



# Sample Marketing Campaign Reports

A step-by-step best practices guide for reporting in Geezeo Admin

## All PFM Users

To target all PFM users.

Create report with no filters.

**Name your Report**

Report Name  
All PFM Customers

**Target your Users** [How do filters and subfilters work?](#)

Find users with **all** of the following conditions

Add a condition

Find users with **any** of the following conditions

Add a condition

Run this report

## Auto Loan Targeting (Deposit Accounts over \$1,500 & No Auto Loan)

Find users with Checking, Savings & Investment accounts with balances over \$1,500 and do not have a auto loan with you:

- 1. Add a condition** under “Find users with all of the following conditions”  
Select “Account Type,” “Does not have” & “Auto”
- 2. Add a condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Checking”
- 3. Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “1500”
- 4. Add another condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Savings”
- 5. Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “1500”
- 6. Add another condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Investment”

**Name your Report**

Report Name  
Auto Loans Prospects

**Target your Users** [How do filters and subfilters work?](#)

Find users with **all** of the following conditions

Account Type Does not have Auto Remove Filter

Add a Subfilter

Add a condition

Find users with **any** of the following conditions

Account Type Is Checking Remove Filter

Account Balance Is greater than 1500 Remove Filter

Add a Subfilter

Account Type Is Savings Remove Filter

Account Balance Is greater than 1500 Remove Filter

Add a Subfilter

Account Type Is Investment Remove Filter

Account Balance Is greater than 1500 Remove Filter

Add a Subfilter

Add a condition

- 7. Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “1500”
- 8. Click the blue “Run this report”** button on the button of the page

## Auto Targeting (External Held Auto Loan)

Find users with Checking, Savings & Investment accounts with balances over \$1,500 and do not have a auto loan with you.

1. **Add a condition** under “Find users with all of the following conditions”  
Select “Account Location,” “is” & “External”
2. **Add a Subfilter**  
Select “Account Type,” “Is” and “Auto”
3. Click the blue “Run this report” button on the button of the page

The screenshot shows a report configuration interface. The top section, 'Name your Report', has a text input field containing 'External Auto Loans'. The 'Target your Users' section is divided into two parts. The first part, 'Find users with all of the following conditions', contains two rows of filters: 'Account Type' is 'Auto' and 'Account Location' is 'External'. Each row has a red 'Remove Filter' button and an 'Add a Subfilter' link. Below these is an 'Add a condition' button. The second part, 'Find users with any of the following conditions', currently has no filters and only an 'Add a condition' button. A green link 'How do filters and subfilters work?' is in the top right of the 'Target your Users' section.

## Credit Card Targeting (Externally Held Credit Cards)

Find users who hold credit cards externally.

1. **Add a condition** under “Find users with all of the following conditions”  
Select “Account Type” “Is” & “Card”
2. **Add a Subfilter**  
Select “Account Location,” “Is” and “Cashedge”
3. Click the blue “Run this report” button on the button of the page

The screenshot shows a report configuration interface. The top section, 'Name your Report', has a text input field containing 'Credit Card 0% Transfer Offer'. The 'Target your Users' section is divided into two parts. The first part, 'Find users with all of the following conditions', has an 'Add a condition' button. The second part, 'Find users with any of the following conditions', contains three rows of filters: 'Payoff Goal Type' is 'Pay off a credit card', 'Account Type' is 'Card', and 'Account Balance' is 'greater than' 250. Each row has a red 'Remove Filter' button and an 'Add a Subfilter' link. Below these is an 'Add a condition' button. A green link 'How do filters and subfilters work?' is in the top right of the 'Target your Users' section.

## Credit Card Targeting (Deposit Accounts over \$2,500 & No Credit Card)

Find users with Checking, Savings & Investment accounts with balances over \$5,000 and do not have a credit card in the PFM.

1. **Add a condition** under “Find users with all of the following conditions”  
Select “Account Type,” “Does not have” & “Card”
2. **Add a condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Checking”
3. **Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “2500”
4. **Add another condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Savings”
5. **Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “2500”
6. **Add another condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Investment”

The screenshot shows the 'Name your Report' section with the report name 'Credit Card Prospects'. Below it is the 'Target your Users' section. Under 'Find users with all of the following conditions', there is one condition: 'Account Type' is 'Does not have' 'Card'. Under 'Find users with any of the following conditions', there are three conditions: 1) 'Account Type' is 'Checking' with a subfilter 'Account Balance' is greater than '2500'. 2) 'Account Type' is 'Savings' with a subfilter 'Account Balance' is greater than '2500'. 3) 'Account Type' is 'Investment' with a subfilter 'Account Balance' is greater than '2500'. Each condition has a 'Remove Filter' button.

7. **Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “2500”
8. **Click the blue “Run this report” button** on the button of the page

## Mortgage Targeting (Externally Held Mortgages)

Find users who hold mortgages externally.

1. **Add a condition** under “Find users with all of the following conditions”  
Select “Account Type” “Is” & “Mortgage”
2. **Add a Subfilter**  
Select “Account Location,” “Is” and “External”
3. **Click the blue “Run this report” button** on the button of the page

The screenshot shows the 'Name your Report' section with the report name 'Mortgage Prospects'. Below it is the 'Target your Users' section. Under 'Find users with all of the following conditions', there are two conditions: 1) 'Account Type' is 'Mortgage' with a subfilter 'Account Location' is 'External'. 2) 'Account Location' is 'External'. Each condition has a 'Remove Filter' button. Under 'Find users with any of the following conditions', there is an 'Add a condition' button.

## Mortgage Targeting (Deposit Accounts over \$10,000 & No Mortgage Account)

Find users with Checking, Savings & Investment accounts with balances over \$15,000 and do not have a mortgage.

1. **Add a condition** under “Find users with all of the following conditions”  
Select “Account Type,” “Does not have” & “Mortgage”
2. **Add a condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Checking”
3. **Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “10000”
4. **Add another condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Savings”
5. **Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “10000”
6. **Add another condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Investment”

The screenshot shows the 'Name your Report' section with the report name 'Mortgage Prospects'. Below it is the 'Target your Users' section. It features two main areas: 'Find users with all of the following conditions' and 'Find users with any of the following conditions'. The 'all' section has one condition: Account Type is Does not have Mortgage. The 'any' section has three conditions: 1) Account Type is Checking, with a subfilter of Account Balance is greater than 10000. 2) Account Type is Savings, with a subfilter of Account Balance is greater than 10000. 3) Account Type is Investment, with a subfilter of Account Balance is greater than 10000. Each condition and subfilter has a 'Remove Filter' button. There are also 'Add a Subfilter' and 'Add a condition' buttons for each section.

7. **Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “10000”
8. **Click the blue “Run this report” button** on the button of the page

## Home Equity Targeting (Internal & External Mortgage Accounts)

Find users who hold mortgages internally and externally.

1. **Add a condition** under “Find users with all of the following conditions”  
Select “Account Type” “Is” & “Mortgage”
2. **Click the blue “Run this report” button** on the button of the page

The screenshot shows the 'Name your Report' section with the report name 'Home Equity Prospects'. Below it is the 'Target your Users' section. It features two main areas: 'Find users with all of the following conditions' and 'Find users with any of the following conditions'. The 'all' section has one condition: Account Type is Mortgage. The 'any' section is currently empty. There are 'Add a Subfilter' and 'Add a condition' buttons for each section.

## No External Accounts

To find users with no aggregated accounts.

1. Add a condition under “Find users with all of the following conditions”  
Select “Account Location,” “Is not ” & “External”
2. Click the blue “Run this report” button on the button of the page

The screenshot shows the 'Name your Report' section with the report name 'Account Aggregation Prospects'. Below it is the 'Target your Users' section. Under 'Find users with all of the following conditions', there is one condition: 'Account Location' is not 'External'. There are buttons for 'Add a Subfilter', 'Add a condition', and 'Remove Filter'.

## Any External Accounts

To find users with no aggregated accounts.

1. Add a condition under “Find users with all of the following conditions”  
Select “Account Location,” “Is” & “External”
2. Click the blue “Run this report” button on the button of the page

The screenshot shows the 'Name your Report' section with the report name 'No Auto Loans & External Auto Loans With Balance < \$2000'. Below it is the 'Target your Users' section. Under 'Find users with all of the following conditions', there is one condition: 'Account Type' does not have 'Auto'. Under 'Find users with any of the following conditions', there are four conditions: 'Account Type' is 'Auto', 'Account Type' is 'Auto', 'Account Location' is 'External', and 'Account Balance' is less than '\$2000'. Each condition has a 'Remove Filter' button.

# Investments

## (External Deposit Accounts over \$15,000)

Find users with external Checking, Savings & Investment accounts with balances over \$15,000.

1. **Add a condition** under “Find users with any of the following conditions”

Select “Account Type,” “Is” & “Checking”

2. **Add a Subfilter**

Select “Account Balance,” “Is greater than” and “15000”

3. **Add a Subfilter**

Select “Account Location,” “Is” and “External”

4. **Add another condition** under “Find users with any of the following conditions”

Select “Account Type,” “Is” & “Savings”

5. **Add a Subfilter**

Select “Account Balance,” “Is greater than” and “15000”

6. **Add a Subfilter**

Select “Account Location,” “Is” and “External”

7. **Add another condition** under “Find users with any of the following conditions”

Select “Account Type,” “Is” & “Investment”

**Name your Report**

Report Name  
Investment Prospects

**Target your Users** [How do filters and subfilters work?](#)

Find users with **all** of the following conditions

[Add a condition](#)

Find users with **any** of the following conditions

Account Type is Checking [Remove Filter](#)

Account Location is External [Remove Filter](#)

Account Balance is greater than 15000 [Remove Filter](#)

[Add a Subfilter](#)

Account Type is Savings [Remove Filter](#)

Account Location is External [Remove Filter](#)

Account Balance is greater than 15000 [Remove Filter](#)

[Add a Subfilter](#)

Account Type is Investment [Remove Filter](#)

Account Location is External [Remove Filter](#)

Account Balance is greater than 15000 [Remove Filter](#)

[Add a Subfilter](#)

8. **Add a Subfilter**

Select “Account Balance,” “Is greater than” and “15000”

9. **Add a Subfilter**

Select “Account Location,” “Is” and “External”

10. **Click the blue “Run this report” button** on the button of the page

# Investments

## (Deposit Accounts over \$15,000 & No IRA)

Find users with Checking, Savings & Investment accounts with balances over \$15,000 and do not have an existing IRA.

- 1. Add a condition** under “Find users with all of the following conditions”  
Select “Account Type,” “Does not have” & “Investment”
- 2. Add a condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Checking”
- 3. Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “15000”
- 4. Add another condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Savings”
- 5. Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “15000”

**Name your Report**

Report Name  
Investment Prospects

**Target your Users** [How do filters and subfilters work?](#)

Find users with **all** of the following conditions

Account Type  Does not have  Investment

[Add a Subfilter](#)

Find users with **any** of the following conditions

Account Type  Is  Checking

Account Balance  Is greater than  15000

[Add a Subfilter](#)

Account Type  Is  Savings

Account Balance  Is greater than  15000

[Add a Subfilter](#)

Account Type  Is  Investment

Account Balance  Is greater than  15000

[Add a Subfilter](#)

- 6. Add another condition** under “Find users with any of the following conditions”  
Select “Account Type,” “Is” & “Investment”
- 7. Add a Subfilter**  
Select “Account Balance,” “Is greater than” and “15000”

Click the blue “Run this report” button on the button of the page

If you need any help,  
contact your Client Success Manager

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