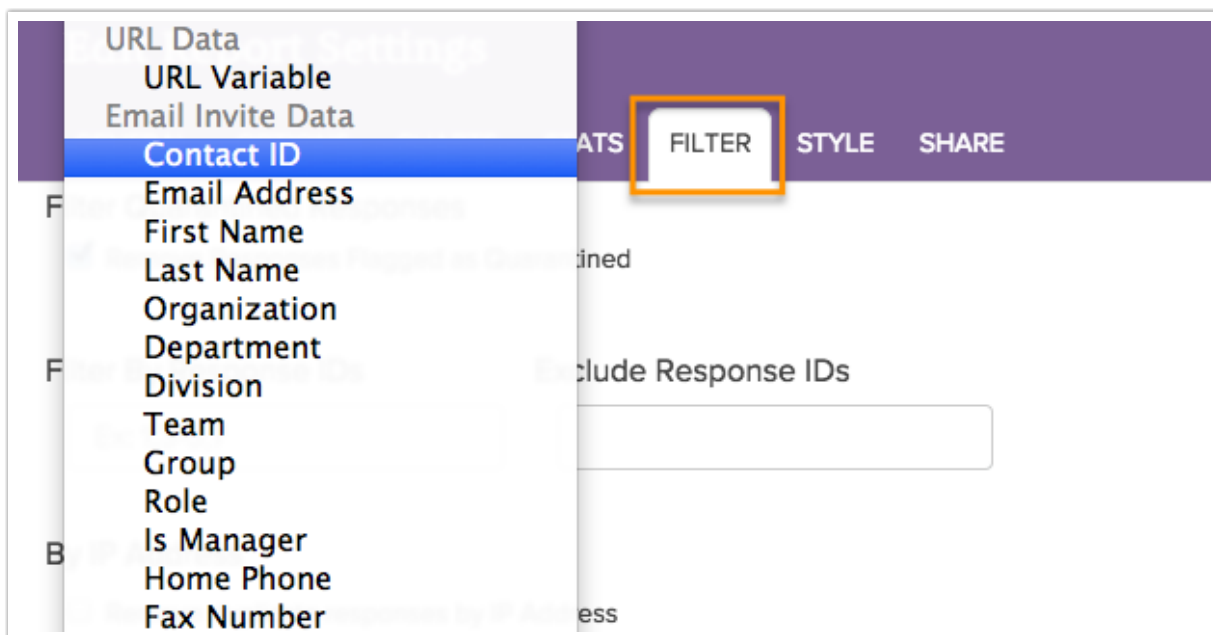


Legacy Summary Report: Filter Based on Email List Custom Fields

This report type is only available in accounts and surveys created before March 2016. We have a pending plan to deprecate Legacy Summary Reports. Check out the New and Improved [Standard Report](#) ! If there are features/functionality missing from the Standard Report check out our [Known Issues Category](#) in Community to vote and subscribe to updates.

SurveyGizmo's [Email Lists](#) feature allows **account administrators** to create [Custom Contact Fields](#) in addition to the Standard Contact Fields available to everyone in Email Campaigns.

While the **Standard Fields** are available for filtering by default (within Reports and Exports), Custom Contact Fields created in Email Lists are not.



In order to be able to filter your Reports or Exports based on the Custom Fields from your Email Lists, you will need to take some additional steps before launching your survey.

The data associated with your custom fields will need to be captured on your survey with the use of [Hidden Value](#) actions.

Create Custom Contact Fields

If you have not created custom contact fields, please visit our tutorial [here](#) . Custom fields will need to be available before we can proceed.

In our example we have created the following Custom Fields within our Email Lists.

Custom Fields		
Custom Field Name	Field Type	
<input type="text" value="customerid"/>	<input type="text" value="Text"/>	✕
<input type="text" value="domain"/>	<input type="text" value="Text"/>	✕
<input type="text" value="location"/>	<input type="text" value="Text"/>	✕
<input type="text" value="New Custom Field"/>	<input type="text" value="Text"/>	<input type="button" value="Add New Field"/>

Create an Email Campaign Using an Email List

Create an [Email Campaign](#) within your survey. Select the desired Email List to add contacts to your campaign.

Add Contacts

Upload Contacts

Use an Existing List

Add Single Contact



First Wave

Advanced

Import Contacts



I confirm that I have explicit permission to email all contacts added to SurveyGizmo in accordance to local, state, federal and international law (CAN-SPAM).

close

Create Hidden Values to Capture Custom Field Information

We will need to construct merge codes for the Custom Contact Fields and place these inside Hidden Values on our survey. Learn more about Custom Contact Field merge codes [here](#).

Page 1: Page One

ID: 1

Hidden Value Action

Hidden Value - capture customer id

Value: [contact("customerid")]

Hidden Value Action

Hidden Value - capture domain

Value: [contact("domain")]

Hidden Value Action

Hidden Value - capture location

Value: [contact("location")]

In our example we will be capturing customerid, domain and location data in Hidden Values on page one of the survey. Now, when a contact enters the survey, we will capture the associated information inside of the Hidden Values and the information will be available for filtering.

Creating Filters Based on Hidden Values

Now that the survey has been setup to collect the Custom Fields in Hidden Values - the Hidden Values will be available in Report and Export filters.

Report on responses matching these rules:

Remove All Logic

✓ --Select a condition--

Previous Questions - Page 1

Hidden Value - capture customer id

Hidden Value - capture domain

Hidden Value - capture location

Q 1. Name

+ Add Group

Never Mind

Save

Select the Hidden Value that you wish to base your filter on and define an answer for the filter rule.

Report on responses matching these rules:

[Remove All Logic](#)

Hidden Value - capture customer ▾

is exactly equ ▾

1111

[+ Add Condition](#)

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