you need to pause your work on building the list, you may hit **Save** at any time. *Note that once you save the list, you cannot rename it. You can edit all other list criteria if needed.*

## Population and Purpose

Remember that the list narrows as you move through the tabs of the list wizard. The broadest population is first selected in the **Population and Purpose** tab.
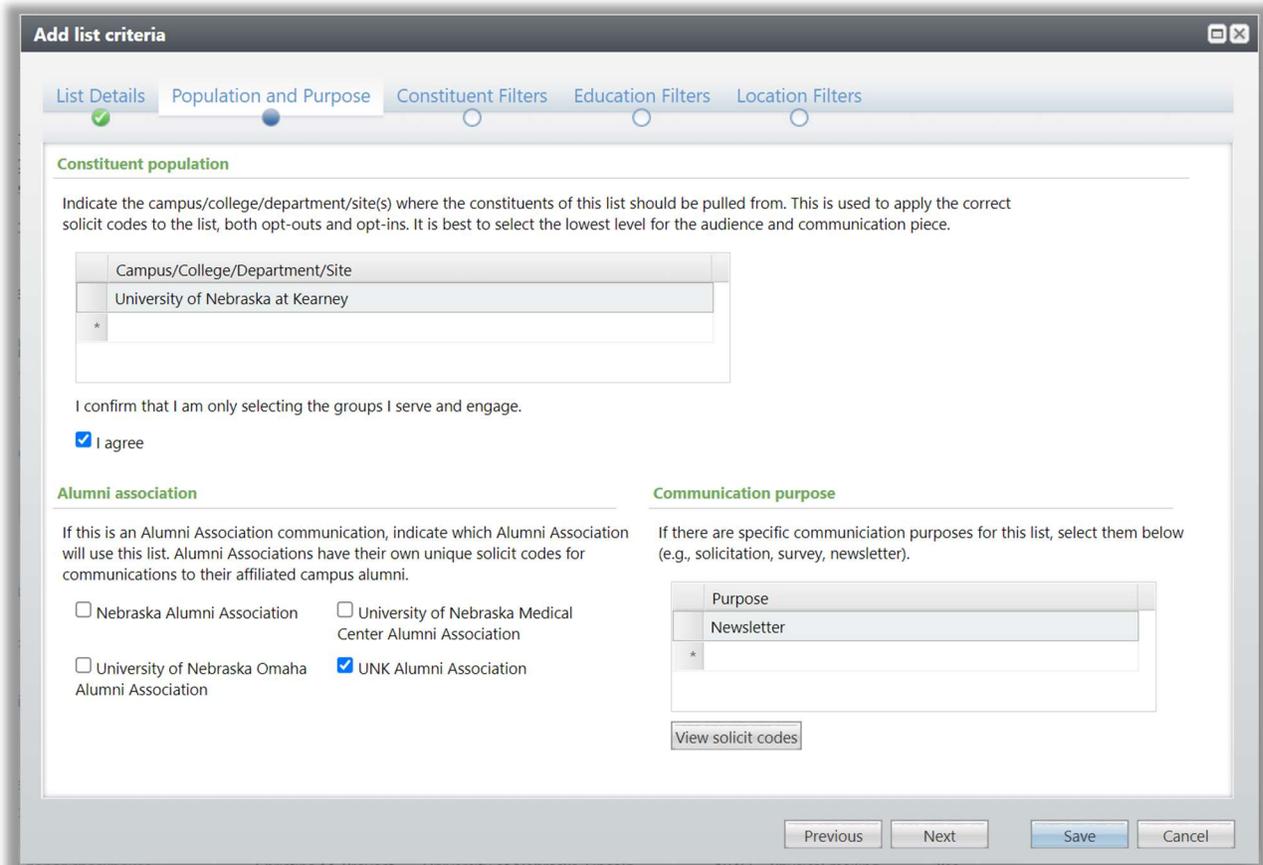
## Constituent Population

- Fill in the highest-level **Site** for your audience. (The full Site Hierarchy is listed in Ali CRM [here](#).) You may also select multiple Sites. This establishes your base audience. If you aren't sure which Site to select, refer to the Site explanation appearing in the [Glossary of Key Terms](#) in this guide. Not all the lower-level Sites are available in ALB. If you do not see your Site in the list, email servicedesk@nufoundation.org. To navigate to the Site Hierarchy in Ali, go to the Administration functional area and click Sites. Click the small arrows to expand or collapse the hierarchy.
- Check the box "I agree" to confirm that you are selecting only the population for which your role is responsible. This is a step to confirm that you are engaging only with alumni and donors of your assigned constituency.

## Alumni Association

- (Optional) If you are an employee of one of the alumni associations and sending the communication on behalf of the university or college that you work with, do *not* check the alumni association boxes. If you are mailing the communication from the alumni association, check the appropriate box to apply the correct opt-out or opt-in codes.

## Communication Purpose

- (Optional) If applicable, use the Communication purpose drop-down menu to select the Purpose. These Purposes are different depending on the earlier Site and Alumni Association checkboxes.

*If there is an extra blank row in the Purpose field, highlight that row and press the delete key to remove the blank row.*

## View Solicit Codes

- (Optional) To see the solicit codes that will be applied to the list, click the **View solicit codes** button.
- Click the **Next** button on the bottom of the form or select the Constituent Filters tab at the top. If you need to pause your work on building the list, you may hit **Save** at any time. *Reminder that once you save the list, you cannot rename it. You can edit all other list criteria if needed.*

## Constituent Filters

All constituent filters are optional.
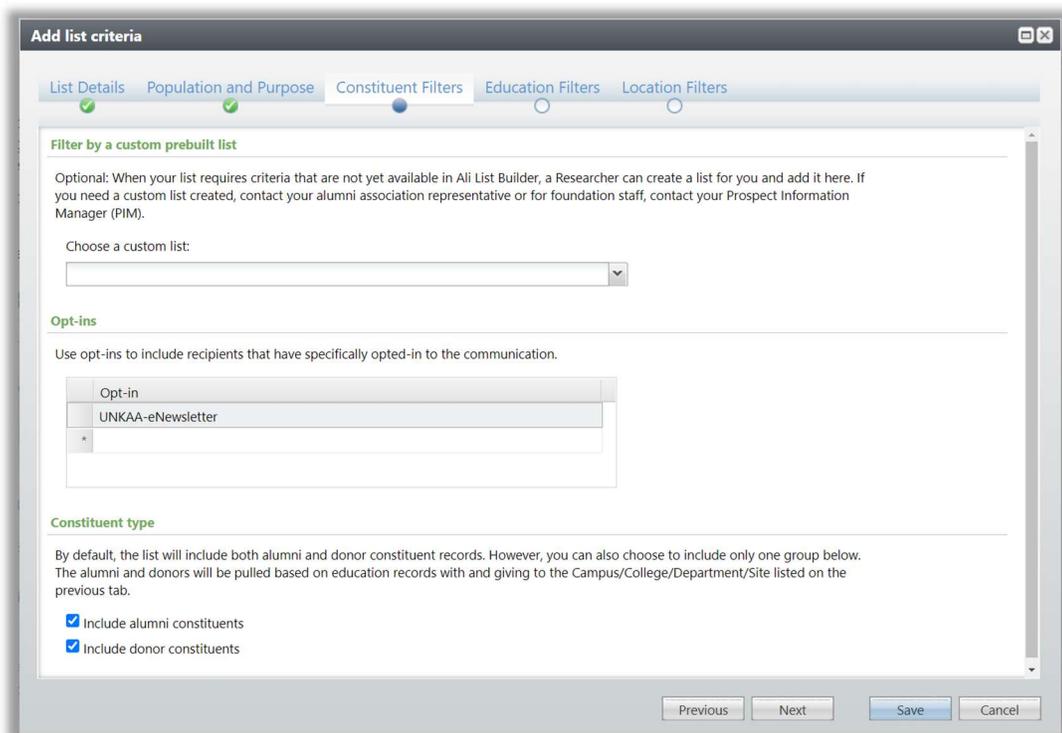


## Filter by a Custom Prebuilt List

(Optional) If you have a complicated list that requires criteria that aren't available in the list builder, a prospect research analyst (PRA) can add a custom list (also known as a "selection") for you. *Note that the custom list will be a subset of the Population (Site or Sites) that was selected in the previous tab.* If the custom list contains people who are not in the Population (Site) selected, they will not pull into the final list. Custom lists that were built and assigned specifically to you are noted with an asterisk in the pulldown menu.

## Opt-ins

(Optional) If your publication has opt-ins that need to be added, enter them in the Opt-ins section. The opt-ins available are dependent on the Site selected on the Population and Purpose tab.

## Constituent Type

- Check the boxes to include either alumni, donors or both. By default, both boxes are checked. At least one box must be checked to see results.
- Click the **Next** button on the bottom of the form or select the Education Filters tab at the top. If you need to pause your work on building the list, you may hit **Save** at any time. *Reminder that once you save the list, you cannot rename it. You can edit all other list criteria if needed.*

## Import — Match constituents from an imported list

This feature finds the matching constituent record lookup IDs in Ali CRM so that the list can be used with Emma and AlumnIQ, the email and event tools. The **Import** feature is on the **Constituent Filters** tab on any Ali List Builder list. Any contacts that don't exist in Ali CRM can then be added.

**Prepare the Import File**

1. Open the list in Excel.
2. Use these required column headers:

| First Name | Last Name | Email address | Phone | Address Line 1 | City | State | ZIP |
| --- | --- | --- | --- | --- | --- | --- | --- |

Ali List Builder will match constituents if one of the following conditions is met:

- First Name + Last Name + Email address
- First Name + Last Name + Phone
- First Name + Last Name + Address

3. Save the file in CSV format. This is important, as the XLS or XLSX formats cannot be imported.

**Import the File to Ali List Builder**

1. Open Ali List Builder.
2. Click the green +symbol to add a new list.
3. Complete the List Details and Population and Purpose steps.
4. On **Constituent Filters**, click the **Import** tab.
5. Check the box for **List populated via CSV file**.
6. Use the green up arrow next to the **Import List** box and find your CSV file.
7. Match the Source column fields to the Target fields.
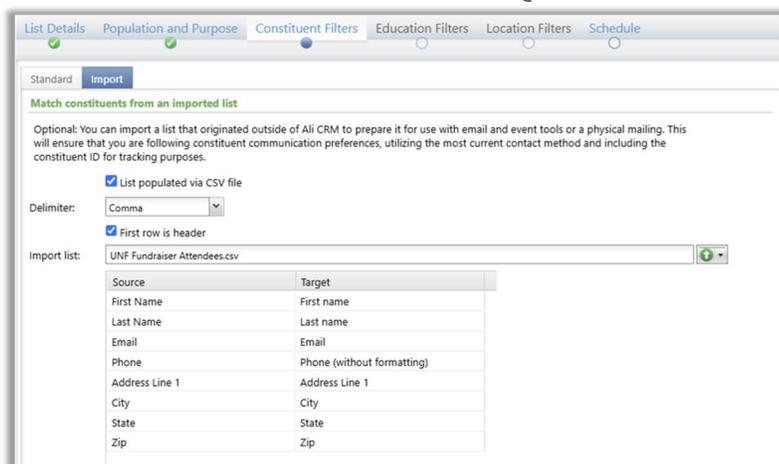
**Review the Imported Data**
1. Click the **View data** button.
2. Review the data in each column and check for errors.
   a) Ensure the data in each column matches the information type. If the source file data contains commas, it could shift into an incorrect column.
   b) Errors will be highlighted with a yellow caution symbol. Common errors are improperly formatted email addresses or text in number fields.
3. If changes are made to the source file data, clear the original import and import the corrected file.
   a) Close the **Import Data** form.
   b) On the Import page, click the down arrow next to the green import arrow button and click "Clear"
   c) Import the corrected file and review the data. Repeat until there are no errors.



4. Click the blue **Save** button.
5. Click **Refresh the list**.
6. After the list is refreshed, navigate to the **List Results** tab, then the **Imported Records** page.
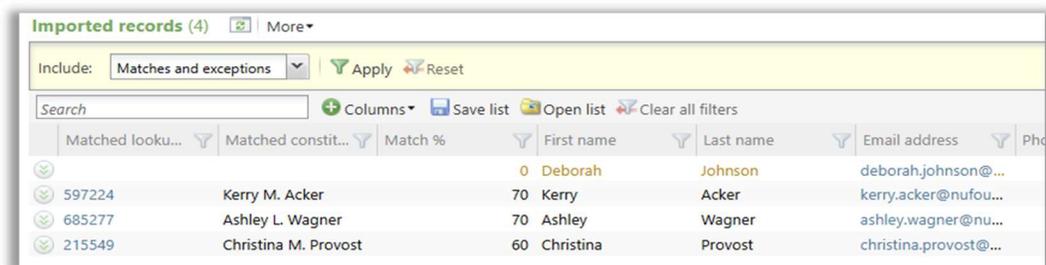


7. Any names with exceptions can be manually matched. Change the **Include** filter to **Exceptions Only** and click **Apply**.
8. Click the double green chevron button to reveal both the **Review matches** and **Edit** functions.



   a) Start with **Review matches**. If one of the records are the correct constituent, click [Select record as a match] . Click **Save**. If none of the potential matches are correct, click **Cancel**.
   b) If the above step didn't find the correct constituent, click **Edit**. The **Edit import record** page will open. Type the person's name in the Constituent search box and click the magnifying glass to search. Potential matches will be displayed in the Results window. If one of the constituents in the Results is the correct constituent, select that one, then click **Save**. Otherwise, click **Cancel** and then **Cancel** again.
   c) If a matching constituent was selected and saved, the constituent will now display in the **Recipients** tab.

9. Optional last step: Export the list of people that didn't have a match. Request to have constituent records created for them by sending an email to biographicalrecords@nufoundation.org.

## Education Filters

All the education filters are optional. *Note that the education filters narrow the list to only constituents who have NU education records. It excludes donors that do not have NU education records.* If you want to include donors to and alumni from a specific college, it is best to create two separate lists, one with donors and one with alumni.

Leave the education filters blank if you would like to include non-alumni donors. A second list can be created to add alumni from specific colleges.

Add list criteria

List Details  Population and Purpose  Constituent Filters  **Education Filters**  Location Filters

**Institution and college/school**

Use the institution and/or college/school fields to filter your list of constituents to those with the selected values present on their education records. Selecting more than one college/school will create an 'OR' condition.

Institution:
University of Nebraska at Kearney

Delivery campus:
Kearney

College/School:

| | College/School |
|---|---|
| | Arts and Sciences |
| * | |

○ Include those who attended the selected institution OR those with the chosen delivery campus

○ Include those who attended the selected institution AND have the chosen delivery campus

**Additional education filters**

Further refine your list of constituents using parameters that apply to the education record from the institution selected above.

Status:  ☑ Graduated  ☑ Incomplete

Time frame:
Graduation date   1/1/1990  to  12/31/1999

Program:  ☑ Graduate  ☐ Law
☑ Undergraduate

All options are included by default. To include only specific options, mark the checkbox next to those options.

Previous   Next   Save   Cancel

## Institution and College/School

1. (Optional) To narrow the list to include only alumni from one of the four campuses, select the institution from the pulldown menu.
2. (Optional) To narrow the list to include only specific colleges or schools within the institution, enter them under the College/School.
   a. Adding multiple colleges adds to the population. It does not select only alumni with affiliations to all of those listed.
   b. If there is an extra blank row in the College/School field, highlight that row and press the delete key to remove the blank row.
3. (Optional) The Delivery Campus criteria allow for including those who attended the institution at specific locations. The toggle buttons allow for selecting those who attended the institution and/or that location. For example, those who attended UNK *or* had classes at the Kearney campus. Likewise, those who attended UNK *and* had classes at the Kearney campus.

## Additional Education Filters

4. (Optional) To further narrow the list to those who have a specific Status or Program of study, select the appropriate checkboxes: Graduated and Incomplete degrees; Undergraduate, Graduate, and Law programs; and specific graduation dates. Note that all options are included by default. To include only specific options, mark the checkbox next to those options.

5. Click the **Next** button on the bottom of the form or select the Location Filters tab at the top. If you need to pause your work on building the list, you may hit **Save** at any time. *Reminder that once you save the list, you cannot rename it. You can edit all other list criteria if needed.*

## Location Filters
All location filters are optional.



## City, State, ZIP
1. (Optional) You can fill in just the city and state, the state only or the zip range. To narrow the list to a state, specific city and state, or zip range, fill in the respective fields. When filtering by city, include the state, because many city names occur in different states. *Note that the +4-digit extension should be included if using the zip range.*
   - While it is possible to refine your list by city, state or zip, a better practice is to use the Geographic selections option below.

## Geographic Selections
2. (Optional) *It is highly recommended to use one of these pre-built geographic locations available for narrowing a list.* These were carefully built and may be more accurate than using the city, state or zip range.
   - Search for the appropriate location by clicking on the magnifying glass on the empty row under Geographic selection.
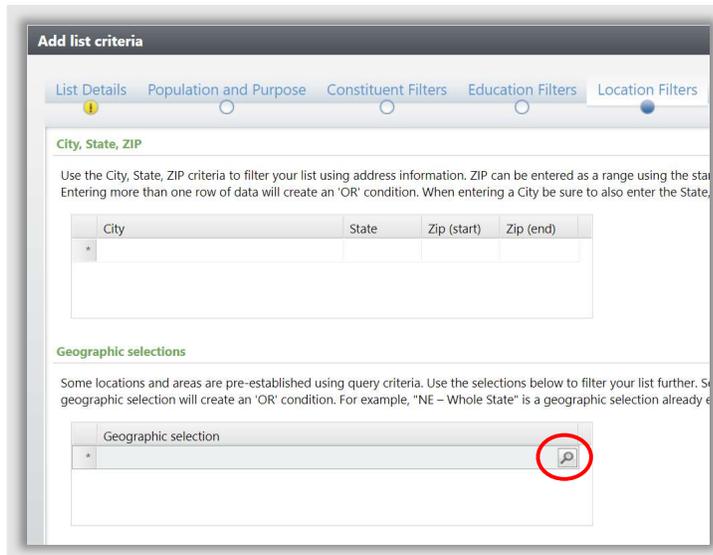
- There are numerous location options, and the Region filter serves to narrow the results (see picture below). Regions include North West, South West, North East, South East, North Central, South Central and Nebraska.
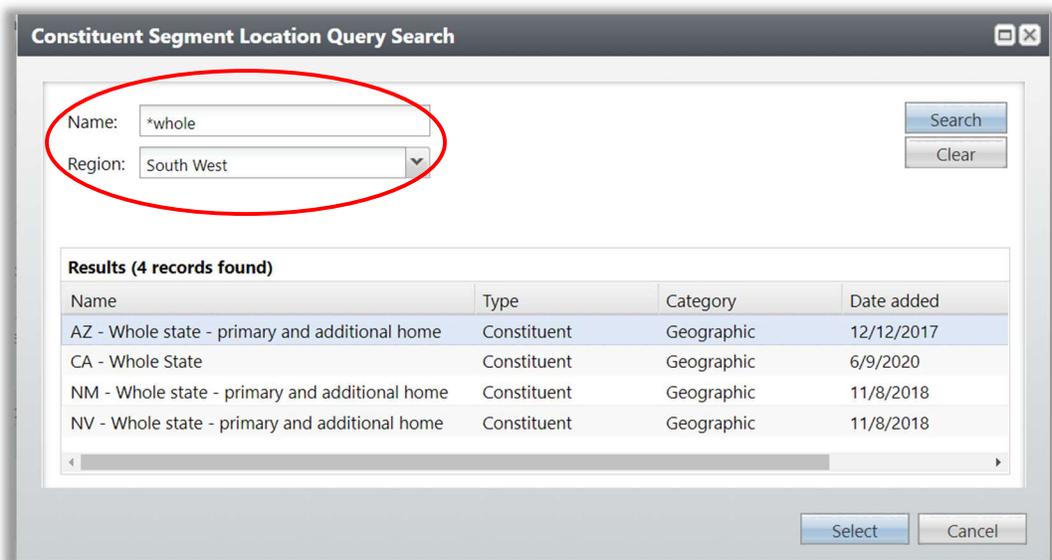


- It helps to put an asterisk in front of the location when searching as the exact name of the selection may be unexpected.
- It may take some time to become familiar with the Geographic selections available. If you have any questions, contact a PRA or email servicedesk@nufoundation.org.

## Review and Save the List

Click the **Previous** button or any of the tabs at the top to review the filters. When you are finished reviewing, click **Save**. *Reminder that once you save the list, you cannot rename it. You can edit all other list criteria if needed.*

## Refresh the List

After saving the list, open the list and click **Refresh the list** in the left side menu (on the list details record) to process the results.
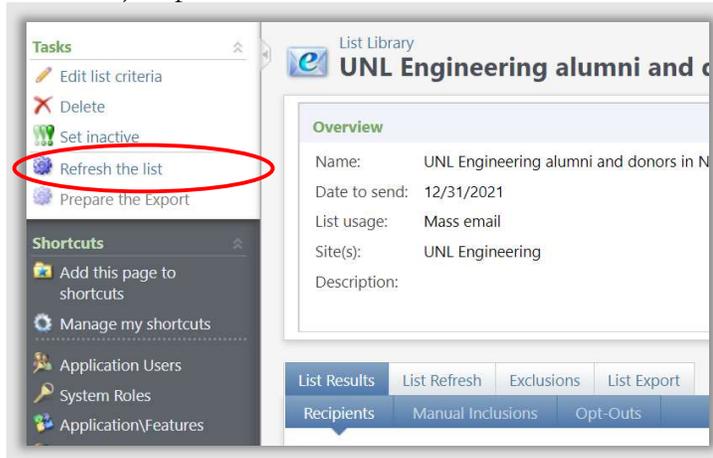


## View and Edit/Manage Existing List

View or edit the list's details and results by clicking the blue hyperlinked name. A lot of information is provided about each list to ensure the correct population is being included.
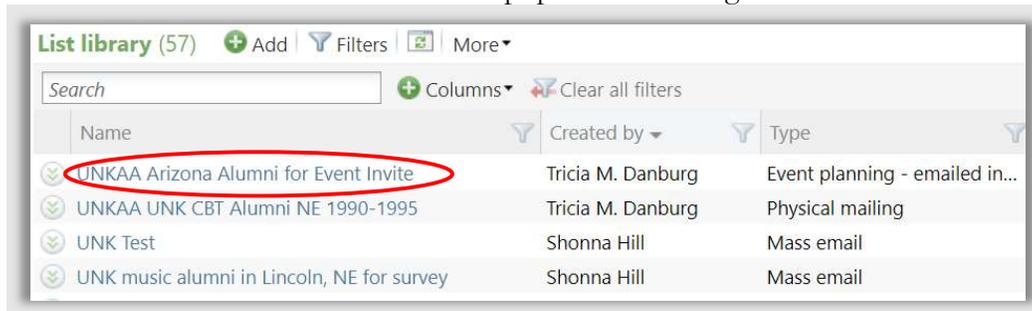


A list can also be edited from the List Library by clicking the green double chevron, then clicking the **Edit** button.

## Overview, Status and History

The top portion of the screen contains information about the list, which is provided in three sections: the Overview, Status and History. The **Overview** section provides information that was manually entered when the list was created or last updated, including the List usage.

- The **Overview** section provides information, such as List usage, that was entered when the list was created or last updated.
  - ➢ **Status:** informs users of changes made that require the list to be refreshed or mean the list is ready to be exported. It also indicates how many people have been manually added or removed from the list. Individuals who wouldn't normally qualify for the list can be manually added and those who do qualify can be manually removed.
  - ➢ **Segment results**: the number of individuals who qualify based on the criteria selected minus those who have opted out.
  - ➢ **Opted out:** the number of individuals who have solicit codes that exclude them from the list. For example, an email list will exclude those with a 'Do Not Email' solicit code.
  - ➢ **Exportable:** the number of individuals who qualify for the list, plus those manually added, minus those who opted out and minus those who were manually excluded.
  - ➢ **History:** displays the list's first setup date, last refreshed date, number of constituents added since the last change, number of constituents removed since the last change, the last export date and number of constituents last exported.

## List Results Tab

The **List Results** tab displays the constituents in the list. Only the first 500 recipients will display in increments of 25 per page.  The right side of the page provides navigation for users to access additional pages. To review the list in its entirety, **Prepare the export** and **Download** the output. *Note that the list can be sorted and filtered by any column to find the person you're looking for. There is also a hyperlink on the Lookup ID to navigate to the person's constituent record.*
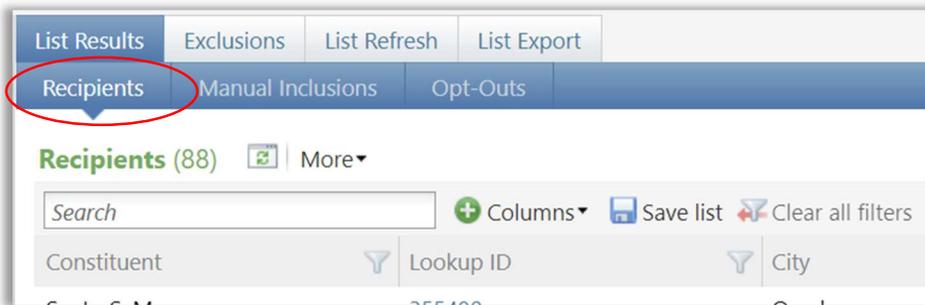


- The **Recipients** sub-tab includes all those who qualify for the list based on the criteria selected. It does not include those who were manually added or those who opted out.
- The **Manual Inclusions** sub-tab displays those who were manually added to the list.
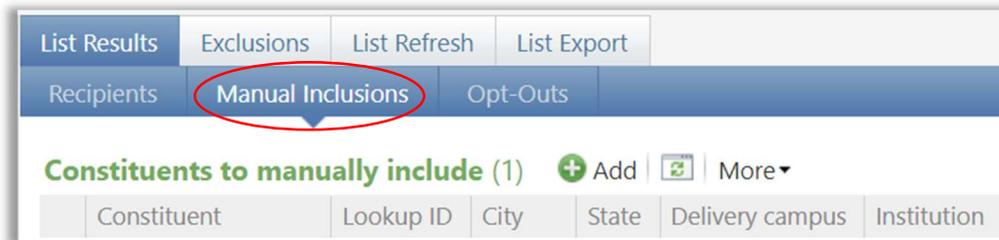


- The **Opt-Outs** sub-tab displays all those who opted out and why.
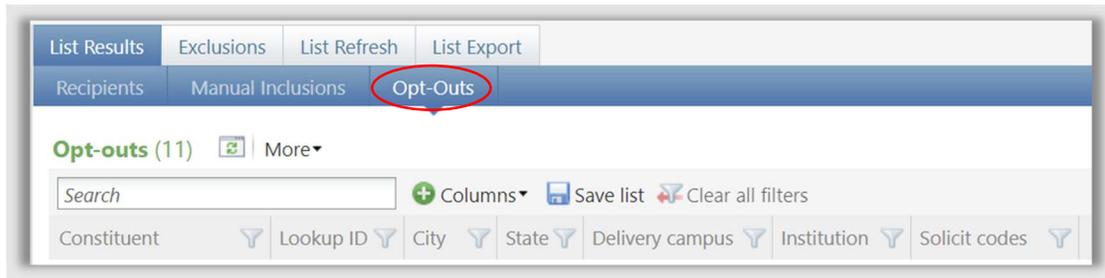
## Exclusions Tab

The **Exclusions** tab displays the solicit codes that have been applied to the list based upon the list's criteria. This is also where constituents can be manually excluded from the list. Exclusions that are almost always applied include deceased and inactive. If the list is for email purposes, people who have no email address will be excluded.
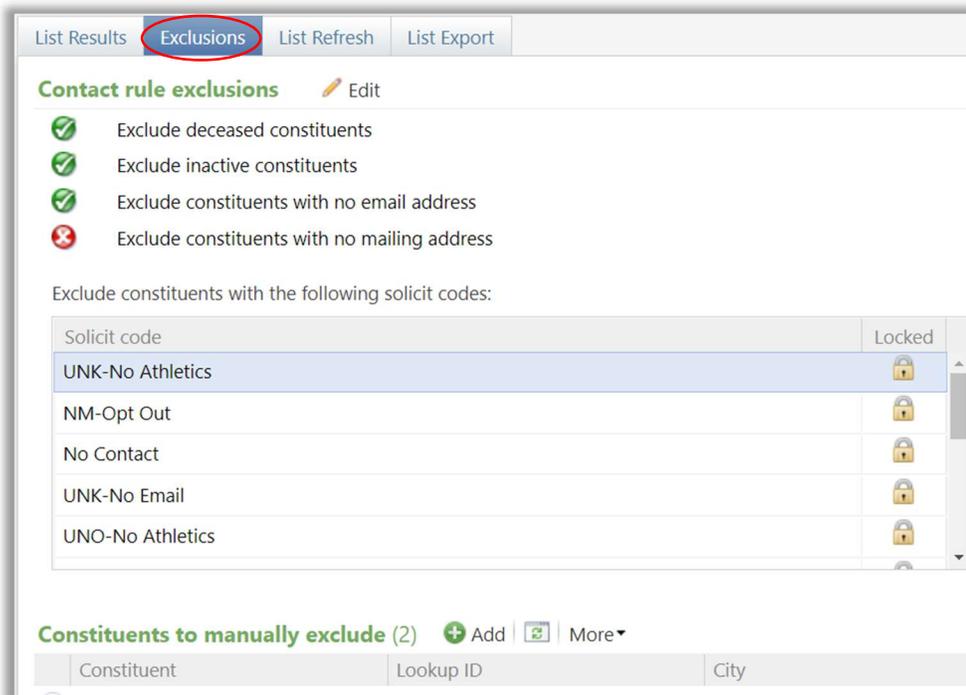


- **Contact rule exclusions.** The green checkmark means that the exclusion is applied. The red "X" means that the exclusion is not applied. For example, if you're creating an email list you would *not* want to exclude people with no (physical) mailing address, but you *would* want to exclude constituents with no email address.
- **Constituents to manually exclude.** Click the **Add** button, search and select any constituents who must be excluded even though they may qualify based on the list criteria.

## List Refresh Tab

*When the list is saved and every time thereafter that the list criteria are changed, the list must be refreshed. Prior to use, the list should also be refreshed to ensure any changes to constituent records are reflected.* The **List Refresh** tab shows both most recent refresh status and history of refreshes.
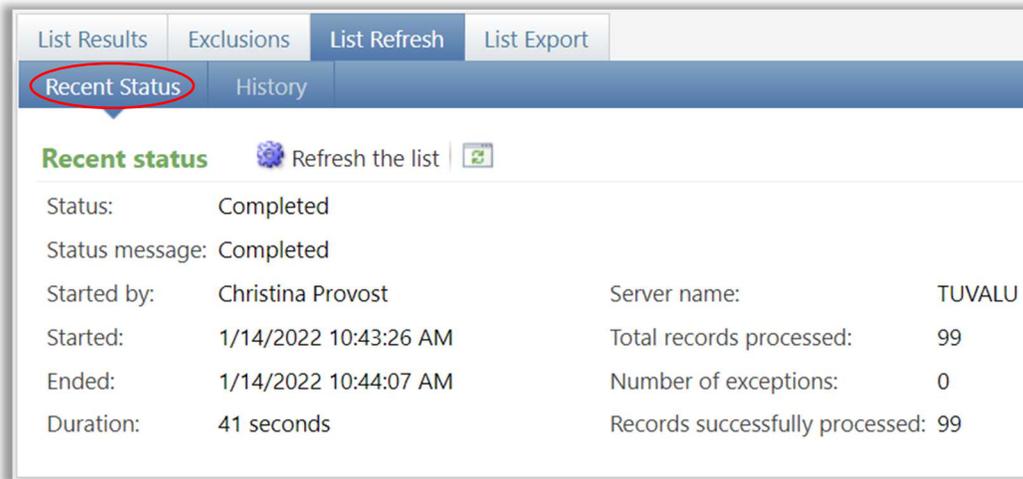
- **Recent Status** sub-tab shows the total records processed, number of exceptions and records successfully processed.
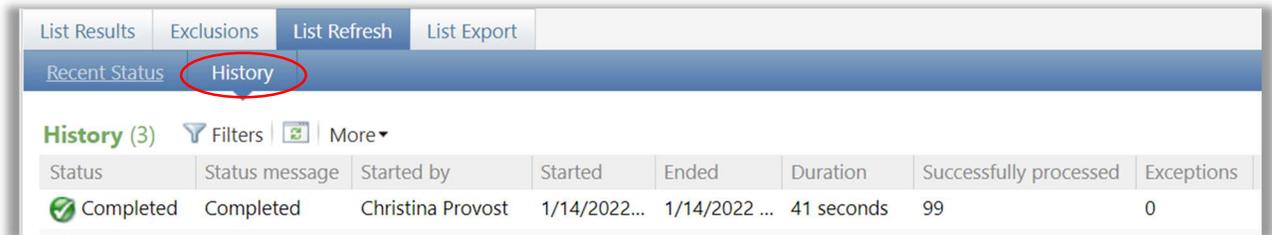


- **History** sub-tab displays all the historical refreshes where the number of successfully processed records can be compared.

## List Export Tab

After the list has been refreshed it can be exported. The **List Export** tab displays the most recent export status, including the number of constituents in the export and number of exceptions.
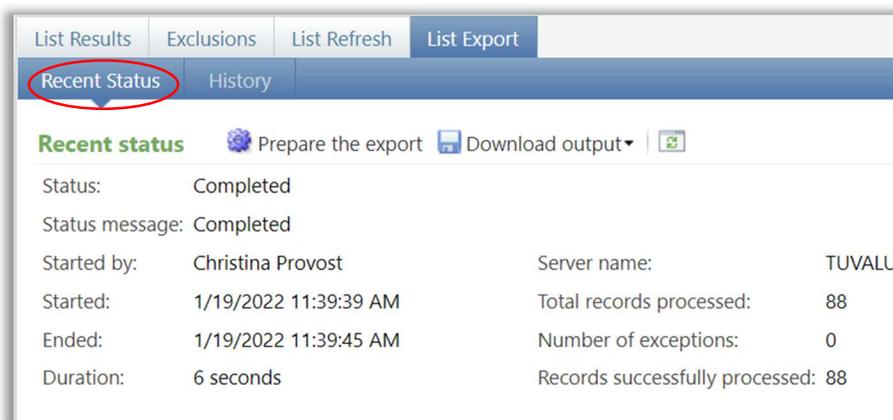


It also shows the export history. Historical export versions can be downloaded by clicking the green double chevron next to the item.
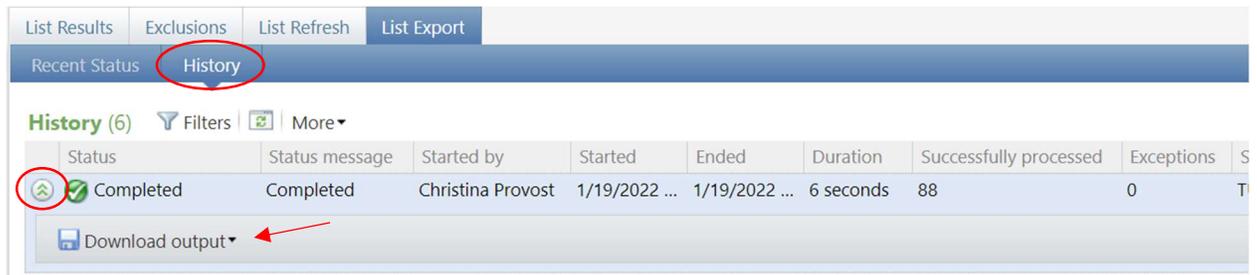
To export the list, first click **Prepare the export** from the Tasks menu on the left side of your screen (or the List Export tab > Recent Status sub-tab) and select the appropriate export definition. The export definition defines the columns that will be output in the spreadsheet, including the name formatting.
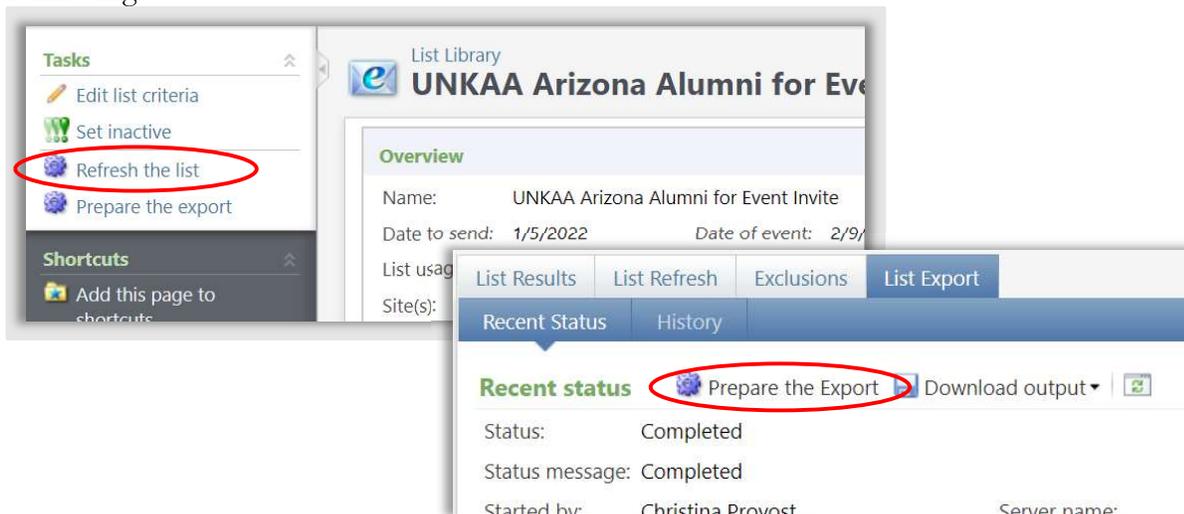


Some export definitions available include:
- Email Export for Planning: does not contain actual email addresses. Lists are integrated with the email tool for sending email.
- Formal Individual Physical Mail Export Householded: includes the primary constituent addressee and salutation. Only one per physical mailing address.
- Formal Joint Physical Mail Export: includes the joint addressee and salutation.
- Standard Physical Mail Export Householded: the most used export definition for physical mailings.

*Lists used for email are brought into the email tool, Emma, so all the legal requirements for sending email can be applied. Email addresses are not exported directly from ALB.*

## Download Output

To download the list click **Download output** on the List Export's tab > Recent Status sub-tab. When downloading the list, the download format needs to be selected. For simplicity, choose the

CSV format. *The download can be sorted and filtered in Excel to find a certain constituent(s) and verify the list easily.*
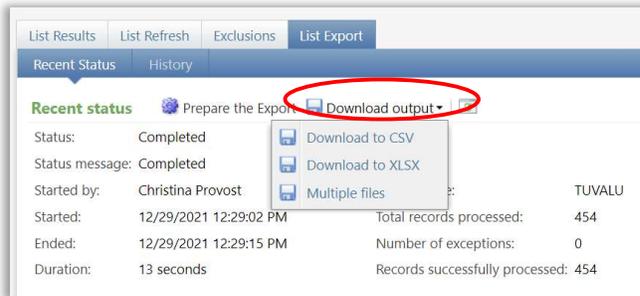


Any of the historical exports can also be downloaded by clicking on the double-down arrow (green chevron) next to the history item.
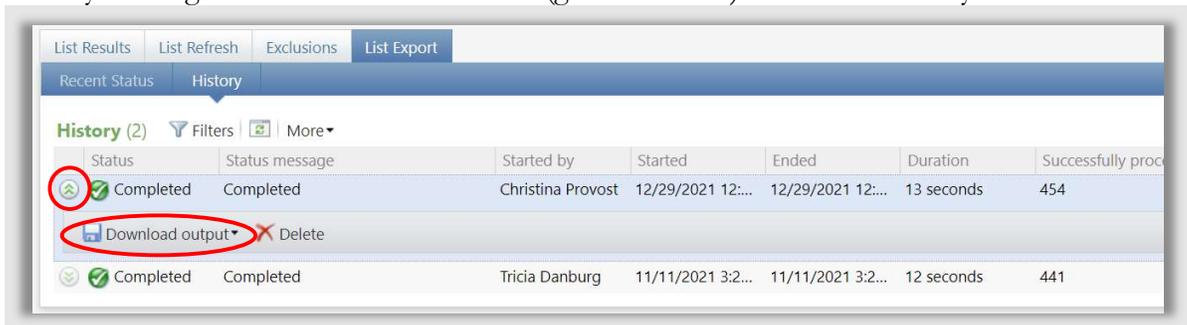


## Best Practice: When to Edit and When to Create New

The same list can be reused at any time, so long as the List Usage aligns with the type of communication. For example, a list of all alumni and donors for a certain geographical area can be used for many publications and messages. *A separate list should be created if the solicit codes (opt-outs or opt-ins) are unique.* Important things to consider:

- People can opt out/in from event invitations separately from regular informational emails.
- People can opt out/in from email communications versus physical mail communications.
- People can opt out/in from specific campus, college or school communications.

If there are adjustments to be made to the list, it can be edited at any time; however, the list name cannot be changed. Updating the list description with any changes helps to know what list criteria are included. Best practice: If the list needs to be adjusted so that the name no longer aligns with the results, it is best to create a new list or copy the list, rename it and make those criteria adjustments.

Important: Each time a list is edited, the **Refresh the list button** should be clicked to apply the changes and see the updated results.

## List Maintenance

The lists in ALB are only maintained by the users who work with them. At least once per year your area's lists should be reviewed for relevance by sorting the List Library by the Date updated column. Set as inactive any lists that are no longer needed.

## Set Inactive

As lists are no longer needed, they can be inactivated. Either click on the blue hyperlink on the list Name or click on the double-down arrow (green chevron) next to the list to **Set inactive**.
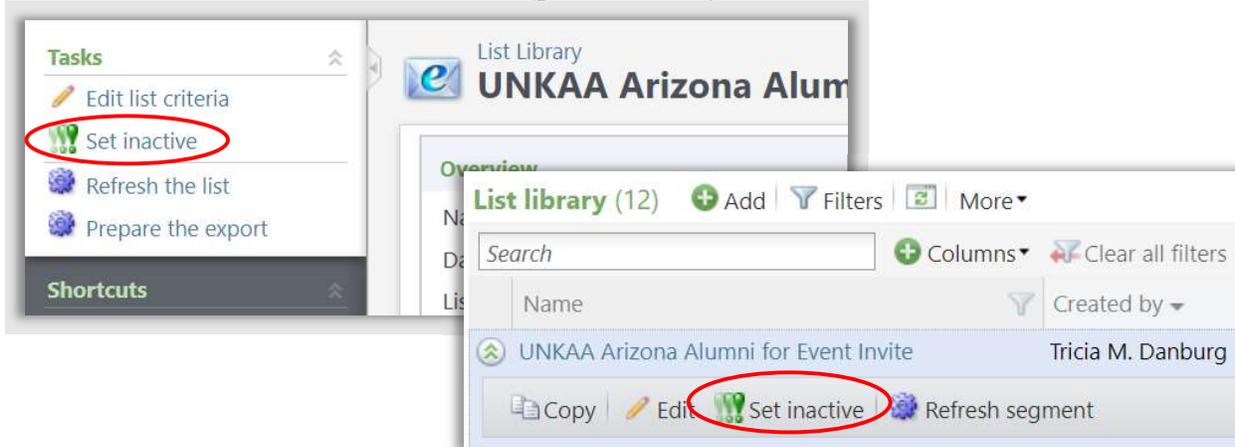


Lists that have been set inactive can be Set active (reactivated) again at any time. A recommended best practice is to ensure the "Include inactive?" checkbox in the list library is checked so all your lists are displayed by default:
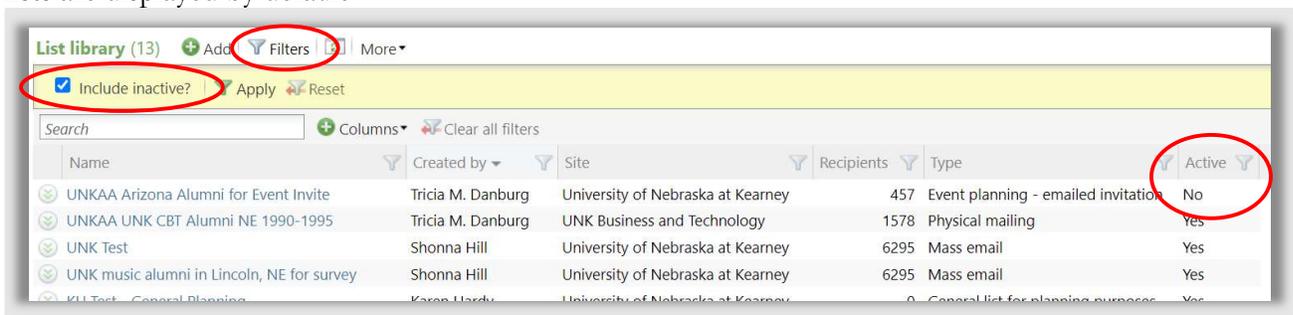


## Support and Help

If you have questions about using Ali List Builder (ALB) or are a current Ali user and wish to request new access to the ALB tool, email alicrm@nufoundation.org.

If you have the need for a complex list to be built (that can't be achieved using ALB):

**University partners**
- Contact your alumni association representative or see the **How-To Guides** for university partners on the front page of the Ali Community website located below the green Ali CRM Constituent Record Access section, lower left side.

**Foundation staff members**
- Contact your prospect information manager (PIM).

If you need assistance using Ali CRM, email the foundation's Service Desk at servicedesk@nufoundation.org.

If you wish to request new Ali CRM user access (granting access to constituent records), visit the Ali Community website and click Request Access > New User to begin the application process. Note in your new user request if "add-on" access is also being requested for ALB.

# Appendix A: List of Pre-defined Geographic Areas

| Geographic Area Name | Region | Description |
|---|---|---|
| NE - Legislative District 1 | Nebraska | Otoe, Johnson, Nemaha, Pawnee, Richardson counties |
| NE - Legislative District 12 | Nebraska | Southern Douglas County: Millard/Ralston |
| NE - Legislative District 14 | Nebraska | Papillion and LaVista |
| NE - Legislative District 18 | Nebraska | Central Omaha |
| NE - Legislative District 21 | Nebraska | Northwest Lancaster County |
| NE - Legislative District 25 | Nebraska | Eastern Lancaster County |
| NE - Legislative District 32 | Nebraska | Fillmore, Saline, Thayer, Jefferson, SW Lancaster (not Lincoln) |
| NE - Legislative District 37 | Nebraska | Southeast Buffalo County |
| NE - Legislative District 39 | Nebraska | Western Douglas County |
| NE - Legislative District 41 | Nebraska | Antelope, Boone, Garfield, Greeley, Howard, Pierce, Sherman, Valley, Wheeler counties |
| NE - Legislative District 48 | Nebraska | Scottsbluff County |
| NE - Legislative District 49 | Nebraska | Sarpy County (Gretna) |
| NE - Lincoln/Omaha, 60-mile radius of both | Nebraska | Douglas, Sarpy, Cass, Dodge, Otoe, Sanders, Washington and Lancaster counties, as well as Pottawattamie, Harrison and Mills counties in Iowa |
| NE - Beatrice, 20-mile radius (Gage County) | Nebraska | Beatrice, 20-mile radius (Gage County) |
| NE - Broken Bow to Norfolk | Nebraska | |
| NE - Broken Bow, 30-mile radius | Nebraska | Zip codes within 30 miles of Broken Bow |
| NE - Cass County | Nebraska | Whole county |
| NE - Central NE | Nebraska | Nebraska counties within a 100-mile radius of Dunning, Nebraska |
| NE - Central Nebraska - for Trustees | Nebraska | For use with Central Nebraska Trustees lists |
| NE - Central Nebraska - for Trustees - static | Nebraska | For use with Central Nebraska Trustees lists |
| NE - Chadron, 1-hour radius | Nebraska | |
| NE - Colfax County | Nebraska | Whole county |
| NE - Columbus, 30-mile radius | Nebraska | Counties of Boone, Platte, Colfax, Nance, Polk, Butler |
| NE - Columbus, 60-mile radius (no Lincoln/Omaha) | Nebraska | Counties of Boone, Platte, Colfax, Nance, Polk, Butler, Dodge, Saunders, Seward, York, Merrick, Madison, Stanton, Cuming |
| NE - Columbus, small radius | Nebraska | Platte, Boone, Butler, Colfax counties |
| NE - Dodge County | Nebraska | Whole county |
| NE - Doug Carr Travel Territory | Nebraska | |
| NE - Douglas County | Nebraska | Whole county |
| NE - Eastern Half of the State | Nebraska | |
| NE - Fremont, 15-mile radius | Nebraska | Counties of Dodge, Saunders and Washington |
| NE - Grand Island to North Platte | Nebraska | Cities along I-80, up to North Platte-by County |
| NE - Grand Island, 20-mile radius | Nebraska | Grand Island, 20-mile radius (does not include Kearney or Hastings) |

| Geographic Area Name | Region | Description |
|---|---|---|
| NE - Grand Island, 30-mile radius | Nebraska | NE - Grand Island, 30-mile radius |
| NE - Hastings, 30-mile radius | Nebraska | NE - Hastings, 30-mile radius |
| NE - Hastings, Adams and Clay counties | Nebraska | Hastings, Adams and Clay counties |
| NE - Holdrege, 30-mile radius | Nebraska | Phelps, Gosper, Kearney and Harlan counties |
| NE - I-80 Corridor | Nebraska | Cities along I-80, up to North Platte |
| NE - Kearney, 100-mile radius | Nebraska | NE - Kearney, 100-mile radius |
| NE - Kearney, 20-mile radius | Nebraska | Buffalo, Phelps and Kearney counties (does not include Grand Island or Hastings) |
| NE - Kearney, 30-mile radius | Nebraska | Zip codes within 30 miles of Kearney |
| NE - Kearney, 50-mile radius | Nebraska | NE - Kearney, 50-mile radius |
| NE - Kearney, 75-mile radius | Nebraska | NE - Kearney, 75-mile radius |
| NE - Lexington, 30-mile radius | Nebraska | Zip codes within 30 miles of Lexington |
| NE - Lexington, Dawson County | Nebraska | Dawson County |
| NE - Lexington: Dawson, Lincoln and Buffalo Counties | Nebraska | Dawson, Lincoln and Buffalo counties |
| NE - Lincoln for RAO lists | Nebraska | Lancaster County only |
| NE - Lincoln, 100-mile radius | Nebraska | |
| NE - Lincoln, 200-mile radius | Nebraska | |
| NE - Lincoln, 30-mile radius | Nebraska | Counties within 30 miles of Lincoln |
| NE - Lincoln, 40-mile radius | Nebraska | |
| NE - Lincoln, 60-mile radius, including Omaha | Nebraska | |
| NE - McCook Area | Nebraska | McCook and surrounding counties |
| NE - McCook, Large Area | Nebraska | McCook and surrounding counties |
| NE - Neligh to Valentine | Nebraska | |
| NE - Norfolk & Columbus Areas | Nebraska | |
| NE - Norfolk, 20-mile radius | Nebraska | Counties of Pierce, Wayne, Madison, Stanton |
| NE - Norfolk, 30-mile radius | Nebraska | Zip codes within 30 miles of Norfolk |
| NE - Norfolk, large radius | Nebraska | |
| NE - North Central Nebraska | Nebraska | Includes towns of Valentine, O'Neill, Ainsworth |
| NE - North Platte to Scottsbluff | Nebraska | Drive from North Platte to Scottsbluff |
| NE - North Platte, 1-hour radius | Nebraska | |
| NE - North Platte, 30-mile radius | Nebraska | Zip codes within 30 miles of North Platte |
| NE - Ogallala, large radius | Nebraska | Ogallala and surrounding counties |
| NE - Omaha for RAO lists | Nebraska | Douglas and Sarpy counties in Nebraska, Pottawattamie County in Iowa |
| NE - Omaha, 100-mile radius | Nebraska | 58 counties in Nebraska, Iowa, Kansas and Missouri |
| NE - Omaha, 150-mile radius | Nebraska | 122 counties in Nebraska, Iowa, Kansas and South Dakota |
| NE - Omaha, 30-mile radius | Nebraska | Douglas, Sarpy, Washington, Saunders and Cass counties, as well as Pottawattamie, Mills and Harrison counties in Iowa |

| Geographic Area Name | Region | Description |
|---|---|---|
| NE - Omaha, 50-mile radius, including Lincoln | Nebraska | Douglas, Sarpy, Cass, Dodge, Otoe, Sanders, Washington and Lancaster counties, as well as Pottawattamie, Harrison and Mills counties in Iowa |
| NE - Omaha, 75-mile radius | Nebraska | 31 counties in Nebraska, Iowa and Missouri |
| NE - Omaha, metro area | Nebraska | Douglas and Sarpy counties, as well as Pottawattamie County in Iowa |
| NE - Otoe County | Nebraska | Whole County |
| NE - Panhandle | Nebraska | Ogallala west through the Panhandle |
| NE - Panhandle & Sandhills | Nebraska | Ogallala west through the Panhandle |
| NE - Red Cloud | Nebraska | Ogallala and surrounding counties |
| NE - Sarpy County | Nebraska | Whole county |
| NE - Saunders County | Nebraska | Whole county |
| NE - Scottsbluff, 1-hour radius | Nebraska | |
| NE - Scottsbluff, 30-mile radius | Nebraska | Zip codes within 30 miles of Scottsbluff; excludes Wyoming zip codes |
| NE - Sidney, 30-mile radius | Nebraska | Zip codes within 30 miles of Sidney |
| NE - Southeast NE Doug Carr | Nebraska | Counties |
| NE - Southeast NE, including Lincoln | Nebraska | |
| NE - Southeast NE, no Lincoln | Nebraska | |
| NE - Southwest NE | Nebraska | |
| NE - Tri-Cities | Nebraska | Counties in Nebraska containing Kearney, Grand Island and Hastings |
| NE - Washington County | Nebraska | Whole county |
| NE - West of Ogallala | Nebraska | Ogallala and everything northwest of Ogallala, up to the South Dakota border |
| NE - West of York | Nebraska | |
| NE - Western Area | Nebraska | North Platte, Valentine, Mullen, Ogallala, Sidney |
| NE - Western Half of the State | Nebraska | West of Kearney |
| NE - Western NE Official | Nebraska | West of North Platte, includes Cherry, Thomas counties |
| NE - Whole State | Nebraska | Entire state of Nebraska |
| NE - York County | Nebraska | York County |
| IA - Ames Area | North Central | Story, Boone, Polk counties |
| IA - Cedar Rapids, approx. 40-mile radius | North Central | IA - Cedar Rapids, approx. 40-mile radius |
| IA - Des Moines and drive from Omaha | North Central | IA - Des Moines and drive from Omaha |
| IA - Des Moines for RAO lists | North Central | IA - Des Moines, approx. 30-mile radius |
| IA - Des Moines to MN Border | North Central | IA - Des Moines, approx. 60-mile radius |
| IA - Des Moines, approx. 60-mile radius | North Central | IA - Des Moines, approx. 60-mile radius |
| IA - I-29 Corridor | North Central | |
| IA - Northwest Iowa | North Central | |

| Geographic Area Name | Region | Description |
|---|---|---|
| IA - Okoboji Area - Primary & Additional | North Central | All primary and additional homes in Dickinson County |
| IA - Quad Cities and Cedar Rapids | North Central | |
| IA - Sioux City, including NE & SD | North Central | |
| IA - Southwest Iowa | North Central | |
| IA - Western Third | North Central | |
| IA - Western, Counties of Mills, Harrison, Pottawattamie | North Central | Counties around Council Bluffs |
| IA, MN - Lincoln to Des Moines to Twin Cities | North Central | 50-mile radius along I-80 and I-35 |
| IA/SD - Sioux City to Sioux Falls Areas | North Central | Northwestern Iowa (around Sioux City) and Southeastern South Dakota (around Sioux Falls and Yankton). |
| IL - Central IL | North Central | Illinois - Peoria/Champaign/Bloomington/Springfield, 50-mile radius |
| IL - Chicago for RAO lists | North Central | Metro area of Chicago, including NW suburbs |
| IL - Chicago, 75-miles | North Central | Metro area of Chicago, including NW suburbs |
| IL - Chicago, Metro Area | North Central | Metro area of Chicago, including NW suburbs |
| IL - Peoria area | North Central | Illinois - Peoria, 50-mile radius |
| IL - Peoria, driving route | North Central | |
| IL - Southern Half | North Central | |
| IL - Springfield area | North Central | Decatur included |
| IL, IN - Champaign to Terre Haute | North Central | |
| IL, IN - Chicago & Gary | North Central | Metro area of Chicago, including NW suburbs |
| IN - Ft. Wayne | North Central | |
| IN - Indianapolis, 2-hour radius | North Central | |
| IN - Indianapolis, 40-mile radius | North Central | |
| IN - Indianapolis, Bloomington | North Central | |
| IN/OH/KY - Indianapolis, Cincinnati, Louisville | North Central | |
| KS - Manhattan to Salina to Wichita | North Central | |
| KS - Salina 50-mile radius | North Central | Kansas - Salina 50-mile radius<br>Retention: Permanent |
| KS - Salina to Topeka & surrounding area | North Central | Kansas - zips 664-666, 674, 668-669<br>Retention: Permanent |

| Geographic Area Name | Region | Description |
|---|---|---|
| KS - Topeka, 50-mile radius | North Central | Kansas - Topeka, 50-mile radius |
| KS - Western Kansas | North Central | Manhattan and West |
| KS - Wichita 50-mile radius | North Central | Kansas - Wichita 50-mile radius |
| KS/MO - Kansas City for RAO lists | North Central | Kansas/Missouri - Kansas City, 60 miles |
| KS/MO - Kansas City, 60-mile radius | North Central | Kansas/Missouri - Kansas City, 60 miles |
| KS/MO - Kansas City, 90-mile radius | North Central | Kansas/Missouri - Kansas City, 90 miles |
| KS/MO - Kansas City, metro | North Central | Kansas/Missouri - Kansas City, metro area - includes Kansas counties of Leavenworth, Wyandotte and Johnson and Missouri counties of Platte, Clay and Jackson |
| KS/MO - Lincoln to KC Driving Route | North Central | |
| KS/MO - NE City to KC Driving Route | North Central | Nebraska City to Kansas City driving route |
| MI - Ann Arbor, 50-miles | North Central | |
| MI - Detroit to Grand Rapids | North Central | |
| MI - Detroit, 2-hours | North Central | Metro area of Detroit, including Ann Arbor |
| MI - Detroit, Metro Area | North Central | Metro area of Detroit, including Ann Arbor |
| MI - Grand Rapids | North Central | Grand Rapids area |
| MI - Kalamazoo Area | North Central | |
| MI - Lansing | North Central | Grand Rapids area |
| MI - Southern Half of State | North Central | |
| MN - Bemidji, 1-hour | North Central | Minnesota - Bemidji, 1-hour |
| MN - Minneapolis for RAO lists | North Central | Minnesota - Minneapolis, 20-mile radius |
| MN - Minneapolis, 100-mile radius | North Central | Minnesota - Minneapolis, 100-mile radius |
| MN - Minneapolis, 100-mile radius and North to Walker | North Central | Minnesota - Minneapolis, 100-mile radius and north to Walker, Minnesota |
| MN - Minneapolis, 50-mile radius | North Central | Minnesota - Minneapolis, 50-mile radius |
| MN - Minneapolis, Twin Cities Metro | North Central | Minnesota - Minneapolis, 20-mile radius |
| MN - Rochester, 50-mile radius | North Central | Minnesota - Rochester, 50-mile radius, includes Mankato |

| Geographic Area Name | Region | Description |
|---|---|---|
| MO - Kansas City to St. Louis along I-70 | North Central | Missouri along I-70 and two counties in Illinois; does not include Kansas City metro area |
| MO - Saint Joseph, 50-mile radius | North Central | Missouri - Saint Joseph, 50-mile radius |
| ND - Bismarck, 100-mile radius | North Central | Including Minnesota |
| ND - Fargo, 100-mile radius | North Central | Including Minnesota |
| ND - Fargo, I-29 from Omaha | North Central | |
| OH - Cincinnati, 60-mile radius | North Central | Ohio - Cincinnati, 60-mile radius - primary address |
| OH - Cleveland Area | North Central | |
| OH - Columbus, 60-mile radius | North Central | Ohio - Columbus, 60-mile radius - primary address |
| OH - Columbus, Dayton, Cincinnati | North Central | Ohio |
| OH - Dayton, 150-mile radius | North Central | Includes Columbus |
| OH - East Lake Erie, including Detroit | North Central | For prospects |
| OH - Northern Ohio | North Central | Includes cities of Cleveland, Akron, Youngstown, Canton and Toledo |
| SD - Rapid City, Large Area | North Central | Large area around Rapid City |
| SD - SE SD & NW IA | North Central | 60-mile radius of Sioux Falls, but only including South Dakota |
| SD - Sioux Falls & Sioux City IA | North Central | 60-mile radius of Sioux Falls, but only including South Dakota |
| SD - Sioux Falls, 60-mile radius | North Central | 60-mile radius of Sioux Falls |
| SD - Sioux Falls, Large Radius & Drive | North Central | 60-mile radius and I-29 Corridor |
| WI - Janesville to Madison to Green Bay | North Central | |
| WI - Madison Area | North Central | |
| WI - Milwaukee Area | North Central | |
| WI - Milwaukee Area, Very Small | North Central | Just Milwaukee County |
| CT - Connecticut, whole state | North East | Connecticut, whole state |
| CT - Hartford, 30-mile radius | North East | Connecticut - Hartford, 30-mile radius; includes Massachusetts |
| DC - Metro Area | North East | Washington, D.C. metro area |
| DC - Neighboring States | North East | Washington, D.C. metro area |
| DC - Washington, 50-mile radius | North East | Washington, D.C. and parts of Maryland and Virginia |
| DC - Washington, 90-mile radius | North East | Washington, D.C. and parts of Maryland and Virginia, Delaware, and Pennsylvania |
| DC/VA - Metro Area & entire state of VA | North East | Washington, D.C. metro area and state of Virginia |

| Geographic Area Name | Region | Description |
|---|---|---|
| MA - Boston, 100-mile radius | North East | Massachusetts - Boston, 100-mile radius - primary address; includes the wholes states of Massachusetts and Rhode Island, and parts of Connecticut, New Hampshire and Maine |
| MA - Boston, 35-mile radius | North East | Massachusetts - Boston, 35-mile radius; primary address |
| MA - Massachusetts, whole state | North East | Massachusetts, whole state |
| MD - Baltimore, Large Radius No DC | North East | Baltimore and northeast Maryland; no D.C. metro |
| ME - Portland, 30-mile radius | North East | Maine - Portland, 30-mile radius |
| NY - Albany Area, Large | North East | Large area covering Vermont border; permanent |
| NY - Albany, 30-mile radius | North East | New York - Albany, 30-mile radius |
| NY - Buffalo, 30-mile radius | North East | New York - Buffalo, 30-mile radius; excludes Canada |
| NY - Ithaca, 30-mile radius | North East | New York - Ithaca, 30-mile radius |
| NY - New York City Metro Area | North East | Including New Jersey and Connecticut |
| NY - New York City Metro Area & NJ | North East | |
| NY - New York City, 5 Boroughs | North East | |
| NY - New York City, 50-mile | North East | Including New Jersey and Connecticut |
| NY - New York, no NYC | North East | State of New York without the 5 boroughs of New York City |
| NY - New York, no NYC metro area | North East | The state of New York without the New York City metro area |
| NY - NYC, 100-mile radius | North East | Including New Jersey, Connecticut, Massachusetts, Delaware and part of Pennsylvania |
| NY - NYC, Philly, NJ VERY Large Area | North East | New York City and Eastern New York State, Philly and Eastern Pennsylvania, New Jersey, Connecticut suburbs |
| NY - Rochester, 30-mile radius | North East | New York - Rochester, 30-mile radius |
| NY - Syracuse/Ithaca/Rochester | North East | |
| ON - Toronto, 100-mile radius (including NY) | North East | |
| PA - Eastern PA, Including NYC, Conn, NJ | North East | Including New Jersey and Connecticut |
| PA - Pennsylvania, Large Radius | North East | Approx. 100-mile radius, including parts of New Jersey and Delaware |
| PA - Philadelphia, 50-mile radius | North East | Approx. 50-mile radius, including parts of New Jersey and Delaware |
| PA - Philadelphia, 75-mile radius | North East | Approx. 75-mile radius, including parts of New Jersey and Delaware |
| PA - Pittsburgh, 30-mile radius | North East | Pennsylvania - Pittsburgh, 30-mile radius |
| RI - Rhode Island, whole state | North East | Rhode Island, whole state |
| VA - Norfolk, 30-mile radius | North East | Virginia - Norfolk, 30-mile radius |
| VA - Richmond to DC | North East | Richmond, Virginia to Washington, D.C. metro area |
| VA - Richmond, 30-mile radius | North East | Virginia - Richmond, 30-mile radius |
| CA - Fresno & North | North West | Used for Planned Giving (PG) team |
| ID - Northern Idaho | North West | |
| ID - Southern Idaho | North West | Includes Boise, Twin Falls, Pocatello, Idaho Falls |
| MT - Billings Area | North West | Large area |
| OR - Bend, surrounding counties | North West | |
| OR - Portland Area | North West | Most of the western half of Oregon |

| Geographic Area Name | Region | Description |
|---|---|---|
| OR - Portland, 100-mile radius | North West | Most of the western half of Oregon |
| OR - Portland/Eugene/Bend areas | North West | Most of the western half of Oregon |
| OR, CA - Medford, OR to Arcata, CA | North West | |
| OR/WA - Northeast OR and Southwest WA | North West | |
| WA - Kennewick & Walla Walla | North West | Washington - Spokane, 30-mile radius; includes Idaho |
| WA - Seattle to Spokane | North West | |
| WA - Seattle, 120-mile radius | North West | The western two-thirds of the state of Washington |
| WA - Seattle, 30-mile radius | North West | Washington - Seattle, 30-mile radius |
| WA - Seattle, 50-mile radius | North West | Island, Jefferson, King, Kitsap, Mason, Pierce, Snohomish, Thurston counties in Washington |
| WA/OR - Seattle to Portland | North West | |
| WY - Cheyenne, 100-mile radius | North West | 100-mile radius around Cheyenne, Wyoming, including parts of Colorado and Nebraska |
| WY - Jackson Area | North West | |
| KS/MO - Drive to Kansas City | South Central | Drive to Kansas City without Nebraska |
| MO - St. Louis, Jefferson City, Springfield | South Central | |
| MO - St. Louis, Metro area | South Central | St Louis metro area, including Illinois |
| OK - Edmond, 50-mile radius | South Central | Oklahoma - Edmond, 50-mile radius |
| OK - OKC and North Half | South Central | |
| OK - OKC and Tulsa, Large Area | South Central | |
| OK - Tahlequah, 50-mile radius | South Central | Oklahoma - Tahlequah, 50-mile radius |
| OK - Tulsa | South Central | |
| OK - Tulsa and drive to Kansas border toward Wichita | South Central | Oklahoma - Tulsa and drive to Kansas border toward Wichita; west to Stillwater then north on I-35 |
| TX - Austin & San Antonio | South Central | |
| TX - Austin, 100-mile radius | South Central | Large radius around Austin, Texas; includes San Antonio and Waco |
| TX - Austin, 30-mile radius | South Central | |
| TX - Austin, Houston, & San Antonio | South Central | |
| TX - Dallas for RAO lists | South Central | Texas - Dallas, 60-mile radius |
| TX - Dallas to Midland | South Central | |
| TX - Dallas, 60-mile radius | South Central | Texas - Dallas, 60-mile radius |
| TX - Houston Metro | South Central | Texas - Houston, metro area |

| Geographic Area Name | Region | Description |
|---|---|---|
| TX - Houston, 60-mile | South Central | Texas - Houston, 60-mile radius |
| TX - Lubbock & Amarillo areas | South Central | |
| TX - San Antonio, 30-mile | South Central | |
| TX - San Antonio, 50-mile radius | South Central | |
| TX - San Antonio, 75-mile radius | South Central | |
| TX - South of San Antonio | South Central | Southern tip of Texas; including San Antonio |
| TX - Western Half | South Central | Western Texas – Amarillo, Lubbock, Midland, El Paso, Terlingua, etc. |
| AL – Northern Alabama | South East | Northern half of Alabama; includes cities of Tuscaloosa, Birmingham and Huntsville |
| FL - Central Florida | South East | Includes Daytona, Orlando, Tampa and Sarasota |
| FL - Ft. Meyers to Naples | South East | |
| FL - Ft. Meyers to Naples - Primary and Additional Home | South East | Lee and Collier counties |
| FL - Ft. Meyers, small radius | South East | |
| FL - Gainesville area | South East | |
| FL - Miami 100-mile radius | South East | Includes Miami, West Palm Beach, Naples and Florida Keys |
| FL - Naples 100-mile radius - Primary and Additional Home | South East | 100-mile radius around Naples, Florida, including Miami |
| FL - Northern Florida - Primary and additional home | South East | Southernmost city included is Orlando; other cities include Daytona Beach, Jacksonville, Gainesville, Tallahassee and Pensacola |
| FL - Orlando South Primary | South East | All of Florida, including and south of Orlando, primary addresses |
| FL - Orlando to Jacksonville | South East | Primary or additional home addresses used for Orlando, Jacksonville and areas in between the two |
| FL - Orlando to Miami - Primary and Additional Home | South East | Orlando to Miami, down the east coast of Florida - primary and additional home |
| FL - Orlando, 60-mile radius | South East | |
| FL - Orlando, 60-mile radius - includes additional home | South East | |
| FL - Panhandle plus Mobile, AL - Primary and Additional Home | South East | Florida Panhandle (includes Pensacola, Panama City and Tallahassee) and Mobile, Alabama |
| FL - Sarasota South - Primary and additional home | South East | Sarasota -> South |
| FL - Southern Florida - Primary and additional home | South East | Florida areas south of Orlando; the northernmost city included is Tampa; other cities included: Sarasota, Naples, Miami, Palm Beach, Melbourne |
| FL - Tampa to Naples | South East | Preferred or additional home addresses used for Tampa, Naples, and all areas between the two |
| FL - Tampa/Ft. Meyers, 50-mile Primary and SEASONAL | South East | |

| Geographic Area Name | Region | Description |
| --- | --- | --- |
| FL - Tampa/Ft. Meyers, 50-mile radius | South East | |
| FL - Tampa/Ft. Meyers, 50-mile radius SEASONAL | South East | Based on additional home |
| FL - Whole state - Primary and Additional Home | South East | All constituents with a Florida primary or additional home address |
| FL-Specific Zips North & South of Orlando - Primary | South East | Uses primary address, specific trip |
| GA - Atlanta area and parts of AL and TN | South East | NW Georgia: Atlanta, Athens<br>NE Alabama: Huntsville, Birmingham<br>South Central Tennessee: Chattanooga |
| GA - Atlanta small radius | South East | Zips 300 to 303; counties Walton, Barrow, Clarke, Oconee, Morgan |
| KY - Louisville, 60-mile radius | South East | Kentucky - Louisville, 60-mile radius - primary address |
| LA - New Orleans, 50-mile radius | South East | |
| LA - Southern Louisiana | South East | Primary addresses in southern Louisiana; includes cities of New Orleans, Baton Rouge, Lafayette and Lake Charles |
| MS - Southern Half | South East | Southern half of Mississippi - Jackson, Gulfport, Hattiesburg, Meridian |
| NC - Charlotte & Greensboro areas | South East | Charlotte area, including into South Carolina and Greensboro area |
| NC - Charlotte Small Radius | South East | Charlotte area, including into South Carolina |
| NC - Raleigh Area | South East | Raleigh/Durham area of North Carolina |
| NC - Western Half of State | South East | Includes cities of Charlotte, Greensboro, Raleigh, Fayetteville |
| SC - Hilton Head Island area | South East | Includes Charleston, South Carolina, along the coast to the north and Savanna, Georgia, to the south |
| TN - Knoxville 50-mile radius | South East | Includes Franklin and Murfreesboro |
| TN - Nashville 50-mile radius | South East | Includes Franklin and Murfreesboro |
| TN - Nashville, 75-mile radius | South East | Tennessee - Nashville, 75-mile radius - primary address |
| VA - Norfolk/VA Beach area | South East | |
| AZ - Chandler/Gilbert/Mesa area - Primary & Additional Home | South West | Arizona - Chandler, Gilbert, Mesa area - primary address and additional address |
| AZ - Phoenix, Maricopa and Pinal Counties | South West | Arizona - Phoenix, Maricopa and Pinal counties - primary address |
| AZ - Phoenix, Maricopa and Pinal Counties - Primary & Additional Home | South West | Arizona - Phoenix, Maricopa and Pinal counties - primary address and additional address |
| AZ - Phoenix, Maricopa, Pinal, Pima Counties | South West | Arizona - Phoenix, Maricopa and Pinal counties - primary address |
| AZ - Phoenix, Prescott and Flagstaff Areas - Primary & Additional Home | South West | Arizona - Phoenix, Prescott and Flagstaff Area - primary and additional home |
| AZ - Phoenix, Tucson, Primary & Additional | South West | Arizona - Phoenix, Maricopa and Pinal counties - primary address |
| AZ - Pima, Maricopa and Pinal Counties | South West | Arizona - primary address; includes Tucson and Phoenix |
| AZ - Sun City Area - Primary & Additional Home | South West | Arizona - zips 85373, 85375, 85351, 85374, 85387 - primary address and additional address |

| Geographic Area Name | Region | Description |
|---|---|---|
| AZ - Tucson - Primary & Additional Home | South West | AZ - Tucson, Pima County - primary address and additional address |
| AZ - Whole state - primary and additional home | South West | Constituents with a primary or additional home address in the state of Arizona |
| CA - Bakersfield, 30-mile radius | South West | California - Bakersfield, 30-mile radius |
| CA - Bay Area | South West | |
| CA - Eureka, 30-mile radius | South West | California - Eureka, 30-mile radius |
| CA - Fresno, 30-mile radius | South West | California - Fresno, 30-mile radius |
| CA - LA to San Diego - Primary & Additional Home | South West | San Diego, Santa Barbara, Orange, Ventura and Los Angeles counties in California |
| CA - LA, Ventura, & Santa Barbara Counties | South West | |
| CA - LA, Ventura, Santa Barbara, & San Luis Obispo Counties | South West | California – Los Angeles, Ventura, Santa Barbara and San Luis Obispo counties |
| CA - Los Angeles and Ventura Counties - Primary & Additional Home | South West | Primary and additional homes in Los Angeles and Ventura counties |
| CA - Los Angeles County | South West | |
| CA - Los Angeles Metro Area | South West | Primary address in Los Angeles, Orange and Ventura counties |
| CA - Los Angeles Metro Area - Primary & Additional Home | South West | Primary and additional homes in Los Angeles, Orange and Ventura counties |
| CA - Los Angeles, 150-mile radius | South West | Riverside, Kern, San Diego, San Bernardino, Santa Barbara, Orange, Ventura and Los Angeles counties in California |
| CA - Los Angeles, 150-mile radius - Primary & Additional Home | South West | Riverside, Kern, San Diego, San Bernardino, Santa Barbara, Orange, Ventura and Los Angeles counties in California |
| CA - Northern California | South West | Bay Area and north |
| CA - Northern California, Pebble Beach to Sacramento | South West | Pebble Beach area to Sacramento/Santa Rosa area |
| CA - Orange County | South West | |
| CA - Palm Springs Area - Primary & Additional Home | South West | Counties of San Bernadino and Riverside - primary address and additional address |
| CA - Palm Springs to LA | South West | San Bernadino, Riverside, Orange and Los Angeles counties, preferred and additional home |
| CA - Sacramento, 30-mile radius | South West | California - Sacramento, 30-mile radius |
| CA - Salinas, Santa Cruz, Monterey, 30-mile radius | South West | California - Salinas, 30-mile radius; includes Santa Cruz and Monterey |
| CA - San Diego and Orange Counties - Primary & Additional Home | South West | Primary and additional homes in San Diego and Orange counties |
| CA - San Diego County | South West | |
| CA - San Diego, 100-mile radius | South West | Primary and additional homes |
| CA - San Diego, metro | South West | Metro area, no Los Angeles or Palm Springs |
| CA - San Diego, metro - Primary and Additional Home | South West | Metro area, no Los Angeles or Palm Springs |

| Geographic Area Name | Region | Description |
|---|---|---|
| CA - San Francisco to Sacramento to Lake Tahoe - huge radius | South West | Large area |
| CA - San Francisco to San Jose | South West | Primary and additional home |
| CA - San Francisco, 100-mile radius | South West | Includes San Jose, Stockton and Sacramento |
| CA - San Francisco-San Jose-Sacramento | South West | Alameda, Yolo, Contra Costa, San Francisco, San Mateo, San Joaquin, Sacramento, Napa, Santa Clara, Santa Cruz, Monterey, San Benito, Sonoma and Solano counties in California |
| CA - San Jose, 30-mile radius | South West | California - San Jose, 30-mile radius |
| CA - South Los Angeles - Primary & Additional Home | South West | Primary and additional homes in Los Angeles and Orange counties |
| CA - Southern California | South West | Riverside, Kern, San Diego, San Bernardino, Santa Barbara, Orange, Ventura, Imperial and Los Angeles counties in California |
| CA - Southern California ALL | South West | Riverside, Kern, San Diego, San Bernardino, Santa Barbara, Orange, Ventura, Imperial and Los Angeles counties in California |
| CA - Specific Areas of San Diego | South West | 92037, 92056, 92057, 92067, 92075, 92651, 92660, 92663, 92673 |
| CA - Whole State | South West | |
| CA, NV - Sacramento to Reno | South West | |
| CA/NV - Nevada & Northern California | South West | Bay Area and north |
| CO - Colorado Springs, Metro Area | South West | Colorado Springs metro area - El Paso County in Colorado |
| CO - Denver and Colorado Springs | South West | Includes area around Denver and Colorado Springs, from Boulder south to Pueblo |
| CO - Denver and entire Northeast portion of state - primary and additional home | South West | Includes cities of Denver, Ft. Collins, Boulder, Colorado Springs |
| CO - Denver for RAO lists | South West | 60-mile radius; includes Ft. Collins and Colorado Springs |
| CO - Denver Metro and North | South West | Denver metro and the whole state south; no Colorado Springs |
| CO - Denver Metro and south | South West | Denver metro and the whole state south; no Ft. Collins |
| CO - Denver Metro to Greeley | South West | Denver metro and Greeley and Fort Collins areas; no Colorado Springs |
| CO - Denver to Scottsbluff | South West | Drive from Denver to Scottsbluff |
| CO - Denver, 60-mile radius | South West | Includes Ft. Collins and Colorado Springs |
| CO - Denver, Metro Area | South West | Denver metro area, including Adams, Arapahoe, Denver, Douglas and Jefferson counties in Colorado |
| CO - Denver, Metro Area - including Boulder | South West | Denver metro area, including Adams, Arapahoe, Denver, Douglas, Jefferson and Boulder counties in Colorado |
| CO - Front Range-Fort Collins to CO Springs | South West | Approx. 50-mile wide path from Ft. Collins to Colorado Springs, Colorado |
| CO - Grand Junction Area | South West | Approx. 50-mile radius |
| CO - I-25 Corridor | South West | Includes Laramie and Albany counties in Wyoming |
| CO - Northeast CO, Denver, Ft Collins, Sterling | South West | Colorado - Northeast Colorado, Denver, Ft. Collins, Sterling |

| Geographic Area Name | Region | Description |
|---|---|---|
| CO - Pueblo, 50-mile radius | South West | Approx. 50-mile radius around Pueblo, Colorado |
| NM - Albuquerque large area | South West | Northwestern part of New Mexico; includes Albuquerque, Santa Fe, Gallup, Las Vegas and Farmington |
| NM - Albuquerque/Santa Fe 50 mi radius | South West | Approx. 50-mile radius |
| NM - Clovis/Roswell Area | South West | Approx. 50-mile radius |
| NM - Whole state - primary and additional home | South West | Constituents with a primary or additional home address in the state of New Mexico |
| NV - Las Vegas | South West | Clark County |
| NV - Reno Area | South West | Counties surrounding Reno, primary and additional |
| NV - Whole state - primary and additional home | South West | Constituents with a primary or additional home address in the state of Nevada |
| UT - Salt Lake City, 50-mile radius | South West | Wasatch, Morgan, Utah, Tooele, Davis, Summit, Weber and Salt Lake counties in Utah |