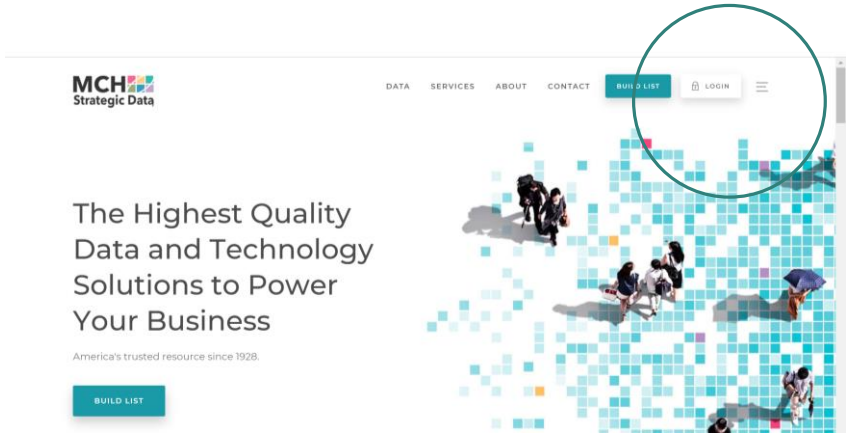
MCH ListBuilder User Guide

FEBRUARY 20, 2020

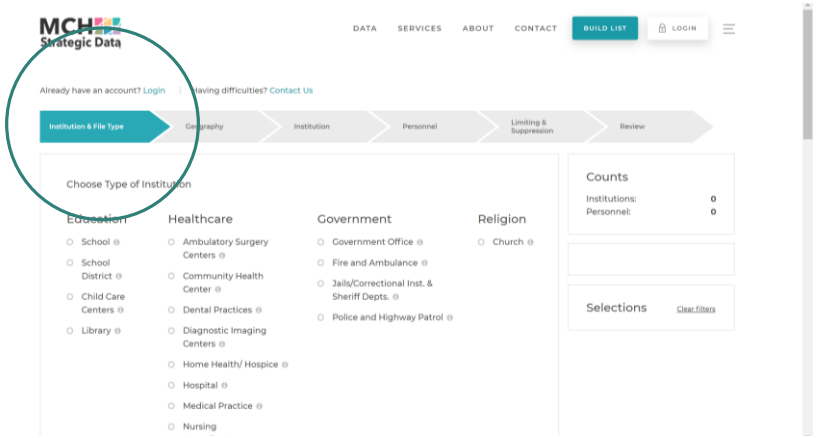
ListBuilder Helpful tips

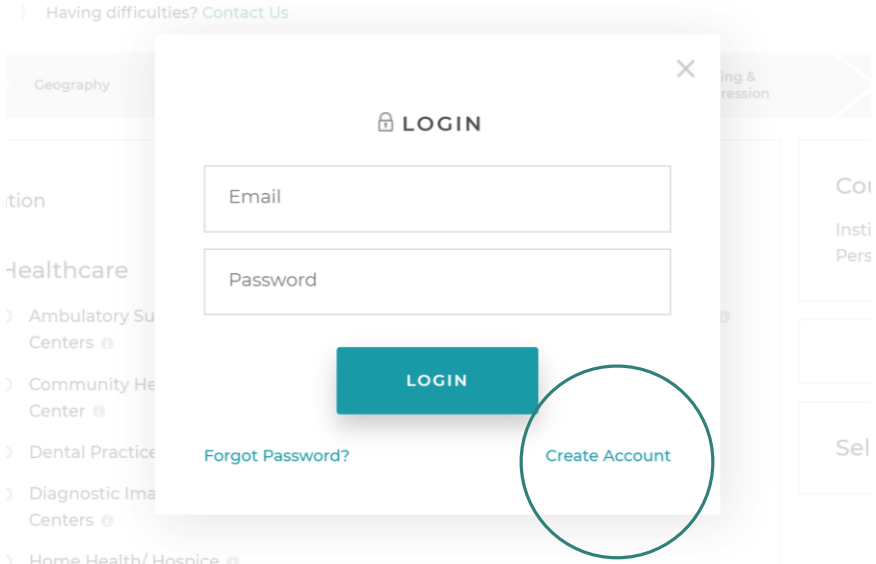
1. There is a $10K maximum dollar amount for each order.
2. Changing an email associated with an account must be managed by MCH's IT team. Please send an email to info@mchdata.com for assistance.
3. You can build a list without a login and see counts and pricing based on your selections, however, you will not be able to complete the check-out process unless you create a login.
4. Discounts that are associated with user accounts will only display if a user is logged in.
5. If you forget your password, you may click on the **forgot password** link in the login box. MCH will send an email with a link to reset your password.



Creating a LOGIN

Click on the LOGIN button at the top of the page or select the login hyperlink directly above the chevron bar on the ListBuilder page.





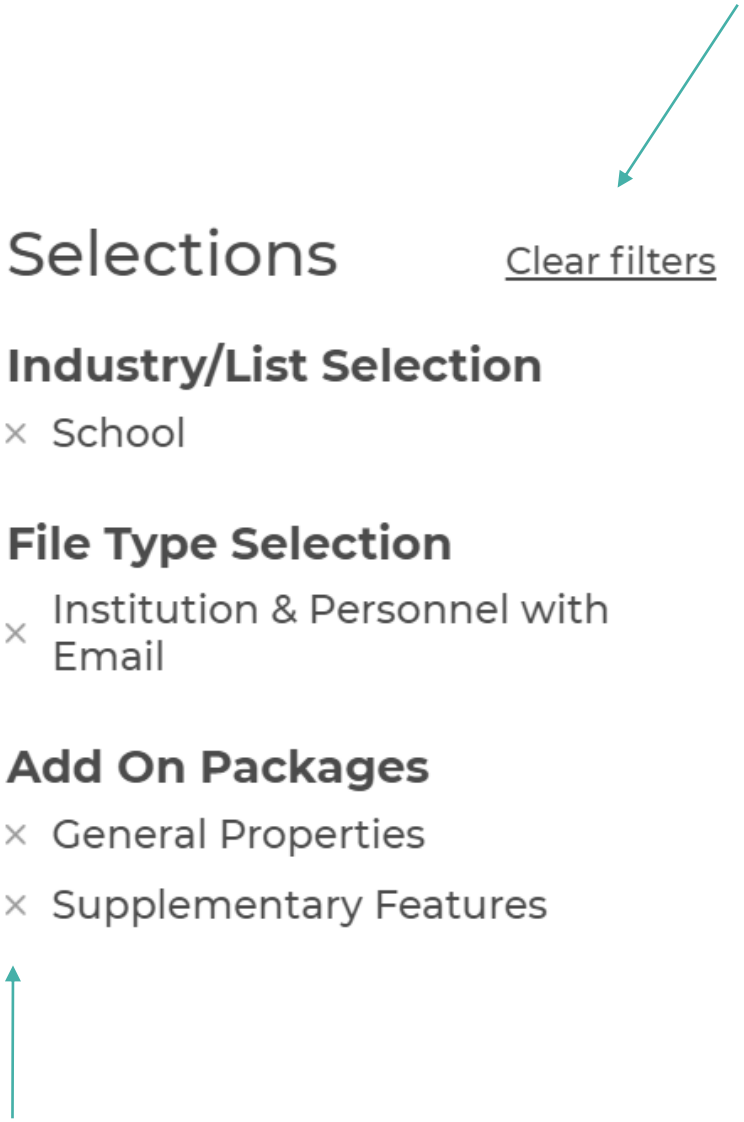
Account Set-Up

When you see the LOGIN pop-up box, click on Create Account in the lower right corner.

This will prompt you to enter your email address and create a password.

Once you hit the SIGNUP button you will receive an email to verify your account. After you verify your account you will be prompted to log in and enter your profile information.

Once you have completed your profile you will be able to build and save a list, review your selections and complete your order.



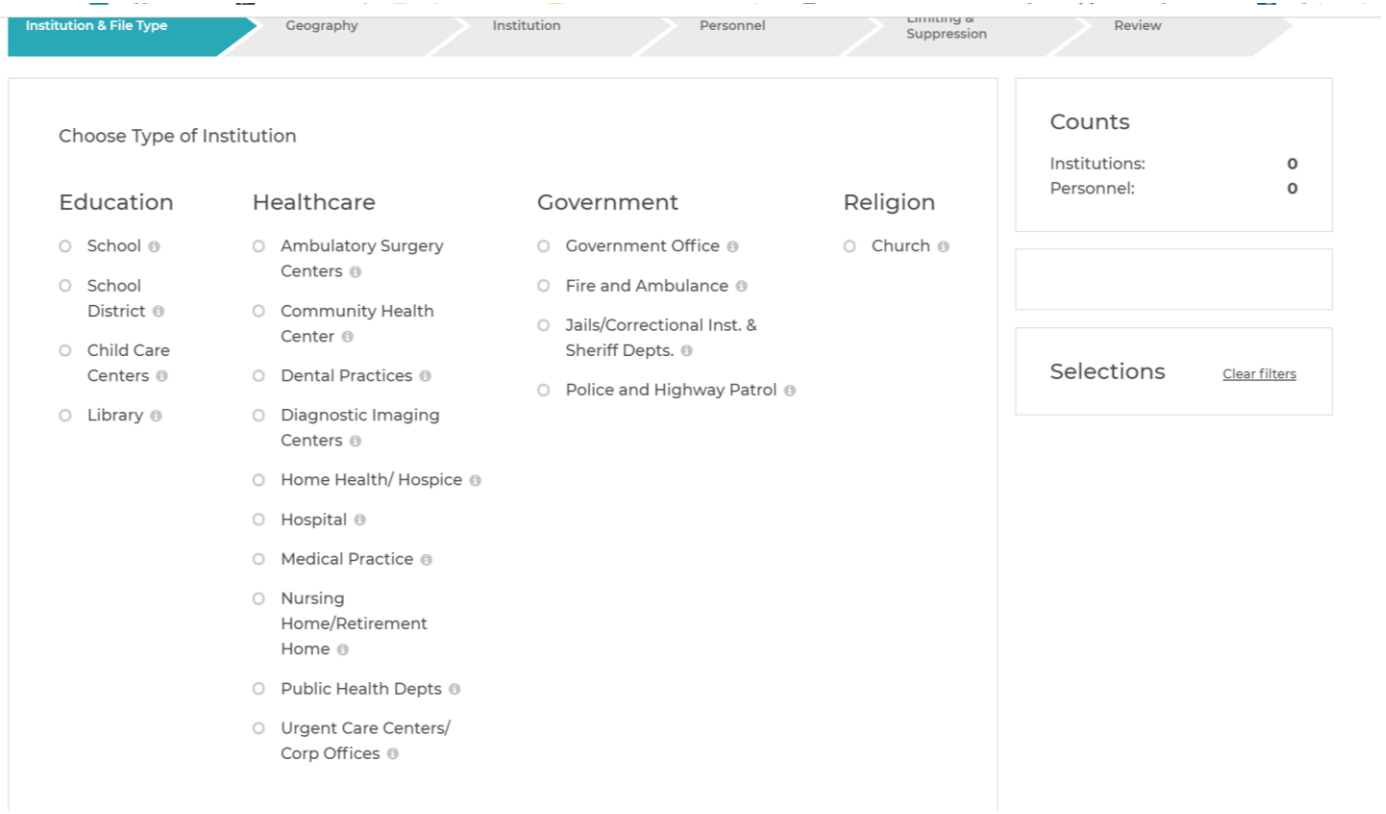
Building a list

Select Criteria.

As you build your list, you can view the selection criteria you have added in the selections section to the right underneath the counts and pricing box. At any time if you want to remove a criteria, simply click the **x** next to the criteria you want to remove. To clear all criteria, select **clear filters** located in the top right corner of the selection box.

Counts and Pricing.

Once you select the institution type and file type, you will be able to view counts. If you select the institution only file type, you will also be able to view pricing. If you select any file type with personnel, you will be able to view pricing **after** the personnel selections are made.



Choose Institution Type

MCH's data is categorized by industry. Select the institution type for the industry sector you need.

Education.

Healthcare.

Government.

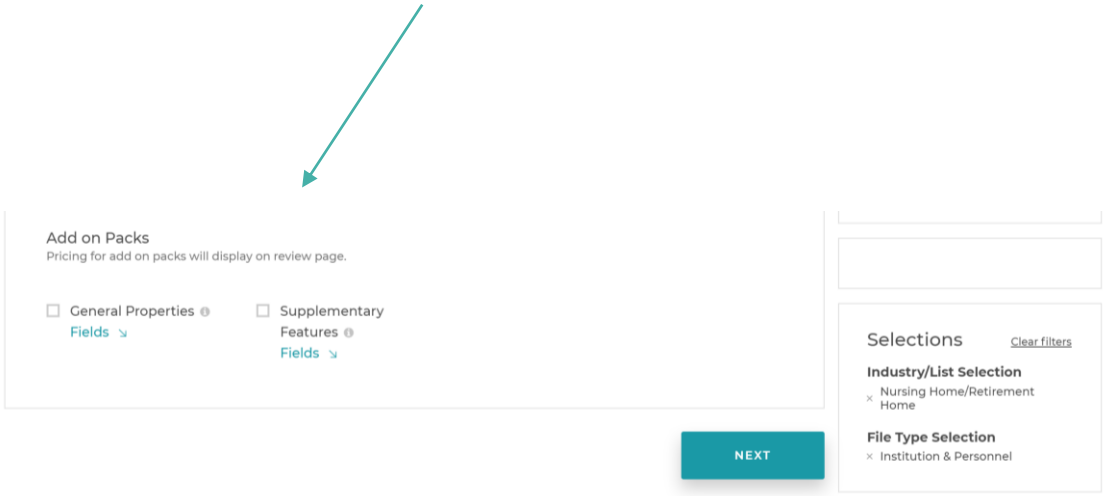
Religion.

Choose File Type

Choose between three different file types:

1. **Institution Only:** A single file containing only institution and its attributes.
2. **Institution & Personnel:** A single file containing personnel that meet your selection criteria as well as the institution data associated with that person.
3. **Institution & Personnel with Email:** A single file containing personnel that have email addresses associated with them that meet your selection criteria as well as the institution data associated with that person.

To see a list of the attributes included in the output file, click on the *Fields* link directly below the selection.



Add on Packs

MCH has made it easy to add bundled attributes to your output file with **Add on Packs**. To see the attributes included in each of the **Add on Packs**, click on the fields list directly below the package name.

Counts and pricing will be available on the review page.

Filter Options:

State/County/City – You can choose individual states by clicking on the states you would like to include. In order to narrow down your list by county or city you must select **only one state**. When one state is selected you will then see the options to input either the county or city selection(s) you want to include. NOTE: you can only select city or county (not both).

Zip Code + Radius – This option allows you to enter a single zip code and enter a whole number in the text box up to a 500 mile radius you would like to apply. You can only enter one zip code and radius per list.

Zip Code Filters – Zip code options allow multiple ways to filter by zip code. Either use the Zip Code List to enter up to 100 zip codes to include or use the Zip Code CSV to upload a CSV file of zip codes to include. The CSV file should be formatted to have the list of zip codes in the first column with no header. The file will be used to limit the list you are building to only include records that have those zip codes that are in the file.

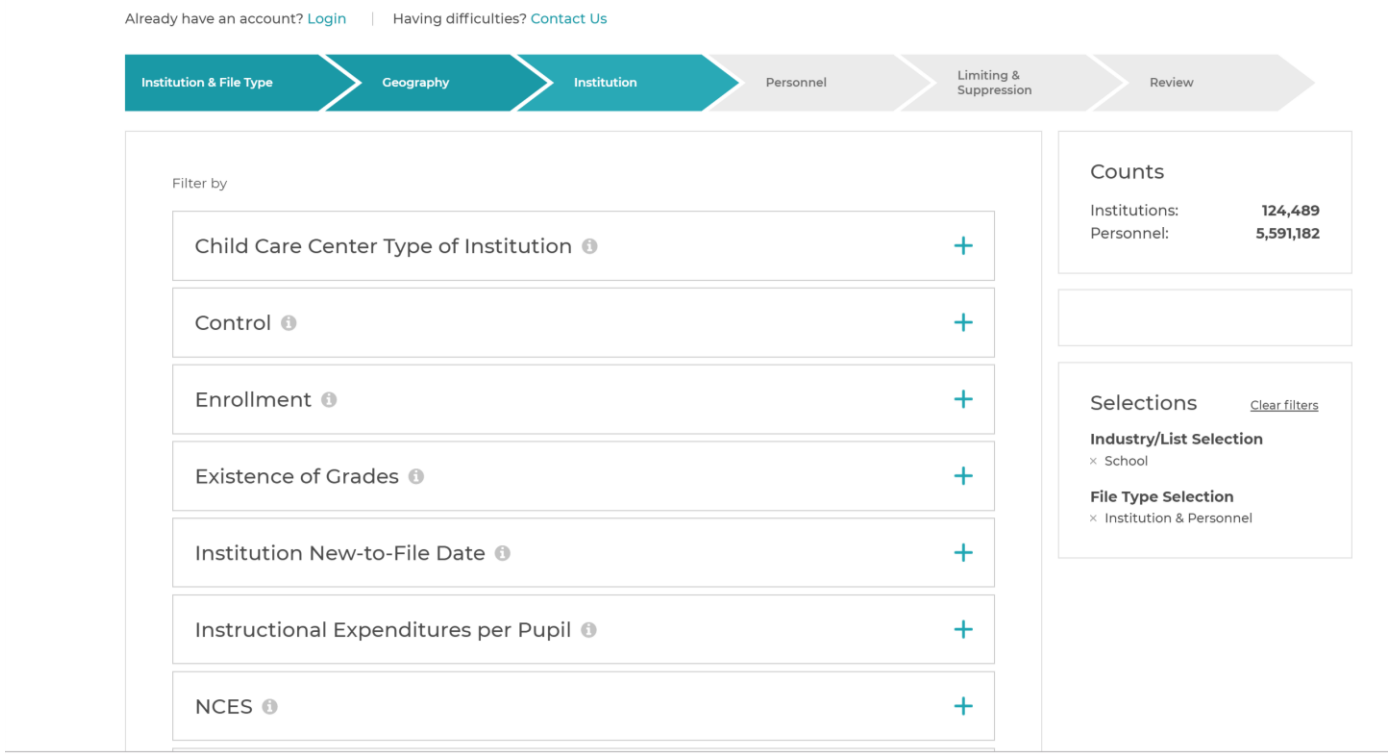
SCF Filters: SCF options allow multiple ways to filter by SCF code. Either upload a CSV file of SCF codes or enter up to 100 SCF codes using the SCF list on the screen.

CBSA/MSA Filters: Check a box to filter by a designated CBSA or MSA. These categories are grouped alphabetically and include CBSA/MSA ID, along with a search feature to help users easily find what they are looking for.

Geography

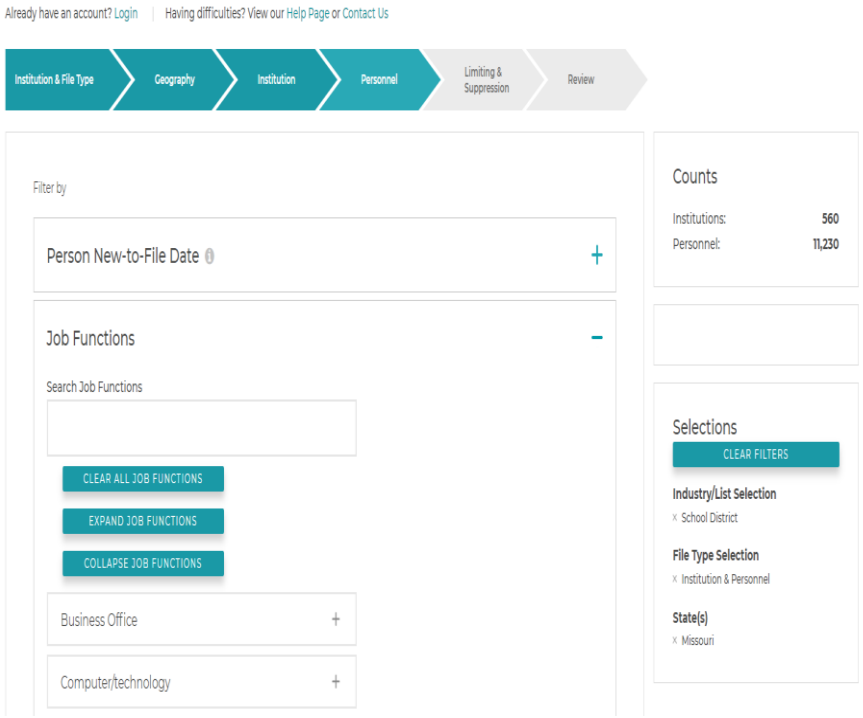
1. The default for geography is all state.
2. Choose one of the options to limit selection criteria.
3. Selections will appear in the criteria box.
4. Counts/prices will also be adjusted.

NOTE: Prices will not display for lists that have personnel until the personnel selections are made. Counts and prices for Add on Packs will not display until the review page.



Institution

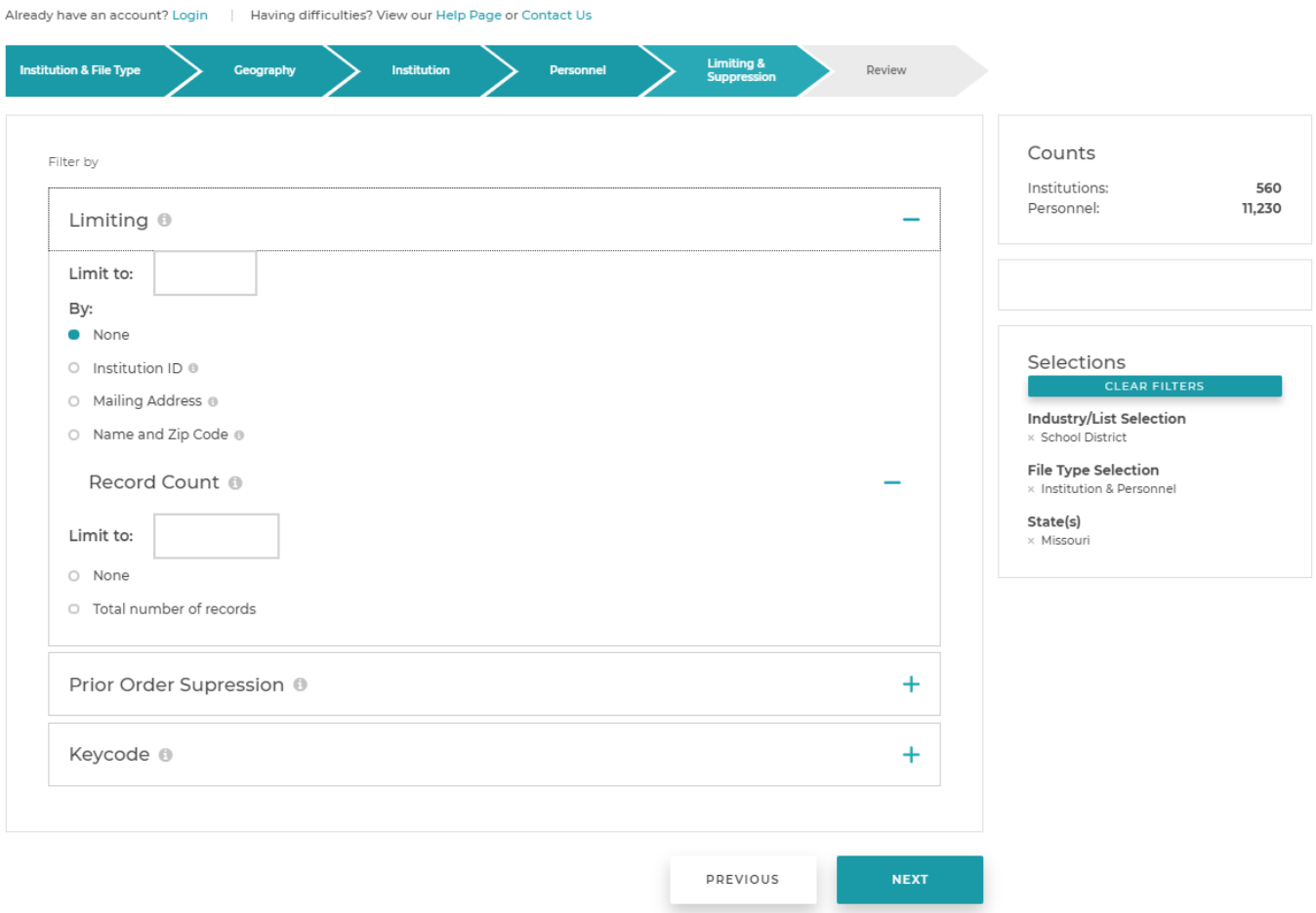
Within the institution tab you will find a list of institution level attributes you can use to filter your list. The list of attributes will vary based on the institution type selected. The filter options are different based on the data type of the attributes.



Personnel

This tab will only display if you are building a list that is a file type which includes personnel (i.e. Institution & Personnel or Institution & Personnel with Email). This is where you can filter your list based on personnel-level attributes such a **new-to-file date** or by **job function**.

Job functions may be broken down into categories. You can expand the category groups and select individual job functions within the category. If you want all job functions within the category just double click on the select all option in the category group. You can see what job functions have been selected by looking in the **Selections** section on the right side of the screen. To remove a job function, just click on the **x** next to the job function in the **Selections** list. You also have the ability to search for a job title by typing the text you are looking for an it will automatically expand and highlight job titles that meet the criteria to make the easier to find.

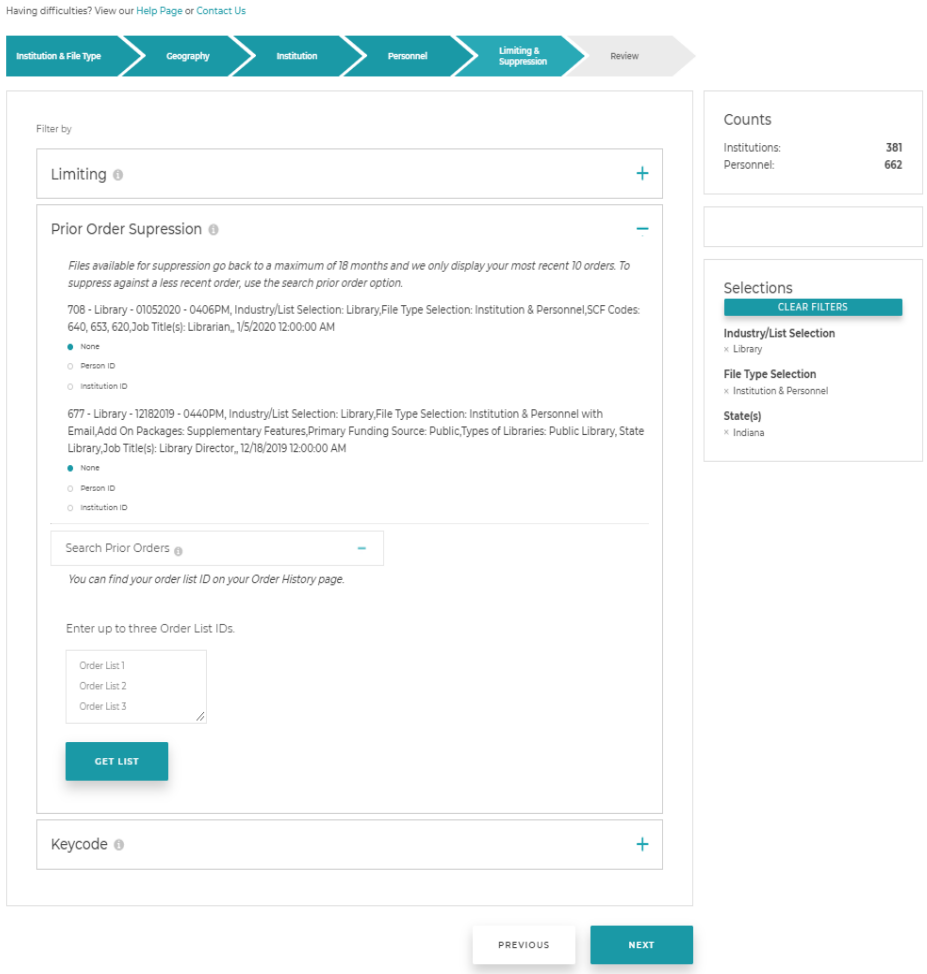


Limiting and Suppression

Limiting – this option allows you to enter the maximum number of records you want included in a file based on the option you select.

The is also an option to limit to total records in the output file to a specified number.

For example, if you were building an **Institution & Personnel** list for **School** that included multiple job functions, you could limit the file to 2 records per institution.



Limiting and Suppression

Suppression – In order to use the suppression functionality, you have to be logged in with your user ID. This allows you to select a prior order and remove any records from your current order.

- Institution ID: The unique MCH ID for the institution. This option is available for all file types.
- Person ID: The unique MCH ID for the person. This option is available for Institution & Personnel or Institution & Personnel with Email file types.
- Email Address: The email address associated with the person. This option is available for the Institution & Personnel with Email file type.

Search Prior Orders – Search Prior Orders allows you to input up to three order list ID of prior order placed within the last 18 months for the Institution Type you are building the current list on. You can find the order list ID on your order history page. Once you input you order list id you hit the GET LIST button and it will return the information on those lists for you to select your suppression options.

Keycode – This is a text value field you can specify. A KeyCode column will be added to your output file with the value populated in that field for every record.

The rule for the field is alpha numeric, no more than 25 characters, and cannot have spaces in it.

Review and Cart

Review:

Includes a summary of the selections, counts and pricing of your order. This includes the counts and pricing for any Add on Packs you selected.

Cart:

When you add an item to your cart it will be given a system generated name for the list. To change the name, click **Edit Name**.

To make changes to a list in your cart, click on **Edit** below your list details. It will take you back to the list builder to make additional changes and place the item back on your cart. ***NOTE: If you choose to edit a list and do not hit add to cart after you are done making change that list will no longer be in your cart.***

To delete a list in your cart, click **Delete**.

To clone a list that is in your cart click the **Clone** option and that will create a cloned copy of the order list.

If you have more than one list in your cart and you are not ready to purchase all lists, you can move lists that you do not want to purchase at this time to your saved cart area. Just click **Save for Later.** The list will appear under **Saved Lists.** When you are ready to purchase a list in your saved list area, select **Move to Cart**.

Check Out

In the checkout area you will see the payment method options that are available to you as either Open Account or Credit Card.

NOTE: Open account is only shown if you have applied and been approved for an open account with MCH.

If paying by credit card you will be prompted to enter your card number, name on the card, expiration date, and CVV. Your billing address will be prepopulated with the address associated with your profile. You can edit the address by typing over the information.

If paying by open account, you have the option to enter a PO number if you have one, but it is not required. Your billing address will be prepopulated with the address associated with your profile.

If you have a promo code you can enter it in the **Promo Code** box and hit **Apply**.

In order to complete the checkout you will be required to check the box that you agree to the terms and conditions noted.

Once checkout is completed you will see a confirmation page where you can print your receipt and download your list.

My Account

When you are logged in to ListBuilder, you will see **My Account** located in the upper right corner of the website. The options under **My Account** include:

My Profile where you will see the profile information you entered when you created your user profile. You may edit the information, with the exception of email address. If you need to change the email address associated with your account, you will need to contact MCH at info@mchdata.com.

Order History will take to you our Order History page which allows you to view your prior order placed on ListBuilder over the past 18 months.

Order History

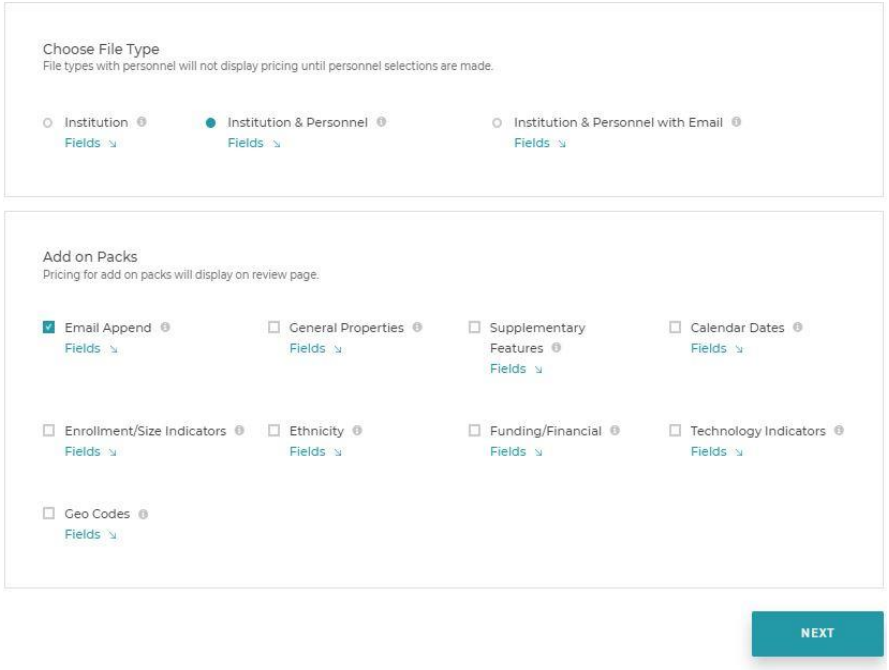
In the **Order History** section, you will be able to view your List Builder order history along with the order details, date created and the download expiration date.

Click **Order ID** to reprint a copy of your order receipt.

Click the **download button** to download your list. List will be available to download for 14 days.

If you see a message indicating *your file is being generated* in lieu of the download button, check back in a few minutes, or refresh your screen to get your download. Depending on the size of the list ordered it may take a few minutes for the order to process.

How to build a list with and without email addresses



In order to obtain a file that includes personnel with and without email addresses you will need to select the file type of **institution & personnel** and then select the add on pack for **Email Append**.