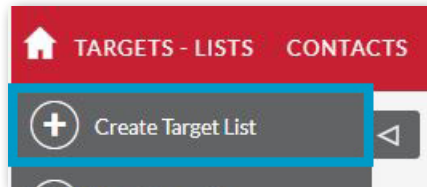


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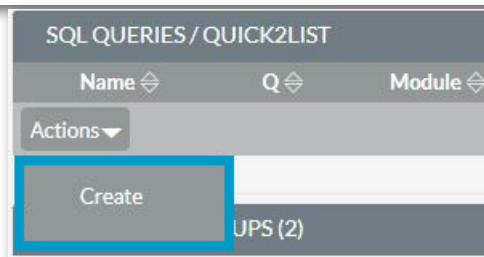
Creating a Dynamic Target List - Part 2: Create Target List

1. Navigate to the Target List module in the Navigation Menu and then select Create Target List.



2. On the Create Target List page, enter a Name and select Dynamic as the Type. *Note: To avoid confusion name the list the same name as the report you created.* You can also enter a Description and select a Category. Use the tickbox if you would the List created in Campaign Monitor. Once you've entered all the required information click Save and Close.

3. You will now have an empty target list, scroll down to SQL Queries / Quick2List subpanel and click the Create button.



4. Give the Query the same name as the Report and the Target List. For the Module also select the same module you did in the report you built. In Dynamic Actions select Remove and Redo, this will make the Target List update itself. For the job interval, select daily and at specific time (6am). To connect the Report you built click Select Query From KReports.

5. A popup will appear to select the report from, Click the report you want to use.

Title	Module	List Type	Description	Category name	Date created	Date changed	Assigned User
Account Management Report - Keeping in Touch	Organisations	pivot		Strategic Account Reports	22-08-2018 19:03	22-08-2018 19:19	Bob
Account without primary contacts	Organisations	standard			21-10-2021 16:12	21-10-2021 16:12	Bob
Businesses by Partner	Organisations				11-03-2016 14:28	25-10-2017 13:42	Bob
Cases - account info	Organisations	standard			23-03-2020 14:38	23-03-2020 14:38	Bob

6. The Query condition box on the target list will be populated and will display how many records have been imported. Click Save and the Target List will start to populate. On its schedule the Target List will update and always be up to date.

Query Condition:*

SELECT famjqhwtkwr.id as "primaryid", 'Accounts' as "sugarRecordModule", kmtbtqcwfa.id as "kmtbtqcwfaid", 'root:Accounts::relate:Accounts:primary_contact' as "kmtbtqcwfaipath", qtqzsggjqc.id as "qtqzsggjqcid",

CHECK QUERY Successfully Done: Total Record - 330