Communications Guide

06/13/2017 Blackbaud Altru 4.96 Communications US

Communications-2017

Contents

Communications Configuration

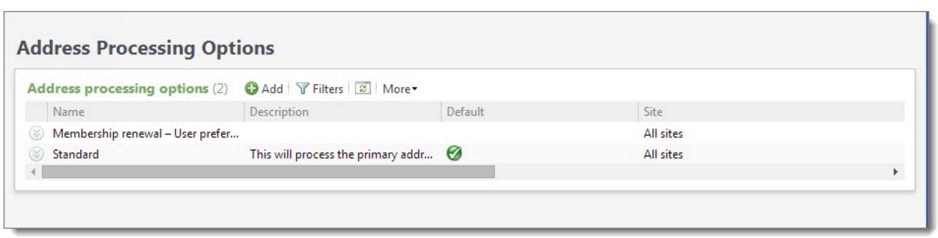
Before your organization creates and sends communication efforts, set configuration options for *Marketing and Communications*. You can access these options from the Marketing and Communications page, under **Configuration**.

Address Processing Options

On the Address Processing Options page, you can manage sets of address processing options for your various marketing efforts and correspondence. Address processing options determine which constituent address (home, business, summer home, etc.) to use for a communication effort. For example, you can create a set of address processing options for your holiday appeal that specifies to use the mail preferences from constituent records and to use seasonal addresses when available. For each set of address options, you can choose which address to use for individuals, organizations, and households/groups.

When you run a communication effort process, the program first applies exclusions (deceased, inactive, solicit codes, exclusion selections, previous mailings, etc.) to the selection of records included in the effort. The program then checks address processing options (mail preferences set on the Communications tab of constituent records or addresses selected for the **1st choice** and **2nd choice** fields), as well as the **Do not send** checkbox on mail and email addresses. If no valid address is found, the program either removes the constituent from the effort or includes the constituent without an address .

To access the Address Processing Options page from *Marketing and Communications*, click **Address processing options** under **Configuration**.

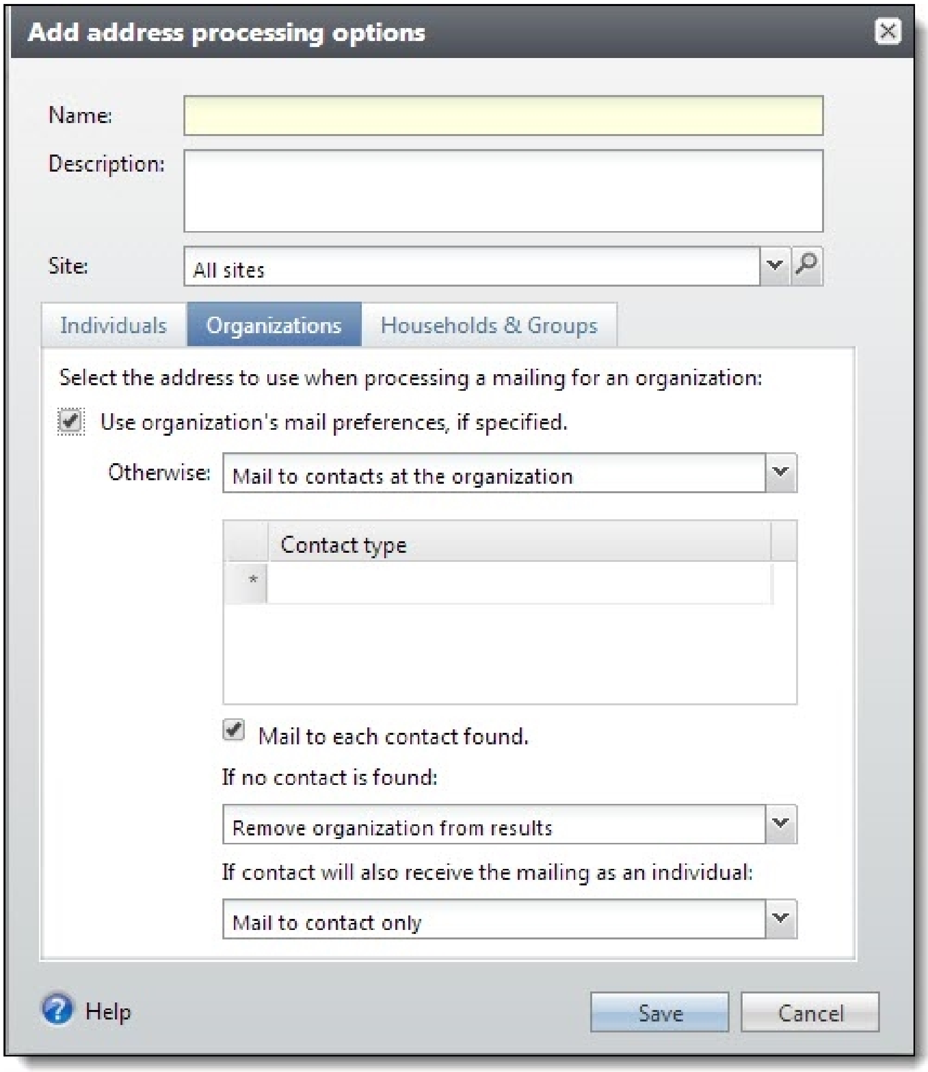


Add Address Processing Options

When you add an address processing option, you can select whether to use the address types specified by the mail preferences from individual, household, and group constituents included in the communication effort. You can also select backup addresses to use if no mail preferences are defined on the constituent record.

Add an address processing option

1. From *Marketing and Communications*, click **Address processing options** under **Configuration**. The Address Processing Options page appears.
2. In the **Address processing options** grid, click **Add**. The Add address processing options screen appears.
3. Enter a unique name and description to help identify the address processing option. For example, enter the type of communication to use this option.
4. Select the Individuals tab to choose the address types to use for individual constituents included in the communication effort.
   a. To use the mail preferences from individual constituent records, select **Use individual's mail preferences, if specified**.
   b. Under **Otherwise, use these addresses**, select the address types to use as an alternative to mail preferences or when mail preferences are not set up for an individual.
   c. To use seasonal addresses for individuals who have them, select **Use seasonal address, if available**.
   d. In the **If address is not found** field, select whether to include individuals without addresses from the communication output.
5. Select the Organizations tab to choose the address types to use for organization constituents included in the communication effort.



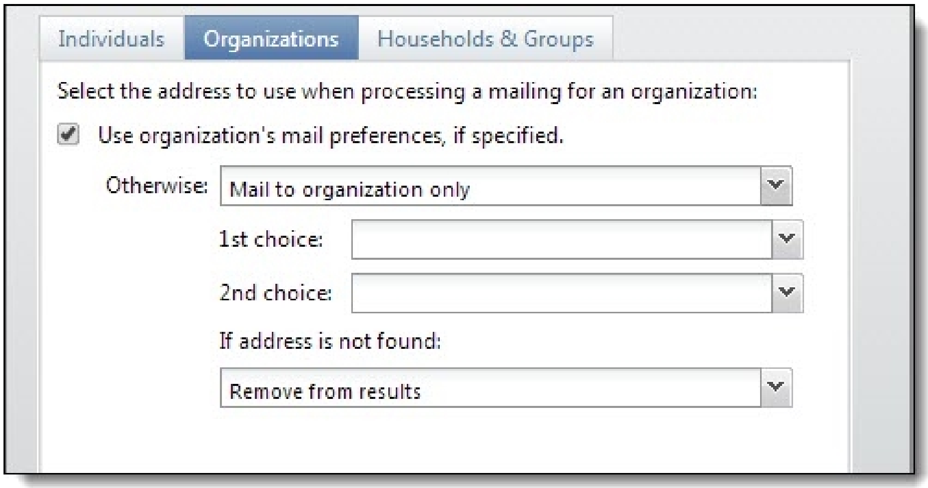
a. To use the mail preferences from organization constituent records, select **Use organization's mail preferences, if specified**.

b. In the **Otherwise** field, select the address to use as an alternative to mail preferences or when mail preferences are not set up for an organization.

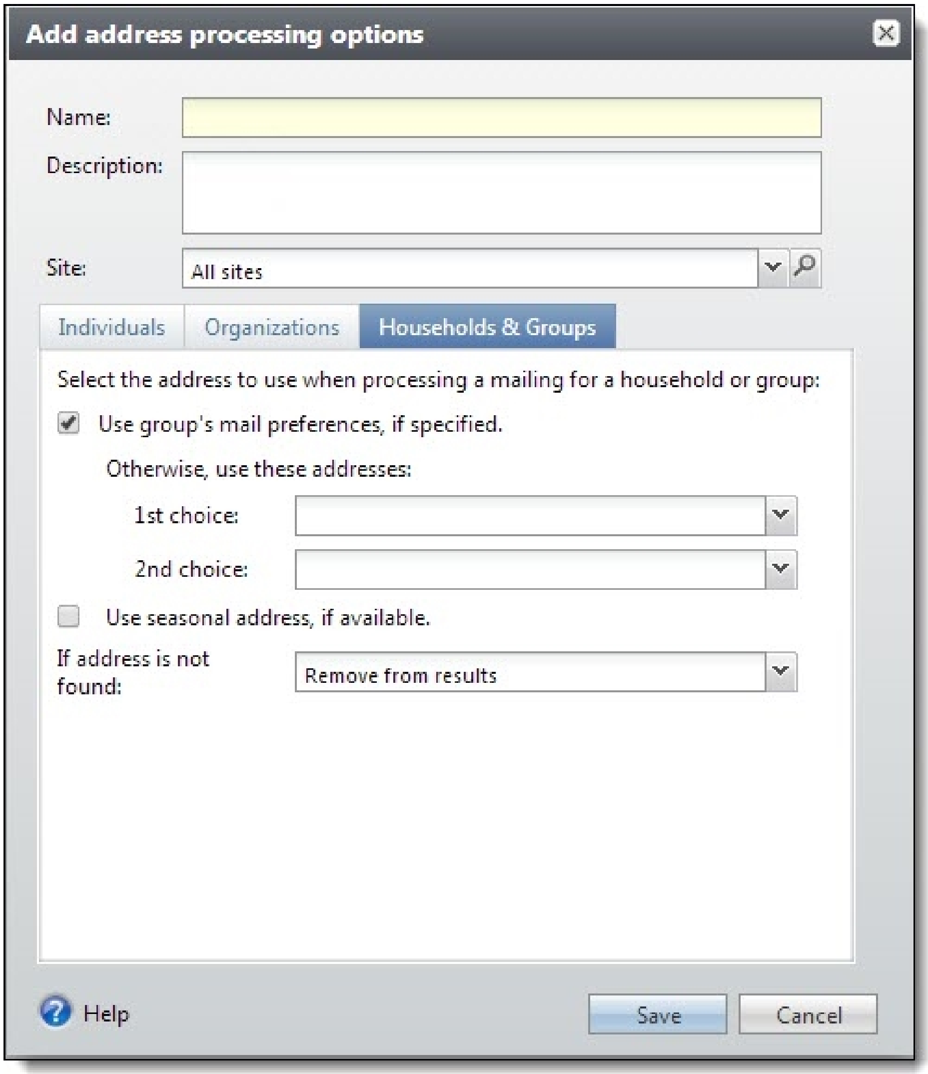
   If you select "Mail to contacts at the organization," in the **Contact type** box, select the type of contacts to receive the communication effort, in order of priority. To include contacts that meet all selected types, select **Mail to each contact found**. In the **If no contact is found** field, select whether to include or remove organizations without contacts from the communication effort output. In the **If contact will also receive the mailing as an individual** field, select whether to include the contact in the communication effort as a contact, an individual, or both.

Note: If you do not select **Mail to each contact found**, the communication effort includes only contacts of the type listed first in the **Contact type** box.

If you select “Mail to organization only,” in the **1st choice** and **2nd choice** fields, select the address types to use. In the **If address is not found** field, select whether to include organizations without addresses from the communication output.



6. Select the Households & Groups tab to choose the address types for constituent groups and households included in the communication effort.



a. To use the mail preferences from group and household constituent records, select **Use group's mail preferences, if specified**.

b. Under **Otherwise, use these addresses**, select the address types to use as an alternative to mail preferences or when mail preferences are not set up for a group or household.

c. To use seasonal addresses if available for a household, select **Use seasonal address, if available**.

d. In the **If address is not found** field, select whether to include groups and households without addresses from the communication output.

7. Click **Save**. You return to the Address Processing Options page.

Set an Address Processing Option as the Default

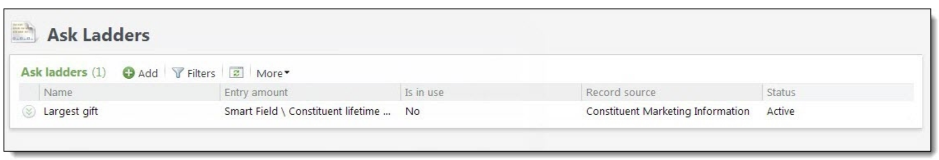
On the Address Processing Options page, you can select a default address processing option. This address processing option is selected by default anywhere you can choose an address processing option for a communication effort.

Under **Address processing options**, select the option to set as the default and click **Mark as default**. In the grid, the **Default** column displays a checkmark to indicate which addressing processing option is the default.

Ask Ladders

Ask ladders (also known as ask amounts or ask strings) are sets of fixed or calculated ask amounts based on a constituent’s giving history. You assign ask ladders to segments in a marketing effort to ensure each recipient receives the appropriate ask amount on their marketing effort. For example, if a donor’s last gift was $50, on the appeal mailing, you can suggest they give $75, $100, or $125. If another donor’s last gift was $150, the same ask ladder would suggest they give $225, $300, or $375.

On the Ask Ladders page, you can manage the ask ladders your organization uses. To access this page from *Marketing and Communications*, click **Ask ladders** under **Configuration**.



Under **Ask Ladders**, you can view the name, entry amount, and record source of each ask ladder. You can also view whether an ask ladder is active or in use. To include only ask ladders with a specific status in the grid, click **Filter**, select whether to view inactive or active ask ladders, and click **Apply**. To update the information in the grid, click **Refresh List**.

Note: From a marketing effort, you can create ask ladder overrides to apply different ask ladders to selections than the one specified for their segment.

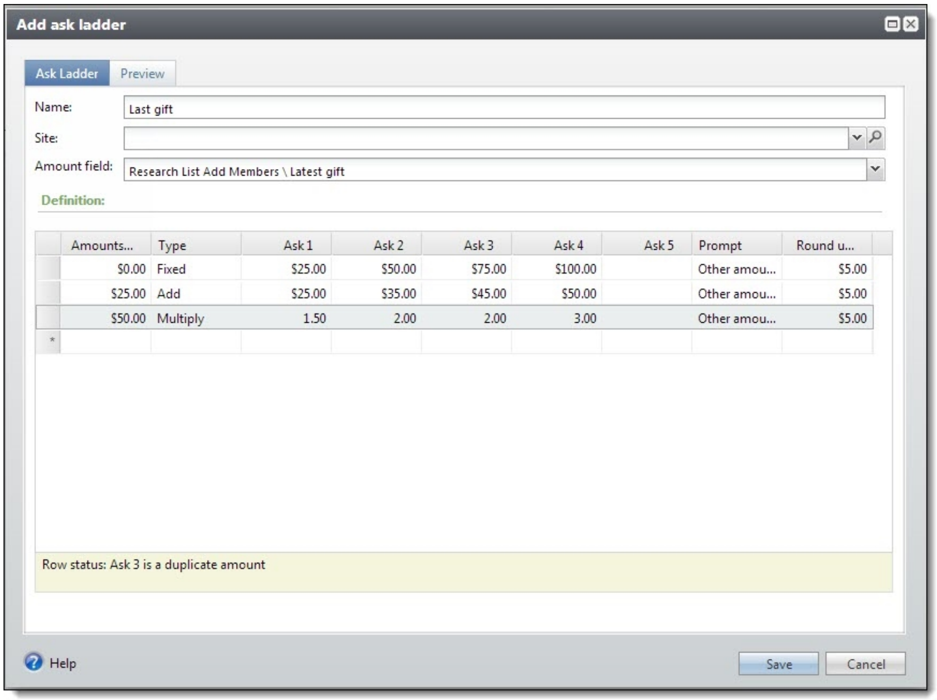
Add Ask Ladders

When you create an ask ladder, you define the calculations for ask amounts based on an “entry amount” value from the constituent’s giving history, such as the most recent or largest gift amount. The parameters you define for an ask ladder determine the lower and upper limits of an entry amount range and the ask amount calculations that apply to constituents who fall within that range. To calculate ask amounts, the program adds a specified amount to the entry amount, or multiplies the entry amount by a specified value. For fixed ask ladders, you define the ask amounts used for all constituents. This table demonstrates each type of ask ladder (Add, Multiply, and Fixed) and how ask amounts are calculated for each type.

Amounts at or above	Type	Ask 1	Ask 2	Ask 3	Round up to	Ask Ladder
0 (Entry amount range = $0 - 24.99)	Fixed	25	50	75	1	$25, $50, $75 Applies to all entry amounts less than $25
25 (Entry amount range = $25 - 49.99)	Add	25	35	45	5	$25 (+25, +35, +45) = $50, $60, $70 $30 (+25, +35, +45) = $55, $65, $75 $35 (+25, +35, +45) = $60, $70, $80 $40 (+25, +35, +45) = $65, $75, $85 $45 (+25, +35, +45) = $70, $80, $90
50 (Entry amount range = $50+)	Multiply	1.5	2	2.5	10	(50*1.5, 50*2, 50*2.5) = $75, $100, $125 (60*1.5, 60*2, 60*2.5) = $90, $120, $150 (70*1.5, 70*2, 70*2.5) = $105, $140, $175 Etc.

Add an ask ladder

1. From *Marketing and Communications*, click **Ask ladders** under **Configuration**. The Ask Ladders page appears.
2. Click **Add**. The Add ask ladder screen appears.



3. On the Ask Ladder tab, enter a unique name to help identify the ask ladder.
4. If you have multiple record sources defined, the **Record source** field appears. Select the record source to use for this ask ladder.
5. In the **Amount** field, select the type of entry amount to use for this ask ladder. The values available for this field are smart fields or amount fields associated with the record type, such as Last Gift, Largest Gift, or Average Gift. To create an ask ladder with fixed values, select "<none>."

   For information about smart field ask ladder values, see Smart Fields for Ask Ladders on page 22.
6. Under **Definition**, enter the parameters for ask ladder calculations. Each row defines the lower and upper limits of an entry amount range and the ask amount calculations that apply to constituents who fall within that range.
   a. In the **Amounts at or above** column, enter a value for the lower limit of an entry amount range. For example, if you enter 0, 25, 50, 75, and 100 in the **Amounts at over above** column, the entry amount ranges for the ask ladder are:

      $0 - 24.99

      $25 - 49.99

      $50 - 74.99

      $75 - 99.99

      $100+

Note: To ensure that each constituent receives an ask ladder, we recommend that you use $0 as the first value in the **Amounts at or above** column. If you do not have a constituent's giving history, such as when the constituent comes from an acquisition list or has a constituency of Relation only, then their entry amount is considered $0.

b. In the **Type** column, select the method to calculate ask amounts.

   "Add" — Select this option to add the values entered in the **Ask** columns to entry amounts.

   "Multiply" — Select this option to multiply the entry amount by the amounts entered in the **Ask** columns.

   "Fixed" — Select this option to use the values entered in the **Ask** columns for all constituents in this entry amount range. Fixed ask ladders are useful for acquisition mailings where there is no history of prior giving.

c. In the **Ask** columns, enter values according to the calculation method selected in the **Type** field.

   If you select "Add," enter the values to add to the entry amount, such as 50, 75, and 100. For a constituent with an entry amount of $30, the ask ladder included on the marketing effort would be $80, $105, $130 (if rounded to 1 or 5).

   If you select "Multiply," enter the values to multiply by the entry amount, such as 1.5, 2, and 2.5. For a constituent with an entry amount of $30, the ask ladder included on the marketing effort would be $45, $60, $75 (if rounded to 1 or 5).

   If you selected "Fixed," enter the fixed values to use for the entry amount range, such as 50, 75, 100. For all constituents in the entry amount range, the ask ladder included on the marketing effort would be $50, $75, and $100.

d. In the **Prompt** field, enter the text to appear on the marketing effort for write-in ask amounts, such as "Other Amount."

e. In the **Round up to** field, enter a whole number to round up calculated ask amounts. For example, if you enter 10, the program rounds all calculated ask amounts up to the tens place value.

Note: If you select <none> in the **Entry amount** field, you can define only one row in the grid because that ask ladder is used for all constituents included in the marketing effort.

7. To test the parameters of calculated ask amounts, select the Preview tab.

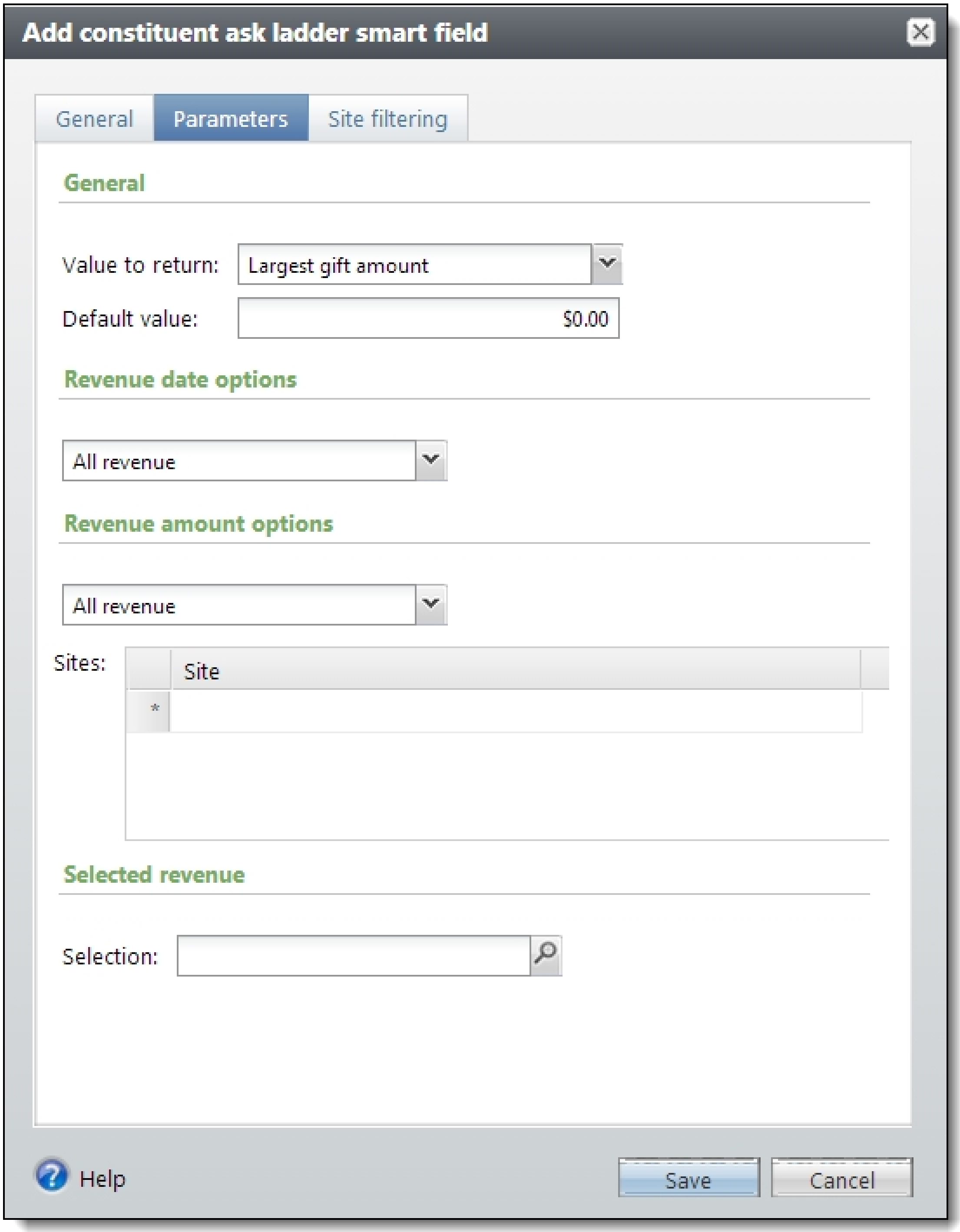
   a. In the **Entry amount range** field, select an entry amount range based on the values entered in the **Amounts at or above** column. The grid displays the calculated ask amounts for all entry amounts included in the range.

   b. In the **Interval** field, select the place value to round to. Ask amounts update in the grid based on rounding.

8. Click **Save**. You return to the Ask Ladders page.

Smart Fields for Ask Ladders

The **Constituent Ask Ladder** smart field calculates values for ask ladder entry amounts based on criteria you define. The calculation considers only revenue that falls within the date and amount parameters you set on the Parameters tab of the Add constituent ask ladder smart field screen. For more information about smart fields, see the *Administration Guide*.

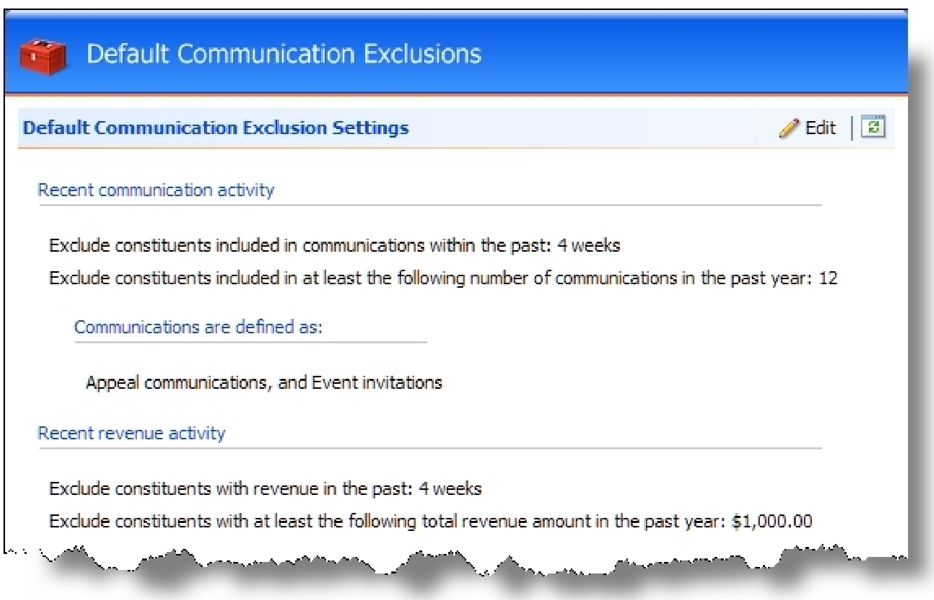


The table below explains each field on the Parameters tab:

Screen Item	Description
Value to return	Select "Largest gift amount," "Smallest gift amount," "Last gift amount" (the most recent gift), or "Average gift amount."
Default value	Enter the entry amount to use when a value can not be calculated.
Revenue date options	Select "All revenue," "This calendar year," "Past {n} months." or "Specific range." If you select "Past {n} months," enter the number of months. If you select "Specific range," enter a starting and ending date.
Revenue amount options	Select "All revenue" or "Specific range." If you select "Specific range," enter a dollar amount range in the fields.
Selected revenue	Select a revenue selection from *Query*. Use this field for more specific filtering; for example, finding revenue based on gift type.

Default Communication Exclusions

From *Marketing and Communications*, you can configure default exclusions to exclude constituents from communications based on previous communication or revenue history. For example, you can configure the program to automatically exclude constituents who received an appeal in the last three months. When you configure the criteria, you can select the types of communications to consider for exclusion. To configure the default exclusions, from *Marketing and Communications*, click **Default communication exclusions** under **Configuration**. The Default Communication Exclusions page appears.



Under **Default Communication Exclusion Settings**, you can view the communication and revenue activity criteria configured for the default exclusions. For information about how to edit these settings, see Edit the Default Communication Exclusion Settings on page 25.

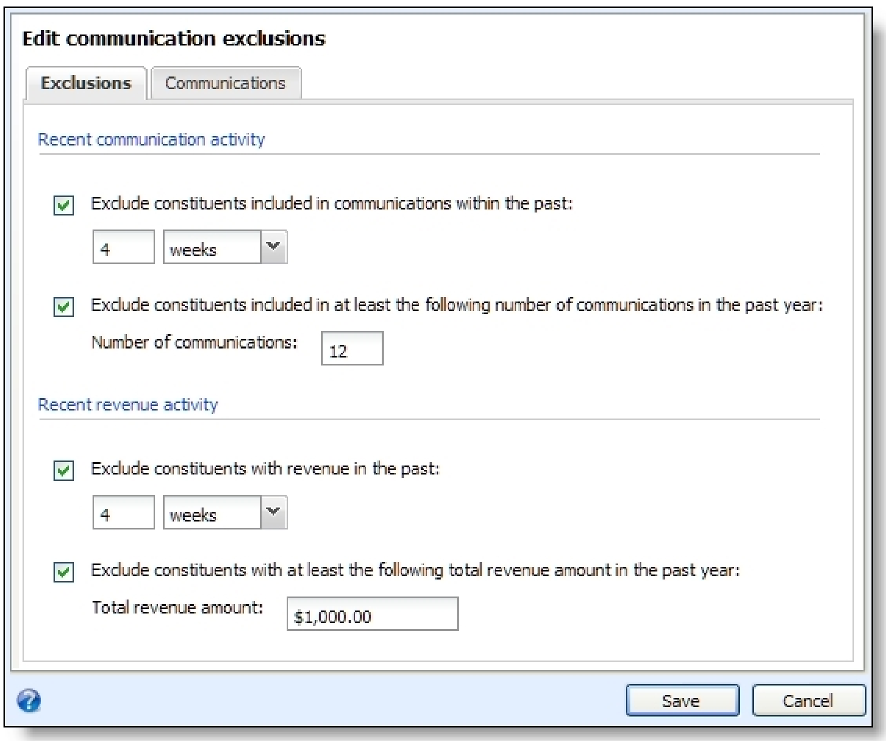
To refresh the information on this page, click **Refresh**.

Edit the Default Communication Exclusion Settings

From *Marketing and Communications*, you can configure the default exclusions to use to exclude constituents from communications based on communication or revenue history. For example, you can define the types of communications, period of time, and total revenue amount to exclude.

Configure the default communication exclusions

1. From *Marketing and Communications*, click **Default communication exclusions** under **Configuration**. The Default Communication Exclusions page appears.
2. Under **Default Communication Exclusion Settings**, click **Edit** on the action bar. The Edit communication exclusions screen appears. For information about the items on this screen, see Edit Communication Exclusions Screen on page 26.



3. On the Exclusions tab, select the criteria of the constituents to exclude from communications.
   a. Under **Recent communication activity**, select whether to exclude constituents included in recent communications. If you select **Exclude constituents included in communications within the past**, enter the time period of the communications to consider for exclusion.
   b. Select whether to exclude constituents based on the number of communications received over the past year. If you select **Exclude constituents included in at least the following number of communications in the past year**, enter the maximum number of communications constituents can receive.

   c. Under **Recent revenue activity**, select whether to exclude constituents with recent revenue transactions. If you select **Exclude constituents with revenue in the past**, enter the time period of the revenue transactions to consider for exclusion.
   d. Select whether to exclude constituents based on their total revenue amount for the past year. If you select **Exclude constituents with at least the following revenue amount in the past year**, enter the total revenue amount at which to begin to exclude constituents.
4. Select the Communications tab.
5. Select the types of communications to consider for exclusion based on recent communication activity.
6. Click **Save**. You return to *Marketing and Communications*.

Edit Communication Exclusions Screen

The table below explains the items on the Edit Communication Exclusions screen. For information about how to access this screen, see Edit the Default Communication Exclusion Settings on page 25.

Screen Item	Description
Exclude constituents included in communications within the past	To exclude constituents included in recent communications, select this checkbox. If you select this checkbox, enter the time period of the communications to consider for exclusion.
Exclude constituents included in at least the following number of communications in the past year	To exclude constituents already included in a maximum number of communications for the year, select this checkbox. If you select this checkbox, enter the number of communications at which to exclude a constituent. We recommend you configure this setting to avoid over-communication with constituents.
Exclude constituents with revenue in the past	To exclude constituents associated with recent revenue transactions, select this checkbox. If you select this checkbox, enter the time period of the transactions to consider for exclusion.
Exclude constituents with at least the following total revenue amount in the past year	To exclude constituents based on the total revenue amount for the past year, select this checkbox. If you select this checkbox, enter the total revenue amount at which to exclude a constituent.
Communications	On this tab, select the types of communications to consider for exclusion based on recent communication activity.

Finder Number Settings

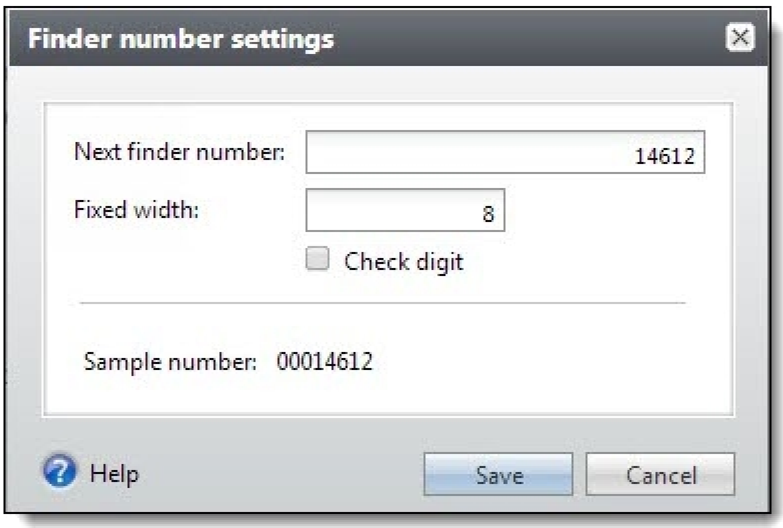
A finder number is a sequential number assigned to each name in a marketing effort that is printed on each reply form. Finder numbers generally consist of 15 or fewer characters so they are quicker to enter in a batch than names and addresses.

Finder numbers are used to match a gift to a particular marketing effort. The program generates finder numbers for a marketing effort when you calculate segment counts. In a marketing effort export, you can include **Finder number** as one of your export fields.

When you configure finder number settings, you specify the next finder number to use and the number of characters available.

Set finder numbers

1. From *Marketing and Communications*, click **Finder number settings** under **Configuration**. The Finder number settings screen appears.



2. In the **Next finder number** field, enter the next finder number available in the sequence. In most cases, you should set this to 1.
3. In the **Fixed width** field, enter the number of characters for your finder numbers. The default width of 8 characters allows for 99,999,999 finder numbers before the program needs to reuse a finder number. We recommend that you use 17 characters, the largest width allowed. You can increase the number of characters, but you cannot decrease it below the width of the highest assigned or reserved finder number.
4. To use the Mod 10 algorithm to validate finder numbers, select **Check digit**. The algorithm detects single-digit errors as well as transpositions of adjacent digits. A single digit is appended to each finder number to generate the validation calculation. For information about how the program calculates the check digit, see Calculate Check Digits on page 28.

Note: Once you choose to use a check digit with your finder numbers, you cannot turn it off. Also, the check digit functionality applies to only the number in the **Next finder number** field and any number that occurs afterward, not finder numbers already in use.

The **Sample number** field displays a preview of sample numbers based on your settings.

5. Click **Save**. You return to *Marketing and Communications*.

Calculate Check Digits

Tip: We recommend that you use a check digit to ensure finder numbers are entered accurately during gift entry.

If you use a check digit with your finder numbers, the program uses the Luhn, or mod 10, algorithm to validate finder numbers. The algorithm detects single-digit errors as well as transpositions of adjacent digits. To generate the validation calculation, the program appends a single digit to each finder number.

To calculate a check digit, the program uses this algorithm:

1. The program starts with the last digit in the finder number and, as it moves to the left, doubles the value of every other digit. For example, to calculate the check digit for finder number 56789:

9	9 * 2 = 18	18
8		
7	7 * 2 = 14	14
6		
5	5 * 2 = 10	10

2. The program adds the individual digits of the doubled numbers to the undoubled numbers from the original finder number.

9	9 * 2 = 18	18	1 + 8 = 9	9
8				8
7	7 * 2 = 14	14	1 + 4 = 5	5
6				6
5	5 * 2 = 10	10	1 + 0 = 1	1
				9 + 8 + 5 + 6 + 1 = 29

Note: The modulo operation finds the remainder when you divide a number. X modulo Z (abbreviated as X mod Z) is the remainder when you divide X by Z. For example, “7 mod 3” equals 1, while “9 mod 3” equals 0.

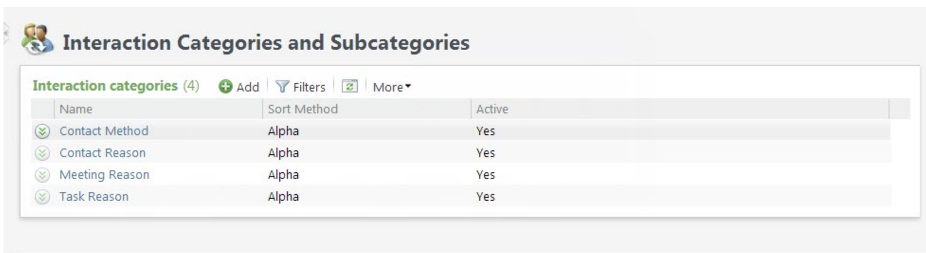
3. The program calculates the sum of the digits mod 10. For this example, 29 mod 10 = 9. (29 divided by 10 = 2 with a remainder of 9.)
4. For the check digit calculation, the program subtracts the remainder from 10. For example, 10 - 9 = 1. The check digit equals 1.

In our example, the full “valid” finder number (including check digit) is 567891. If the final value in the finder number was any number other than 1, then the finder number would be “invalid” or corrupt. Numbers like 567892, 567893, 567894, 567895, 567896, 567897, 567898, 567899, and 567890 are all "invalid" or corrupt finder numbers because 1 is the only valid check digit number for finder number 56789.

Interaction Categories and Subcategories

In *Constituents*, you use interaction categories and subcategories to specify communication activities and actions taken to build a relationship with a constituent. For example, you can create a Contact Method interaction category with subcategories of Casual Interaction, Digital, Event, Face-to-Face, Internal Marketing, Mail, Task, Telephone.

From *Marketing and Communications*, you can manage the types of interactions available to users in *Constituents*. To view the interaction categories available to users, from *Marketing and Communications*, click **Interaction categories and subcategories** under **Configuration**. The Interaction Categories and Subcategories page appears.



Under **Interaction categories**, you can view the sort method and active status of each category. To view inactive categories in the grid, click **Filter**, select **Include inactive**, and click **Apply**.

To view or manage the subcategories of an interaction category, click the name of the category in the grid. The subcategories page for the category appears. For information about this page, see Manage Subcategories on page 30.

Add Interaction Categories

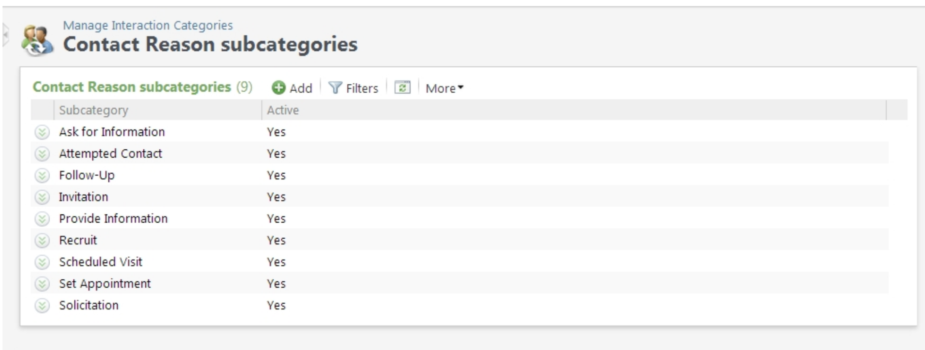
In *Constituents*, you use interaction categories and subcategories to track communication activities and actions taken to build a relationship with a constituent. From *Marketing and Communications*, you can add the types of interactions available to users in *Constituents*.

Add an interaction category

1. From *Marketing and Communications*, click **Interaction categories and subcategories** under **Configuration**. The Interaction Categories and Subcategories page appears.
2. Under **Interaction categories**, click **Add**. The Add an interaction category screen appears.
3. Enter a unique name to help identify the category.
4. In the **Sort method** field, select whether to arrange the categories alphabetically or in a user-defined arrangement.
5. Click **Save.** You return to the Interaction Categories and Subcategories page.

Manage Subcategories

To further define and expand an interaction category, you can assign it subcategories to break down its definition into multiple types. For example, you can create a Contact Reason interaction category with subcategories of Follow-up, Schedule Visit, and Solicitation. To view the subcategories of an interaction category, click the name of the category in the grid. The subcategories page for the interaction category appears.



In the grid, you can view the active status of each subcategory. To view inactive subcategories, click **Filter**, select **Include inactive**, and click **Apply**.

Add Interaction Subcategories

To further define and expand an interaction category, you can add subcategories to break down its definition into multiple types. For example, for a Phone interaction category, you can add subcategories of Home, Office, and Mobile.

Add subcategories to an interaction category

1. From *Marketing and Communications*, click **Interaction categories and subcategories** under **Configuration**. The Interaction Categories and Subcategories page appears.
2. Click the interaction category's name to access its subcategories page.
3. Click **Add**. The Add a subcategory screen appears.
4. Enter a unique name to help identify the subcategory.
5. Click **Save.** You return to the subcategories page.

Reorder Interaction Subcategories

For an interaction category with a user-defined sort method, you can reorder the subcategories. For example, you can arrange the subcategories so the common subcategories appear first in the list.

Arrange the order of user-defined subcategories

1. On the subcategories page for the interaction category, click **Re-order subcategories**. The Re-order subcategories screen appears.
2. Under **Subcategory**, select the subcategory to arrange in the order and click the up or down arrow as necessary.
3. Click **Save**. You return to the subcategories page.

Letter Template Library

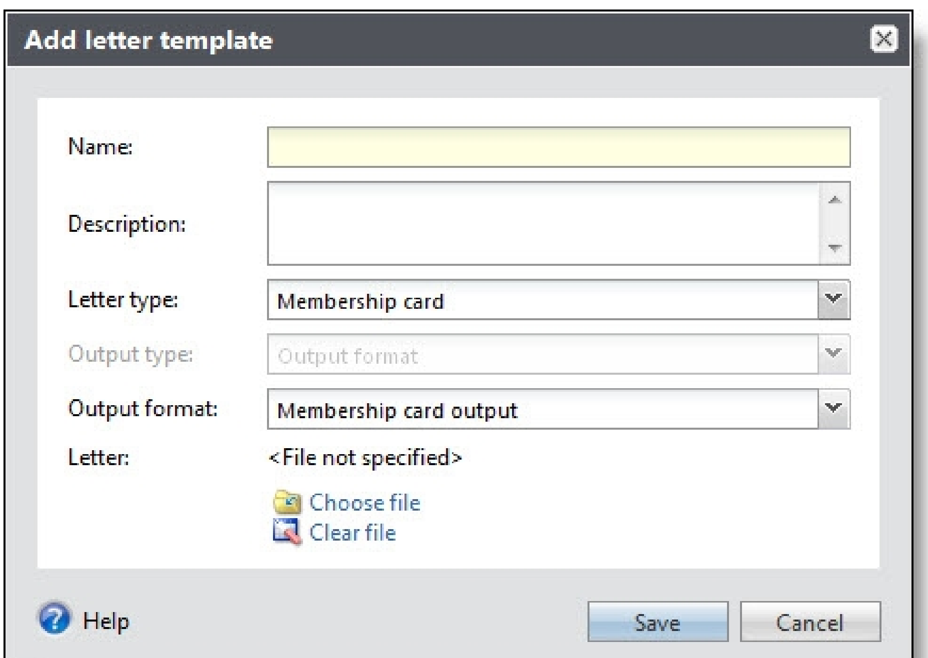
In the Letter Template Library, you can add and manage Microsoft *Word* templates for use with communications such as membership cards, and group sales contacts.

Add Letter Templates

From the Letter Template Library page, you can add templates to use in various types of communication efforts.

Add a letter template

1. From *Marketing and Communications*, click **Letter template library** under **Configuration**. The Letter Template Library page appears.
2. Click **Add**. The Add letter template screen appears.



3. Enter a unique name and description to help identify the template.

4. In the **Letter type** field, select the type of communication to use the template. The template is available only in areas of the program where the letter type is available.
5. If you select “Constituent Letter” as the letter type, the **Output type** field is enabled. Select “Output format” to use a program-defined set of export fields or “Export definition” to use a user-defined set of export fields.
6. In the **Output format** field, select the output format to determine how to export the data for mail merge. The output format filters the constituent information in the communication. For example, a standard output format uses the constituent’s primary address, while a seasonal output format uses a seasonal address. The selected letter type determines the available output formats.
7. If you selected “Export definition” as the output type for a constituent letter, select a constituent export definition in the **Export definition** field. Only constituent export definitions with **Allow definition to be used by other areas of the application** selected on the Options tab of the Export Definition Properties screen can be used for constituent letters. For more information about the **Allow definition to be used by other areas of the application** option, see the *Query and Export Guide*.
8. In the **Letter** field, click **Choose file** to select the *.docx file to use as the template. After you select a file, you can click its link in the **Letter** field to edit the document. To remove a file from the field, click **Clear file**.

Warning: While the program will upload *.doc or other document file types, these are not supported by the mail merge feature. To use mail merge, you must upload a *Word* document with the *.docx file extension.

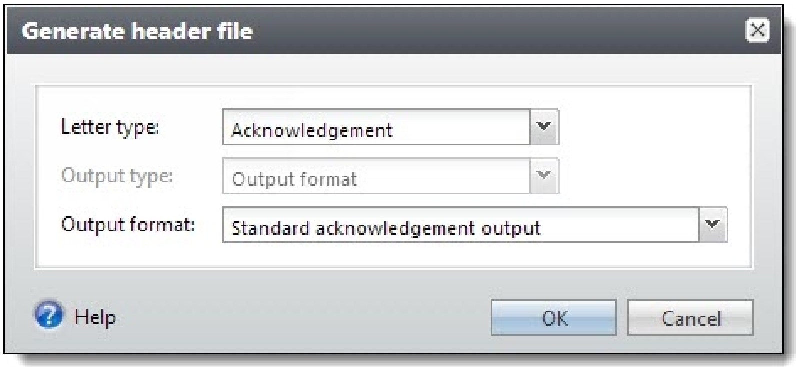
9. Click **Save**. You return to the Letter Template Library page. The template appears in the **Letter template** grid.

Generate a Header File for Letters

From the Letter Template Library, you can generate a header file that includes the merge fields available for a letter template. The fields included in the header file are determined by the selected output format or export definition. When you create a mail merge letter in *Word*, use the generated header file for your record source.

Generate a header file for letters

1. From *Marketing and Communications*, click **Letter template library** under **Configuration**. The Letter Template Library page appears.
2. Under **Tasks**, click **Generate header file**. The Generate header file screen appears.



3. In the **Letter type** field, select the type of communication to generate a header file for.
4. If you select "Constituent Letter" as the letter type, the **Output type** field is enabled. In this field, select "Output format" to use a program-defined set of export fields or "Export definition" to use a user-defined set of export fields.

Note: During implementation, Blackbaud Professional Services likely customizes output formats to fit the needs of your organization.

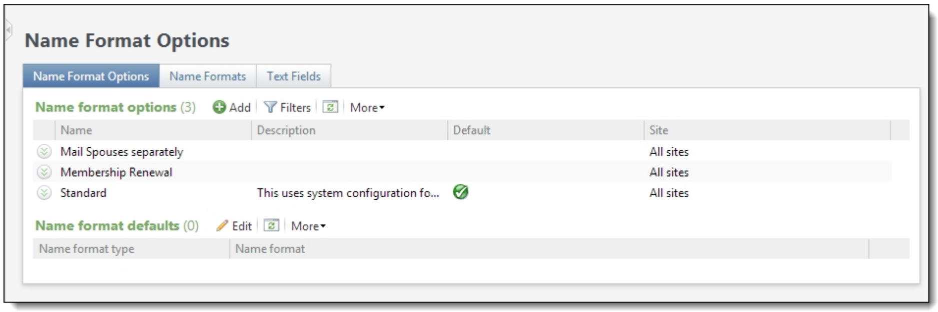
5. If you selected "Export definition" as the output type, select a constituent export definition in the **Export definition** field. Only constituent export definitions created in *Administration* with **Allow definition to be used by other areas of the application** selected on the Set save options tab can be used for constituent letters.
6. Click **OK**. The .csv file downloads automatically. (This process varies according to your type of browser.)

Name Format Options

Name formats determine how to names are formatted in a marketing effort. For example, for marketing efforts such as event invitations and appeals, you may use a more formal format that includes titles and suffixes (Mr. William H. Smith Jr.). For marketing efforts like alumni letters, you may use a less formal format such as the nickname and last name (Willie Smith). The program provides many common name formats, but you can add custom formats if needed.

Name format options are parameter sets that specify which name formats to use for addressees and salutations for individuals, organizations, and households and groups, as well as how to format joint names. From the Name Format Options page, you can create multiple sets of name format options that are tailored for different types of marketing efforts and correspondence.

To access the Name Format Options page from *Marketing and Communications*, click **Name format options** under **Configuration**.

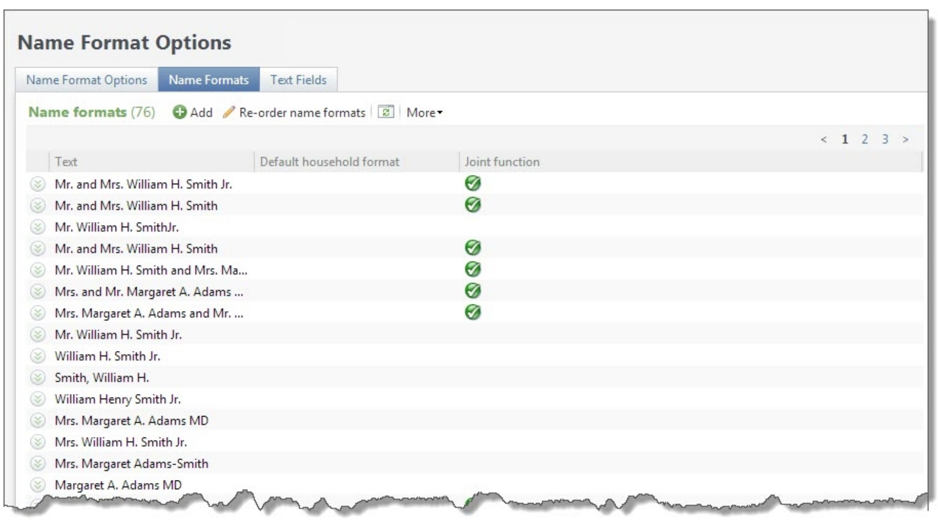


Name Formats

Name formats are used throughout the system as a way to let you choose how to address each constituent. For example, for some correspondence it might be more appropriate to use formal salutations, while for others you would use informal salutations. While the program provides many common name formats, you can also build new ones to suit your organization.

You can also specify which name formats to use as the default **Primary salutation** and **Primary addressee** on new constituent records. You can edit the order of name formats so that ones you use most often appear at the top of the list and are more accessible.

You can specify which name formats to use as defaults when new constituent records are added to the database. Default name formats appear automatically on the Personal Info tab of new constituent records. You can also select which name formats to use as the default for the Primary addressee or Primary salutation.

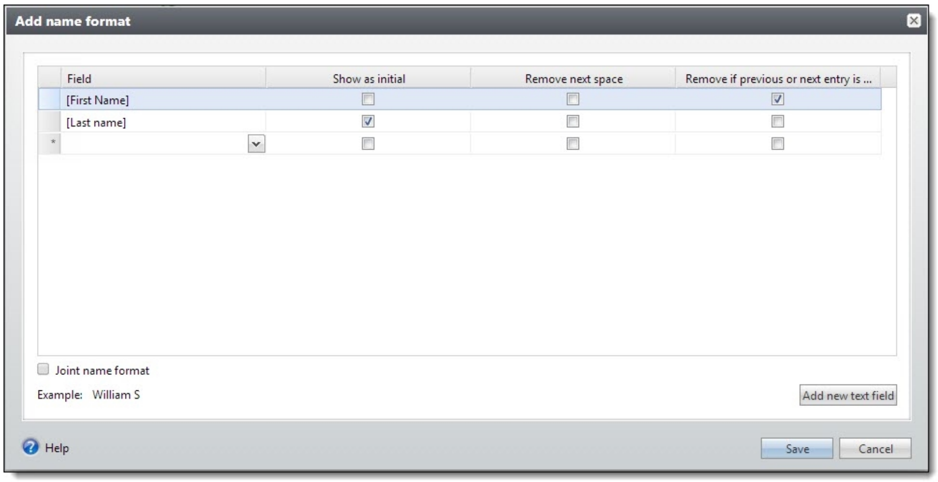


Add Name Formats

You can add name formats to use throughout the program, such as when sending appeals to constituents. You can specify the fields and parameters to use to build the name format.

Add a name format

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.
2. On the Name formats tab, click **Add**. The Add a name format screen appears.



3. In the **Field** column, select a name field to include in the name format.
4. To display the field as an initial only, select Show as initial. For example, instead of a constituent's middle name, you can show only the middle initial. A period automatically follows each initial.
5. To remove the space following the field, select **Remove next space**. For example, if you include both first and middle names as initials, you can remove the space after the first name initial to get a name format similar to "W.H. Smith" instead of "W. H. Smith."
6. To handle missing name fields, you can select **Remove if previous or next entry is blank**. With this option marked, the program checks the next field in the format. If no value is present for that field, the program removes the value of the field before it. For example, if the name format is "Mr. and Mrs. Smith," you can select **Remove if previous or next entry is blank** for the text field "and." This way, if there is not a spouse (and therefore no spouse title), the program leaves them out of the name format.
7. If the name format includes more than one constituent, select **Joint name format**. When you add name format options, on the Joint name formats tab, you can specify which person appears first when the name is built.
8. To add a text field for the format, click **Add new text field**. For example, to address a family as "The Smith Family," you can create text fields for "The" and "Family." For more information about how to add text fields, see Text Fields for Name Formats on page 36.

Note: An example of the name format appears below the grid.

9. Click **Save**. You return to the Name formats tab.

Text Fields for Name Formats

You can use text fields to create additional words or symbols to incorporate into your name format options, such "Friend of" or "&." After you create text fields, they can be used as the building blocks of the name formats you create.

Add a text field for name formats

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.
2. On the Text fields tab, click **Add**. The Add a text field screen appears.
3. Enter the text value to display in name formats, such as "&."
4. Click **Save**. You return to the Text fields tab. The text field you entered is available to use in name formats.

Edit the Order of Name Formats

You can edit the order of name formats so that ones you use most often appear at the top of the list and are more accessible.

Edit the order of name formats

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.
2. On the Name formats tab, click **Re-order name formats**. The Re-order name formats screen appears.
3. Select a name format and click the arrows to move it up or down in the list. This is the order of the name formats available when you set name format options or when you add a name format to a constituent.
4. Click **Save**. You return to the Name formats tab.

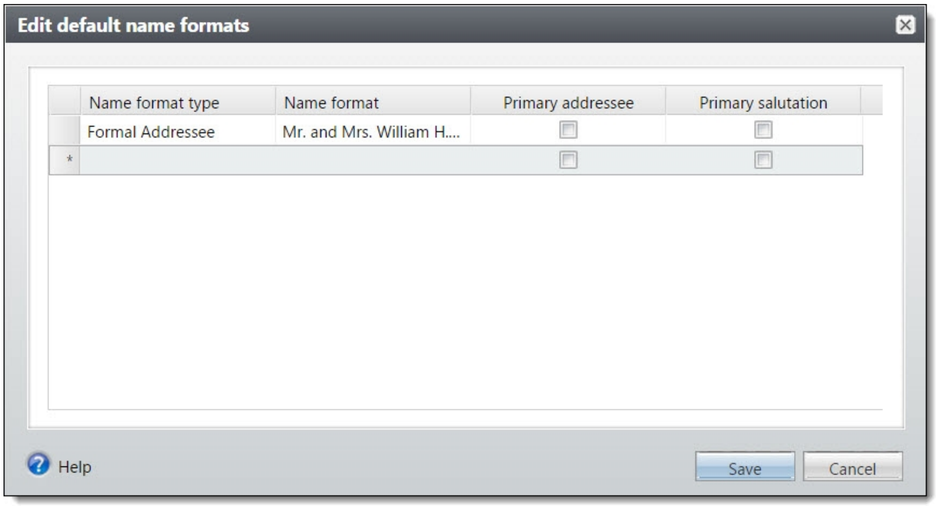
Set Default Name Formats

On the Name Format Options tab, you can specify which name formats to use as defaults when new constituent records are added to the database. Default name formats appear automatically on the Personal Info tab of new constituent records. You can also select which name formats to use as the default for the Primary addressee or Primary salutation. On the Name Formats tab, you can select which name format is the default for household records.

Set default name formats

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.

2. Select the Name format options tab.
3. Under **Name format defaults**, click **Edit**. The Edit default name formats screen appears.



4. In the **Name format type** column, select the type of name format, such as Formal Addressee or Informal Salutation. This type will help users identify which name format to assign to a constituent. The program provides several name format types, but you can add new ones as needed.
5. In the **Name format** column, select the name format to use.
6. To use the name format as the default for the primary addressee or primary salutation, select the checkbox in the appropriate column.
7. Click **Save**. You return to the Manage Name Format Options page.

Set a Default Name Format for Households

You can select a name format to use as the default for households. On the Name formats tab, select a name format to use with households and click **Set default household name format**. A green checkmark appears in the **Default household format** column of the grid.

Add Name Format Options

Create name format options to define which name formats to use for various communication types. You can specify one set of name format options as the default to use on new communication efforts. While you can create just one set of name format options to use as the default for all communication efforts, we recommend that you add multiple sets to provide more flexibility for addressing and greeting constituents in communication efforts.

Add a name format option

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.
2. Select the Name format options tab.

3. Under **Name format options**, click **Add**. The Add name format options screen appears.
4. In the **Name** and **Description** fields, enter a unique name and description to help identify the name format processing option. For example, enter a explanation of the type of communication effort to use with the option.

Note: The program applies formats to a constituent using the order defined in the grid. The program tries to apply the first format in the list; if that format is not included on the constituent's Personal Info tab, the program tries to apply the second format, and so on. If none of the formats listed are on the constituent's Personal Info tab, the program uses the format specified in **Otherwise, use this format**.

5. Select the addressee and salutations for individuals included in the communication effort.
   a. Select the Individuals tab.
   b. Under **Addressee**, in the **Use format defined on individual's record** grid, select the default name formats from constituent records to use for addressees. Use the up and down arrows to change the order of name formats in the grid.
   c. In the **Otherwise, use this format** field, select the name format to use if none of the selected name formats appear on the constituent's record.
   d. Under **Salutation**, in the **Use format defined on individual's record** grid, select the name formats from constituent records to use for salutations. Use the up and down arrows to change the order of name formats in the grid.
   e. In the **Otherwise, use this format** field, select the name format to use if none of the selected name formats appear on the constituent's record.
6. Select the addressee and salutations for organizations included in the communication effort.
   a. Select the Organizations tab.
   b. Under **Addressee**, select whether to use the name formats defined on the contacts' constituent records or a standard configured name format to address the organization contacts.

      Under **Use formats defined on contact's record**, select the name format to use from the constituent record. such as Primary addressee. In the **Otherwise, use this format** field, select the format to use if the first selection is not defined.
   c. Under **Salutation**, select whether to use the organization's name, the contact's name, or another name as a greeting in the communication. If you select Other name, enter the name to use.
7. Select the addressee and salutations for households and groups included in the communication effort.
   a. Select the Households and groups tab.
   b. Under **Addressee**, select whether to use the name formats defined on the primary members' constituent records or a standard configured name format to address the primary members.

      Under **Use formats defined on primary member's record**, select the name format to use from the constituent record, such as Primary addressee. In the **Otherwise, use this format** field, select the format to use if the first selection is not defined.

c. Under **Salutation**, select whether to use the group or household's name, the primary member's name, or another name as a greeting in the communication. If you select Other name, enter the name to use.

8. To select the addressee and salutation to use when a name format includes both spouses of a household, select the Joint name formats tab.

- To consider one spouse the primary constituent, or the one listed first, for all joint communications to the household, select **Apply the following rule to all constituents** and select the constituent to consider the primary.
- To consider a spouse the primary constituent when he or she appears in a selection, select **List constituents from the following selection first** and search for and select the selection of constituents to consider the primary.

If you select **List constituents from the following selection first**, select the constituent to consider the primary if both spouses or neither spouse appear in the selection.

- Under **Advanced name options**, you can specify the conditions for excluding a spouse from the joint name format. These options work independently of each other.

- **The spouse does not qualify or is excluded from the process** — Select this option to exclude the spouse if they are not included in a segment for the effort or if they are included in a segment but are excluded from the effort because of solicit codes, mailing preferences, householding options, or some other type of exclusion. For example, a husband and wife both qualify for inclusion in a mailing, but the wife has a "Do not mail" solicit code, so she will be excluded from the mailing process. With this option selected, the wife will not receive the mailing and her name is removed from the joint name format on the husband's record.

- **Both spouses will be mailed separately within the process** — Select this option to exclude the spouse from both records if they are both included in a segment for the marketing effort process. For example, the husband and wife both qualify for inclusion in a mailing and neither have any type of exclusion such as a "Do no mail" solicit code. With this option selected, the husband and wife will both receive a copy of the mailing addressed to them individually.

9. Click **Save**. You return to the Name Format Options page. Under **Name format options**, the new name format parameter appears.

Make a Name Format Option the Default

After you establish name format options, you can mark one as the default to use on new marketing efforts and correspondence.

Mark a name format option as the default

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.
2. On the Name format options tab, select a name format option and click **Mark as default**. A checkmark appears beside the name format option.

   When you make another one the default, the checkmark is removed from the previous default and a checkmark appears beside the new default. Only one name format option can be the default.

Solicit Codes

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, you can configure a “Do not email” solicit code and assign it to the Communications tab of their constituent records. When you run a marketing effort, you can exclude constituents based on solicit codes. For example, you can exclude constituents with a "Do not email" solicit code from all email blasts or constituents with a "Do not call" solicit code from all telemarketing efforts.

To access the Solicit codes page, from *Marketing and Communications*, click **Solicit codes** under **Configuration**.

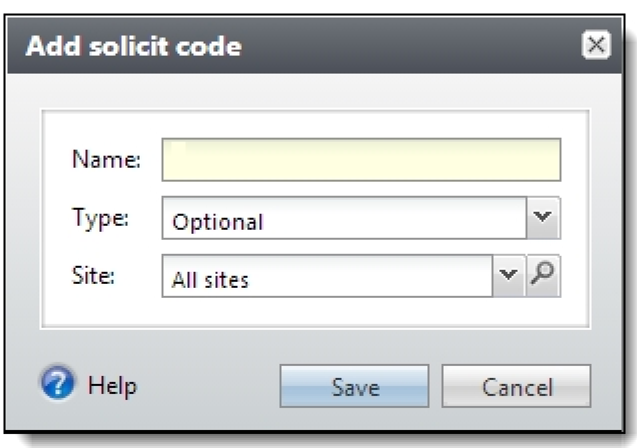
> ***Note:*** To define more nuanced rules for solicitations and communications, use mail preferences or constituent attributes. For example, you can set mail preferences for a constituent who wants to receive appeals by mail, but receipts by email. You can create even more precise mail preferences, for example, a constituent wants to receive invitations to sporting events, but not auctions. For custom rules that cannot be configured through mail preferences, create constituent attributes. For example, if a constituent does not want the calendar that is typically mailed with the holiday appeal, you can create an attribute for "Include no calendar." For more information about mail preferences and constituent attributes, see the *Constituents Guide*.

Add Solicit Codes

From the Solicit Codes page, you can configure solicit codes that allow constituents to globally opt out of solicitations and communications. For example, if a constituent requests to never receive phone calls for solicitations, you can add a "Do not call" solicit code to ensure they are excluded from all telemarketing.

Add a solicit code

1. From *Marketing and Communications*, click **Solicit codes** under **Configuration**. The Solicit Codes page appears.
2. Under **Solicit codes**, click **Add**. The Add a solicit code screen appears.



3. Enter a unique name to help identify the solicit code.
4. In the **Type** field, select whether the solicit code is optional, default, or required when users generate communications.
   - If you select Optional, users can add the solicit code to the exclusions of a communication as applicable.
   - If you select Default, the solicit code automatically appears as an exclusion for a communication process, but users can remove it as necessary.
   - If you select Required, the solicit code automatically appears as an exclusion for a communication process, and users cannot remove it.
5. Click **Save**. You return to the Solicit Codes page.

Appeals

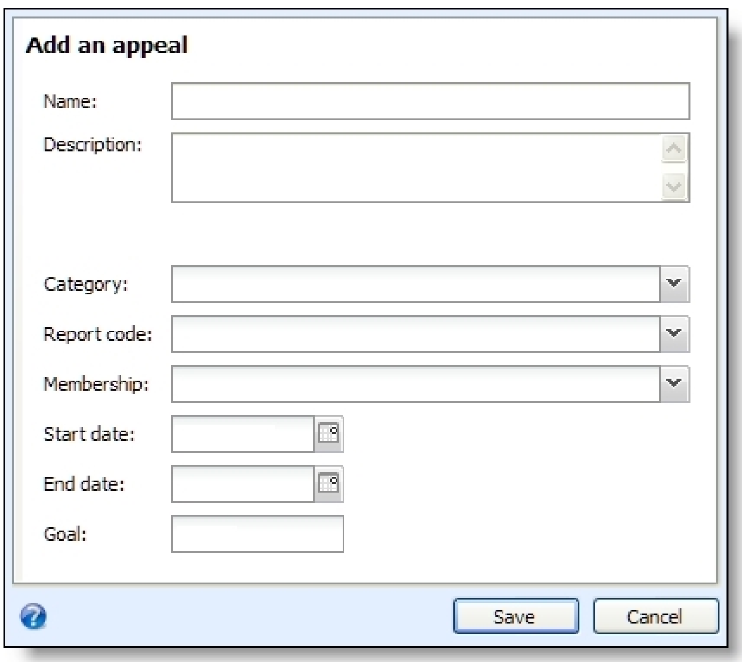
Appeals are planned efforts your organization undertakes to contact constituents and generate gifts. Appeals are usually bound by a time period and have a monetary goal. From *Marketing and Communications*, you can create and manage appeals such as direct mailings and phonathons.

Add Appeals

Appeals are planned efforts your organization undertakes to contact constituents and generate gifts. From *Marketing and Communications*, you can add appeals such as direct mailings and phonathons. When you add an appeal, you can specify its goal, start and end dates, and category.

Add an appeal

1. From *Marketing and Communications*, click **Add an appeal**. The Add an appeal screen appears. For information about the items on this screen, see Add an Appeal Screen on page 44.



2. Enter a unique name and description to help identify the appeal.
3. To group the appeal with like appeals, in the **Category** field, select the category of the appeal.
4. In the **Report code** field, enter a code to help identify the appeal for analysis.
5. If the appeal supports a membership renewal campaign, in the **Membership** field, select the applicable membership program.

6. Enter the start and end dates for the appeal. If the appeal occurs on a single day, enter only a start date.
7. In the **Goal** field, enter the monetary amount you hope to raise through the appeal.
8. Click **Save**. The record of the appeal appears. From the appeal record, you can associate the appeal with fundraising designations. For information about the record, see Appeal Record on page 45.

Add an Appeal Screen

The table below explains the items on the Add an appeal screen. For information about how to access this screen, see Add Appeals on page 43.

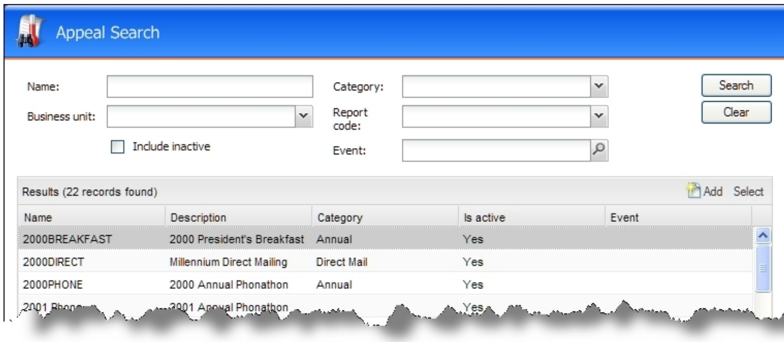
Screen Item	Description
Name	Enter a unique name to help identify the appeal, such as on an appeal mailing or for analysis.
Description	To help further identify the appeal, enter a unique description.
Category	To group the appeal with similar appeals, select an appeal category. For example, you can group annual appeals and membership appeals separately. When you search for an appeal, you can filter the search results by category.
Report code	To enhance analysis of your appeals, enter the type of information to track for the appeal. For example, you can perform analysis to determine the effective of the appeals for a specific cause.
Membership	If this appeal supports a membership renewal campaign, select the applicable membership program.
Start date and **End date**	Enter the duration of the appeal. For an appeal that occurs on a single day, enter only a start date.
Goal	Enter the monetary amount you hope to raise through the appeal. You can use the goal to help analyze the effectiveness of the appeal.

Search for Appeals

After you add an appeal, you can use the Appeal Search screen to access the appeal record. When you search for an appeal, you can make the search broad or specific, depending on the criteria you select. To get the results you need, we recommend you be selective in your search criteria and use detailed information such as name and report code.

Search for an appeal

1. From *Marketing and Communications*, click **Appeal search**. The Appeal Search screen appears.



2. Enter the search criteria to use, such as name and category, to find the appeal record. To include inactive appeals in the search results, select **Include inactive**.
3. Click **Search**. The program searches the database for appeals that match the search criteria entered. Under **Results**, the appeals that match the criteria appear. Depending on the search criteria you enter, the search may return one appeal or many.
4. Under **Results**, select the appeal record to open and click **Select**. The appeal record opens.

   If the appeal does not appear in the search results, click **Add** to add it to the database. For information about how to add an appeal, see Add Appeals on page 43.

Appeal Record

When you add an appeal, the program automatically generates a record of the appeal. From the record, you can view and manage detail information about the appeal. For example, you can add the designations the appeal supports, edit the benefits donors receive for responses to the appeal, and manage the mailings that support the appeal. To help you navigate this information, the appeal record contains multiple tabs.

From the appeal record, you can manage the appeal as necessary.

Edit an Appeal

After you add an appeal, you can edit its information, such as its goal amount or start and end dates, as necessary.

Edit an appeal

1. Open the record of the appeal to edit. For information about how to open an appeal record, see Search for Appeals on page 44.
2. Under **Tasks**, click **Edit appeal**. The Edit an appeal screen appears.
3. Make changes as necessary. The items on this screen are the same as on the Add an appeal screen. For a detailed explanation of the options, see Add an Appeal Screen on page 44.
4. Click **Save**. You return to the appeal record.

Mark an Appeal Inactive or Active

After you add an appeal, you can mark it inactive, such as if your organization no longer uses it. Inactive appeals remain in the database, but users cannot select the appeal such as for new mailings. To mark an appeal inactive, open its record and click **Mark inactive** under **Tasks**. A confirmation message appears. Click **Yes**.

After you mark an appeal inactive, you can mark it active to resume its use. To mark an appeal active, open its record and click **Mark active** under **Tasks**. A confirmation message appears. Click **Yes**.

Delete an Appeal

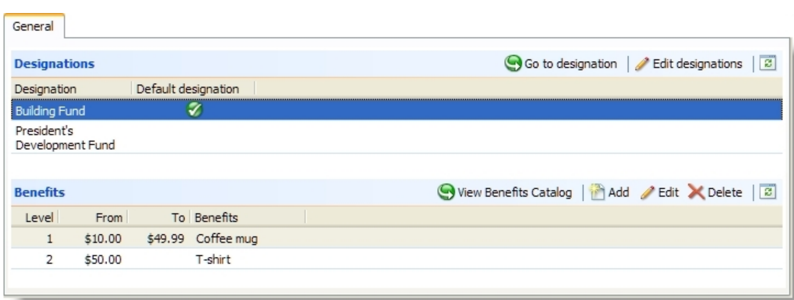
After you add an appeal, you can delete it from its record, such as if your organization does not use it. If an appeal is associated with a revenue transaction, you cannot delete it.

Tip: Rather than delete an appeal, you can mark it inactive. Inactive appeals remain in the database, but users cannot select the appeal such as for new mailings. For information about how to mark an appeal inactive, see Mark an Appeal Inactive or Active on page 46.

To delete an appeal, open its record and click **Delete appeal** under **Tasks**. When a message appears to ask whether to delete the appeal, click **Yes**.

General Appeal Information

From the General tab of an appeal record, you can view and manage the designations and benefits associated with the appeal.



Under **Designations**, the designations that the appeal supports appear. The **Default designation** column indicates the designation is the default for the appeal. When you add a revenue transaction and enter the appeal associated with the revenue, the default designation automatically appears. To access the record of a designation, select it in the grid and click **Go to designation**. From the grid, you can edit the designations associated with the appeal as necessary. For information about how to edit this information, see Edit Appeal Designations on page 47.

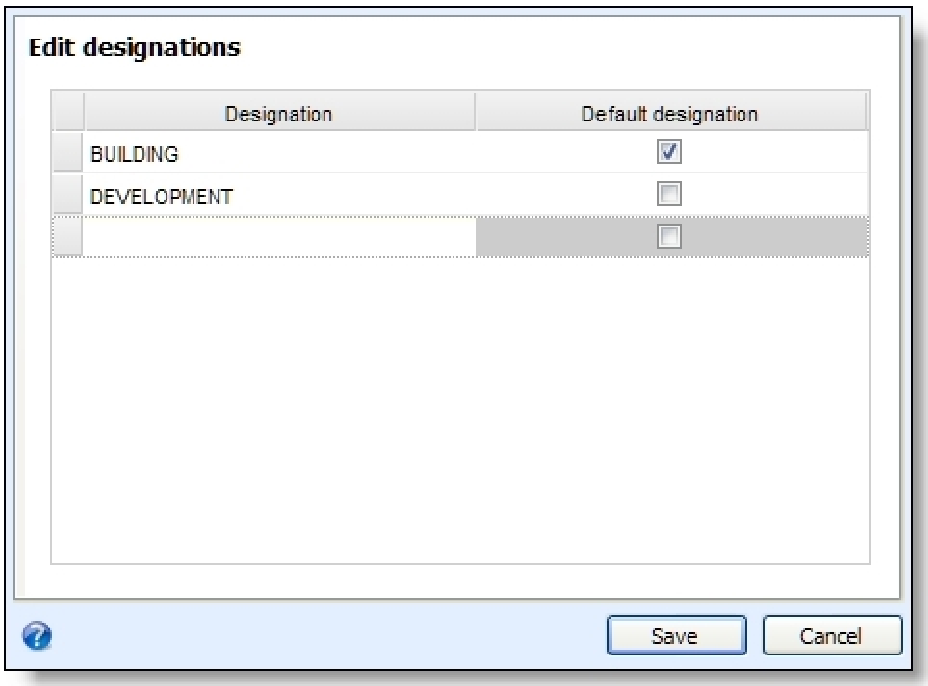
Under **Benefits**, you can view and manage the benefits a constituent who donates through the appeal receives as a thank-you. To award the appeal's benefits based on giving level, your organization can create a benefit program to specify a minimum revenue amount necessary to receive a benefit. For each benefit in the grid, you can view its giving level and applicable revenue amount range. To view additional information about benefits, click **View Benefits Catalog**. From the grid, you can add and manage the appeal's benefit program as necessary.

Edit Appeal Designations

From the General tab of an appeal record, you can add and manage the designations the appeal supports. You can also select the default designation for the appeal.

Edit the designations of an appeal

1. Open the record of the appeal with the designations to edit. For information about how to open an appeal record, see Search for Appeals on page 44.
2. On the General tab, click **Edit designations**. The Edit designations screen appears.



3. Under **Designation**, search for and select the designations associated with the appeal.
4. Under **Default designation**, select the checkbox for the designation to be the default for the appeal.

Tip: To save time when users add revenue transactions associated with the appeal, we recommend you select a default designation. When users add a revenue transaction and select the appeal, the default designation automatically appears.

5. Click **Save**. You return to the appeal record.

Add Benefit Levels to an Appeal

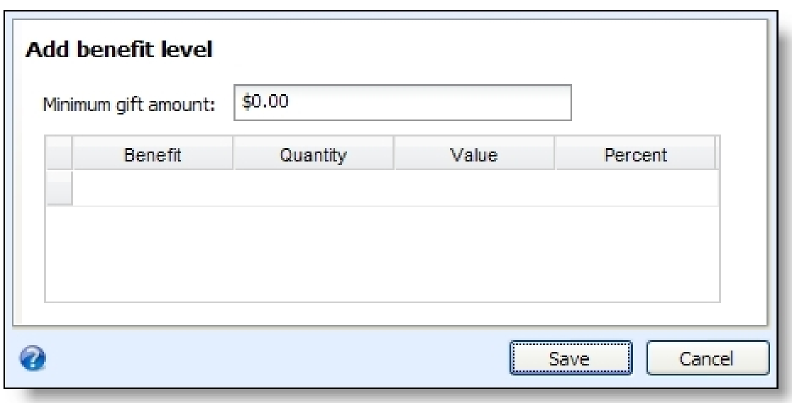
To award different benefits based on giving levels, you can create benefit programs for your appeals. To create benefit programs for an appeal, you can select benefits from the Benefits Catalog. When you add a benefit to an appeal, you specify the minimum revenue amount required to receive the benefit. You can define multiple giving levels, so different amounts qualify for different benefits. For example, you may give a gift bag as thanks for donations of \$500 or more and a t-shirt for donations between \$100 and \$499.

From the General tab of the appeal record, you can add a benefit program with an unlimited number of giving levels. When you create the benefit program, the benefit levels must have these characteristics:

- The levels must be consecutive and cannot have gaps in the ranges. Level 1 does not have to start at \$0.
- The levels cannot overlap.
- The program calculates a level's maximum value based on the minimum value of the next level. The maximum value of the last level is open-ended.

Add a benefit level to an appeal

1. Open an appeal record and select the General tab. For information about how to open an appeal record, see Search for Appeals on page 44.
2. Under **Benefits**, click **Add**. The Add benefit level screen appears.



3. Enter the minimum gift amount that qualifies for this benefit level.
4. In the **Benefit** column, search for and select the benefits to receive at this level. You can add a new benefit from the search screen if necessary.
5. Enter the quantity of the specified benefit awarded at this level. For example, you may give one benefit, such as a free ticket, for a donation of one level and two tickets for a higher donation.
6. Edit the monetary or percent value of the benefit. The amount in the benefit catalog is the default, but you can edit it if necessary. The value defined on the appeal is used on any revenue records associated with that appeal.

7. Click **Save**. You return to the General tab.

Edit a Benefit Level

You can edit levels and benefits on an appeal, even if the appeal has associated revenue. If the appeal has associated revenue, any changes to the benefit level affects the applicable revenue transactions.

Edit a benefit level on an appeal

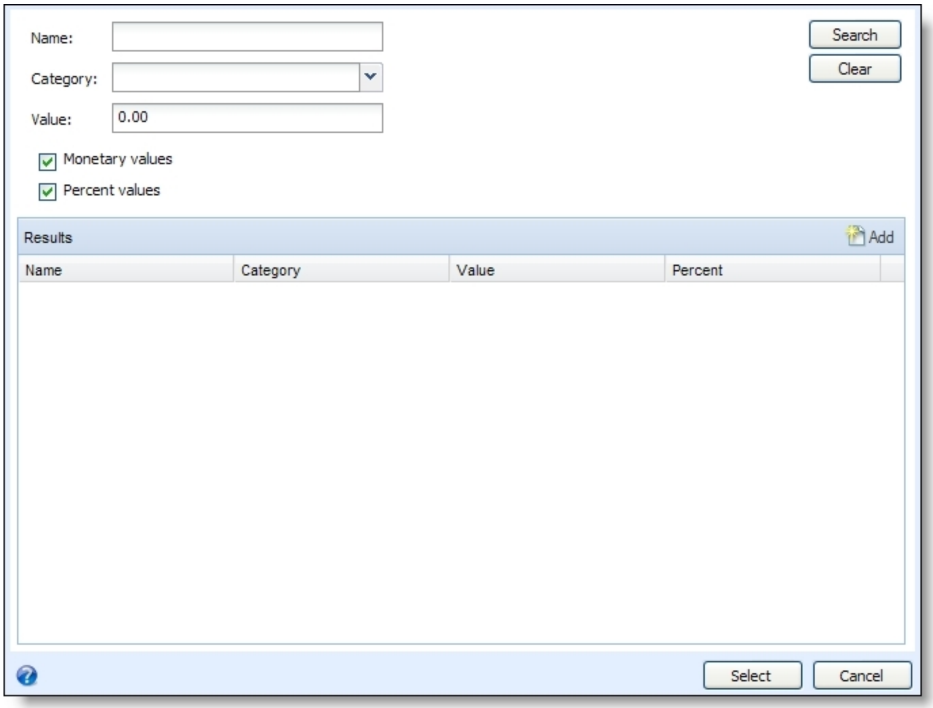
1. Open the record of the appeal with the benefit level to edit. For information about how to open an appeal record, see Search for Appeals on page 44.
2. Select the General tab.
3. Under **Benefits**, select a benefit level and click **Edit**. The Edit benefit level screen appears.
4. Edit the minimum gift amount or benefit information as necessary.
5. Click **Save**. You return to the General tab.

Delete a Benefit Level

You can delete a benefit level, such as one that your organization no longer uses. To delete a benefit level from an appeal, select it under **Benefits** on the General tab of the appeal record on click **Delete**. When a confirmation message appears to ask whether to delete the benefit level, click **Yes**.

Search for Benefits

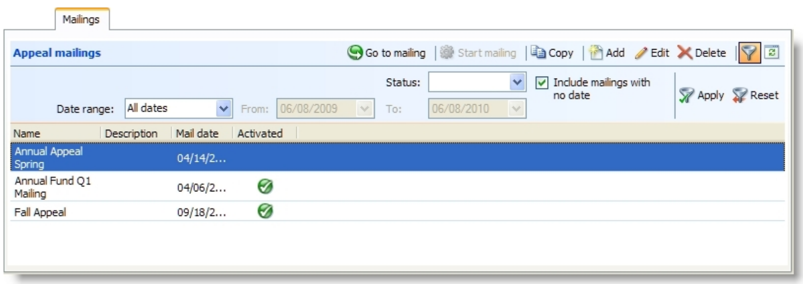
After you add a benefit to the Benefits Catalog, you can use a search screen to locate and select the benefit, such as to add it to an appeal. When you search for a benefit, you can make the search broad or specific, depending on the criteria you select. To get the results you need, we recommend you be selective in your search criteria and use detailed information such as name and category. You can also select to include only benefits with either monetary or percent values.



When you enter your search criteria and click **Search**, the program searches the catalog for benefits that match the criteria. Under **Results**, the benefits that match the criteria appear. Depending on the search criteria you enter, the search may return one benefit or many. Under **Results**, select the benefit to use and click **Select**. If the benefit does not appear in the search results, you can click **Add** to add it to the catalog.

Appeal Mailings

To reach the goals of your fundraising efforts, you can create communications to support your appeals. On the Mailings tab, you can view the appeal mailings used with the appeal.



Under **Appeal mailings**, you can view the mailings your organization uses to request donations toward the appeal. For each mailing, you can view its name and description, mail date, and activation status. To update the information in the grid, click **Refresh List**.

You can select whether to display only mailings with a specific status or mail date. You can also select whether to display mailings that do not have a mail date assigned. To filter the grid, click **Filter**, select the criteria of the mailings to view, and click **Apply**. To remove the filter, click **Reset**.

To view additional information about an appeal mailing, select it in the grid and click **Go to mailing**. The record of the mailing appears. On the record, you can view summary information about the mailing, such as its package, mail date, and fixed and total costs. You can also manage information about the mailing such as its universe or recipients. For information about the items on the record, see Appeal Mailing Record on page 73.

From the grid, you can also add and manage appeal mailings as necessary.

Appeal Documentation

You can track detailed notes and attachments about your appeals. You can also save links to related materials or websites.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

Add an attachment

1. Go to the Documentation tab of a record.
2. Click **Add attachment**. The Add an attachment screen appears.
3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Add an Attachment Screen

Screen Item	Description
Type	Select the type of attachment. The system administrator configures attachment types.
Date	Enter the date of the attachment.
Title	Enter the title, or purpose, of the attachment.
Author	To search for the author, click the binoculars. A search screen appears.
File	To locate the attachment, click **Choose file**. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**.

Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

Edit an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Edit**. The Edit attachment screen appears.
3. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. To select a different file, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

Delete an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

Add a media link

1. Go to the Documentation tab of a record.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Add a Media Link Screen

Screen Item	Description
Type	Select the type of media link. The system administrator configures media link types.
Date	Enter the date of the media link.
Title	Enter the title, or purpose, of the link.
Author	To search for an author, click the binoculars. A search screen appears.
Media URL	Enter the URL for a website.

Edit Media Links

You can edit the URL for a website.

Edit a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Edit**. The Edit media link screen appears.
3. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

Delete a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track notes about your records.

Add a note

1. Go to the Documentation tab of a record.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

Add a Note Screen

Screen Item	Description
Type	Select the type of note. The system administrator configures note types.
Date	Enter the date of the note.
Title	Enter the title, or purpose, of the note.
Author	To search for an author, click the magnifying glass. A search screen appears.
Notes	Enter the content of the note.

Edit Notes

On the Documentation tab, you can edit notes as necessary.

Edit a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Edit**. The Edit note screen appears.
3. Make changes as necessary to the note type, date, title, author, or note content.
4. Click **Save**. You return to the Documentation tab.

Delete Notes

After you add notes to the Documentation tab, you can delete notes when necessary.

Delete a note

1. Go to the Documentation tab of a record.

2. Click the double arrows beside a note and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment. To do this, click the double arrows beside the attachment and click **Open file**.

GL Mapping Tab

To successfully post transactions, you must set up GL Ledger information, such as accounts, transaction mappings, and segment mappings in *Administration*.

When you create segment mappings for items, such as appeals or events, the GL Mapping tab appears on the item's record. For example, once you select appeal as a segment in an account structure, when you view the appeal record, the GL Mapping tab appears. From the GL Mapping tab, you can view the segment value and edit the mapping.

Note: You create segment mappings in *Administration*. To view the Map Segment page, select an account system from the GL Ledger Setup page. From an account system page, click **Define Segment Mappings**.

To view and manage the GL Ledger mapping of an item, select the GL Mapping tab on the item's record. Additional examples of items with potential segment mappings are: fundraising purposes, events, and membership levels.

Note: The GL Mapping tab does not appear on records that are used as segments in more than one account structure within the database.

When you apply a revenue transaction toward an item, such as a designation, the GL mapping information automatically appears as a default on the revenue record. From the revenue record's GL Mapping tab, you can edit the segment mapping.

Edit mapping

1. On the record of an item such as a designation or appeal, select the GL Mapping tab.
2. Under GL **mapping**, click **Edit**. The Edit mapping screen appears.
3. Select a different segment value to associate with this item.

   When you edit a segment value from the Edit mapping screen, the value is automatically updated on the Map Segment page in *Administration*. To view the Map Segment page, click **Define Segment Mappings** on the GL Ledger Setup page of *Administration*.
4. To return to the GL Mapping tab, click **Save**.

Appeal Mailings

The solicitation of your constituents to donate to your organization’s mission plays an essential role in your fundraising efforts. To reach the goals of your fundraising efforts, you can create mailings for the appeals used to support these efforts. You can add multiple mailings to support an appeal. From

Marketing and Communications, you can plan and manage your appeal mailings. When you add an appeal mailing, you can manage and track its effectiveness from its record.

Appeal Mailing Workflow

The solicitation of your constituents to donate to your organization's mission plays an essential role in your fundraising efforts. To use appeal mailings effectively, you must perform several steps to create the communications used to support these efforts.

- ☐ Create the appeals, or planned efforts, to contact constituents to generate donations and revenue. When you add an appeal, you specify its start and end dates and the goal amount. For information about how to add an appeal, see Add Appeals on page 43.
- ☐ From the organization calendar, plan your organization's communication effort. For example, at the end of the year, plan your appeal mailings for the upcoming year. From the calendar, you can quickly add appeal mailings and check dates to help avoid conflicts with other activities at your organization. For information about the Plan appeal mailings page, see Planning Calendar on page 58.
- ☐ To determine ask amounts for the mailings, create an ask ladder as necessary. An ask ladder is a set of fixed or calculated ask amounts based on a constituent's giving history and included on a response device. For information about ask ladders, see Ask Ladders on page 19.
- ☐ On the Appeal Mailings page, add appeal mailings as necessary. When you add an appeal mailing, you select the appeal it supports, its mail date, and its processing options. You can also create the letters to include with the mailing. For information about how to add or edit appeal mailings, see Manage Appeal Mailings on page 60. For information about the HTML editor used to create content for letters, see Communication Letters on page 111.
- ☐ A mailing task is a job required in preparation for an appeal mailing, such as to prepare the mailing for production. From the record of an appeal mailing, add or manage the tasks associated with the mailing as necessary. When you add a task, you can assign it to staff members involved with the mailing. You can also set up email alerts to remind the owner to complete the task. For information about how to manage tasks, see Appeal Mailing Tasks on page 77.
- ☐ On the mail date for the mailing, run the mailing to send it to the recipients. When you run the mailing, the program uses recipient information based on the letters' merge fields to create personalized output for the mailing. You can also schedule when to send the mailing's email content to its recipients. For information about how to run or activate an appeal mailing, see Start an Appeal Mailing on page 75.
- ☐ After you run the mailing, download its mail output for delivery to its recipients. You can also manually send its email content to recipients. For information about how to manage the output of a mailing, see Letter Output and History on page 136.
- ☐ To view the effectiveness of the activated appeal mailing, create and manage key performance indicators (KPIs) for the mailing. For information about appeal mailing KPIs, see Appeal Mailing Key Performance Indicators on page 81.

Planning Calendar

From *Marketing and Communications*, you can access the Planning calendar to view and manage your appeal mailings over an extended period of time. To access the calendar, from *Marketing and Communications*, click **Planning calendar**.

From this page, you can view the organization calendar, such as to determine whether scheduled appeal mailings conflict with other activities at your organization such as an event or a holiday. For information about how to manage the organization calendar to plan appeal mailings, see Calendar on page 58.

From this page, you can view the organization calendar, such as to determine whether scheduled appeal mailings conflict with other activities at your organization such as an event or a holiday. You can also view the appeal mailings scheduled for a constituent selection to receive, such as to help determine the amount of communication a specific group of constituents receives. To help you navigate through this information, the Plan appeal mailings page contains multiple tabs.

Calendar

On the Planning calendar page, the organization calendar appears. From the calendar, you can view and manage planned activities related to your organization or community, such as to help schedule and coordinate appeal mailings. For example, at the end of the year, you can plan your communication effort for the upcoming year and use the calendar to help avoid conflicts with other activities at your organization.

On the Planning calendar page, the Calendar tab displays the organization calendar. From the calendar, you can view and manage planned activities related to your organization or community, such as to help schedule and coordinate appeal mailings. For example, at the end of the year, you can plan your communication effort for the upcoming year and use the calendar to help avoid conflicts with other activities at your organization.

When you first open the calendar, the current month appears, with the current date selected. You can adjust the period of time that appears as necessary.

- To view the items and activities for another month, click the left or right arrow above the calendar to navigate to the month to view.
- To view the dates on the calendar in a daily, weekly, or yearly format, click the interval to use above the calendar. To return to the monthly format, click **Month**.
- To view the items on the calendar in a list view, click **View as list**. To view the items in the calendar view, click **View calendar**.
- To view the items and activities for a specific date, in the **Jump to date** field, select the date to view.

The calendar automatically displays any scheduled appeal mailings. Under **Filters**, you can select the items and activities to view on the calendar, such as scheduled calendar items, events, or mailings scheduled during the selected period of time. You can also select the appeal mailings to display based on the recipient selections. To help you navigate through the information on the calendar, each type of calendar item or activity is color-coded. To adjust the color of an item type, click **Customize style**. To view more information about an item or activity, select it on the calendar and click **Go to activity**. The record of the selected item appears.

After you select the activities to view, you can apply filters to further define the activities that appear. To apply filters to a selected activity type, click the down arrow next to the activity type and select the criteria of the items to view. The calendar updates to display the activities that meet the selected criteria.

From the calendar, you can add and manage appeal mailings, such as when you plan the future communication efforts.

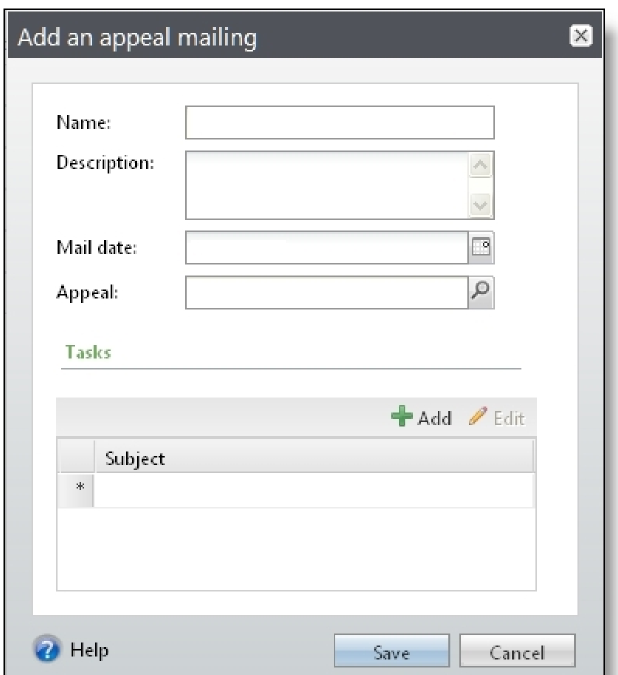
Add Appeal Mailings to the Organization Calendar

From the Planning calendar page, you can quickly add appeal mailings to the organization calendar. For example, you can add mailings as you quickly plan mail dates for communications in a future time period. When you add an appeal mailing from the calendar, you enter only general information such as name, mail date, appeal, and tasks.

After you add the mailing, you can edit it from the Appeal Mailings page in *Marketing and Communications* to enter additional information such as content.

Add an appeal mailing to the organization calendar

1. From *Marketing and Communications*, click **Planning calendar**. The Planning calendar page appears.
2. Above the calendar, click **Add**, **Appeal mailing**. The Add an appeal mailing screen appears.



3. Enter a unique name and description to help identify the mailing.

4. In the **Mail date** field, select the date to send the mailing to its recipients. When you add the mailing from the calendar view, the date selected on the calendar automatically appears.
5. In the **Appeal** field, search for and select the appeal that the mailing supports.
6. Under **Tasks**, the tasks associated with the mailing appear. To add a task, click **Add** on the action bar. To edit a task, select its subject and click **Edit** on the action bar. For information about tasks, see Appeal Mailing Tasks on page 77.
7. Click **Save**. You return to the Planning calendar page. On the mail date, the new mailing appears.

Edit an Appeal Mailing on the Calendar

After you add an appeal mailing to the organization calendar, you can edit it as necessary, such as to adjust its mail date. When you edit an appeal mailing from the calendar, you can edit only general information such as name, mail date, appeal, and tasks. From an appeal mailing's record, you can edit additional information such as exclusions and content.

Edit an appeal mailing on the organization calendar

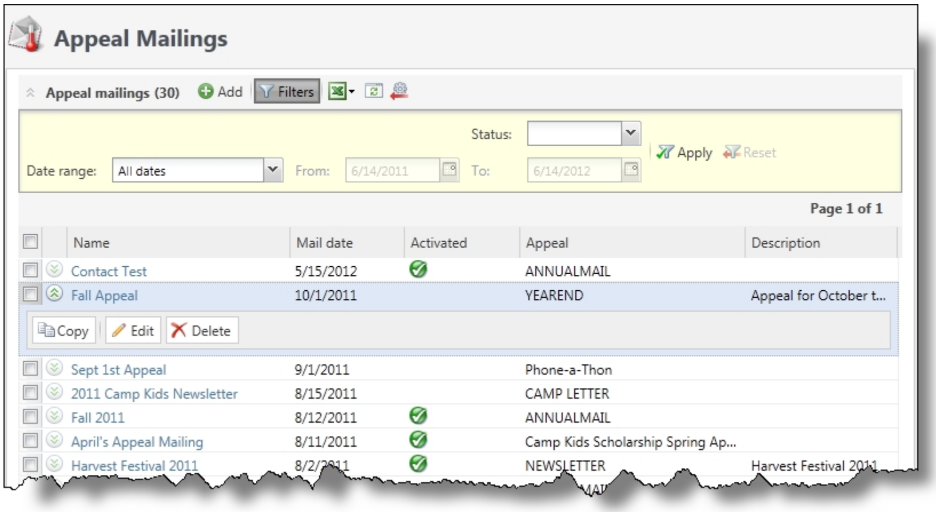
1. From *Marketing and Communications*, click **Planning calendar**. The Planning calendar page appears.
2. On the calendar, select a mailing and click **Edit**. The Edit appeal mailing screen appears. The items on this screen are the same as on the Add an appeal mailing screen. For a detailed explanation of the options, see Add Appeal Mailings to the Organization Calendar on page 59.

Note: To view appeal mailings on the calendar, under **Filters**, you must select **Appeal mailings**.

3. Edit the information as necessary.
4. Click **Save**. You return to the Planning calendar page.

Manage Appeal Mailings

To reach the goals of your fundraising efforts, you can create mailings for the appeals used in support of those efforts. You can add multiple mailings to support your appeals. When you add a mailing, you specify its universe, or the constituents eligible to receive the mailing. You can base the universe on a specific selection of constituents. To view and manage the appeal mailings your organization uses, from *Marketing and Communications*, click **Appeal mailings**. The Appeal Mailings page appears.



Under **Appeal mailings**, you can view the mailings your organization uses to request donations from your constituents. For each mailing, you can view its name and description, mail date, and activation status. You can also view the appeal associated with each mailing. To update the information in the grid, click **Refresh List**. The **Activated** column displays a green checkmark for appeal mailings that have completed their most recent process. For appeal mailings that have not run or are in process, the **Activated** field is blank.

You can select whether to display only mailings with a specific status or mail date. You can also select whether to display mailings that do not have a mail date assigned. To filter the grid, click **Filters**, select the criteria of the mailings to view, and click **Apply**. To remove the filter, click **Reset**.

To view additional information about an appeal mailing, click its name in the grid. The record of the mailing appears. On the record, you can view summary information about the mailing, such as its mail date, processing options, and anticipated recipient count and net revenue. You can also manage information about the mailing such as its recipients and letters. For information about the items on the record, see Appeal Mailing Record on page 73.

From the grid, you can also add and manage appeal mailings as necessary.

Add Appeal Mailings

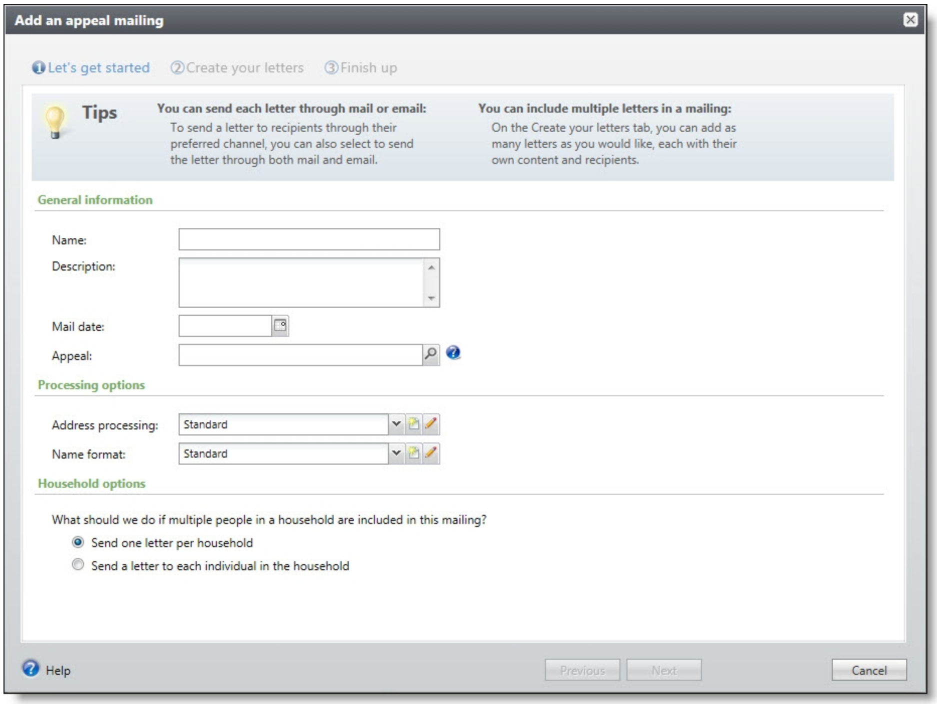
You can add multiple mailings to send through mail or email in support of an appeal. You can add an appeal mailing from the Appeal Mailings page or the Mailings tab on an appeal record.

When you add a mailing, you can base its recipients on selections that the program automatically provides based on constituency. You can also merge two such selections to create a new selection of constituents to include in the mailing. As you set up a mailing, you can specify the solicit codes or selections to use to exclude constituents from the mailing as well as the addresses, name formats, and packages to use.

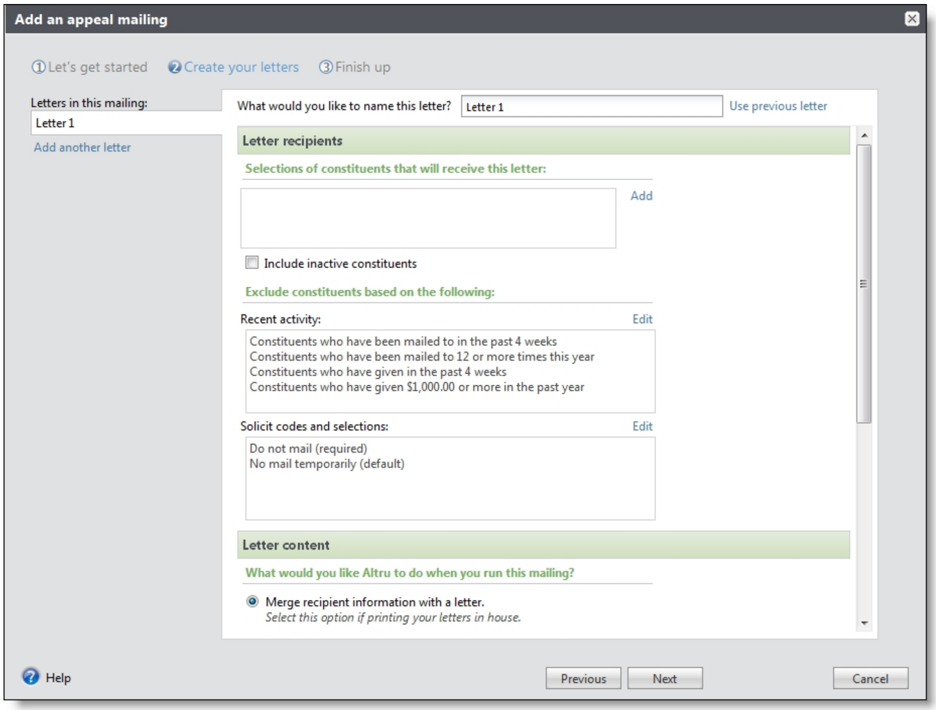
Add an appeal mailing

1. From *Marketing and Communications*, click **Appeal mailings**. The Appeal Mailings page appears.

2. Under **Appeal mailings**, click **Add**. The Add an appeal mailing screen appears. For information about the items on this screen, see Add an Appeal Mailing Screen on page 66.



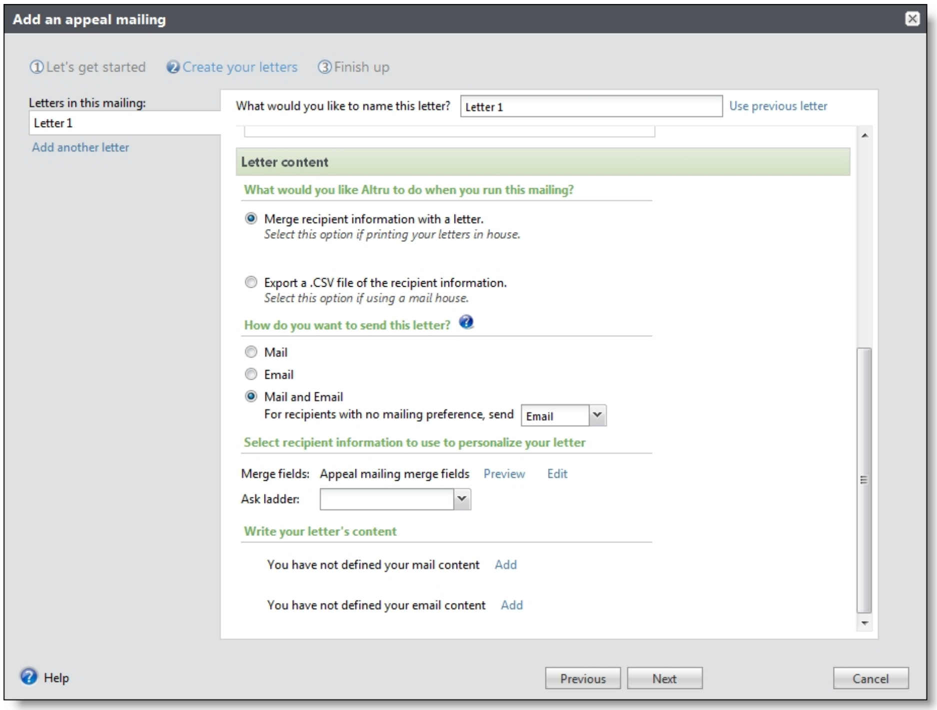
3. Under **General information**, enter a unique name and description to help identify the mailing.
4. In the **Mail date** field, select the date you plan to send the mailing to its recipients.
5. When you add a mailing from the Appeal Mailings page, the **Appeal** field appears. Search for and select the appeal that the mailing supports, or add the appeal if necessary.
6. In the **Processing options** field, select the address processing option to use with the constituent addresses included in the mailing.
7. In the **Name format** field, select the option to use to determine the addressees and salutations to use with the constituents included in the mailing.
8. Under **Household options**, select whether to send only one letter to a household with multiple recipients or to send a letter to each applicable member of the household.
9. Click **Next**. The Create your letters options appear.



10. Select whether to use a new or existing letter with the mailing.
   - To create a new letter, enter a unique name to help identify the letter.
   - To use an existing letter, click **Use previous letter** and search for and select the letter to use.
11. Under **Letter recipients**, the selections of constituents to receive the selected letter appear. For a new letter, click **Add** and select its recipients. To adjust the recipients for an existing letter, click **Edit**. For information about how to select recipients for a letter, see Select Recipients for a Communication on page 120.
12. The program automatically excludes deceased constituents from the mailing. Select whether to include inactive constituents, such as to engage with lapsed donors.
13. Under **Exclude constituents based on the following**, the default communication exclusions for your organization appear. Edit the exclusion criteria for the letter as necessary.

Note: When you edit the exclusion criteria, you edit the exclusions for the appeal mailing letter only. For information about how to edit the communication exclusions for your organization, see Default Communication Exclusions on page 24.

   - To edit the criteria of the recipients excluded based on communication and revenue activity, click **Edit** for **Recent activity**. For information about how to edit exclusions based on recent activity, see Edit Recent Activity Exclusions on page 121.
   - To edit the criteria of the recipients excluded based on solicit codes or constituent selection, click **Edit** for **Solicit codes and selections**. For information about how to edit exclusions based on solicit codes or selections, see Edit Solicit Code and Selection Exclusions on page 122.
14. Scroll down to view the **Letter content** options.



15. Select whether to merge the mailing's recipient information with a letter or export the recipient information as a comma-separated values (*.CSV) file.

   - If you print your letters in-house, select **Merge recipient information with a letter**. When you select this option, ***Altru*** merges the recipients you selected for the letter with the letter content you create in the HTML Content Editor, such as to fill the merge fields used in the letter with information about each constituent. After you run the mailing, a Microsoft *Word* document is created that contains the letter content for each recipient that you can then print and send through mail. If your mailing contains multiple letters, a .ZIP file is created that contains a Microsoft *Word* document for each letter.

   When you select this option, ***Altru*** also generates a (*.CSV) file of recipient information along with your merged content.

   - If you use a mail house for the mailing, or want to write your letters with another program such as Microsoft *Word*, select **Export a .CSV file of the recipient information**. When you select this option, ***Altru*** generates a Comma Separated Value (CSV) file of your recipient information, merge fields, and ask ladder that you can then send to a mail house to create the mailing, or manually export to Microsoft *Word* to create the mailing yourself.

16. If you select **Merge recipient information with a letter**, select whether to send the letter through the mail, email, or both.

   If you select **Mail and Email**, recipients receive the letter through a channel based on their communication preferences. Select the channel to use for constituents with no selected communication preference.

17. Under **Select recipient information to use to personalize your letter**, select the merge fields and ask ladder to use with the letter.

Note: By default, the mailing uses merge fields commonly used for appeal mailings. To view a list of the merge fields included in the export definition, click **Preview**. To edit the merge fields included in the export definition, click **Edit**. When you edit merge fields, you cannot remove a merge field from the export definition that is being used in another letter. To remove the merge field, you must first remove it from the letter in which it is used.

Tip: When you start the mailing, the program automatically generates finder numbers for its recipients. To quickly identify constituents and the communication, include the finder number as a merge field in your letter content. For example, your content can include an ask for a donation and a return device that includes the finder number. When a constituent includes the return device with a donation and you enter the finder number when you add the payment, the program automatically associates the donation with the constituent and the communication.

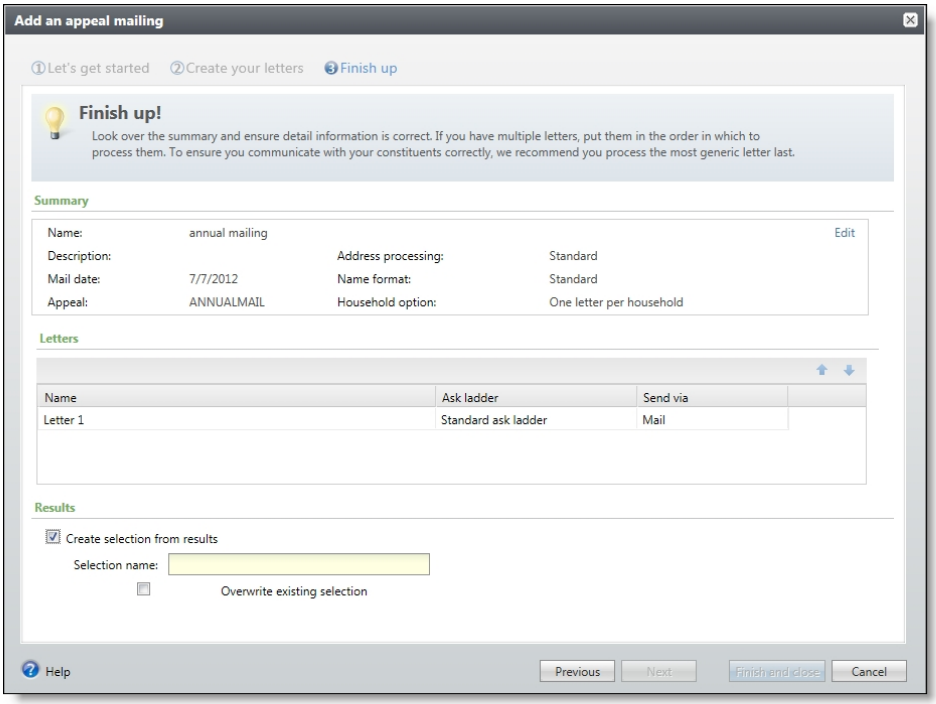
18. If you select **Merge recipient information with a letter**, click **Add** under **Write your letter's content**.The Add content screen appears so you can define the letter content to use for the selected channels. For information about how to define letter content, see Letter Content on page 123.

Tip: To view how content appears as mail output, click **Preview** to download a sample of the content as a Microsoft *Office* open XML document (*.docx) file. With this file, you can preview the content in a word processing program such as Microsoft *Word* or Google *Docs*. You cannot save changes made to the preview. If necessary, edit the content through the appeal mailing letter. To edit the content, click **Edit** on the Add communication letter screen. To remove the content entirely, such as to re-write it, click **Remove**.

To create another letter to use with the mailing, such as to target different recipients with specific content, click **Add another letter**.

Tip: The letters included in a mailing appears on the left side of the Create your letters tab. When you include multiple letters, arrange them in the order in which to generate them for the mailing. For example, arrange the letters so the program generates letters for constituents with large average gift amounts before it generates the letter used for all other constituents. To remove a letter from the mailing, click its red **X**.

19. After you add all letters to use with the mailing, click **Next**. The Finish up options appear.



20. Under **Summary**, the general information and processing options entered for the mailing appear. To edit information or an option, click **Edit**.
21. Under **Letters**, all letters selected for use with the mailing appear. If you add multiple letters, arrange them in the order in which to generate them for the mailing. For example, arrange the letters so the program generates letters for board members or constituents with large average gift amounts before the letter used for all other constituents. To adjust a letter's position in the order, select it in the grid and click the up or down arrow as necessary.
22. Under **Results**, select whether to create a constituent selection of the mailing's recipients. If you select **Create selection from results**, enter a name to help identify the selection and select whether overwrite an existing selection with the same name.
23. Click **Finish and close**. The record of the mailing appears. For information about the items on this record, see Appeal Mailing Record on page 73.

Add an Appeal Mailing Screen

The table below explains the items on the Add appeal mailing screen. For information about how to access this screen, see Add Appeal Mailings on page 61.

Screen Item	Description
Name	Enter a unique name to help identify the mailing.
Description	Enter a description to help identify the mailing, such as the appeal it supports or its recipients.
Mail date	Select the date to send the mailing to its recipients.

Screen Item	Description
Appeal	When you add an appeal mailing from the Appeal Mailings page, this field appears. Search for and select the appeal to support with the mailing, or add the appeal if necessary.
Address processing	Select the option to use to determine the address types to use with the constituents included in the mailing. From the field, you can add or edit an address processing option as necessary.
Name format	Select the option to use to determine the addressees and salutations to use with the constituents included in the mailing. From the field, you can add or edit a name format option as necessary.
Household options	Select whether to send only one letter to a household with multiple recipients or to send a letter to each applicable member of the household.
What would you like to name this letter?	To add a new letter to use with the appeal mailing, enter a unique name to help identify the letter. To use an existing letter with the appeal mailing, click **Use previous letter**. A search screen appears so you can find and select the letter to use.
Selections of constituents that will receive this letter	This box displays the constituent selections selected to receive the letter. To edit the selections for an existing letter or add selections for a new letter, click **Add**. For information about how to manage the constituent selections to receive a letter, see Select Recipients for a Communication on page 120.
Include inactive constituents	By default, the program excluded constituents marked as deceased or inactive from the letter recipients. To include inactive constituents, such as to target lapsed donors, select this checkbox.
Exclude constituents based on the following	From *Marketing and Communications*, your organization can configure the default exclusions for your communications. Under **Recent activity**, the default exclusions based on recent communication and revenue activity appear. Under **Solicit codes and selections**, the default exclusions based on solicit codes and constituent selections appear. Edit the exclusions as necessary for the letter. For information about how to edit recent activity exclusions, see Edit Recent Activity Exclusions on page 121. For information about how to edit solicit code and selection exclusions, see Edit Solicit Code and Selection Exclusions on page 122.

Screen Item	Description
What would you like Altru to do when you run this mailing?	Select whether to merge the recipient information with a letter or export the recipient information as a comma-separated values (*.CSV) file. If you print your letters in-house, select **Merge recipient information with a letter**. When you select this option, ***Altru*** automatically generates a (*.CSV) file of recipient information along with your merged content. Your browser downloads a .zip file that contains both the merged letters and the (*.CSV) file. If you use a mail house to create your letters, select **Export a .CSV file of the recipient information.**
How do you want to send this letter?	If you select **Merge recipient information with a letter**, select whether to send the letter through the mail, email, or both. If you select **Mail and Email**, the program sends the letter to recipients through the channel determined by the constituents' communication preferences.
For recipients with no mailing preference, send	If you select **Mail and Email**, this field is enabled. Select the channel to use for recipients with no selected communication preference.
Select recipient information to use to personalize your letter	Select the merge fields and ask ladder to use with the mailing. By default, the program uses merge fields commonly used with appeal mailings. To view a list of the merge fields included in the export definition, click **Preview**.To edit the merge fields, click **Edit** and manage the export definition. For information about how to manage export definitions, see the *Query and Export Guide*. In the **Ask ladder** field, select the ask ladder to determine the ask amount to include in a recipient's letter based on giving history. For information about ask ladders, see Ask Ladders on page 19.
Write your letter's content	To create the content for each selected channel, click **Add**. For information about how to define the letter content, see Letter Content on page 123. To view the letter's content as mail output, click **Preview**. The program downloads a sample of the content as a Microsoft *Office* open XML document (*.docx) file that you can preview in a word processing program such as Microsoft *Word* or Google *Docs*. You cannot save changes made to preview. To edit the content defined for a letter, click **Edit**. To delete the content, click **Remove**.
Summary of letter recipients	This section displays the selections of constituents to receive the letter and any exclusions based on solicit codes, selections, and recent communication or giving activity. To edit the letter recipients or exclusions, click **Edit**.

Screen Item	Description
Summary of letter content	This section displays the channels selected for the letter's content and whether you have defined content for each channel. From this section, you can add or preview content as necessary. To edit the letter's channels or content, click **Edit**.
Add another letter	To create or select multiple letters to use with an appeal mailing, click this button and enter the information about each mailing.
Summary	This section displays the **Let's get started** options selected for the mailing. To change an option, click **Edit**.
Letters	This section displays the letters selected for the mailing. If you add multiple letters, arrange them in the order in which to generate them for the mailing. For example, you can arrange the letters so the program generates letters for board members or constituents with large average gift amounts before the letter used for all other constituents. To adjust a letter's position in the order, select it in the grid and click the up or down arrow as necessary.
Create selection from results	Select whether to create a selection of the constituents that meet the selection and exclusions criteria and are included in the mailing. If you select this checkbox, enter a name for the new selection. To replace an existing selection of the same name with the new selection, select **Overwrite existing selection**.

Copy an Appeal Mailing

To add a new appeal mailing with many of the same parameters as an existing appeal mailing, you can copy the existing mailing to use as a starting point for the new mailing. When you copy an activated mailing, the new mailing is not activated. After you create a copy of a mailing, you can edit the new mailing to adjust its parameters as necessary.

- To copy an appeal mailing from the Appeal Mailings page, select the mailing and click **Copy**. When a message appears to ask whether to copy the mailing, click **Yes**. On the Appeal Mailings page, the new mailing appears with a name of "Copy of..."
- To copy an appeal mailing from the record of its appeal to create a new mailing for the same appeal, select the mailing to copy on the Mailings tab and click **Copy**. When a message appears to ask whether to copy the mailing, click **Yes**. On the Mailings tab, the new mailing appears with a name of "Copy of..."

To assign a new name to the mailing or adjust its parameters, edit the new mailing. For information about how to edit the mailing, see Edit an Appeal Mailing on page 70.

Edit an Appeal Mailing

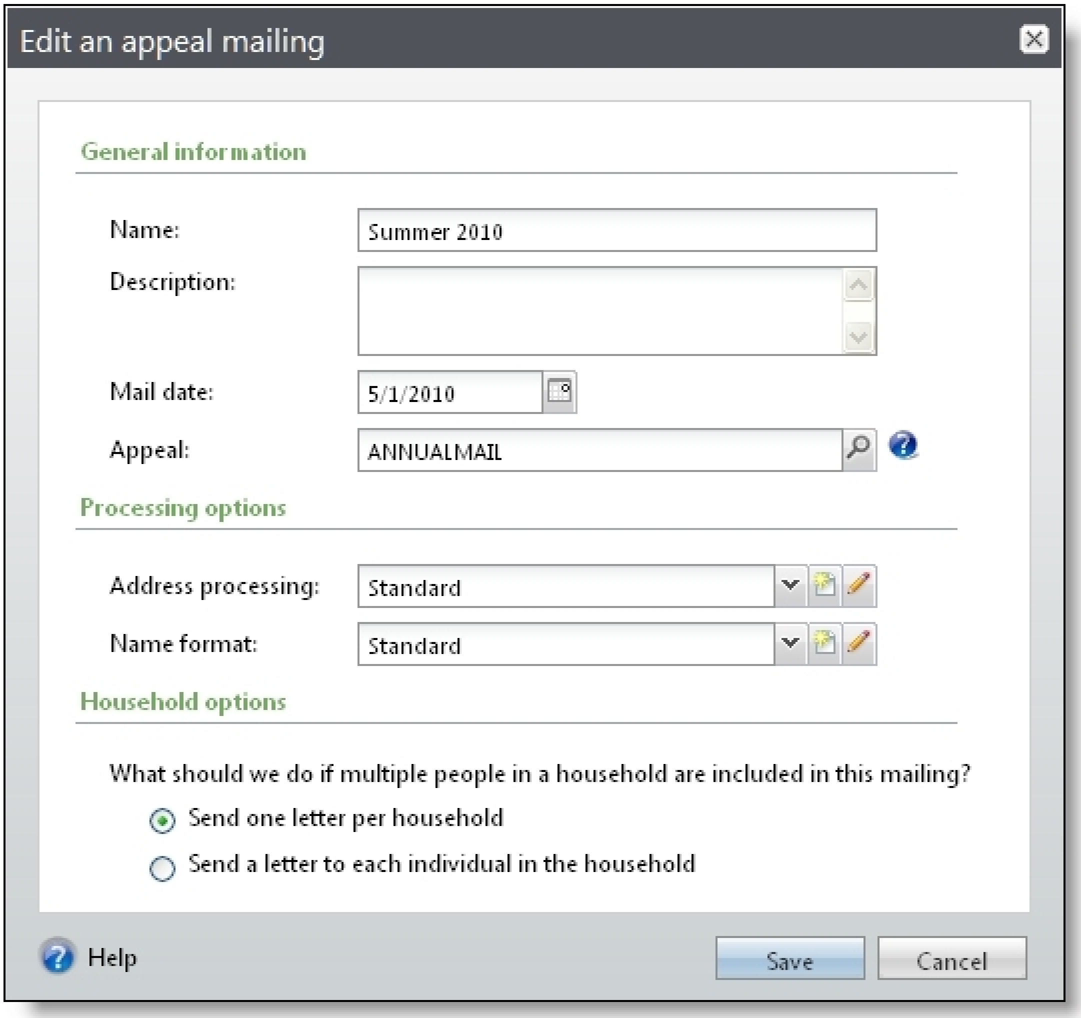
After you add an appeal mailing, you can edit its general information and options as necessary. You can edit an appeal mailing from its record, from the Appeal Mailings page, or from the record of an appeal.

Warning: When you edit an activated mailing, the program automatically removes the mailing from the history of its recipients. To retain the mailing in recipients' history, you can copy the mailing and edit the new mailing as necessary. For information about how to copy a mailing, see Copy an Appeal Mailing on page 69.

Edit an appeal mailing

1. From *Marketing and Communications*, click **Appeal mailings**. The Appeal Mailings page appears.
2. Under **Appeal mailings**, select a mailing and click **Edit**. The Edit an appeal mailing screen appears.

Note: To edit an appeal mailing from its record, click **Edit mailing** under **Tasks**.



3. Make changes as necessary. The items on this screen are the same as the Let's get started options on the Add appeal mailing screen. For a detailed explanation of the options, see Add an Appeal Mailing Screen on page 66.
4. Click **Save**. You return to the Appeal Mailings page.

Delete an Appeal Mailing

After you add an appeal mailing, you can delete it as necessary. When you delete a mailing, you completely remove it and its history from the database.

Note: Appeals can only be deleted individually and cannot be globally deleted.

- To delete a mailing from the Appeal Mailings page or from the Mailings tab on an appeal record, select the mailing to delete and click **Delete**. A confirmation message appears to ask whether to delete the mailing. To delete the mailing, click **Yes**.
- To delete a mailing from its own record, and click **Delete mailing** under **Tasks**. A message appears to ask whether to delete the mailing. To delete the mailing, click **Yes**.

Default Appeal Mailing Merge Fields

When you create letters for appeal mailings, you can use merge fields to personalize the content with details specific to the constituent, their giving history, and the ask amount. The table below explains the default merge fields for appeal mailings.

Merge field	Description
Finder number (Finder number)	Displays the finder number for the recipient. Finder numbers are assigned to each name on a recipient list and help speed the data entry of responses to an appeal. They also match gifts to marketing efforts, to enable tracking and reporting on marketing effort performance.
Ask 1 (Ask amount)	Displays the ask amount in dollars from the ask ladder associated with the appeal mailing. You can use ask amounts to provide a suggested gift amount based on the constituent's giving history.
Name (Full name)	Displays the full name as it appears on the constituent record.
Addressee (Addressee)	Displays the constituent's name based on the addressee name format. You set the addressee name format on the constituent record.
Contact addressee (Contact addressee)	The contact addressee is the contact person listed for an organization constituent. The merge field displays the contact's name based on the addressee name format. You set the addressee name format on the constituent record.
Salutation (Salutation)	Displays the salutation to use to greet the constituent in a communication. For example, Mr. Thomas Smith's salutation could be Tom or Thomas.
First name (First name)	Displays the first name as it appears on the constituent record.
Last name/Organization name (Last/Org name)	Displays the last name or organization name as it appears on the constituent record.
Address (Address)	Displays the address as it appears on the constituent record.
City (City)	Displays the city information for the constituent's primary address as it appears on the constituent record.
State abbreviation (State)	Displays the state information for the constituent's primary address as it appears on the constituent record.
ZIP (Postal code)	Displays ZIP Code information for the constituent's primary address as it appears on the constituent record.
Phone number (Phone number)	Displays the primary phone number information as it appears on the constituent record.

Merge field	Description
Email address (Email address)	Displays the primary email address information as it appears on the constituent record.
System record ID (CONSTITUENTID)	Displays the record ID for the constituent. Constituents are assigned unique system record IDs when you add them to your database.
Last payment date (Last payment date)	Displays the date of the last payment the constituent submitted your organization.
Last payment amount (Last payment amount)	Displays the amount of the last payment the constituent gave your organization.
Designation list (Designations)	Displays the designations associated with the constituent's last payment.
Check number (Check number)	Displays the check number for the last revenue transaction.
Credit type (Credit type)	Displays the credit card type for the last revenue transaction from the constituent.
Reference (Reference)	Displays any additional information about the last revenue transaction from the constituent as it appears in the **Reference** field on the payment record.
Membership level (Membership level)	If the constituent is a member, this merge field displays the current membership level.
Member since (Member since)	If the constituent is a member, this merge field displays the date on which the membership began.
Last renewed (Last renewed)	If the constituent is a member, this merge field displays the date on which the membership was last renewed.
Status (Status)	If the constituent is a member, or a previous member, this merge field displays membership status such as active or expired.
Expiration date (Membership expiration date)	If the constituent had a membership that expired, this merge field displays the date the membership expired.

Appeal Mailing Record

When you add an appeal mailing, the program automatically creates a record of the mailing. From the record, you can view summary information about the mailing, such as its package and mail date. To access the record of a mailing from the Appeal Mailings page, click its name under **Appeal mailings**.

From the summary section, you can update the mailing’s recipient count and calculate its estimated net revenue and expenses. After you create a mailing and configure its recipients, you can activate the mailing.

From the record of an appeal mailing, you can manage its letters and assigns tasks to staff members involved with the mailing. After you activate the mailing, you can also view and manage the response information and refresh process of the mailing. To track the effectiveness of the mailing, you can also add or edit key performance indicators (KPIs) associated with the mailing. To help you navigate through this information, the appeal mailing record includes multiple tabs.

Update the Recipient Count for an Appeal Mailing

On the record of an appeal mailing, the **Expected recipients** field displays the number of constituents estimated to receive the mailing, based on the constituent selections of its letters and selected exclusions and householding options. To refresh the recipient count of an unactivated mailing, such as to reflect changes in the constituents that meet the selection criteria of the letters, click **Update count**. We recommend you update the recipient count of a mailing before you calculate its estimated net revenue and expense amounts.

Note: After you activate a mailing, you cannot update its expected recipient count.

Calculate Revenue for Mailing Estimates and Expenses

After you add an appeal mailing, you can calculate its total cost and estimated net revenue. To calculate these amounts, the program uses the budget, estimated response rate, estimated average gift amount, letter costs, and expected recipient count for the mailing. To ensure accurate estimates, we recommend you update the recipient count before you calculate the revenue amounts.

The program uses the estimated response rate and average gift amount as the goals for the appeal mailing's key performance indicators (KPIs). For information about the mailing's KPIs, see Appeal Mailing Key Performance Indicators on page 81.

Calculate revenue for an appeal mailing

1. Access the record of the appeal mailing with the revenue to calculate.
2. To calculate the recipient count, click **Update count** next to the **Expected recipients** field.
3. Next to the **Estimated net revenue** field, click **Calculate revenue**. The Revenue calculator screen appears. For information about the items on this screen, see Revenue Calculator Screen on page 75.
4. To verify that the mailing is within budget, select the Expenses tab and adjust the amount budgeted for the mailing as necessary. The **Remainder** field displays the budget amount less the calculated total cost.
5. To estimate the net revenue for the mailing, select the Revenue calculation tab and adjust the estimated response rate and average gift amount as necessary. The **Estimated net revenue** field displays the estimated gross amount of the mailing less the calculated total cost.
6. Click **Save**. You return to the appeal mailing record.

Revenue Calculator Screen

The table below explains the items on the Revenue calculator screen. For information about how to access this screen, see Calculate Revenue for Mailing Estimates and Expenses on page 74.

Screen Item	Description
Total cost	This field displays the estimated cost of the mailing, based on the recipient count and the letter costs entered for the mailing.
Budget	This field displays the amount budgeted for the mailing. You enter this amount when you add or edit the mailing. Edit the amount as necessary.
Remainder	This field displays the budget amount less the total cost amount.
Estimated response rate	This field displays the percentage of recipients expected to respond to the mailing. You enter this estimate when you add or edit the mailing. Edit the estimate as necessary. The program uses this percentage as the goal for the mailing's Response Rate KPI.
Estimated average gift amount	This field displays the average gift amount expected in response to the mailing. You enter this estimate when you add or edit the mailing. Edit the estimate as necessary. The program uses this amount as the goal for mailing's Average Gift Amount KPI.
Previous years' averages from this appeal	To help with estimation, the actual response rates and average gift amounts for previous years' mailings associated with the same appeal appear.
Gross revenue	This field displays the estimated total amount expected in response to the mailing, based on the recipient count, estimated response rate, and estimated average gift amount.
Estimated net revenue	This field displays the gross revenue amount less the total cost amount.

Start an Appeal Mailing

After you create the mailing and configure its selection of recipients, you can start, or run, the mailing. To start the mailing, click **Run mailing** on its record. After you run the mailing, you can track information about the responses received from the mailing, including the number of responders, the total and average gift amounts, the response rate, and the return on investment (ROI) amounts and percentages.

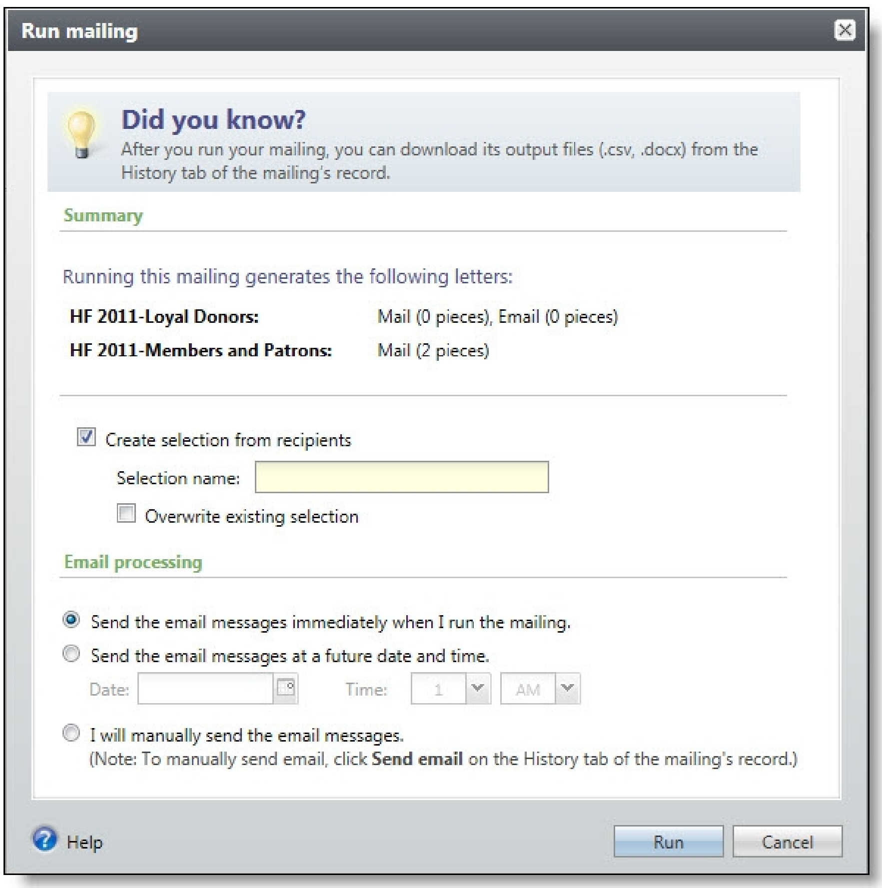
Because you can associate an appeal with multiple mailings, when you start a mailing, the program automatically assigns a "finder number" for each potential recipient in the mailing. The finder number identifies the mailing and recipient. For each mailing, the program stores a mailing ID and finder numbers to determine which mailing a donation is in response to, or whether it is an indirect response or unresolved response.

After you run the mailing, you can download its output files, such as letters to manage in Microsoft *Word*. You can also use analysis tools to determine the effectiveness of the mailing.

To run a mailing again, click **Rerun mailing** on its record.

Run an appeal mailing

1. Access the record of the appeal mailing to activate.
2. Click **Run mailing** or **Rerun mailing**. The Run mailing screen appears. For information about the items on this screen, see Run Mailing Screen on page 77.



3. Select whether to create a constituent selection of the mailing recipients. If you select **Create selection from recipients**, enter a unique name to help identify the selection.
4. For a mailing that contains email content, the **Email processing** options appear. Select when to send the appeal mailing to the email recipients. You can send the email messages at the time you run the mailing or at a future date and time, or you can manually send email at an undetermined date and time.
5. Click **Start**. The program activates the mailing.

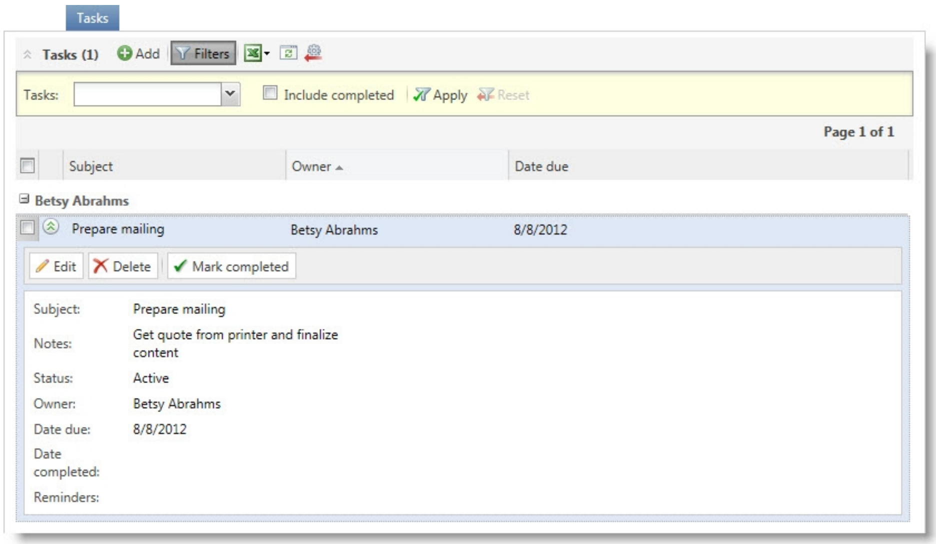
Run Mailing Screen

The table below explains the items on the Run mailing screen. For information about how to access this screen, see Start an Appeal Mailing on page 75.

Screen Item	Description
Summary	This section displays the letters included in the appeal mailing. For each letter, you can view the name and the amount generated for each channel.
Create selection from recipients and **Selection name**	To create a constituent selection of the recipients included in the mailing, select this checkbox and enter a unique name to help identify the selection. For example, you can create a constituent selection to include in a follow-up mailing.
Email processing	For a mailing that contains email content, this section appears. Select when to send the email content to its recipients. To send the content at the time you run the mailing, select **Send the email messages immediately when I run this mailing**. When you select this option and run the mailing, the program sends the messages when it next sends fundraising blasts to the Shared Services server hosted by *Blackbaud*. To send the content at a future date and time, select **Send the email messages at a future date and time** and enter when to send the messages. For example, if the appeal mailing includes both mail and email content, you may allow several days before you send email to better coincide with when mail recipients receive letters included in the mailing. To send the content at an undetermined date and time, select **I will manually send the email messages**. After you run the mailing, you can manually send its email content from the History tab of the mailing record. For information about how to send email, see Send Email Content for a Communication on page 136. For information about how to set up email services, see the *Administration Guide*.

Appeal Mailing Tasks

A mailing task is a job required in preparation for an appeal mailing. You can assign tasks to staff members involved with the mailing, such as to prepare the mailing for production. To view the tasks associated with a mailing, select the Tasks tab of the mailing record.



Under **Tasks**, you can view the tasks associated with the plan, grouped by owner. For each task, you can view its subject and due date. An exclamation point appears next to tasks that are past their due dates. Completed tasks appear with a checkmark. To update the information in the grid, click **Refresh List**.

To view additional information about a task, select its row in the grid. The row expands and displays information about the selected task, such as status and any additional notes. For a completed task, you can view its completion date.

You can select whether to display completed tasks or only tasks that are due to be completed by this week or this month. To filter the grid, click **Filters** on the action bar, select the criteria of the tasks to view, and click **Apply**. To remove the filter, click **Reset**.

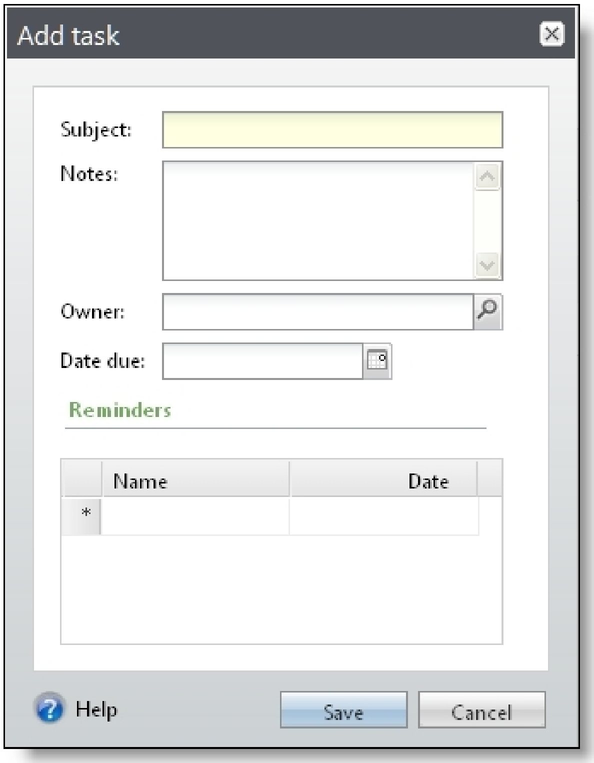
From the grid, you can add and manage the tasks of the appeal mailing.

Add Mailing Tasks

You can add mailing tasks from the record of an appeal mailing. When you add a task to a mailing, you can enter its subject and assign a due date. You can also configure email alerts to remind the task owner to complete the task.

Add a mailing task

1. On the appeal mailing record, select the Tasks tab.
2. Under **Tasks**, click **Add**. The Add task screen appears. For information about the items on this screen, see Add Task Screen on page 79.



3. In the **Subject** field, enter a unique name or description to help identify the task.
4. In the **Notes** field, enter any instruction or explanation for the task.
5. In the **Owner** field, search for and select the staff member to perform the task.
6. In the **Date due** field, select the deadline when the owner must complete the task.
7. To set up email alerts to remind the owner to complete the task, under **Reminders**, enter the name and date for each alert.
8. Click **Save**. You return to the record of the appeal mailing.

Add Task Screen

The table below explains the items on the Add task screen. For information about how to access this screen, see Add Mailing Tasks on page 78.

Screen Item	Description
Subject	Enter a unique name or description to identify the task, such as "Prepare mailing for production. If you configure a reminder for the task, this appears as the subject line of the email alert.
Notes	Enter any instruction, comments, or explanation for the task.
Owner	Search for and select the staff member to perform the task.

Screen Item	Description
Date due	For an active task, select the date when the owner must complete the task.
Status	When you edit the task, this field appears. Select whether the task is active or completed.
Date completed	For a completed task, select the date the owner completes the task.
Reminders	To set up email alerts to remind the owner to complete the task, enter the name and date for each alert. To send an email alert as a reminder, your organization must first configure a task reminder email alert from *Administration*. When you edit the task, the grid displays whether a reminder has been sent. The program automatically updates the **Sent** status when it sends the task reminder email alert.

Edit a Mailing Task

After you add a task to an appeal mailing, you can edit it as necessary. For example, you can delegate ownership of the task to another staff member or enter the date the owner completes the task. You can edit mailing tasks from the record of the appeal mailing.

Edit a mailing task

1. On the record of the appeal mailing, select a task and click **Edit**. The Edit mailing task screen appears.
2. Edit the information as necessary. The items on this screen are the same as on the Add task screen. For a detailed explanation of the options, see Add Task Screen on page 79.

   If you change the status of the task to Completed, select the date when the owner completed the task.
3. Click **Save**. You return to the record of the appeal mailing.

Delete a Mailing Task

You can delete a mailing task from an appeal mailing, such as if your organization no longer requires its completion. You can delete a mailing task from the record of the appeal mailing. Select the task to delete and click **Delete**. When a message appears to ask whether to delete the task, click **Yes**. You return to the record of the mailing or plan.

Mark a Mailing Task as Completed

When a task owner completes a task, you can mark the task as completed. You can mark a mailing task as completed from the record of the appeal mailing. Select the task to mark as completed and click **Mark completed**. You return to the record of the mailing or plan. In the grid, a checkmark appears next to the task to indicate its completed status.

To enter the date the owner completed the task, edit the task. For information about how to edit a task, see Edit a Mailing Task on page 80.

Appeal Mailing Key Performance Indicators

When you calculate revenue for an appeal mailing, the program automatically generates key performance indicators (KPIs) so you can track the effectiveness of the mailing. On the record of an activated mailing, the KPIs tab appears so you can add and manage the KPIs as necessary.

Tip: To add or edit KPIs associated with the mailing, you can also click **Manage KPIs** under **More information**.

After you activate a mailing, you can view the KPIs generated for the mailing from the KPI dashboard. To access the dashboard from the mailing record, click **KPI dashboard** under **More information**.

From the grid, you can add and manage the KPIs as necessary. For information about KPIs, see the *Reports and KPIs Guide*.

From the grid, you can add and manage the KPIs as necessary. For information about KPIs, see the *Reports and KPIs Guide*.

Appeal Reports

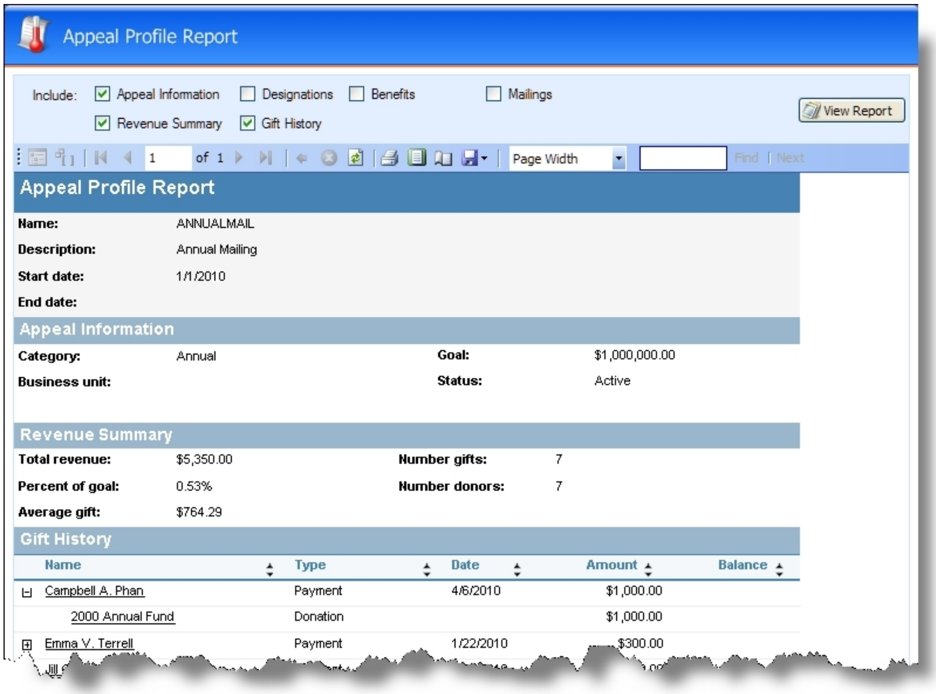
Appeal reports help you evaluate the performance of your efforts to communicate with your constituents to raise funds. You can generate and view several reports to determine and compare the effectiveness of your appeals, appeal mailings, and communication plans.

Appeal Profile Report

The Appeal Profile report shows information about an appeal such as designations, benefits, associated mailings, and revenue information. To run the report from *Marketing and Communications* or an appeal record, click **Appeal profile** under **Reports**. When you run the report from *Marketing and Communications*, you must search for and select the appeal for which to generate the report. After you select the appeal, the Appeal Profile page appears.

Note: To access the Appeal Profile report from *Analysis*, click **Appeal reports**. On the Appeal reports page, click **Appeal profile**.

To run the report, select the type of information to include and click **View Report** in the parameter area.



If you select **Revenue Summary**, the report displays the total amount of revenue, the total number of gifts, and the average gift amount received in response to the appeal.

If you select **Gift History**, the payments associated with the appeal and applied toward donations, pledge installments, and recurring gift payments appear. For each payment, you can view the constituent, date, and amount associated the revenue. To view the applications of a payment, click the plus sign (+). For each application, you can view the designation and amount associated with the revenue.

Note: Under **Revenue Summary**, the **Total revenue** field displays the total amount of all revenue transactions associated with the appeal. Under **Gift History**, the **Amount** column displays only the amount of each transaction applied toward donations, pledge installments, or recurring gift payment. Therefore, the sum of the amounts under **Gift History** may not equal the total revenue amount.

You can print the report or export it in several different formats.

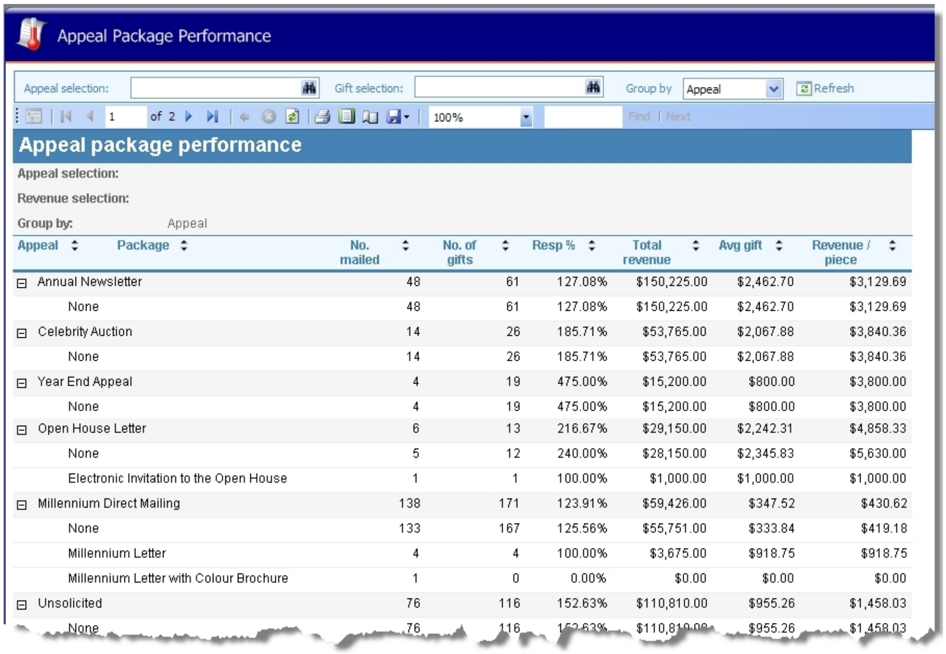
Appeal Package Performance Report

The appeal package performance report includes performance statistics for appeal packages including the number of pieces mailed, number of gifts received, response percentage, total revenue, average gift, and revenue per piece.

Note: The appeal must be specified on the Marketing tab of the gift payment to be included in the report.

To run the report from *Analysis*, click **Appeal reports**. On the Appeal reports page, click **Appeal package performance**. The Appeal Package Performance page appears. In the **Appeal selection** and

Gift selection fields, select which appeal and gift selections to include in the report and click **Refresh**. You can group the results by appeals or packages.



Appeal	Package	No. mailed	No. of gifts	Resp %	Total revenue	Avg gift	Revenue / piece
Annual Newsletter		48	61	127.08%	$150,225.00	$2,462.70	$3,129.69
	None	48	61	127.08%	$150,225.00	$2,462.70	$3,129.69
Celebrity Auction		14	26	185.71%	$53,765.00	$2,067.88	$3,840.36
	None	14	26	185.71%	$53,765.00	$2,067.88	$3,840.36
Year End Appeal		4	19	475.00%	$15,200.00	$800.00	$3,800.00
	None	4	19	475.00%	$15,200.00	$800.00	$3,800.00
Open House Letter		6	13	216.67%	$29,150.00	$2,242.31	$4,858.33
	None	5	12	240.00%	$28,150.00	$2,345.83	$5,630.00
	Electronic Invitation to the Open House	1	1	100.00%	$1,000.00	$1,000.00	$1,000.00
Millennium Direct Mailing		138	171	123.91%	$59,426.00	$347.52	$430.62
	None	133	167	125.56%	$55,751.00	$333.84	$419.18
	Millennium Letter	4	4	100.00%	$3,675.00	$918.75	$918.75
	Millennium Letter with Colour Brochure	1	0	0.00%	$0.00	$0.00	$0.00
Unsolicited		76	116	152.63%	$110,810.00	$955.26	$1,458.03
	None	76	116	[illegible]	[illegible]	$955.26	$1,458.03

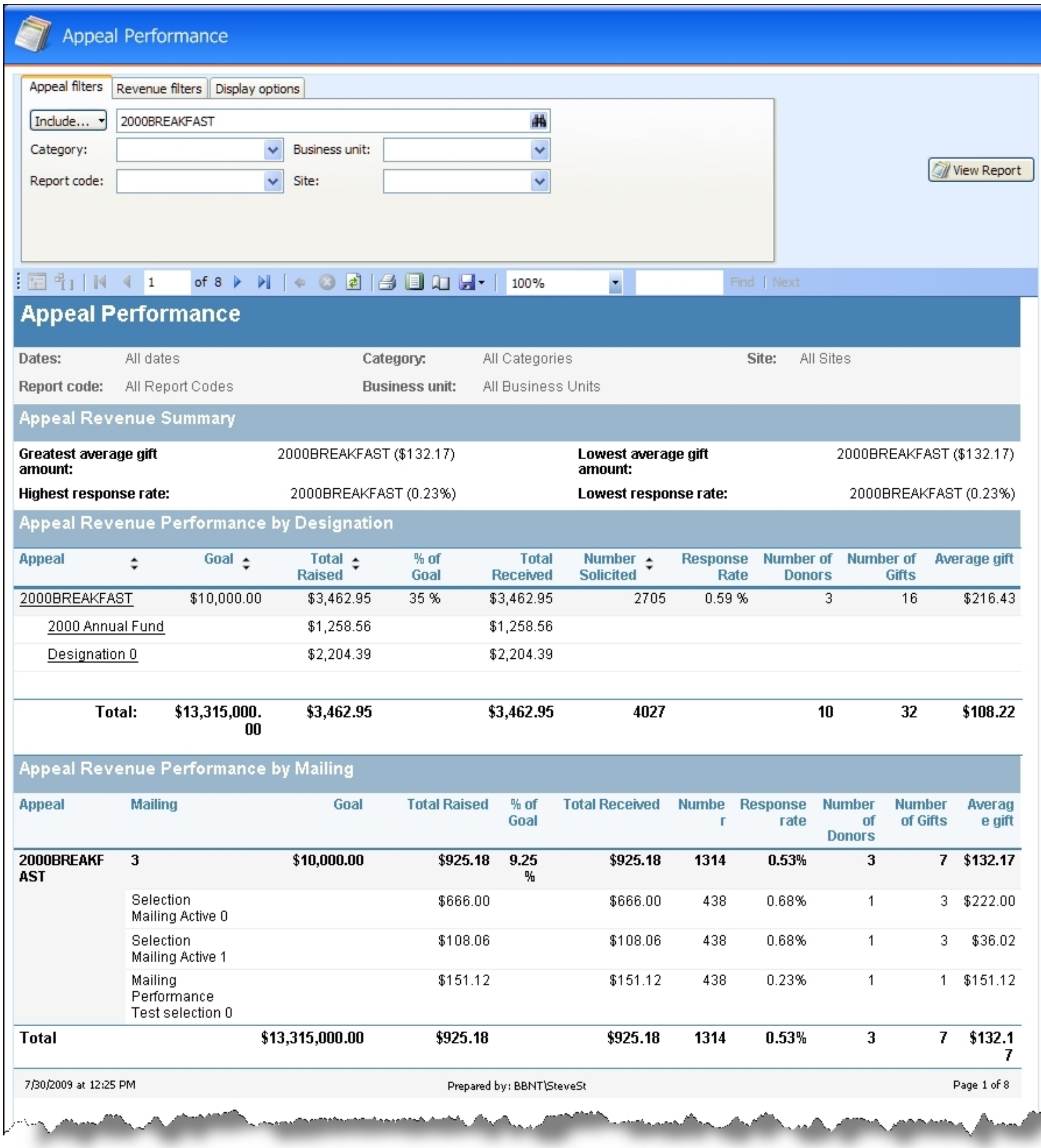
You can print the report or export it in several different formats.

Appeal Performance Report

The Appeal Performance report provides information about the effectiveness of your appeals. When you generate the report, you can select to view information about a single appeal or multiple appeals. You can filter the appeals and revenue information included in the report by various criteria, such as the appeal's category or the date of the revenue transactions.

Note: The Appeal Performance Report includes recurring gift revenue. The revenue counts toward the appeal on the recurring gift payment, not the appeal on the recurring gift.

You can also select to organize the results by the associated designations or the revenue generated by each mailing. You can select whether to view cost information about the appeals or generate charts to represent the comparison of multiple appeals. To access the Appeal Performance report from *Marketing and Communications*, click **Appeal performance** under **Reports**. To run the report, select the criteria of the appeals to include in the report and the information to generate and click **View Report**.



- On the Appeal filters tab, select the appeals to include in the report. You can include all appeals, an appeal selection created in *Query*, or a specific appeal. If you select Appeal selection or Specific appeal, click the binoculars to search for and select the appeal or selection of appeals to include. You can also select the criteria of the selected appeals to include, such as category or report code.

Note: To compare the effectiveness of only two appeals, you can also use the Appeal Period Comparison Report. With this report, you can compare two separate appeals during like time periods, such as by quarter of their respective fiscal years. For information about this report, see Appeal Period Comparison Report on page 86.

- To filter the revenue associated with the appeals included in the report by the dates of the transactions, select the Revenue filters tab and enter the start and end dates of the transactions to include.
- On the Display options tab, select whether to display the revenue associated with each designation or mailing of the selected appeals. You can also select whether to display cost information for the appeals and generate charts to represent the comparison of multiple appeals.

Under **Appeal Revenue Summary**, the report displays which of the selected appeals have the highest and lowest response rates and average gifts.

Under **Appeal Revenue Performance**, the report provides a detailed breakdown of the revenue performance of each selected appeal, including the goal amount, the total raised toward the goal, the total received toward the appeal, the number of constituents solicited through the appeal, and the response rate. If you select **Break down by designation**, you can also view the performance of each designation associated with the appeals.

If you select **Break down revenue by mailing**, the report provides a detailed breakdown of the revenue performance of each selected appeal by mailing, including the total received as a response to each mailing and the response rate and average gift amount for each mailing.

If you select **Display appeal cost**, the report displays a summary of the total cost of the selected appeals. Under **Appeal Cost Summary**, you can view highlights of positive performance and potentially negative performance of the selected appeals with revenue transactions, such as based on return on investment (ROI). Under **Appeal Cost Performance**, the report provides a detailed breakdown of the cost performance of each appeal with revenue transactions, including the number of mailings, total raised, cost, and profit.

If you select **Include charts**, the report provides graphs to represent the total raised toward the goal, average gift amount, and response rate of each appeal. If you select both **Include charts** and **Display appeal cost**, the report provides graphs to represent information such as the ROI percentage and total raised compared to total cost of each appeal with revenue transactions. With these graphs, you can quickly compare the effectiveness of multiple appeals.

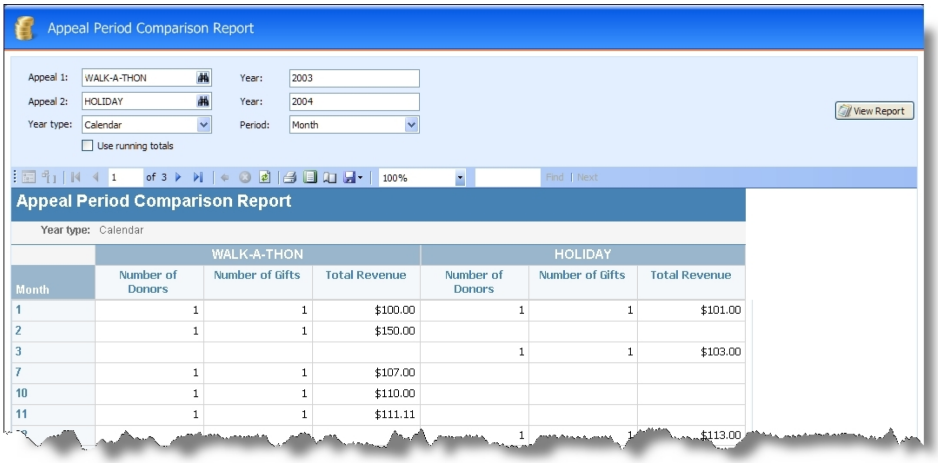
You can print the report or export it in several different formats.

Appeal Period Comparison Report

The Appeal Period Comparison report compares the effectiveness of two separate appeals during like time periods. For example, you can use this report to compare two separate annual appeals by quarter of their respective fiscal years. The report includes all pledges and all payments toward donations and recurring gifts received for each appeal during their respective years. Each appeal must have an established start date. The report does not include any revenue received after the first year of an appeal.

When you generate the report, you can select whether to base the comparison on the calendar or fiscal year and by which interval. You can also select whether the charts generated by the report display running totals during the selected time period of the appeals. To access the Appeal Period Comparison report from *Analysis*, click **Appeal reports**. On the Appeal reports page, click **Appeal period comparison**. The Appeal Period Comparison Report page appears.

Note: To compare the effectiveness of multiple appeals, you can also use the Appeal Performance Report. You can include all appeals or a selection of appeals in this report, such as to compare overall effectiveness. For information about this report, see Appeal Performance Report on page 84.



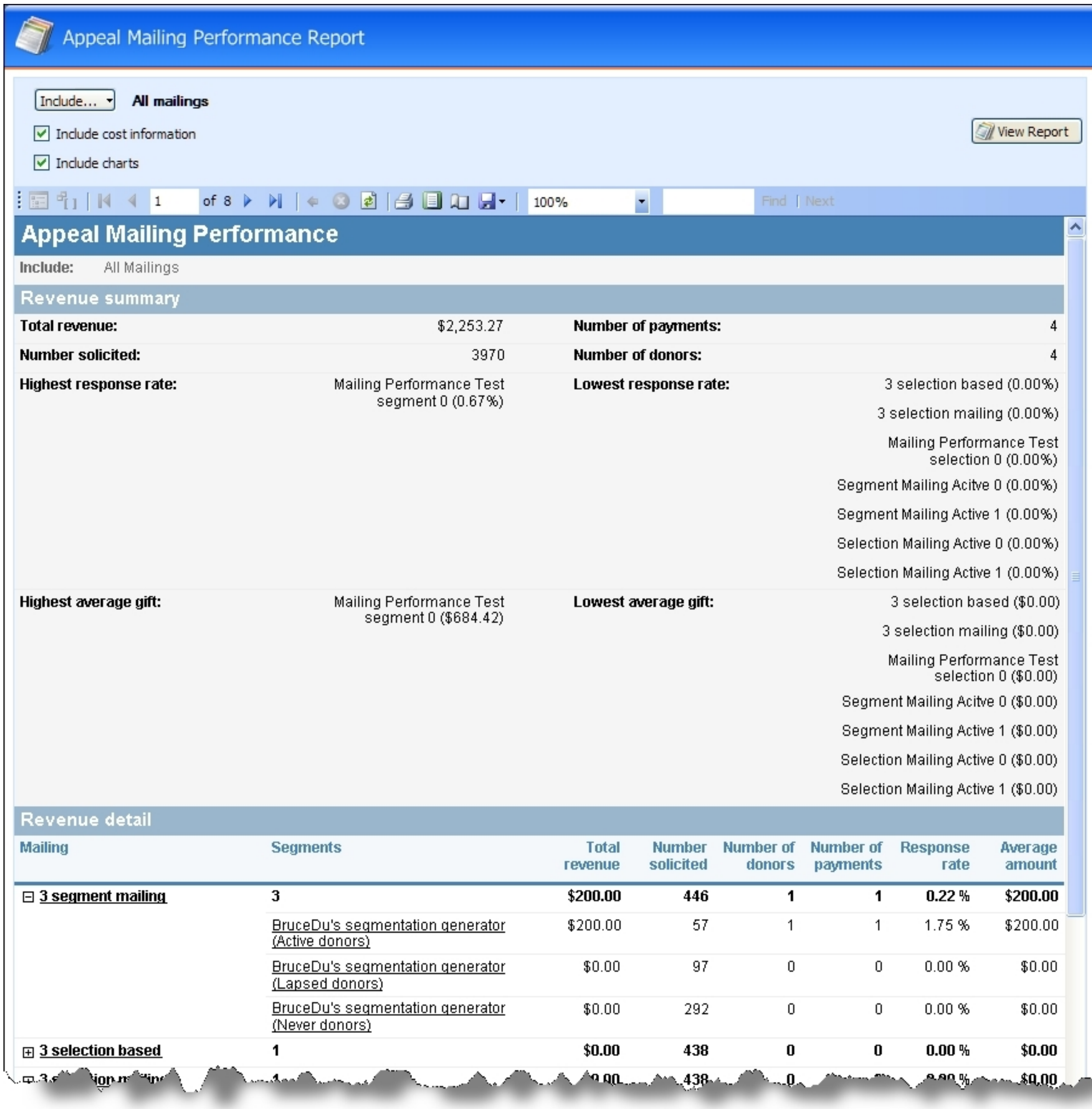
To run the report, select the appeals, years, and time period to compare and click **View Report**. The report compares the performance of the selected appeals over one year from their respective start dates. The comparison displays the total revenue received and the number of donors and gifts received for each appeal at the selected intervals.

The report also generates charts to quickly compare the number of gifts and total revenue received for each appeal during each interval. If you select **Use running totals**, the charts display graphs to represent the totals over the selected intervals.

You can print the report or export it in several different formats.

Appeal Mailing Performance Report

The Appeal Mailing Performance report provides information about the effectiveness of your activated appeal mailings. When you generate the report, you can select to view information about a single mailing or multiple mailings.You can select whether to view cost information about the mailings or generate charts to represent the comparison of multiple mailings. To access the Appeal Mailing Performance report from the record of an appeal mailing, click **Appeal mailing performance** under **Reports**. To run the report, select the appeal mailings to include in the report and the information to generate and click **View Report**.



Under **Revenue summary**, the report displays the selected mailings that have the highest and lowest response rates and average gifts. Under **Revenue detail**, the report provides a detailed breakdown of the performance of each mailing, including the total revenue raised, total number solicited, total number of donors and payments, response rate, and average donation amount.

If you select **Include cost information**, the report displays which of the selected mailings have the highest and lowest return on investment (ROI). Under **Cost summary**, the report provides the cost performance of the mailings, including the total raised, cost, profit, and budget remaining. Under **Cost detail**, the report provides a detailed breakdown of the cost performance of each mailing, including the total revenue raised, cost, profit, and budget remaining.

If you select **Include charts**, the report provides graphs to represent the total raised, average gift amount, and response rate of each mailing. If you select both **Include cost information** and **Include charts**, the report provides graphs to represent the ROI percentage and total raised compared to total cost of each mailing. With these graphs, you can quickly compare the effectiveness of multiple mailings.

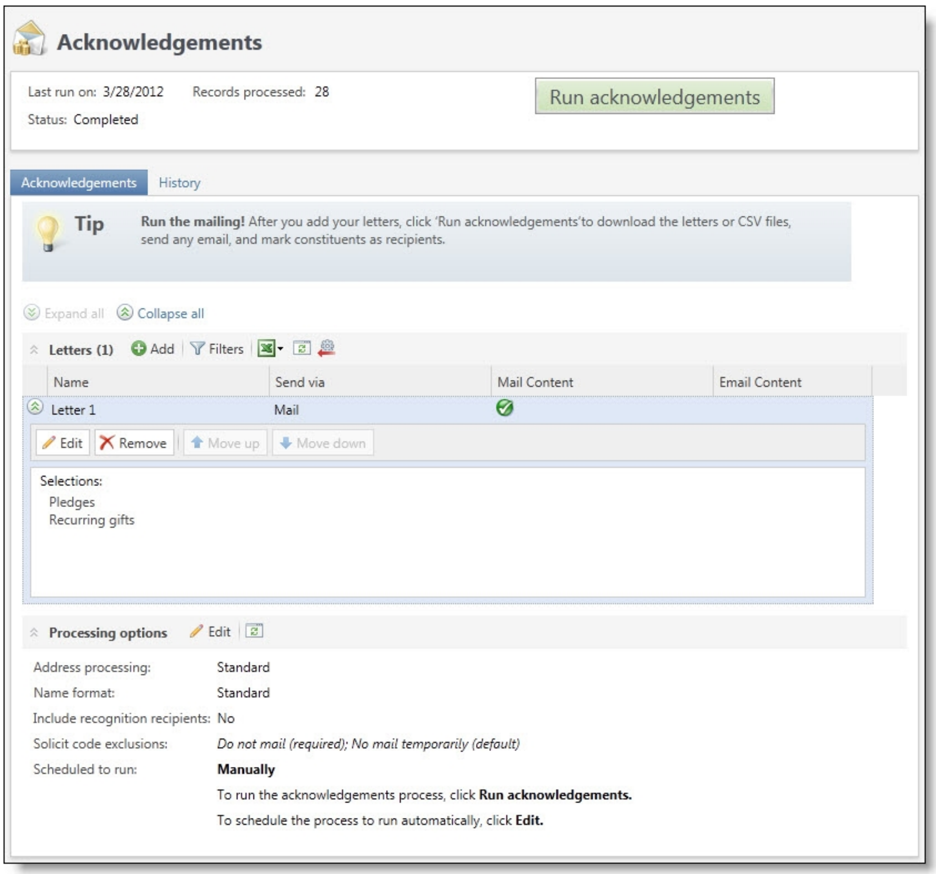
You can print the report or export it in several different formats.

Donor Relation Communications

Communication with your donors is important to cultivate constituent relationships and increase charitable giving. When your organization receives a charitable transaction such as a donation or pledge installment, you should send an acknowledgement to thank the constituent for the revenue or notify an acknowledgee of revenue donated toward a constituent tribute. To help increase charitable revenue and prevent pledge write-offs, you can also send reminders to donors when they miss due dates for commitments such as pledges. From *Marketing and Communications*, you can manage processes to automatically generate these communications based on revenue activity.

Revenue Acknowledgements

When your organization receives revenue such as a payment toward a donation or pledge installment, you should send an acknowledgement to thank the constituent for the transaction. From *Marketing and Communications*, you can manage a process to send acknowledgement letters to constituents based on revenue transactions. You can use multiple letters with the process, such as to target constituents differently based on revenue amount or activity. To confirm that you received the revenue and help constituents track donations for tax purposes, we recommend that your letters also include receipt information.To configure and manage the acknowledgements process and its acknowledgement letters from *Marketing and Communications*, click **Acknowledgements**.



Note: From *Revenue*, your organization can configure a default revenue filter to determine the types of transactions and applications to consider as revenue activity for acknowledgements.

On the Acknowledgements page, you can manage the process and its letters and options. You can also view and manage the history of the process and its output. You can also manually run the process as necessary.

Note: From the Acknowledgements page, you can access revenue acknowledgement processes created before the Q3 2011 update, such as to copy existing letter content as you create new acknowledgement letters. To access these processes from the Acknowledgements page, click **Archived acknowledgements** under **Tasks**. For information about the archived processes, see Acknowledgement Tasks on page 221.

Revenue Acknowledgements Process Workflow

When your organization receives transaction such as a pledge or donation payment, you should send an acknowledgement to thank the constituent for the revenue. From *Marketing and Communications*, you can manage a process to send acknowledgement letters to constituents based on revenue transactions. To use the process effectively, you must perform several steps.

- ☐ From *Revenue*, configure the reporting filters to determine the types of transactions and applications your organization considers as revenue activity.
- ☐ From *Marketing and Communications*, create the name format option to use with the process. The name format option determines the addressees and salutations to use with constituents included in the process. You can use a standard option for use with all communications, or you can create an option for only acknowledgements. For information about how to configure name format options, see Name Format Options on page 33.
- ☐ Create the address processing option to use with the process. The address processing option determines which types of addresses to use with constituents included in the process. You can use a standard option for use with all communications, or you can create an option for only acknowledgements. For information about how to configure address processing options, see Address Processing Options on page 14.
- ☐ Configure the options for the acknowledgement process. When you configure the process, you select the default name format and addressing processing options to use and which constituents to exclude based on solicit code. You can also schedule when to run the process. For example, you can run the process daily to acknowledge revenue transactions added to the database each day. For information about how to configure the process options, see Edit Options for the Acknowledgements Process on page 96.
- ☐ Add the letters to use with the process. You can use multiple letters with the process, such as to target constituents differently based on revenue amount or activity. When you add a letter, you can create content for each channel of mail or email and select the type of revenue transactions to acknowledge with the letter. After you add your acknowledgement and receipting letters, arrange them in the order in which to generate for constituents. For example, you can generate letters for major givers and board members before you generate the letter used to acknowledge all other transactions. For information about how to add and arrange acknowledgements and receipting letters, see Acknowledgement Letters on page 93.
- ☐ From *Revenue*, when you add a revenue transaction such as a payment or pledge, select whether to acknowledge the transaction. To exclude a transaction from the process, select **Do not acknowledge**.
- ☐ From *Marketing and Communications*, to generate letters to send to thank donors for recent transactions, run the acknowledgement process. When you set up the process, you can select to run the process automatically at a scheduled daily or weekly interval. For information about how to run the process, see Start the Acknowledgement Process on page 98.

- To print and send the acknowledgement letters, generate a Microsoft *Word* document of the merged mail content. To send the merge information to a mail house, download the acknowledgement output as a comma-separated value (*.csv) file.

Acknowledgement Letters

On the Acknowledgements page, you can create and manage the letters used to acknowledge revenue transactions received from donors. You can use multiple letters with the process, such as to target constituents differently based on revenue amount or activity. On the Acknowledgements page, under **Letters**, the letters used with the acknowledgements process appear. From the grid, you can view and manage the letters used by the process.

Note: The order in which the letters appear under **Letters** determines the order in which the process generates them for donors. For example, you can arrange to letters so the process generates letters for major givers and board members before you generate the letter used to acknowledge all other transactions. To adjust a letter's position in the order, select it in the grid and click **Move up** or **Move down** as necessary.

For information about how to manage acknowledgement letters, see Manage Letters for a Communication on page 112.

Acknowledgement Letter Best Practices

When you create content for revenue acknowledgements, consider these best practices.

- Keep the letter short, with no more than four paragraphs. In addition, include a friendly postscript with timely information such as a holiday message, an upcoming opportunity to visit your organization, or the web addresses to online videos about your organization.
- Start the letter with an exciting lead sentence. Do not start with "Thank you for your gift of..."
- To personalize the acknowledgement with information about the donor, use merge fields such as name, revenue amount, and the applicable designation, appeal, or membership renewal. To help constituents track charitable giving for tax purposes, include all required tax-deductible related information and verbiage. Mention any benefits the donor receives in exchange for the transaction.
- Thank the donor for the transaction multiple times, and use the word "you" more frequently than "we" and "our." For a recurring gift or repeat donation, thank the donor for both the past and continued generosity. For a tribute or donation made on behalf of another constituent, thank the constituent who made the donation rather than the tributee. Include information about how the donations enable recent accomplishments.
- Do not use the acknowledgement to solicit for additional giving such as donations or recurring gifts.
- Inform the donor of when and how they will next hear from you.
- Include contact information for your organization such as a telephone number, email address, and website. For an email address, direct recipients to a live person rather than a generic inbox.
- Proofread your letter and read the content out loud.

- If possible, sign each printed acknowledgement by hand or determine a minimum amount of a transaction for which to sign by hand.

Default Acknowledgement Merge Fields

When you create letters for acknowledgements, you can use merge fields to personalize the content with details specific to the donor and revenue transaction. The table below explains the default merge fields for acknowledgements.

Merge field	Description
Finder number (Finder number)	Displays the finder number assigned to the recipient of the appeal mailing that generated the revenue transaction being acknowledged. Finder numbers are assigned to each recipient of an appeal mailing to help speed data entry of responses and match donations to help track and analyze the mailing's performance.
Name (Full name)	Displays the full name as it appears on the constituent record.
City (City)	Displays the city information for the donor's primary address as it appears on the constituent record.
ZIP (Postal code)	Displays ZIP Code information for the donor's primary address as it appears on the constituent record.
Email address (Email address)	Displays the primary email address information as it appears on the constituent record.
Phone number (Phone number)	Displays the primary phone number information as it appears on the constituent record.
First name (First name)	Displays the donor's first name as it appears on the constituent record.
Last name/Organization name (Last/Org name)	Displays the donor's last name or organization names as it appears on the constituent record.
System record ID (CONSTITUENTID)	Displays the record ID for the donor. Constituents are assigned unique system record IDs when you add them to your database.
Addressee (Addressee)	Displays the donor's name based on the addressee name format. You set the addressee name format on the constituent record.
Contact addressee (Contact addressee)	The contact addressee is the contact person listed for an organization constituent. The merge field displays the contact's name based on the addressee name format. You set the addressee name format on the constituent record.
Salutation (Salutation)	Displays the salutation to use with the donor. Salutations determine how you greet a constituent in a communication. For example, Mr. Thomas Smith's salutation could be Tom or Thomas.
State abbreviation (State)	Displays the state information for the donor's primary address as it appears on the constituent record.

Merge field	Description
Address (Address)	Displays the address as it appears on the constituent record.
Membership level (Membership level)	When you acknowledge a membership dues payment, this merge field displays the current level of the membership.
Member since (Member since)	When you acknowledge a membership dues payment, this merge field displays the date on which the membership began.
Last renewed (Last renewed on)	When you acknowledge a membership dues payment, this merge field displays the date on which the membership was last renewed.
Status (Membership status)	If the donor is a member, or a previous member, this merge field displays the membership status, such as active or expired.
Expiration date (Membership expiration date)	If the donor had a membership that expired, this merge field displays the date the membership expired.
Date (Donation date)	Displays the date the donor gave the revenue transaction to your organization.
Amount (Donation amount)	Displays the amount of the revenue transaction.
Appeal Name (Appeal name)	Displays the name of the appeal to which the revenue transaction is associated.
Designation list (Designations)	Displays the designations associated with the donor's last payment.
Check date (Check date)	Displays the date on which the check for the revenue transaction was written.
Check number (Check number)	Displays the check number for the revenue transaction.
Date added	Displays the date on which the revenue transaction was added to the database.
Appeal Description	Displays the description of the appeal associated with the revenue transaction.

Acknowledgements Process Options

From the Acknowledgements page, you can manage the process to send acknowledgement letters to constituents based on revenue transactions. On the Acknowledgements tab, you can manage the letters and options used with the process.

The order in which the letters appear in the grid determines the order in which the process generates them for constituents. To adjust a letter’s position in the order, select it in the grid and click the up or down arrow as necessary.

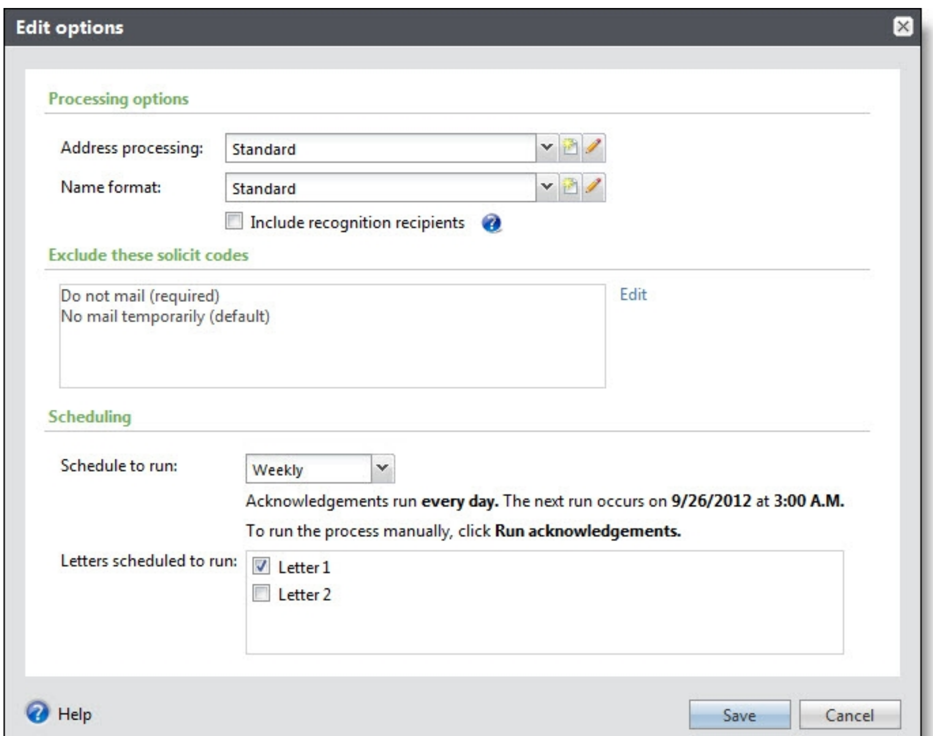
Under **Options**, you can view and configure the options configured for the process. For example, you can select whether to run the process on a daily or weekly basis and enter the information necessary to send acknowledgement letters as email messages. For information about how to configure the options, see Edit Options for the Acknowledgements Process on page 96.

Edit Options for the Acknowledgements Process

On the Acknowledgements page, you can manage the process to send acknowledgement letters to thank constituents for revenue transactions. On the Acknowledgements tab, under **Options**, you can configure the options for the process. When you configure the options, you select the default name format and addressing processing options to use and which constituents to exclude based on solicit code. You can also schedule when to run the process. For example, you can run the process daily to acknowledge revenue transactions added to the database each day.

Edit the acknowledgements process options

1. From *Marketing and Communications*, click **Acknowledgements**. The Acknowledgements page appears.
2. Select the Acknowledgements tab.
3. Under **Options**, click **Edit**. The Edit options screen appears.



4. In the **Address processing options** field, select the option to use to determine which types of addresses to use with constituents included in the process.
5. In the **Name format options** field, select the option to use to determine the addressees and salutations to use with constituents included in the process.

6. To send acknowledgements to constituents that receive recognition credit for revenue transactions included in the process, select **Include recognition recipients**.
7. Under **Exclude these solicit codes**, the default solicit code exclusions appear. To edit the solicit codes excluded from the process, such as to exclude additional solicit codes, click **Edit**. For information about how to edit solicit codes for a communication, see Edit Solicit Code and Selection Exclusions on page 122.

Note: For information about how to manage the default and required solicit codes for your organization's communications, see Solicit Codes on page 40.

Note: The process automatically excludes any transaction marked as **Do not acknowledge**.

8. Under **Scheduling**, select whether to run the process manually or automatically on a daily or weekly interval.
   - If you select Manually, you must run the process from the Acknowledgements page. For information about how to run the process, see Start the Acknowledgement Process on page 98.
   - If you select Daily, the process runs automatically every day at 3:00 A.M. If you have multiple letters in your Acknowledgements process, under **Letters scheduled to run**, you can select which letters to generate when your Acknowledgements are run.
   - If you select Weekly, the process runs automatically every Sunday at 3:00 A.M. If you have multiple letters in your Acknowledgements process, under **Letters scheduled to run**, you can select which letters to generate when your Acknowledgements are run.
9. Click **Save**. You return to the Acknowledgements page.

Acknowledgements Process History

To generate acknowledgment letters to thank constituents for revenue transactions, you can run the acknowledgements process manually or on a daily or weekly interval. From the History tab of the Acknowledgements page, you can view and manage the most recent and previous instances of the process.

Under **Recent status**, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

Under **History**, you view historical status record information about each instance of the process. The information in the grid include the status and date of the instance, the number of records processed, and the number of exceptions. To help reduce the amount of time it takes to find a process instance, you can filter the instances that appear in the grid by status. For example, to search for an instance that did not finish its operation, select to view only records with a status of Did not finish. To filter the records that appear in the grid, on the action bar, click **Filter**, select the status of the instances to view, and click **Apply**.

Under **Outputs**, you can view information about the output files generated by each instance of the process. In the grid, you can view details about each instance, such as who ran the process; its start time, end time, and duration; and the number of records included in the instance. From the grid, you can download and manage the output files of the instance.

For information about how to manage the outputs of the acknowledgements process, see Letter Output and History on page 136.

Start the Acknowledgement Process

Warning: Before you run the acknowledgement process, you must create its letters and configure its options as necessary. For information about the tasks to perform before you run the process, see Revenue Acknowledgements Process Workflow on page 92.

From *Marketing and Communications*, you can configure when to run the acknowledgments process. You can select whether to run the process manually or automatically at a scheduled daily or weekly interval. If you select to run the process on a daily basis, it runs every day at 3:00 A.M. If you select to run the process on a weekly basis, it runs every Sunday at 3:00 A.M. To run the process at any time, click **Run acknowledgements** on the Acknowledgements page.

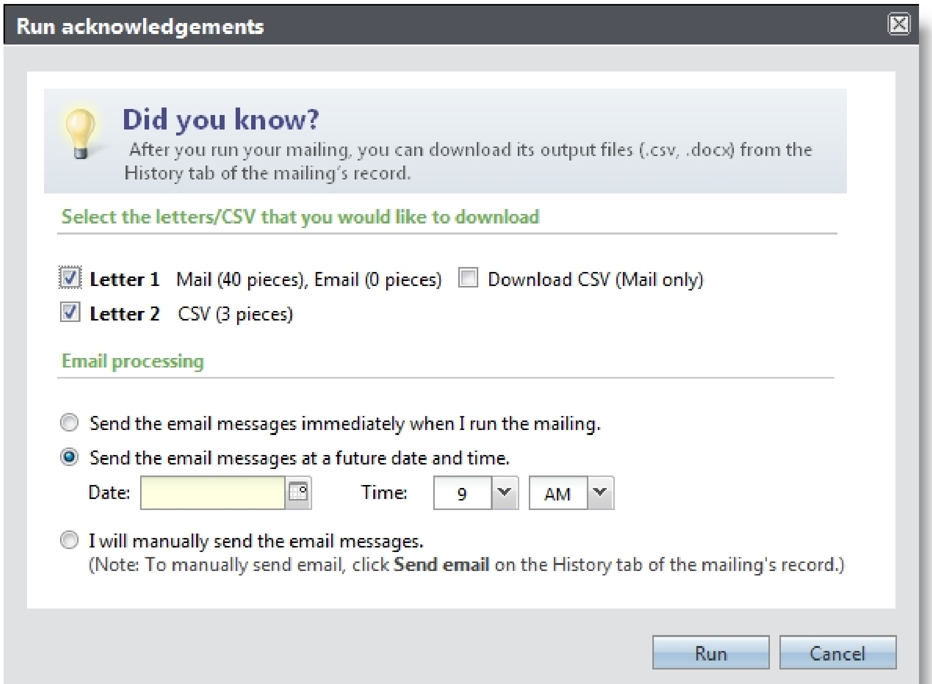
When the process runs, the program generates the letters to acknowledge transactions based on the criteria configured for each letter. If you include multiple letters in the process, each recipient receives only one letter, based on the order in which the process generates the letters. The process automatically excludes any transactions marked as Do not acknowledge. For letters to be sent by mail, the process prepares the content for the letter output to be generated as a Microsoft *Word* document. For letters to be sent as email messages, the process uses the configured email options to generate and send the messages. When the program generates a letter for a revenue transaction, it automatically marks the transaction as Acknowledged.

Tip: To "undo" the run of an acknowledgements process, such as to correct a typographical error and run the process again for the same revenue transactions, you can clear the results of the process. For information about how to clear results, see Clear the Results of a Donor Relations Communication on page 100.

After the process runs, you return to the Acknowledgements page. From the History tab, you can download and manage the output, such as to print mail content in Microsoft *Word*. For information about how to manage the output, see Letter Output and History on page 136.

Run the Acknowledgements Process

1. From *Marketing and Communications*, click **Acknowledgements**. The Acknowledgements page appears.
2. Click **Run acknowledgements**. The Run acknowledgements screen appears. For information about the items on this screen, see Run Acknowledgements Screen on page 99.



3. Under **Select the letters/CSV that you would like to download**, select the letters to download when you run the process. To download a *.csv file along with any letters that have been configured to be sent by mail, select **Download CSV**. You can use the recipient information in the *.csv file to create labels or envelopes for your letters.
4. For acknowledgements that contain email content, under **Email processing**, select when to send the acknowledgements to email recipients. You can send the messages at the time you run the acknowledgements or at a future date and time, or you can manually send email at an undetermined date and time.
5. Click **Run**. The program runs the acknowledgements process.

   On the History tab of the Acknowledgements page, you can manage the output files generated by the process. For information about this tab, see Reminders History on page 109.

Run Acknowledgements Screen

The table below explains the items on the Run acknowledgements screen. For information about how to access this screen, see Start the Acknowledgement Process on page 98.

Screen Item	Description
Select the letters/CSV that you would like to download	This section displays the letters included in the acknowledgements process. For each letter, you can view the name and the amount generated for each channel. By default, all letters are selected to be processed when you click **Run**. To not include a letter, clear its checkbox. To download a *.csv file along with any letters that have been configured to be sent by mail, select **Download CSV**. You can use the recipient information in the *.csv file to create labels or envelopes for your letters.
Email processing	For an acknowledgements process that contains email content, this section appears. Select when to send the email to its recipients. To send the content at the time you run the process, select **Send the email messages immediately when I run this mailing**. When you select this option and run the process, the program sends the messages when it next sends fundraising blasts to the Shared Services server hosted by *Blackbaud*. To send the content at a future date and time, select **Send the email messages at a future date and time** and enter when to send the messages. For example, if the process includes both mail and email content, you may allow several days before you send email to better coincide with when mail recipients receive letters included in the mailing. To send the content at an undetermined date and time, select **I will manually send the email messages**. After you run the mailing, you can manually send its email content from the History tab of the Acknowledgements page. For information about how to send email, see Send Email Content for a Communication on page 136. For information about how to set up email services, see the *Administration Guide*

Clear the Results of a Donor Relations Communication

When you run a donor relations communication such as acknowledgements or reminders, the program automatically marks its associated revenue records with a history of the communication. For example, when you run acknowledgements, the program automatically marks its revenue records as acknowledged. If you need to run the communication again, such as due an incorrect recipient selection or a typographical error in its content, you can clear its results to remove the history of the communication from its recipients or associated records.

On the History tab, select the instance under **Outputs** and click **Clear results**. When a message appears to ask whether to clear the results of the communication, click **Yes**.

Tribute Acknowledgements

With tributes, you can collect donations as recognition of a constituent. Examples of tributes are donations a donor makes “in honor of,” “on behalf of,” or “in memory of” another constituent. From a tribute’s record, you can designate acknowledgees to notify when you receive revenue toward the tribute. From *Marketing and Communications*, you can manage processes to send letters to acknowledgees when you receive tribute revenue. You can use multiple processes to target constituents differently based on revenue amount or activity. To access the tribute acknowledgements processes from *Marketing and Communications*, click **Tribute acknowledgements**. The Tribute Acknowledgements page appears.

Note: You can also manage your tribute acknowledgement processes with your archived revenue acknowledgement processes. To access your archived acknowledgement processes from the Acknowledgements page, click **Archived acknowledgements** under **Tasks**. For information about your archived acknowledgement processes, see Acknowledgement Tasks on page 221.

On the Tribute Acknowledgements page, you can view and manage the acknowledgement letters, acknowledgements processes, and review acknowledgements processes used to generate output for tribute acknowledgement letters. For information about how to manage tribute acknowledgements, see Acknowledgement Tasks on page 221. For information about the steps required to effectively process tribute acknowledgements, see Tribute Acknowledgement Process Workflow on page 101.

Tribute Acknowledgement Process Workflow

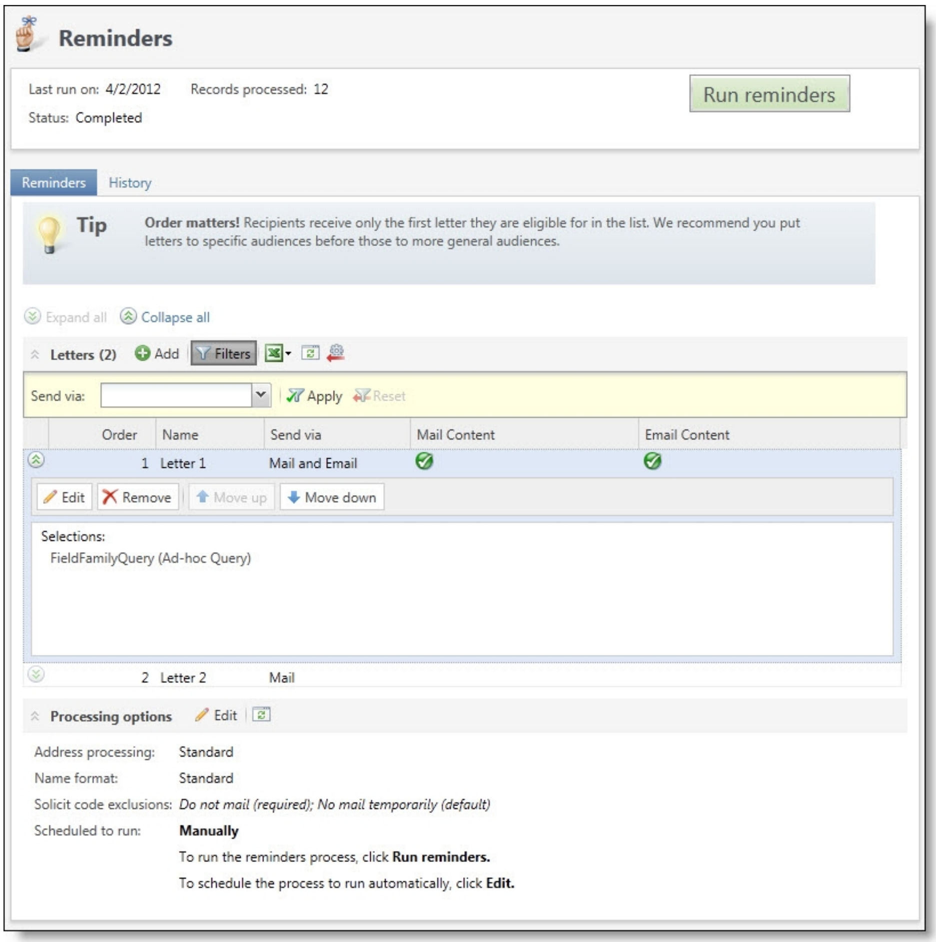
From *Marketing and Communications*, you can manage processes to notify acknowledgees of revenue received toward tributes. A tribute acknowledgement process requires a Microsoft *Word* document that contains the template and content for its acknowledgement letters. To target constituents differently based on revenue amount or activity, you can create multiple tribute acknowledgements to generate multiple letters. To use the process effectively, you must perform these steps.

- ☐ From *Marketing and Communications*, generate the header file to include personalized information, such as constituent name and revenue amount, in the acknowledgement letter. For information about how to generate a header file, see Generate a Header File on page 268.
- ☐ In Microsoft *Word*, create the template for the acknowledgement letter. To include merge fields in your template, perform a mail merge to import the header file.
- ☐ On the Letters tab of the Tribute Acknowledgements page, add the letter template to your database. For information about how to add an acknowledgement letter, see Add a Letter on page 243.
- ☐ From *Constituents*, add tributes as necessary. As you add a tribute, select the default letter template acknowledgees receive. On the tribute’s record, select the acknowledgees to notify when you receive revenue transactions toward the tribute.
- ☐ From *Revenue*, add revenue transactions you receive toward tributes. When you add a transaction, select the tribute to which it applies. On the Letters tab of the payment’s record, the letter associated with the selected tribute appears.
- ☐ On the Acknowledgements tab of the Tribute Acknowledgements page, add a tribute acknowledgement process and select the revenue transactions to include in the process. For information about how to add a tribute acknowledgement process, see Add Acknowledgement Process on page 222.
- ☐ To generate acknowledgement letters to notify acknowledgees associated the selected revenue transactions, run the tribute acknowledgements process. When you run the process, you can select whether to mark the revenue transactions as Acknowledged. For information about how to run the process, see Run Acknowledgement Process on page 226.

- On the record of the tribute acknowledgement process or the Review acknowledgements tab of the Tribute Acknowledgements page, download the output for the acknowledgement letters as merged *Word* documents or as a comma-separated values (*.csv) file for a mail house.

Reminders

To help increase charitable revenue and prevent write-offs, you can send reminders to donors when they miss their due dates for commitments such as pledges. From *Marketing and Communications*, you can manage a process to send reminders to constituents based on revenue commitments. You can use multiple letters with the process, such as to target constituents differently based on revenue amount or activity. To configure and manage the reminders process and its letters from *Marketing and Communications*, click **Reminders**.



On the Reminders page, you can manage the process and its letters and options. You can also view and manage the history of the process and its output. You can also manually run the process as necessary.

Note: From the Reminders page, you can access reminders processes created before the Q3 2011 update, such as to copy existing letter content as you create new reminder letters. To access these processes from the Reminders page, click **Archived reminders** under **Tasks**. For information about the archived processes, see Reminder Tasks on page 259.

Reminders Workflow

To help increase charitable revenue and prevent pledge write-offs, you can send reminders to donors when they miss their due dates for commitments such as pledges. From *Marketing and Communications*, you can manage a process to send acknowledgement letters to constituents based on revenue commitments. To use the process effectively, you must perform several steps.

- Create the name format option to use with the process. The name format option determines the addressees and salutations to use with constituents included in the process. You can use a standard option for use with all communications, or you can create an option for only reminders. For information about how to configure name format options, see Name Format Options on page 33.
- Create the address processing option to use with the process. The address processing option determines which types of addresses to use with constituents included in the process. You can use a standard option for use with all communications, or you can create an option for only reminders. For information about how to configure address processing options, see Address Processing Options on page 14.
- Configure the options for the reminders process. When you configure the process, you select the default name format and addressing processing options to use, which constituents to exclude based on solicit code, and how often to run the process. For information about how to configure the process options, see Edit Options for the Reminders Process on page 106.
- Add the letters to use with the process. You can use multiple letters with the process, such as to target constituents differently based on revenue amount or activity. When you add a letter, you can create content for each channel of mail or email and select the type of revenue commitment due dates to remind with the letter. After you add your letters, arrange them in the order in which to generate for recipients. For example, you can generate letters for major givers and board members before you generate the letter used to remind all other donors. For information about how to add and arrange reminder letters, see Reminder Letters on page 103.
- When you configure the options for the reminders process, you can schedule the process to run on a daily or weekly basis. You can also manually run the process at any time. When you run the process, the program generates the letters based on their order and the criteria of the recipients. For information about how to run the process, see Start the Reminders Process on page 107.
- From *Revenue*, when you add a pledge or recurring gift, select whether to send a reminder for the transaction. To include a transaction in the process, select **Send reminders**.
- After you run the process, download its mail output for delivery to its recipients. You can also manually send its email content to recipients. For information about how to manage the output of the reminders process, see Letter Output and History on page 136.

Reminder Letters

When you set up a reminders process, you create or select the letters it uses. You can use multiple letters for reminders, such as to target donors differently based on revenue activity. On the Reminders page, you can add and manage the letters used with the process from the Reminders tab.

Under **Letters**, the letters used with the process appear. For each letter, you can view its channel, whether its recipients include inactive constituents, and whether it includes content for each channel.

You can filter the letters that appear by channel. To filter the grid, click **Filter** on the action bar, select the channel of the letters to view, and click **Apply**. To remove the filter, click **Reset**.

Note: The order in which the letters appear under **Letters** determines the order in which the process generates them for donors. For example, you can arrange to letters so the process generates letters for major givers and board members before you generate the letter used as a general reminder for all other donors. To adjust a letter's position in the order, select it in the grid and click **Move up** or **Move down** as necessary.

From the grid, you can view and manage the letters used by the process.

For information about how to manage reminder letters, see Manage Letters for a Communication on page 112.

Default Reminders Merge Fields

When you create letters for reminders, you can use merge fields to personalize the content with details specific to the donor and commitment. The table below explains the default merge fields for reminders.

Merge field	Description
Finder number (Finder number)	Displays the finder number assigned to the recipient of the appeal mailing that generated the commitment. Finder numbers are assigned to each recipient of an appeal mailing to help speed data entry of responses and match donations to help track and analyze the mailing's performance.
Amount due (Amount due)	Displays the total amount due on the commitment.
Amount received since last reminder (Amount received since last reminder)	Displays the payment amount your organization has received from the donor since the last time a reminder was sent.
Current due amount (Current due amount)	Displays the amount due on the donor's next payment.
Date of last payment (Date of last payment)	Displays the date of the last payment the donor will make on a commitment, based on the installment schedule.
Next installment date (Next installment date)	Displays the date on which the donor should pay the next installment on the commitment.
Paid through (Paid through)	Displays the date at which the donor is paid through, based on the installment schedule.
Past due amount (Process due amount)	If the donor missed a payment, this merge field displays the total amount of the commitment that is past due.
Process date (Process date)	Displays the date on which your organization the donor's last payment.

Merge field	Description
Designation list (Designations)	Displays the designations associated with the donor's last payment.
Pledge balance (Pledge balance)	Displays the remaining pledge balance owed by the donor.
First name (First name)	Displays the first name as it appears on the constituent record.
Last name/Organization name (Last/Org name)	Displays the last name or organization name as it appears on the constituent record.
Address (Address)	Displays the address as it appears on the constituent record.
City (City)	Displays the city information for the donor's primary address as it appears on the constituent record.
State abbreviation (State)	Displays the state information for the donor's primary address as it appears on the constituent record.
ZIP (Postal code)	Displays ZIP Code information for the donor's primary address as it appears on the constituent record.
System record ID (CONSTITUENTID)	Displays the record ID for the donor. Constituents are assigned unique system record IDs when you add them to your database.
Contact addressee (Contact addressee)	The contact addressee is the contact person listed for an organization constituent. The merge field displays the contact's name based on the addressee name format. You set the addressee name format on the constituent record.
Salutation (Salutation)	Displays the salutation to use with the donor. Salutations determine how you greet a constituent in a communication. For example, Mr. Thomas Smith's salutation could be Tom or Thomas.
Name (Full name)	Displays the donor's full name as it appears on the constituent record.
Email address (Email address)	Displays the primary email address information as it displays on the constituent record.

Reminders Process Options

From the Reminders page, you can manage the process to remind donors of upcoming due dates for revenue commitments such as pledges. On the Reminders tab, you can manage the letters and options used with the process.

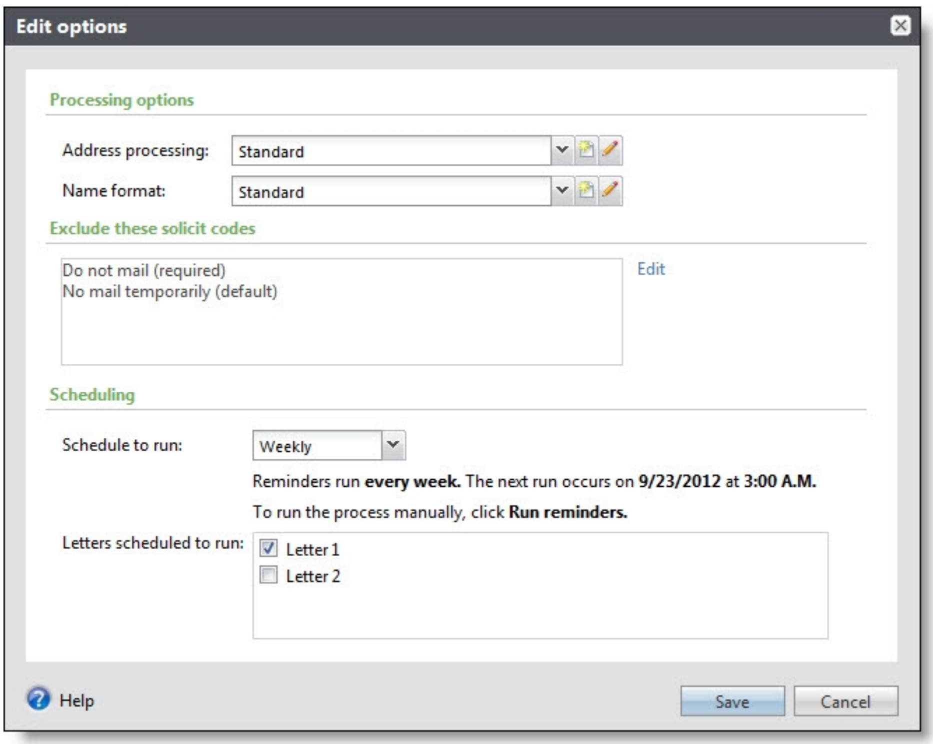
Under **Options**, you can view and configure the options configured for the reminders process. For example, you can select the name formats and address types to use with the process and which solicit codes to exclude.

Edit Options for the Reminders Process

On the Reminders page, you can manage the process to send communications to remind constituents when they miss due dates for revenue commitments. When you configure the options, you select the default name format and addressing processing options to use and which constituents to exclude based on solicit code.

Edit the reminders process options

1. From *Marketing and Communications*, click **Reminders**. The Reminders page appears.
2. Select the Reminders tab.
3. Under **Options**, click **Edit**. The Edit options screen appears.



4. In the **Address processing options** field, select the option to use to determine which types of addresses to use with constituents included in the process.
5. In the **Name format options** field, select the option to use to determine the addressees and salutations to use with constituents included in the process.
6. Under **Exclude these solicit codes**, the default solicit code exclusions appear. To edit the solicit codes excluded from the process, such as to exclude additional solicit codes, click **Edit**. For information about how to edit solicit codes for a communication, see Edit Solicit Code and Selection Exclusions on page 122.

Note: For information about how to manage the default and required solicit codes for your organization's communications, see Solicit Codes on page 40.

7. Under **Scheduling**, select whether to run the process manually or automatically on a weekly or monthly interval.
   - If you select Manually, you must run the process from the Reminders page. For information about how to run the process, see Run the Reminders Process on page 107.
   - If you select Weekly, the process runs automatically every Sunday at 3:00 A.M. If you have multiple letters in your Reminders process, under **Letters scheduled to run**, you can select which letters to generate when your Reminders are run.
   - If you select Monthly, the process runs automatically the first day of the month at 3:00 A.M. If you have multiple letters in your Reminders process, under **Letters scheduled to run**, you can select which letters to generate when your Reminders are run.
8. Click **Save**. You return to the Reminders page.

Start the Reminders Process

Warning: Before you run the reminders process, you must create its letters and configure its options as necessary. For information about the tasks to perform before you run the process, see Reminders Workflow on page 103.

From *Marketing and Communications*, you can configure when to run the reminders process. You can select whether to run the process manually or automatically at a scheduled daily or weekly interval. If you select to run the process on a daily basis, it runs every day at 3:00 A.M. If you select to run the process on a weekly basis, it runs every Sunday at 3:00 A.M. To run the process at any time, click **Run reminders** on the Reminders page.

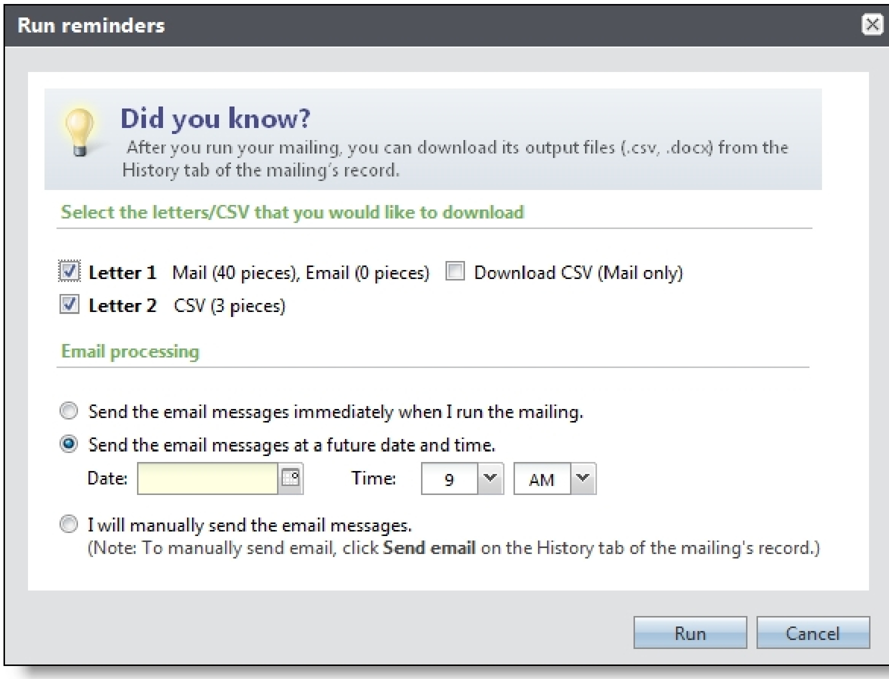
When the process runs, the program generates the letters to remind donors of commitments based on the criteria configured for each letter. If you include multiple letters in the process, each recipient receives only one letter, based on the order in which the process generates the letters. For letters to be sent by mail, the process prepares the content for the letter output to be generated as a Microsoft *Word* document. For letters to be sent as email messages, the process uses the configured email options to generate and send the messages. When the program generates a letter for a revenue transaction, it automatically marks the transaction as having its reminder sent.

Tip: To “undo” the run of an reminders process, such as to correct a typographical error and run the process again for the same revenue transactions, you can clear the results of the process. For information about how to clear results, see Clear the Results of a Donor Relations Communication on page 100.

After the process runs, you return to the Reminders page. From the History tab, you can download and manage the output, such as to print mail content in Microsoft *Word*. For information about how to manage the output, see Letter Output and History on page 136.

Run the Reminders Process

1. From *Marketing and Communications*, click **Reminders**. The Reminders page appears.
2. Click **Run reminders**. The Run reminders screen appears. For information about the items on this screen, see Run Reminders Screen on page 108.



3. Under **Select the letters/CSV that you would like to download**, select the letters to download when you run the reminders process. If you would like to download a *.csv file along with any letters that have been configured to be sent by mail, select **Download CSV**. You can use the recipient information in the *.csv file to help create labels or envelopes for your letters.
4. For reminders that contain email content, the **Email processing** options appear. Select when to send the reminder to the email recipients. You can send the email messages at the time you run the reminder or at a future date and time, or you can manually send email at an undetermined date and time.
5. Click **Run**. The program runs the reminders process.

   On the History tab of the Reminders page, you can manage the output files generated by the process. For information about this tab, see Reminders History on page 109.

Run Reminders Screen

The table below explains the items on the Run reminders screen. For information about how to access this screen, see Start the Reminders Process on page 107.

Screen Item	Description
Select the letters/CSV that you would like to download	This section displays the letters included in the reminder process. For each letter, you can view the name and the amount generated for each channel. By default, all letters are selected to be processed when you click **Run**. If you do not want to include a letter, clear the appropriate checkbox. If you would like to download a *.csv file along with any letters that have been configured to be sent by mail, select **Download CSV**. You can use the recipient information in the *.csv file to help create labels or envelopes for your letters.
Email processing	For a reminders process that contains email content, this section appears. Select when to send the email content to its recipients. To send the content at the time you run the process, select **Send the email messages immediately when I run this mailing**. When you select this option and run the process, the program sends the messages when it next sends fundraising blasts to the Shared Services server hosted by Blackbaud. To send the content at a future date and time, select **Send the email messages at a future date and time** and enter when to send the messages. For example, if the reminders process includes both mail and email content, you may allow several days before you send email to better coincide with when mail recipients receive letters included in the mailing. To send the content at an undetermined date and time, select **I will manually send the email messages**. After you run the mailing, you can manually send its email content from the History tab of the Reminders page. For information about how to send email, see Send Email Content for a Communication on page 136. For information about how to set up email services, see the *Administration Guide*.

Reminders History

To generate letters to remind constituents of overdue revenue commitments, you can run the reminders process manually or on a daily or weekly interval. From the History tab of the Reminders page, you can view and manage the most recent and previous instances of the process.

Under **Recent status**, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

Under **Outputs**, you can view information about the output files generated by each instance of the process. In the grid, you can view details about each instance, such as who ran the process; its start time, end time, and duration; and the number of records included in the instance. From the grid, you can download and manage the output files of the instance.

You can also clear the results of a reminders process if necessary. For information about how to clear the results of a process, seeClear the Results of a Donor Relations Communication on page 100 .

For information about how to manage the outputs of the reminders process, see Letter Output and

History on page 136.

Communication Letters

From *Marketing and Communications*, you create letters as you set up your communications. To create letters, you use a hypertext markup language (HTML) editor to design the content for each channel of the communication such as mail and email. In addition to the HTML editor, there are several considerations as you manage your letters, regardless of the communication type. For example, before you send an communication, you must select the recipients to receive each letter. Also, while your organization can set up default exclusions for your communication efforts, you can also edit the exclusion criteria for each communication as necessary.

Manage Letters for a Communication

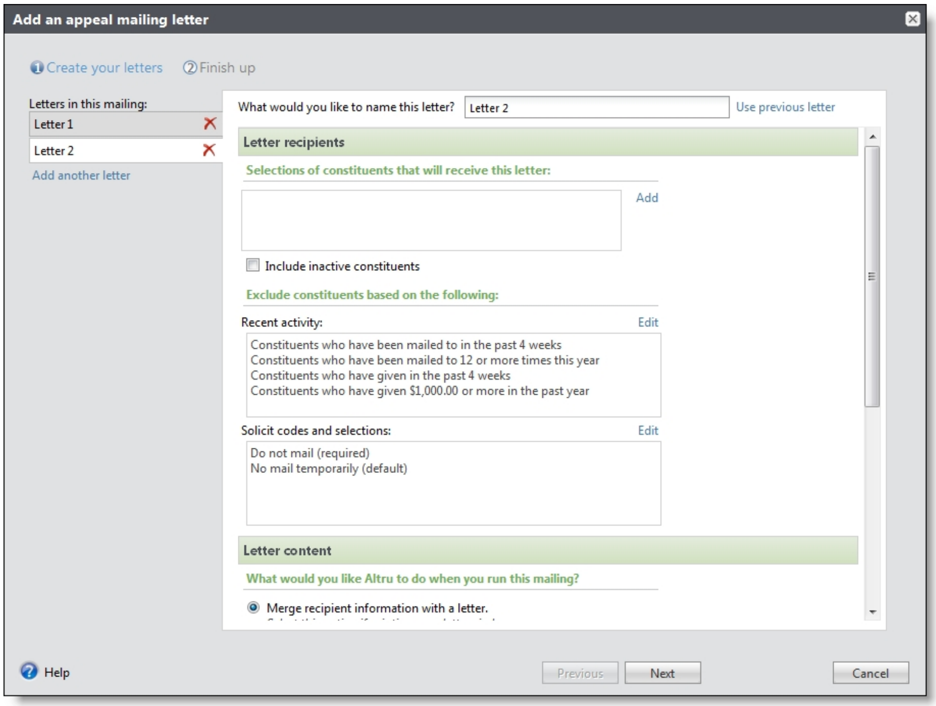
From *Marketing and Communications*, you create letters as you set up your communications. From the record or process page of a communication, you can add and manage its letters as necessary. To target constituents differently based on criteria such as constituency or revenue activity, you can use multiple letters with a communication.

Add Letters for a Communication

As you create a communication, you can add or select the letters to send to its recipients. After you set up a communication, you can add its letters from its record or process page. When you add a letter, you select its recipients and exclusions and compose its content for each delivery method or channel.

Add a communication letter

1. Access the record or process page of the communication.
2. Under **Letters**, click **Add**. The communication’s letters screen appears.



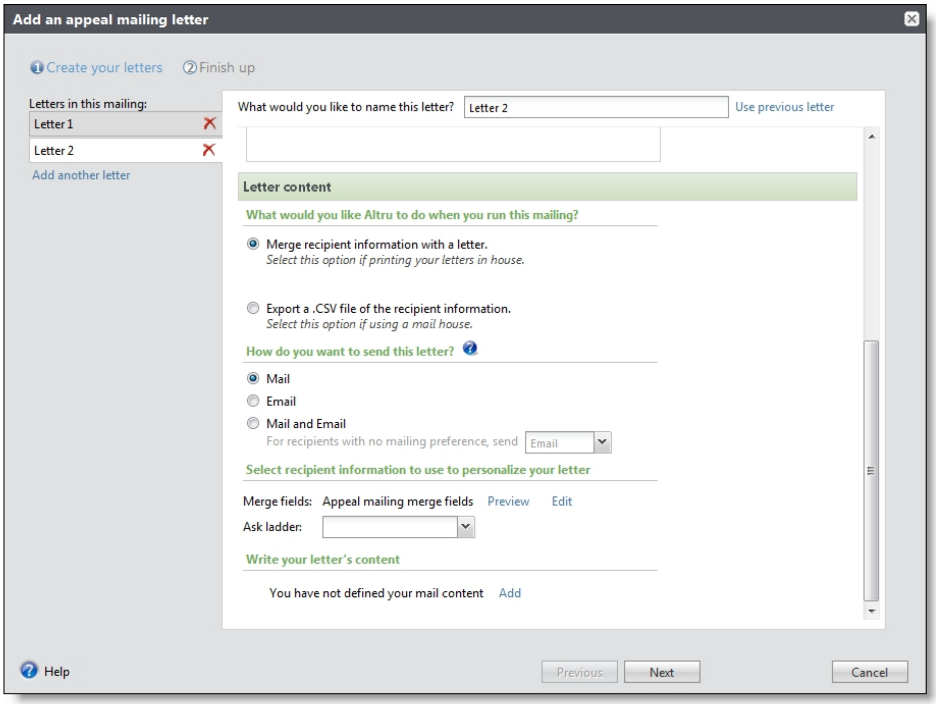
3. In the box on the left, select the letter at the bottom of the list.
4. Select whether to use a new or existing letter with the mailing.
   - To create a new letter, enter a unique name to help identify the letter.
   - To use an existing letter, click **Use previous letter**. The search screen appears for you can search for and select the letter to use.
   - To create a new letter entirely, click **Add another letter** under **Letters in this mailing**.
5. Under **Letter recipients**, select the recipients to receive the mailing. For a new letter, click **Add** and select its recipients. To adjust the recipients for an existing letter, click **Edit**. For information about how to select recipients for a letter, see Select Recipients for a Communication on page 120.
6. The program automatically excludes deceased constituents from the mailing. Select whether to include inactive constituents, such as to engage with lapsed donors.
7. For an appeal mailing, under **Exclude constituents based on the following**, the default communication exclusions for your organization appear. Edit the exclusion criteria for the letter as necessary.

Note: When you edit the exclusion criteria, you edit the exclusions for the appeal mailing letter only. For information about how to edit the communication exclusions for your organization, see Default Communication Exclusions on page 24.

   - To edit the criteria of the recipients excluded based on communication and revenue activity, click **Edit** for **Recent activity**. For information about how to edit exclusions based on recent activity, see Edit Recent Activity Exclusions on page 121.
   - To edit the criteria of the recipients excluded based on solicit codes or constituent selection, click **Edit** for **Solicit codes and selections**. For information about how to edit exclusions

based on solicit codes or selections, see Edit Solicit Code and Selection Exclusions on page 122.

8. Scroll down to view the **Letter content** options.



9. Select whether to merge the mailing's recipient information with a letter or export the recipient information as a comma-separated values (*.CSV) file.

- If you print your letters in-house, select **Merge recipient information with a letter**. When you select this option, ***Altru*** merges the recipients you selected for the letter with the letter content you create in the HTML Content Editor, such as to fill the merge fields used in the letter with information about each constituent. After you run the mailing, a Microsoft *Word* document is created that contains the letter content for each recipient that you can then print and send through mail. If your mailing contains multiple letters, a .ZIP file is created that contains a Microsoft *Word* document for each letter.

When you select this option, ***Altru*** also generates a (*.CSV) file of recipient information along with your merged content.

- If you use a mail house for the mailing, or want to write your letters with another program such as Microsoft *Word*, select **Export a .CSV file of the recipient information**. When you select this option, ***Altru*** generates a Comma Separated Value (CSV) file of your recipient information and merge fields that you can then send to a mail house to create the mailing, or manually export to Microsoft *Word* to create the mailing yourself.

10. If you select **Merge recipient information with a letter**, select whether to send the letter through the mail, email, or both.

    If you select **Mail and Email**, recipients receive the letter through a channel based on their communication preferences. Select the channel to use for constituents with no selected communication preference.

11. Under **Select recipient information to use to personalize your letter**, select the merge fields to use with the letter.

Note: By default, the mailing uses merge fields commonly used for appeal mailings. To view a list of the merge fields included in the export definition, click **Preview**. To edit the merge fields included in the export definition, click **Edit**. When you edit merge fields, you cannot remove a merge field from the export definition that is being used in another letter. To remove the merge field, you must first remove it from the letter in which it is used.

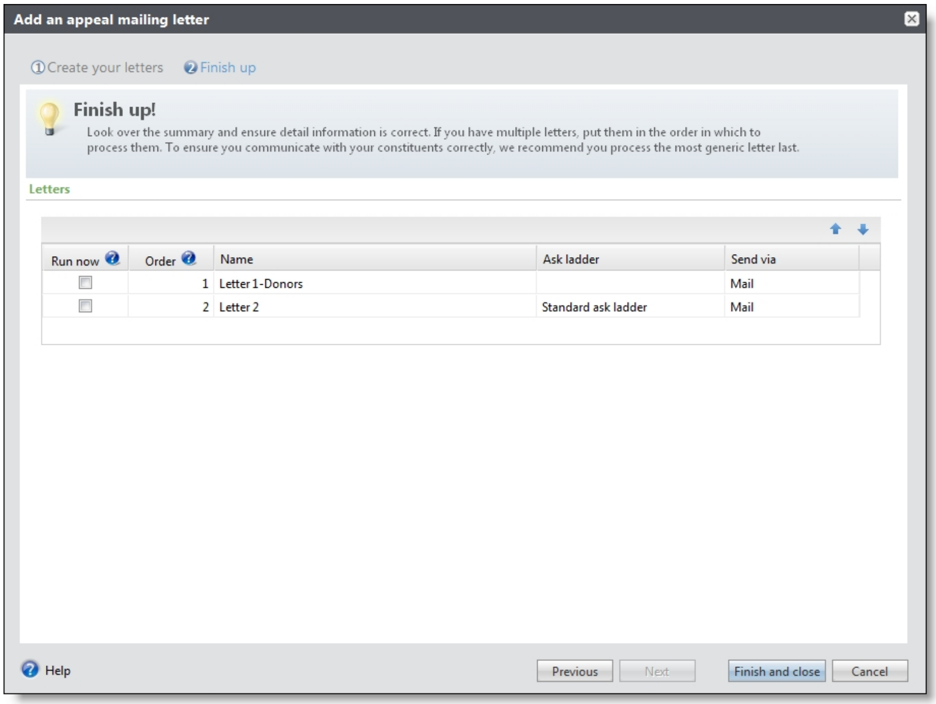
12. For an appeal mailing, select the ask ladder to use to determine the ask amount to include in a recipient's letter based on giving history. For information about ask ladders, see Ask Ladders on page 19.
13. If you select **Merge recipient information with a letter**, click **Add** under **Write your letter's content**.The Add content screen appears so you can define the letter content to use for the selected channels. For information about how to define letter content, see Letter Content on page 123.

Tip: To view how content appears as mail output, click **Preview** to download a sample of the content as a Microsoft *Office* open XML document (*.docx) file. With this file, you can preview the content in a word processing program such as Microsoft *Word* or Google *Docs*. You cannot save changes made to the preview. To edit the content, click **Edit** on the Add communication letter screen. To remove the content entirely, such as to re-write it, click **Remove**.

14. To create another letter to use with the communication, such as to target different recipients with specific content, click **Add another letter** and repeat the process.

Tip: The letters included in a mailing appear on the left side of the Create your letters tab. When you include multiple letters, arrange them in the order in which to generate them for the mailing. To remove a letter from the mailing, click its red **X**.

15. After you add all letters to use with the communication, click **Next**. The **Finish up** options appear.



16. Under **Letters**, the letters included in the communication appear. If you include multiple letters, arrange them in the order in which to generate them for the communication. For example, arrange the letters so the process generates letters for board members and major givers before it generates the default letter used for all constituents.

    To automatically generate a specific letter when you click **Finish and close**, select **Run now**.

    If you selected to process your letters weekly or monthly, the **Run monthly** or **Run weekly** column appears. You can select which letters should run according to that schedule. Any selections you make are reflected on the Edit options screen. For information about processing options and the Edit options screen, see Edit the acknowledgements process options on page 96

17. Click **Finish and close**. You return to the communication record or process page.

Communication Letter Screen

The table below explains the items on the letter screen of a communication. For information about how to access this screen, see Add Letters for a Communication on page 112.

Screen Item	Description
What would you like to name this letter?	To add a new letter to use with the communication, enter a unique name to help identify the letter. To use an existing letter, click **Use previous letter**. A search screen appears so you can find and select the letter to use.

Screen Item	Description
Selections of constituents that will receive this letter	This box displays the constituent selections selected to receive the letter. To edit the selections for an existing letter or add selections for a new letter, click **Add**. For information about how to manage the constituent selections to receive a letter, see Select Recipients for a Communication on page 120.
Include inactive constituents	By default, the program excluded constituents marked as deceased or inactive from the letter recipients. To include inactive constituents, such as to target lapsed donors, select this checkbox.
Exclude constituents based on the following	For an appeal mailing, this section appears. From *Marketing and Communications*, your organization can configure the default exclusions for your communications. Under **Recent activity**, the default exclusions based on recent communication and revenue activity appear. Under **Solicit codes and selections**, the default exclusions based on solicit codes and constituent selections appear. Edit the exclusions as necessary for the letter. For information about how to edit recent activity exclusions, see Edit Recent Activity Exclusions on page 121. For information about how to edit solicit code and selection exclusions, see Edit Solicit Code and Selection Exclusions on page 122.
What would you like Altru to do when you run this mailing?	Select whether to merge the recipient information with a letter or export the recipient information as a comma-separated values (*.CSV) file. If you print your letters in-house, select **Merge recipient information with a letter**. When you select this option, ***Altru*** automatically generates a (*.CSV) file of recipient information along with your merged content. Your browser downloads a .zip file that contains both the merged letters and the (*.CSV) file. If you use a mail house to create your letters, select **Export a .CSV file of the recipient information.**
How do you want to send this letter?	If you select **Merge recipient information with a letter**, select whether to send the letter through the mail, email, or both. If you select **Mail and Email**, the program sends the letter to recipients through the channel determined by the constituents' communication preferences.
For recipients with no mailing preference, send	If you select **Mail and Email**, this field is enabled. Select the channel to use for recipients with no selected communication preference.

Screen Item	Description
Select recipient information to use to personalize your letter	Select the merge fields to use with the mailing. By default, the program uses merge fields commonly used with appeal mailings. To view a list of the merge fields included in the export definition, click **Preview**. To edit the merge fields, click **Edit** and manage the export definition. For information about how to manage export definitions, see the *Query and Export Guide*. For an appeal mailing, the **Ask ladder** field appears. Select the ask ladder to determine the ask amount to include in a recipient's letter based on giving history. For information about ask ladders, see Ask Ladders on page 19.
Write your letter's content	To create the content for each selected channel, click **Add**. For information about how to define the letter content, see Letter Content on page 123. To view the letter's content as mail output, click **Preview**. The program downloads a sample of the content as a Microsoft *Office* open XML document (*.docx) file that you can preview in a word processing program such as Microsoft *Word* or Google *Docs*. You cannot save changes made to preview. To edit the content defined for a letter, click **Edit**. To delete the content, click **Remove**.
Summary of letter recipients	This section displays the selections of constituents to receive the letter. For an appeal mailing, this section also displays any exclusions based on solicit codes, selections, and recent communication or giving activity. To edit the letter recipients or exclusions, click **Edit**.
Summary of letter content	This section displays the channels selected for the letter's content and whether you have defined content for each channel. From this section, you can add or preview content as necessary. To edit the letter's channels or content, click **Edit**.

Screen Item	Description
Add another letter	To create or select multiple letters to use with a communication, click this button and compose an additional letter.
Letters	This section displays the letters selected for the mailing. If you add multiple letters, arrange them in the order in which to generate them for the mailing. For example, you can arrange the letters so the program generates letters for board members or constituents with large average gift amounts before the letter used for all other constituents. To adjust a letter's position in the order, select it in the grid and click the up or down arrow as necessary. To automatically generate a specific letter when you click **Finish and close**, select **Run now**. If you selected to process your letters weekly or monthly, the **Run monthly** or **Run weekly** column appears. You can select which letters should run according to that schedule. Any selections you make are reflected on the Edit options screen. For information about processing options and the Edit options screen, see Edit the acknowledgements process options on page 96

Edit a Communication Letter

After you add a letter to a communication, you can edit its name, recipients, and content as necessary. To edit a letter, select it under **Letters** on the record or process page of the communication and click **Edit**. On the Edit letter screen, edit the information as necessary and then click **Save** to return to the communication record or process page.

For information about the items on the Edit letter screen, see Communication Letter Screen on page 116.

Remove a Letter from a Communication

After you add a letter to a communication, you can remove it such as if your organization no longer uses it. When you remove a letter from a communication, it remains in your database so you can use it with another communication if necessary.

To remove a letter from a communication, select it under **Letters** on the record or process page of the communication and click **Remove**. When a message appears to ask whether to remove the letter, click **Yes**.

Letter Recipients

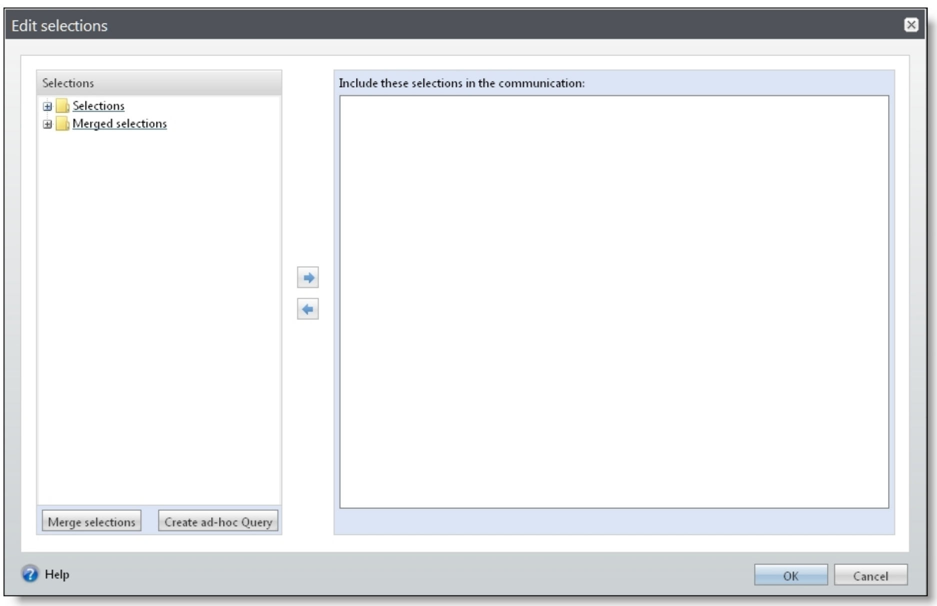
When you create a letter for a communication, you can base its recipients on selections from *Query* or provided by the program for the communication. After you select the recipients, you can select the criteria of the constituents to exclude from the communication. For example, you can select to exclude all constituents with a solicit code of Do not mail from the recipients selections.

Select Recipients for a Communication

When you create a letter for a communication, you can base its recipients on selections from *Query* or provided by the program for the communication. For example, for an appeal mailing, the program provides recipient selections based on constituency, donor lifecycle stage, and donor status. You can also merge two selections to create a new selection of constituents to include in the mailing.

Configure recipient selections for a communication

1. As you add or edit the letter for the communication, click **Add** or **Edit** under **Letter recipients**. The Add selections screen or Edit selections screen appears.



2. Under **Selections**, the program provides recipient selections commonly used for the type of communication; selections from *Query*; and any existing merged selections. To expand a folder and view its selections, click its plus sign (+).

   To select the mailing recipients, drag the selections to receive the letter to the **Include these selections in the communication** box. To remove a selection from the list, click its "X."

Note: A merged selection includes recipients compiled from two selections. To create a new merged selection, click **Merge selections**. To create a new selection from an ad-hoc query, click **Create ad-hoc Query**. For information about how to merge selections or create ad-hoc queries, see the *Query and Export Guide*.

3. Click **OK**. You return to the previous screen.

Manage Exclusion Criteria

From *Marketing and Communications*, your organization can set up default exclusions for your communication efforts. When you create an appeal mailing letter or set up a process for a donor relation communication, you can edit the exclusion criteria for the communication as necessary.

Note: When you edit the exclusion criteria, you edit the exclusions for the communication only. For information about how to edit the communication exclusions for your organization, see Default Communication Exclusions on page 24.

Edit Recent Activity Exclusions

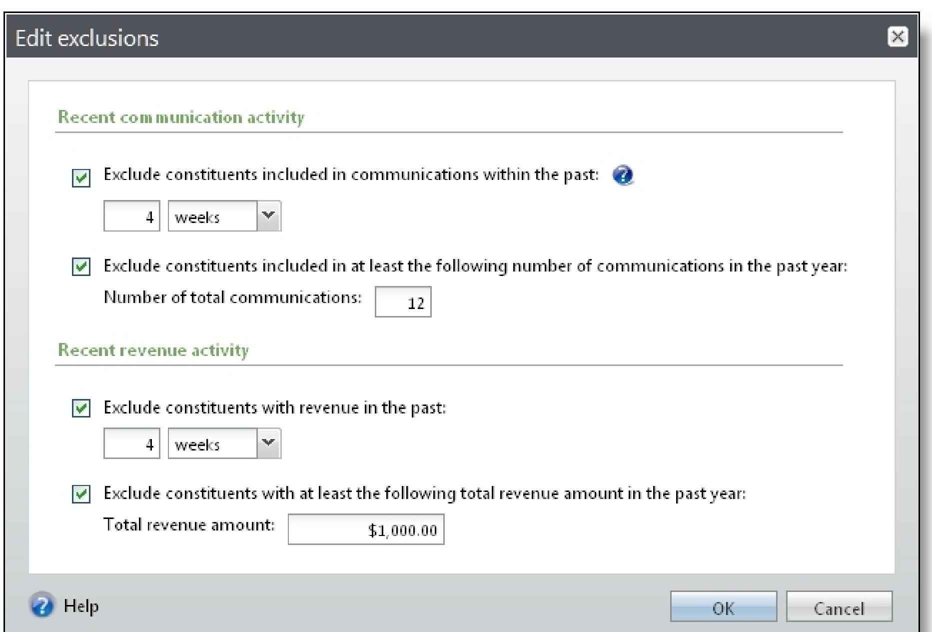
From *Marketing and Communications*, your organization can set up default exclusions for your communication efforts. When you create a letter for an appeal mailing, you can edit the exclusion criteria based on recent communication and revenue activity as necessary.

Tip: When you edit the exclusion criteria, you edit the exclusions for the appeal mailing letter only. For information about how to edit the communication exclusions for your organization, see Default Communication Exclusions on page 24.

Note: From *Revenue*, your organization configures revenue filters to determine the types of revenue transactions and applications to consider as revenue activity. For information about how to manage reporting filters for revenue activity, see the *Revenue Guide*.

Edit recent activity exclusions

1. When you add or edit recipients for an appeal mailing, under **Exclude constituents based on the following**, click **Edit** under **Recent activity**. The Edit exclusions screen appears.



2. Under **Recent communication activity**, select whether to exclude constituents included in recent communications. If you select **Exclude constituents included in communications within the past**, enter the time period of the communications to consider for exclusion.
3. Select whether to exclude constituents based on the number of communications received over the past year. If you select **Exclude constituents included in at least the following number of communications in the past year**, enter the maximum number of communications constituents can receive.
4. Under **Recent revenue activity**, select whether to exclude constituents with recent revenue transactions. If you select **Exclude constituents with revenue in the past**, enter the time period of the revenue transactions to consider for exclusion.
5. Select whether to exclude constituents based on their total revenue amount for the past year. If you select **Exclude constituents with at least the following revenue amount in the past year**, enter the total revenue amount at which to begin to exclude constituents.
6. Click **OK**. You return to the previous screen.

Edit Solicit Code and Selection Exclusions

From *Marketing and Communications*, your organization can set up default exclusions for your communication efforts. When you create an appeal mailing letter or set up a process for a donor relation communication, you can edit the exclusion criteria based on solicit codes as necessary. For an appeal mailing letter, you can also edit the exclusion criteria based on recipient selection.

Note: When you edit the exclusion criteria, you edit the exclusions for the communication only. For information about how to edit the default solicit code exclusions for your organization, see Solicit Codes on page 40.

Edit solicit code and selection exclusions

1. For an appeal mailing letter, when you create the letter, click **Edit** under **Solicit codes and selections**.

   For a donor relation communication such as a reminder or an acknowledgment, when you edit the options, click **Edit** under **Constituents who will not be mailed**.

   The Edit solicit codes screen appears.
2. Under **Solicit codes**, the program provides the available solicit codes. To expand the folder and view its solicit codes, click its plus sign (+).

   To exclude constituents from the letter based on solicit code, drag the solicit codes of the constituents to exclude from the mailing to the **Exclude constituents with the following solicit codes** box. To remove a solicit code from the box, click its “X.”
3. For an appeal mailing, exclude constituents from the letter based on selection as necessary.
   a. Under **Selections**, click **Add**. The Add selections screen appears.
   b. Under **Selections**, the program provides selections of constituents based on constituency, donor lifecycle stage, and donor status; constituent selections from *Query*; and any existing merged selections. To expand a folder and view its selections, click its plus sign (+).

To select the exclusions, drag the constituent selections to exclude from the mailing to the **Exclude these selections from the communication** box. To remove a selection from the box, click its “X.”

Note: A merged selection includes constituents compiled from two constituent selections, such as from two constituencies. To create a new merged selection for your exclusions, click **Merge selections**. To create a new selection from an ad-hoc query, click **Create ad-hoc Query**. For information about how to merge selections or create ad-hoc queries, see the *Query and Export Guide*.

Note: A merged selection includes constituents compiled from two constituent selections, such as from two constituencies. To create a new merged selection for your exclusions, click **Merge selections**. To create a new selection from an ad-hoc query, click **Create ad-hoc Query**. For information about how to merge selections or create ad-hoc queries, see the Query section of the help file.

c. Click **OK**. You return to the Edit exclusions screen.

4. Click **OK**. You return to the previous screen.

Letter Content

When you create a letter for a communication, you use a hypertext markup language (HTML) editor to compose its content. When you create content in the HTML editor, you must design the content for each channel of the communication such as mail and email.

When you first access the HTML editor, it appears in the standard view. From the standard view, you can create content similar to as in a word processing application or “what you see is what you get” (WYSIWYG) editor. As you create your content, you can use the toolbar to adjust and control the format of the content for your communications.

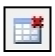
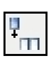
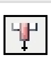
Note: In standard view, when you press **Enter**, you create a <p> tag in the HTML source code to indicate a new paragraph. When you press **Shift + Enter**, you create a
 tag to indicate a single carriage return.

HTML Editor Toolbar

Throughout the program, you use an HTML editor to create content for letters and communications. The toolbar of the editor provides several tasks and menus. These tables explain the items available through the toolbar.

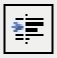
Icon	Task	Description
	**Edit HTML Source**	To view or edit content in the HTML source code, click this button. From the HTML Source Editor screen, you can manage the content or code as necessary. To return to the standard view, close the HTML Source Editor screen.

Icon	Task	Description
	**Cleanup messy code**	To remove unnecessary tags from the HTML source code, click this button. The editor automatically repairs messy code such as <font> and <span> tags.
	**Find**	To find and replace text in the content, click this button. From the Find/Replace screen, you can enter the text to find and, if necessary, its replacement text.
	**Cut**	To remove text from the content, select the text and click this button. You can then paste the removed text elsewhere in the content if necessary.
	**Copy**	To copy text within the content, select the text and click this button. You can then paste the copied text elsewhere in the content. In Mozilla *Firefox*, security settings may disable this button. To copy text from within *Firefox*, select the text and press **CTRL+C**.
	**Paste**	To insert cut or copied text into the content with the same formatting as when cut or copied, click this button. In Mozilla *Firefox*, this button removes HTML tags while in HTML mode. To retain the HTML tags for pasted text in *Firefox* on PCs, press **Ctrl+V**. For *Firefox* on Macs, **Ctrl+V** also removes the HTML tags.
	**Paste as Plain Text**	To insert cut or copied text into the content without any formatting, click this button.
	**Insert page break**	To insert a break between printed pages of the content, click this button. In the HTML source code, the editor adds a division with an attribute of PAGE-BREAK-BEFORE:always.
	**Horizontal rule**	To insert a horizontal line in the content, click this button. On the Horizontal rule screen, enter the width and height of the line and select whether to include a shadow.
	**Insert custom character**	To insert a special character, click this button and, the Custom characters screen, select the character to insert.
	**Insert/edit anchor**	To link to a specific location in the content, place your cursor at the location, such as a heading, and click this button and, on the Insert/edit anchor screen, enter a name for the location. In the HTML source code, the editor adds before the location. In the Standard view, the editor displays an anchor icon at the location.
	**Undo**	To reverse the last action in the content, click this button or press **CTRL+Z**. You can undo multiple actions.
	**Redo**	To redo an undone action in the content, click this button or press **CTRL+Y**. You can redo multiple actions.

Icon	Task	Description
	**Insert image**	To insert an image in the content, click this button. The Select an image screen appears. For information about how to select an image to insert, see Insert Images in Content on page 133.
	**Insert/edit link**	To format text in email content as a hyperlink to a web address or web page, select the text and click this button. If the editor recognizes the text as a web address or URL, it formats the text automatically. Otherwise, the Insert link screen appears. For information about how to insert a link, see Insert Links in Email Content on page 130.
	**Inserts a new table**	To create a table in the content, click this button. From the Insert/Modify table screen, enter the properties of the table. After you insert a table, you can select it and click this button to edit the properties.
	**Delete table**	To remove a table from the content, select the table and click this button.
	**Table row properties**	To edit the properties of a row in a table, select the row and click this button. From the Table row properties screen, edit the properties as necessary.
	**Table cell properties**	To edit the properties of a cell in a table, select the row and click this button. From the Table cell properties screen, edit the properties as necessary.
	**Insert row before**	To insert a new row above a row in a table, select the row and click this button.
	**Insert row after**	To insert a new row below a row in a table, select the row and click this button.
	**Delete row**	To remove a row from a table, select the row and click this button.
	**Insert column before**	To insert a new column to the left of a column in a table, select the column and click this button.
	**Insert column after**	To insert a new column to the right of a column in a table, select the column and click this button.
	**Remove column**	To remove a column from a table, select the column and click this button.
	**Split merged table cells**	To split a cell that spans multiple rows into two cells, select the cell and click this button. The cell no longer spans the bottom row.
	**Merge table cells**	To merge a cell with the cell to its right, select the cell and click this button. The editor removes the content from the cell on the right, and the selected cell now spans both columns.

Icon	Task	Description
	Toggle guidelines/invisible elements	To hide or show the borders of tables in the content, click this button.
	Blockquote	To format text as a long quotation, select the text and click this button. In the HTML source code, the editor adds a <blockquote> tag around the text.
	Abbreviation	To add a tooltip to define an abbreviation in the content, select the text and click this button. From the Abbreviation Element screen, enter the definition in the **Title** field and enter the attributes of the tooltip. In the HTML source code, the editor adds an <abbr> tag around the text. When viewed in a browser, the text appears underlined and a tooltip appears when the cursor moves over the text. Screen readers read the text as a word rather than spell out its letters.
	Acronym	To add a tooltip to define an acronym in the content, select the text and click this button. From the Acronym Element screen, enter the definition in the **Title** field and enter the attributes of the tooltip. In the HTML source code, the editor adds an <acronym> tag around the text. When viewed in a browser, the text appears underlined and a tooltip appears when the cursor moves over the text. Screen readers read the text as a word rather than spell out its letters.
	Citation	To add a tooltip to text to provide refer to another source such as an author, a book title and page numbers, or a link to a website, select the text and click this button. From the Citation Element screen, enter the citation information in the **Title** field and enter the attributes of the tooltip. In the HTML source code, the editor adds an <cite> tag around the text. When viewed in a browser, the text typically appears emphasized and a tooltip appears when the cursor moves over the text.
	Bold	To make text appear bold, select the text and click this button or press **CTRL+B**. In the HTML source code, the editor adds a <strong> tag around the text.
	Italic	To italicize text, select the text and click this button or press **CTRL+I**. In the HTML source code, the editor adds a <em> tag around the text.
	Underline	To underline text, select the text and click this button or press **CTRL+U**. In the HTML source code, the editor adds a <u> tag around the text.
	Strikethrough	To strike a line through text, select the text and click this button. In the HTML source code, the editor adds a <strike> tag around the text.
	Superscript	To format text as a superscript, select the text and click this button. In the HTML source code, the editor adds a <sup> tag around the text.

Icon	Task	Description
	Subscript	To format text as a subscript, select the text and click this button. In the HTML source code, the editor adds a <sub> tag around the text.
	Align left	To align text to the left, select the text and click this button. In the HTML source code, the editor adds an attribute of align=left to the division.
	Align center	To align text to the center, select the text and click this button. In the HTML source code, the editor adds an attribute of align=center to the division.
	Align right	To align text to the right, select the text and click this button. In the HTML source code, the editor adds an attribute of align=right to the division.
	Align full	To fully justify text, select the text and click this button. In the HTML source code, the editor adds an attribute of align=justify to the division.
	Remove formatting	To remove formatting from text, select the text and click this button. In the HTML source code, the editor removes any special format attributes from the text so it appears as plain text.
	Select text color	To adjust the color of text, select the text, click this button, and select the color from the palette. In the HTML source code, the editor adds a <span> tag with the coor around the text.
	Select background color	To highlight text, select the text, click this button, and select the color of the highlight from the palette. In the HTML source code, the editor adds a <span> tag with the background color around the text.
	Ordered list	To insert a numbered list in the content, click this button. In the HTML source code, the editor adds an tag at the location. In the output, list items are numbered sequentially starting with 1. To end the list, click this button again.
	Unordered list	To insert a bulleted list in the content, click this button. In the HTML source code, the editor adds an tag at the location. In the output, a bullet appears before each list item. To end the list, click this button again.

Icon	Task	Description
	**Indent**	To increase an indent, click this button. In the HTML source code, the editor adds a <blockquote> tag around the paragraph. If you increase the indent for a list item, its number or bullet changes to indicate a secondary relationship to the list.
	**Outdent**	To decrease an indent, click this button. In the HTML source code, the editor removes the <blockquote> tag from the paragraph. If you decrease the indent for a primary list item, it becomes body text. If you decrease the indent of a secondary list item, its number or bullet changes to reflect its relationship to the list.
	**Edit letter margins**	To set the page margins for the printed output of mail content, click this button. For information about how to edit the letter margins, see Edit the Page Margins for Mail Content on page 129.

Menu	Description
Format	To apply a paragraph tag to text, select the text and select its format from this menu.
Font family	To apply a typeface to text, select the text and select its font from this menu. This menu provides fonts that commonly appear on most web browsers.
Font size	To adjust the size of text, select the text and select its size from this menu.
Merge fields	To create personalized content, select the merge fields to display information specific to the recipient. For example, include the **Fullname** field as "Hello, <Fullname>" to display the recipient's name. By default for some communications, this menu displays commonly used merge fields. To include additional merge fields or select the merge fields to include, select "More fields" from the menu to create the export definition of merge fields to use. For information about export definitions, see the *Query and Export Guide*. For information about export definitions, see the Query and Export section of the help file.

Mail Content

When you create content in the HTML editor, you must design the content for each channel of the communication. The content you create for a communication sent through the mail may differ greatly from the content you send through email. On the Mail content tab, you can design the content to appear for recipients who receive the communication through the mail. For your mail content, you can also set the page margins for the printed output.

Edit the Page Margins for Mail Content

When you design mail content, you can set the margins of the printed output, such as to allow for your organization's letterhead.

Edit letter margins

1. On the HTML editor, select the Mail content tab.
2. On the toolbar, click **Edit letter margins**. The Edit letter margins screen appears.
3. Enter the distance, in inches, to allow for the margins along the top, bottom, and sides of the printed output.
4. Click **OK**. You return to the HTML editor.

Email Content

When you create content in the HTML editor, you must design the content for each channel of the communication. The content you create for an email message may differ greatly from content you send through the mail. On the Email content tab, you can design the content to appear for recipients who receive the communication as an email message.

Government regulations and Internet service providers (ISPs) require that email communications provide specific information not required for a mail communication. In addition to the content, you must enter information about the subject and sender of the email messages.

Screen Item	Description
Subject	Enter a subject line to accurately identify the content of the message. Use a unique subject for each email message so recipients do not delete a message mistaken for a duplicate. For the entire subject line to appear in a recipient's inbox, we recommend you use a maximum of 35 characters. To prevent spam filters, avoid terms such as "free" and "save" or exaggerations such as all capital letters, asterisks, or dotted lines.
From address	Enter the email address to appear as the sender of the message. The email address should identify your organization as the sender, regardless of whether a third-party vendor manages your email marketing.
Display name	Enter your organization's name to accurately identify it as the sender of the message, regardless of whether a third-party vendor manages your email marketing.

Screen Item	Description
Reply to address	Enter the email address to receive email sent in response to the message. We recommend your organization have a generic email address used to filter and monitor replies to email. If you do not enter a Reply to address, the From address receives replies to the message.

Warning: In accordance with the CAN-SPAM regulations, you must include links to your organization's web pages for privacy policy and user email preferences so recipients can choose to opt out of future email messages. For information about how to include links in your content, see Insert Links in Email Content on page 130.

Email Content Best Practices

When you create content for email communication, consider these best practices.

- Keep your content clear and concise. We recommend a maximum of 250 words for your total email body content.
- Use a consistent font for all email messages for a specific appeal to create a common identity across messages.
- Minimize the use of images, and adjust the size of images to use minimal space within the email.
- To comply with CAN-SPAM regulations, include a link to your website, a contact phone number and email address, and your organization's name and location.
- To build relationships and increase response rates. To personalize the message, use merge fields such as the recipient's first name.
- Invite recipients to update their profiles on your website so they know you value their participation.
- To prevent an increased score as a potential sender of spam, do not use "click here" as the text to display for links.
- Include at least one call to action such as "join," "donate," or "visit our website." We recommend the call to action be the focus of the message and be immediately visible.
- Use inline styles such as <div style="background-color:Blue;">Welcome color</div>. Do not define classes or use external references as some email clients such as Google *Gmail* or Microsoft *Outlook* do not guarantee to render the styles correctly for recipients.

Insert Links in Email Content

When you design email content, you can include links to pages on your organization's website or other websites. For example, in the email content for an appeal mailing, you can include a link to a donation page on your website. From the HTML editor, you can enter a website address or select a special page on your website to include in the content.

Warning: To prevent your email messages from being blacklisted or marked as "spam," you must include links to your organization's online privacy page and user email preferences form. For additional considerations for email content, see Email Content Best Practices on page 130.

Insert a link in email content

1. On the HTML editor, select the Email content tab.
2. On the toolbar, click **Insert/edit link**. The Insert link screen appears.
3. Select the type of link to insert.
   - To insert a link to a page on your organization's website or another website, select **URL** and enter the exact path to the web page, including the protocol such as "http://."
   - To insert a link to your organization's privacy policy page or user email preferences form, select **Special page** and select the web page to link.

Warning: To prevent an increased score as a potential sender of spam, do not use "click here" as the text to display for links.

4. In the **Text to display** field, to display the link as text other than the URL or special page name, enter the text to appear.

Note: If you select text or an image and then click **Insert/edit link**, the **Text to display** field does not appear. The program automatically uses the selected text or image as the link.

5. Click **OK**. You return to the HTML editor. In the editor, the link appears.

Manage Images

When you design content in the HTML editor, you can include images from your image library. Before you can include an image in content, you must upload it to the image library from your computer or network drive. When you add an image to the library, you can group it with similar images by category.

Add Images to the Library

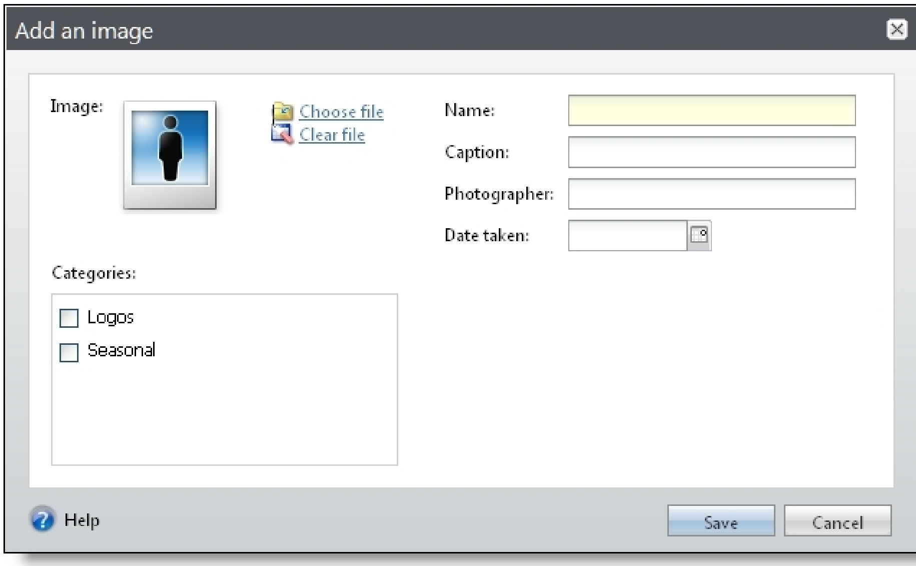
When you design content in the HTML editor, you can include images as part of the message. Before you can include an image in content, you must upload it to the image library from your computer or network drive.

Tip: When you add an image to the library, the program automatically assigns the image an ID number. You can use this ID to search for the image in the library.

When you add an image to the library, you can group it with similar images by category. To include the image in content, you can search by its category. For information about image categories, see Image Categories on page 134.

Add an image

1. On the Select an image screen, under **Images**, click **Add**. The Add an image screen appears.



2. For **Image**, click **Choose file** and browse to the image file to add to the library.
3. To organize the image with similar images, select the categories to which the image applies.
4. Enter a unique name to help identify the image in the library.
5. In the **Caption** field, enter the alternate text to appear when a browser cannot display the image, such as due to a slow connection or screen reader.

Tip: While some browsers may display alternate text as tooltips, do not use the caption to create a tooltip for the image. To comply with the HTML specification, use the title attribute to create tooltips.

6. To acknowledge the source of the image, enter the name of the photographer or artist credited with the image and its creation date.
7. Click **Save**. You return to the Select image screen.

Add an Image Screen

Screen Item	Description
Image	This field displays a thumbnail of the selected image. To select an image, click **Choose file** and browse to the image file on your computer or network drive. To remove a selected image, click **Clear file**.

Screen Item	Description
Categories	To group the image with similar images in the library, select the categories to assign the image. You can use the categories to search for the image in the library. For information about image categories, see Image Categories on page 134.
Name	Enter a unique name to help identify the image in the library.
Caption	Enter the text to appear when a browser cannot display the image in an email message, such as due to a slow connection or screen reader. In the HTML source code for email messages, the caption appears as the alternate text (<alt>) attribute required for images.
Photographer	Enter the name of the photographer, artist, or institution credited as the source of the image.
Date taken	Select the date the image was created.
URL	When you edit the image, this field displays the source URL or address of the image. In the HTML source code for email messages, the URL appear as the source (<src>) attribute required for images.
ID	When you edit the image, this field displays the ID number that the program assigned to the image. You can use the ID to search for the image in the library.

Insert Images in Content

When you design content in the HTML editor, you can include images from your image library.

Insert an image in email content

1. On the toolbar of the HTML editor, click **Insert image**. The Select image screen appears.
2. Search for the image to insert.
    - To search by image category, select the Categories tab and then the applicable category folder from the image library. The images in the selected category appear. For information about image categories, see Image Categories on page 134.
    - To search by criteria such as image name, ID, and category, select the Search tab. Enter the criteria of the image to insert and click **Search**. The images that match the search criteria appear.
3. Under **Images**, select the image to insert.
4. Click **OK**. You return to the HTML editor. In the editor, the selected image appears.
5. Through the HTML source, edit the properties of the image as necessary.

Edit an Image

After you add an image to the library, you can edit its details as necessary. When you edit an image, you can also view its source URL and ID.

Edit the properties of an image

1. On the Select image screen, under **Images**, select the image to edit.
2. On the action bar, click **Edit**. The Edit image screen appears. The items on this screen are the same as the Add image screen. For information about the items on this screen, see Add Images to the Library on page 131.
3. Edit the information as necessary.
4. Click **Save**. You return to the Select image screen.

Delete an Image

After you add an image to the library, you can delete it as necessary.

To delete an image, select it under **Images** on the Select image screen and click **Delete**. When a message appears to ask whether to delete the image, click **Yes**.

Image Categories

When you design content in the HTML editor, you can include images from your image library. To organize your images, you can group them by category such as Logos or Seasonal. To add an image to content, you can search by its category. From the Select image screen, you can manage your image categories.

Add Image Categories

To help organize your images, you can group them by category. On the Select image screen, you can add an image category.

Add an image category

1. On the Select image screen, select the Categories tab.
2. Under **Categories**, click **Add**. The Add a category screen appears.
3. Enter a name to help identify the category.
4. Click **Save**. You return to the Select image screen.

Edit an Image Category

After you add an image category, you can edit its name, such as to correct a typographical error.

Edit an image category

1. On the Select image screen, select the Categories tab.
2. Under **Categories**, select the category to edit and click **Edit**. The Edit category screen appears.
3. Edit the category name as necessary.
4. Click **Save**. You return to the Select image screen.

Delete an Image Category

After you add an image category, you can delete it as necessary.

Warning: You cannot delete a category currently assigned to an image. For information about how to edit the categories assigned to an image, see Edit an Image on page 134.

To delete an image category, select it on the Categories tab of the Select image screen and click **Delete**. When a message appears to ask whether to delete the category, click **Yes**.

Copy and Paste Letter Content from Microsoft Word

In the HTML editor, you can paste content from a Microsoft *Word* document (*.doc) file. For example, to use letter content created for appeal mailings, acknowledgements, or reminders before the Q3 2011 update, you must copy and paste the content from its archived *Word* document into the HTML editor as you create a new letter.

Copy and paste letter content from Word

1. In Microsoft *Word*, open the document file from which to copy content.

   Note: When you copy letter content from an archived acknowledgement or reminders process, note the recipient selection of the archived process so you can include the selection with the new letter.

   - To open an archived acknowledgement letter, edit the archived acknowledgement process and open the letter. For information about how to edit an archived acknowledgement, see Edit Acknowledgement Process on page 225.
   - To open an archived reminder letter, edit the reminders process and open the letter. For information about how to edit an archived reminder, see Edit Reminder Process on page 265.

   If a message appears to ask whether to include merge data from the header file, click **No**.
2. To quickly select and copy all content in the document, press **CTRL + A** and then **CTRL + C** on your keyboard.
3. In ***Altru***, add a letter for the communication process. For information about how to add a communication letter, see Add Letters for a Communication on page 112.
4. For a letter added to replace an archived acknowledgement or reminder letter, include the recipient selection from the archived process as the recipients for the new letter.

5. As you define the letter content, click **Paste** on the toolbar to paste the content copied from *Word* into the HTML editor.
6. With the toolbar, adjust the format of the text as necessary. For information about the toolbar, see HTML Editor Toolbar on page 123.
7. Update merge fields as necessary. In content pasted from *Word*, merge fields appear as placeholder text between brackets, such as "<<Salutation>>". To update a merge field, select the placeholder text and its brackets in the content and then select its respective merge field from the **Merge fields** menu.
8. Update or add images as necessary. For information about images, see Manage Images on page 131.

Tip: To view how content appears as mail output, click **Preview** to download a sample of the content as a Microsoft *Office* open XML document (*.docx) file. With this file, you can preview the content in a word processing program such as Microsoft *Word* or Google *Docs*. You cannot save changes made to the preview. If necessary, edit the content through the communication letter.

9. After you add and save the letter, arrange the order in which to generate letters for the communication. For example, arrange the order so the process generates letters for board members and major givers before it generates the default letter used for all constituents.

Letter Output and History

When you run a communication process, the program compiles any merge field information and generates the letters and content for the communication. After you run a communication process, you can download and manage its letters and output files. For example, you can manually send the email content or download mail content for delivery or a mail house. You can also delete an instance of the communication process to remove its generated content, such as to correct a typographical error.

Tip: For reminders and revenue acknowledgements, you can clear results to remove an instance of the communication process from its transactions, such as to correct a typographical error. For information about how to clear results, see Clear the Results of a Donor Relations Communication on page 100

Send Email Content for a Communication

When you run a communication process that includes email content, you can schedule when to send the content to its recipients. After you run the communication, you can also manually send its email content from its record or process page. On the History tab, select the instance of the communication to send under **Outputs** and click **Send email**. When a message appears to ask whether to start the job, click **Yes**. When you start an email job, the program sends the messages when it next sends fundraising blasts to the Shared Services server hosted by Blackbaud.

For information about how to set up email services, see the *Administration Guide*.

Download Output for a Communication

After you run a process that includes mail content, you can download its merged mail content as Microsoft *Office* open XML document (*.docx) files, or download its merge information as a comma-separated values (*.csv) file, such as to send to a mail house. You download the output on the History tab of the communication's record or process page. When you download the content, the program compiles the documents into a compressed *.zip file.

Note: By default, the program sorts a letter's output by its recipients' last names. To sort by another merge field such as Zip code, edit the sort field for the letter's export definition. To manage the export definition, edit the letter's content and select "More fields" from the **Merge fields** menu.

To download the content, select its instance of the communication under **Outputs**, click **Download**. Your browser downloads the content or merge information as a file named mailing.zip. Contained in the .zip file are separate documents or *.csv files for each recipient in your communication. You can then open the file in an archive utility such as *WinZip* to extract the documents for use in *Word* or *OpenOffice.org Writer*, or as a *.csv file, which you can open and manage in a spreadsheet program such as Microsoft *Excel*.

Note: The .zip file contains merged mail content or *.csv merge information based on what you selected when you created the communication.

Delete an Instance of a Communication Process

When you run a communication process, the program automatically saves a record of the instance of the process and its output. From the communication's record or process page, you can delete an instance of the process. For example, if you run a communication and then discover its content contains a typographical error, you can delete the instance and correct the content so others do not inadvertently send letters with the error.

On the History tab, select the instance under **Outputs** and click **Delete**. When a message appears to ask whether to delete the status record, click **Yes**.

Membership Renewal Efforts

You can use membership efforts to communicate with selections of constituents based on their membership. For example, you can send renewal notices to members with memberships about to expire.

Membership Renewal Efforts Workflow

Setting up membership renewal efforts requires several steps.

- Create export definitions to use with your membership renewal effort process. Export definitions enable you to specify several different templates that you can use when exporting an active membership renewal effort. For information about export definitions, see Export Definitions on page 213.
- Add membership renewal effort processes - Create processes to select memberships based on criteria, such as memberships due to expire. When you add membership renewal effort processes, you define the universe and exclusions for the membership renewal effort.
- Define membership renewal effort rules - For each membership renewal effort process (template) you create, you can specify one or multiple membership rules. Membership rules determine when and how the program processes memberships. When you specify rules, you can also tie the

membership renewal process to a segment to target specific sets of members with certain packages.

- Run a membership renewal effort process - Once you add or edit the membership renewal effort process, you run the process to create the membership renewal effort. You can also opt to activate and export the effort automatically when the membership renewal effort process is complete.
- Activate membership renewal efforts - By activating the membership renewal effort, you are specifying the appeal to be associated with any memberships that come in as a result of the membership renewal effort. You can activate the effort automatically when you run the membership renewal effort process or do it as a separate task.
- Create a membership renewal effort export process - Using the export definitions your system administrator defined for membership renewal efforts, you can add a process to export data fields for your membership renewal efforts. You can export the effort automatically when you run the membership effort process or do it as a separate task.
- Export data to complete the membership process - You can create an export file of the membership effort for use by a processing house or to import into another program.

Membership Export Definitions

From *Marketing and Communications*, you can create export definitions to use for membership renewal efforts. When you create a membership export definition, the available export fields are based on the membership query view. When you create an export definition to use for memberships, you can select from several **Membership** fields such as **Expiration date**, **Join date**, and **Status**. For information about export definitions, see Export Definitions on page 213.

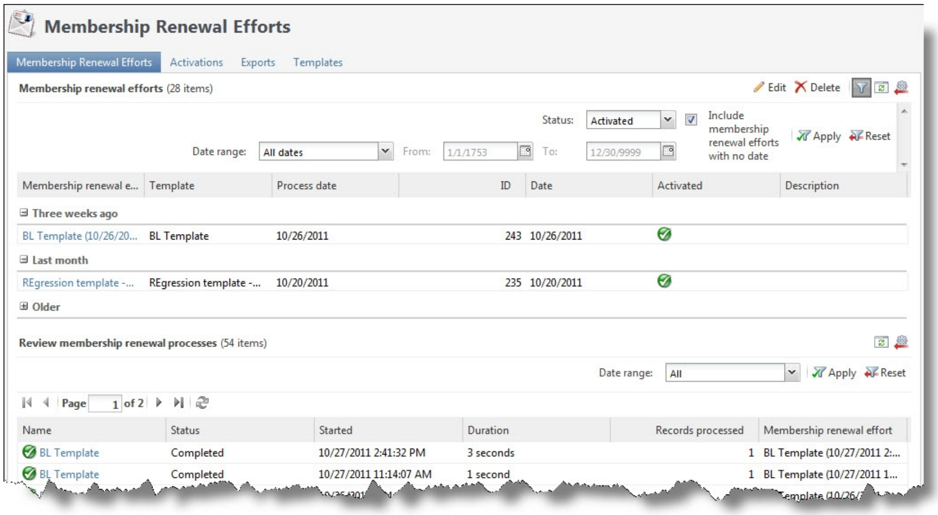
Membership Renewal Efforts Page

With membership renewal efforts, you can communicate with selections of constituents about the status of their memberships and help encourage continued member involvement. On the Membership Renewal Efforts page, you can view and manage the membership renewal efforts in your database. To access the Membership Renewal Efforts page from *Marketing and Communications*, click **Membership renewal efforts**.

From the Membership Renewal Efforts page, you can manage your renewal efforts, the activation and export of these efforts, and the templates used to create the efforts. To help you navigate through this information, the Membership Renewal Efforts page includes multiple tabs.

Membership Renewal Efforts

On the Membership Renewal Efforts tab of the Membership Renewal Efforts page, you can view details about your membership renewal efforts that have been processed. Under **Membership renewal efforts**, you can view information about each effort, such as its template, process date, and activation status. Under **Review membership renewal processes**, details about each run of membership renewal processes appear, including the process status and number of records processed.



From this tab, you can access additional details about a membership renewal effort and edit or delete efforts as necessary.

Edit a Membership Renewal Effort

You can edit general information about a membership renewal effort at any time. When you edit an effort, you edit information determined by the template used to create the effort. After you activate an effort, you can edit only some of its details.

Edit a membership renewal effort

1. From *Marketing and Communications*, click **Membership renewal efforts**. The Membership Renewal Efforts page appears.
2. Select the Membership Renewal Efforts tab.
3. Under **Membership renewal efforts**, select the effort to edit.
4. On the action bar, click **Edit**. The Edit direct marketing effort screen appears.
5. Edit information about the effort as necessary. For information about the items on this screen, see Add Membership Renewal Effort Process Screen on page 151.
6. Click **Save**. You return to the Membership Renewal Efforts page.

Delete a Membership Renewal Effort

On the Membership Renewal Efforts page, you can delete a membership renewal effort at any time. To delete an effort, select it under **Membership renewal efforts** on the Membership renewal efforts tab and click **Delete** on the action bar. When a message appears to ask whether to delete the effort, click Yes.

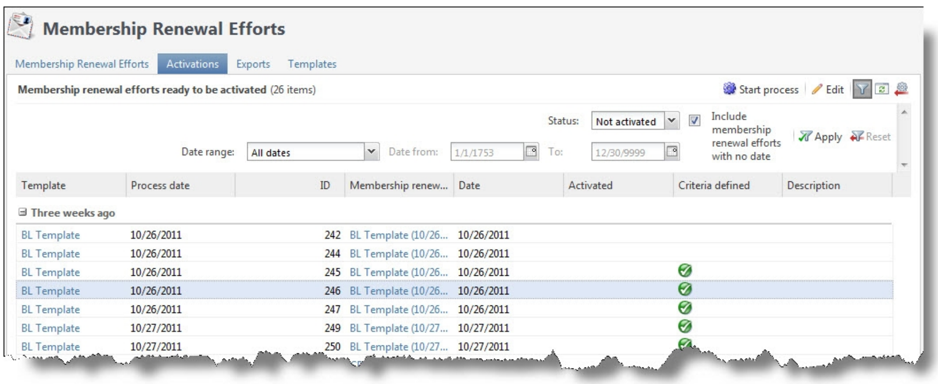
View a Membership Renewal Effort

When you generate a membership renewal effort, the program automatically creates a record of the effort. From this record, you can view and manage information about the effort, including its responses and recipients. To access the record of an effort from the Membership Renewal Efforts page, click its name. For information about the items on the record, see Membership Renewal Effort Records on page 176.

To access the record of a membership renewal effort, you can also search for the effort. For information about how to search for an effort record, see Search for Marketing Efforts on page 185.

Membership Renewal Effort Activations

On the Activations tab of the Membership Renewal Efforts page, you can view and view and manage the activation of your membership renewal efforts. When you activate a membership renewal effort, the program generates and prepares the renewal notices for delivery to their recipients.



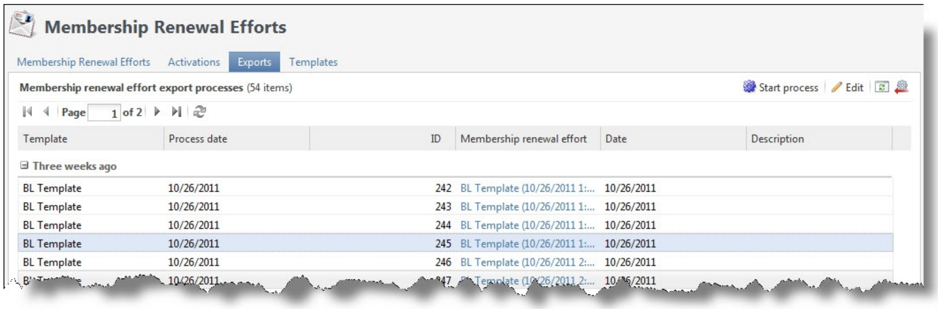
Under **Membership renewal efforts ready to be processed**, you can view details about each activation process, such as its process and activation dates, template, and whether its criteria is defined. To view additional information about an activation process, click its name in the **Template** column to access its status page. For information about the status page, see Manage Activation Status on page 164.

To view additional information about a marketing renewal effort, click its name in the **Membership renewal effort** column to access the record of the effort. For information about the effort record, see Membership Renewal Effort Records on page 176.

From this tab, you can start and edit activation processes as necessary.

Membership Renewal Effort Exports

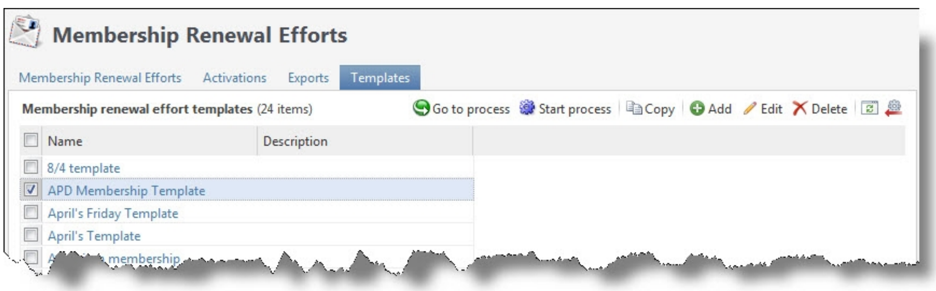
On the Exports tab of the Membership Renewal Efforts page, you can view and view and manage the export of your membership renewal efforts. When you export a renewal effort, you create a comma-separated values (*.csv) file of its information, which you can then download for use and analysis in another program such as Microsoft *Excel*.



Under **Membership renewal effort export processes**, you can view information about each export process, such as its template, process date, and membership renewal effort. From this tab, you can access additional information about an export process and run or edit an export process as necessary. For information about these tasks, see Export Membership Renewal Efforts on page 166.

Membership Renewal Effort Templates

On the Templates tab of the Membership Renewal Efforts page, you can view and manage the templates used to process your renewal efforts. Under**Membership renewal effort templates**, your renewal effort processes appear.



To view additional information about a template, click its name in the grid. The record of the template appears. For information about the record, see Template Page for Membership Renewal Efforts on page 1.

To view information about the process used to generate an effort from a template, select the template in the grid and click **Go to process** on the action bar. The status page of the template process appears. For information about the items on the status page, see Process Status Page for Membership Renewal Efforts on page 154.

From this tab, you can add and manage membership renewal effort process templates as necessary.

Add Membership Renewal Effort Process

To generate membership renewal efforts, you first create processed used as templates for each effort. For example, after you create a template for a membership renewal effort, you can run its process each month to generate renewal notices for members with memberships near the expiration date.

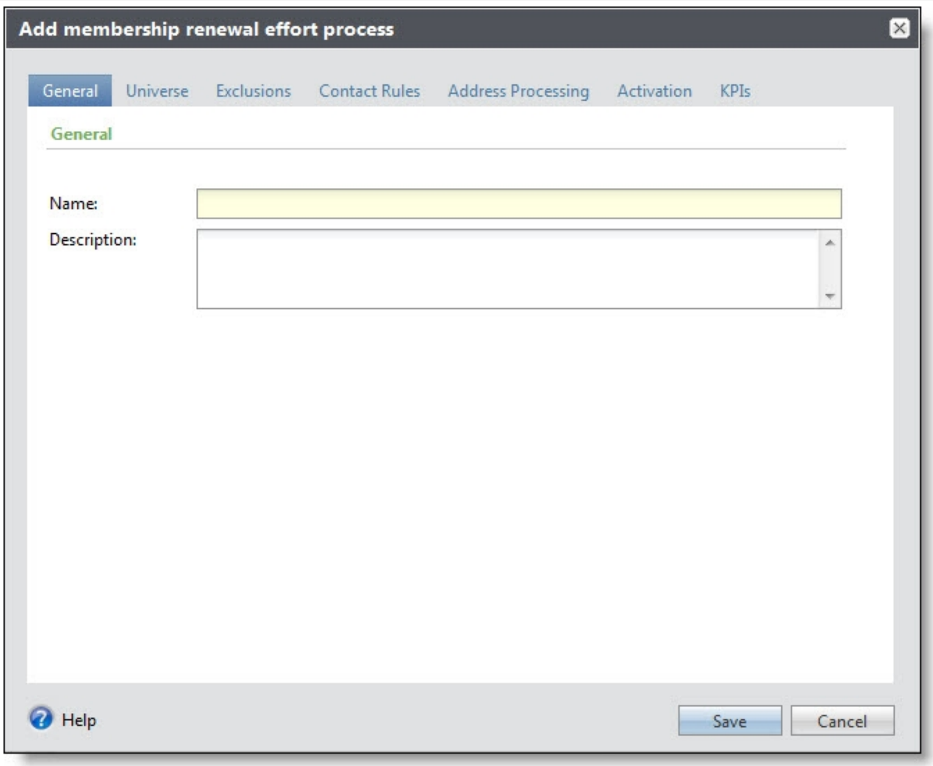
Note: This process is typically completed by the IT Administrator at your organization.

You can create multiple templates to target constituents or members with different content or material based on their activity with your organization. When you create a template, you specify the selections of constituents or memberships to receive the membership renewals generated by the process. You can also select the criteria of the activation and export processes of membership renewal efforts created from the template.

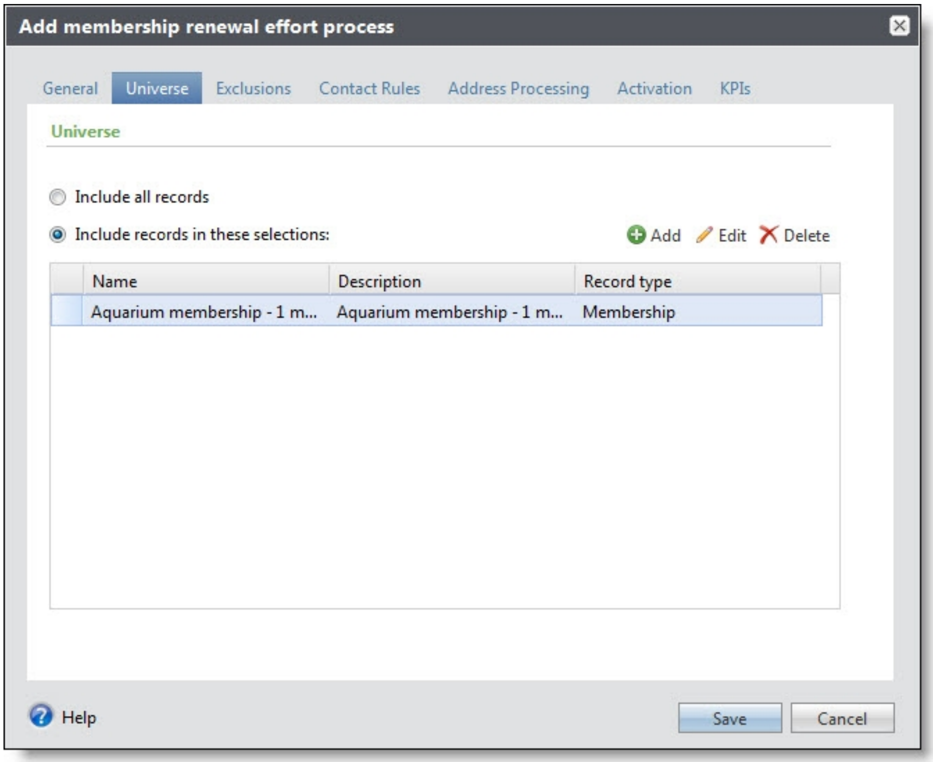
Add a membership renewal effort process

1. From *Marketing and Communications*, click **Membership renewal efforts**. The Membership renewal efforts page appears.
2. Under **Tasks**, click **Add a template**. The Add membership renewal effort process screen appears. For information about the items on this screen, see Add Membership Renewal Effort Process Screen on page 151.

Tip: To add a template from the Templates tab of the Membership Renewal Efforts page, click **Add** under **Membership renewal effort templates**.

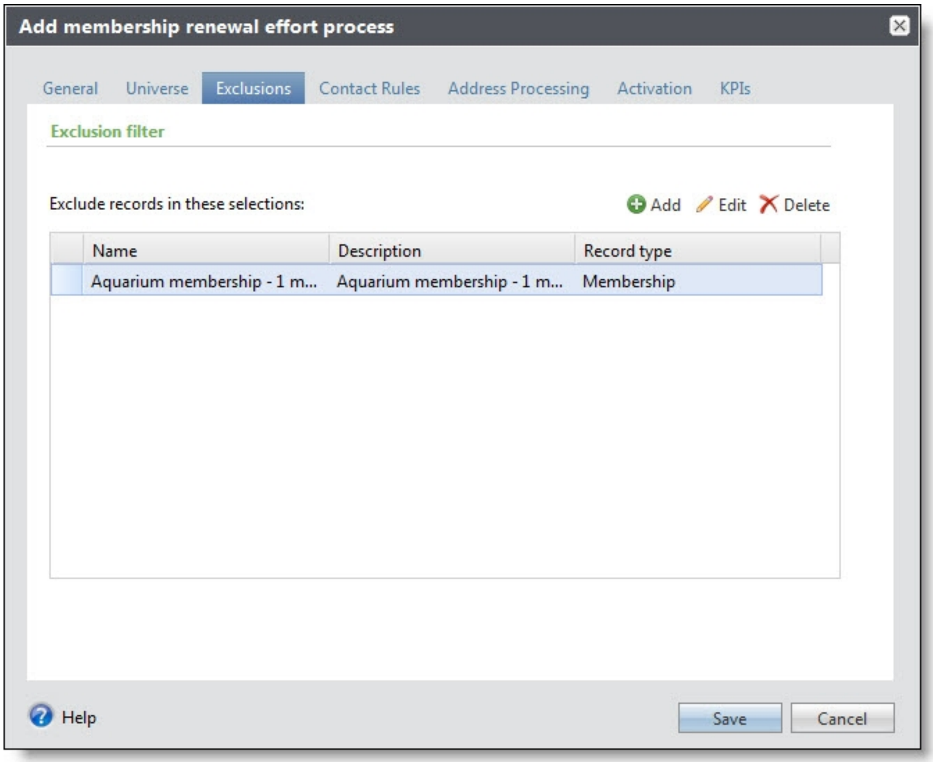


3. On the General tab, enter a unique name and description to help identify the template.
4. On the Universe tab, select the constituents and memberships to receive renewal notices created from efforts based on the template. You can select to include all constituents and memberships or only specific selections of constituents or memberships.



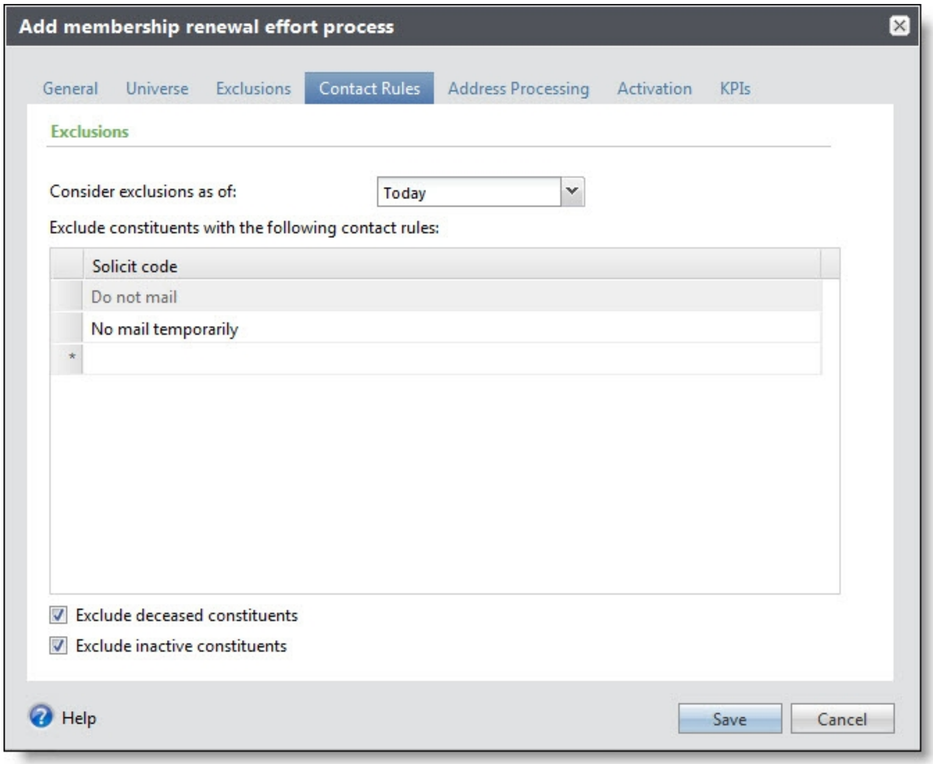
If you select **Include records in these selections**, add the selections of constituents or memberships to include in the process. To add a selection, click **Add** and search for the query selection. When you select to include only specific selections, you reduce the potential "universe" of recipients to only those that meet the criteria of the selected selections.

5. On the Exclusions tab, add the selections of constituents or memberships within the universe to exclude from the process.



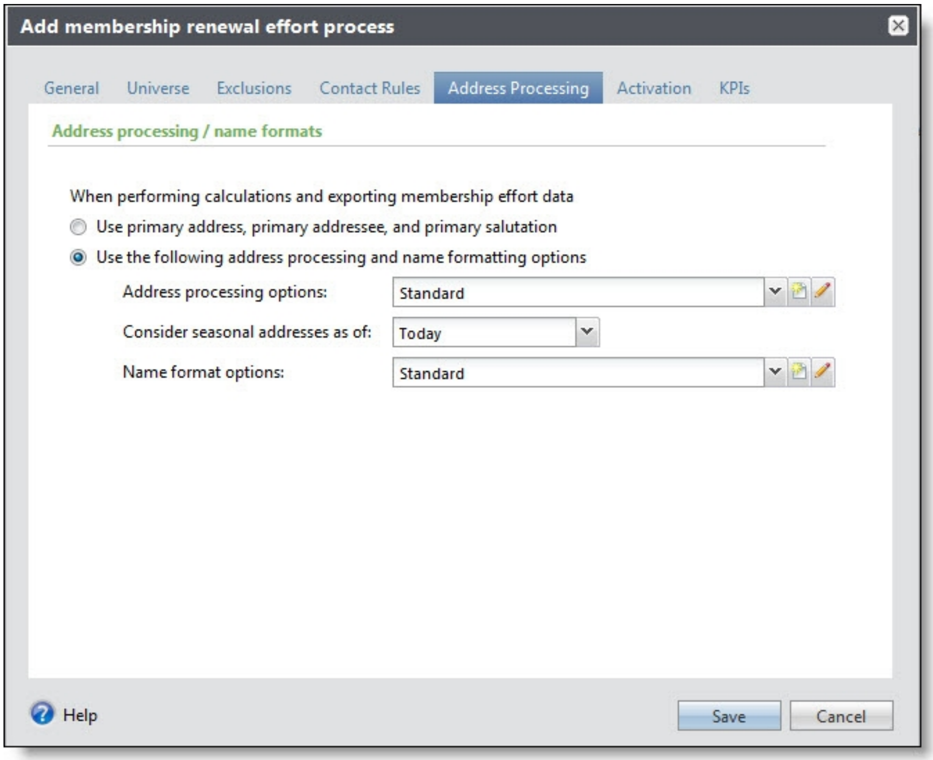
To add a selection as an exclusion, click **Add** and search for the query selection. The process excludes records within these selections from the process, even if they also meet the critieria of selections included in the universe.

6. On the Contact Rules tab, select the criteria of additional constituents to exclude from the universe, based on solicit code, deceased status, or inactive status.



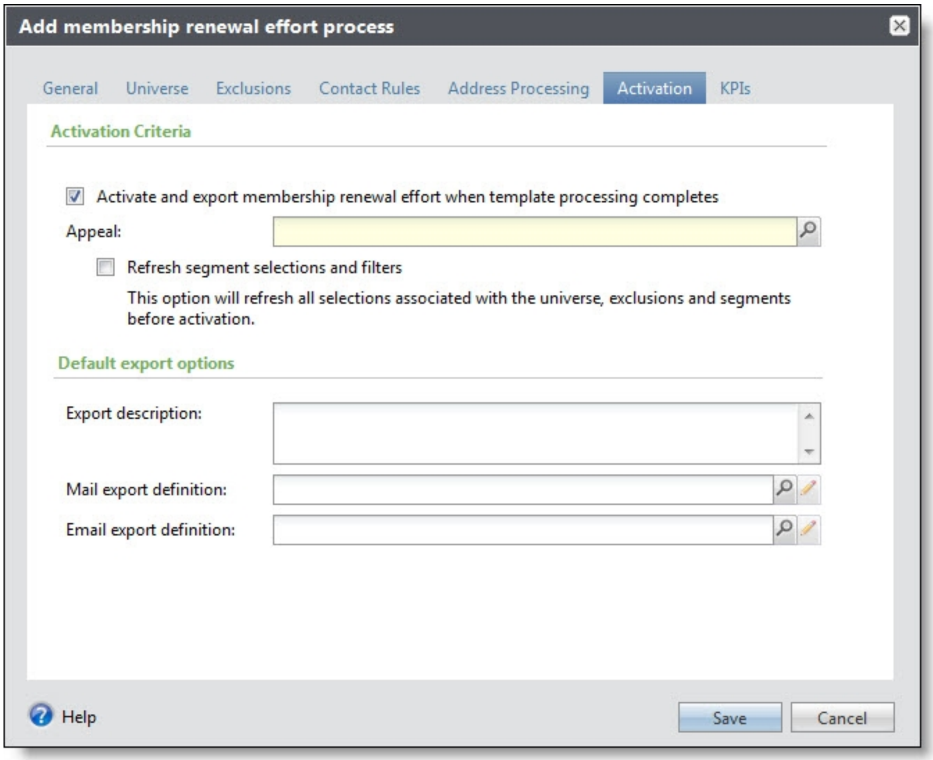
In the **Consider exclusions as of** field, select whether to exclude constituents based on their criteria as of the current date or a specific date.

7. On the Address Processing tab, select whether to use the primary address, addressee, and salutation for each recipient or specific address processing and name formatting options for efforts based on the template.



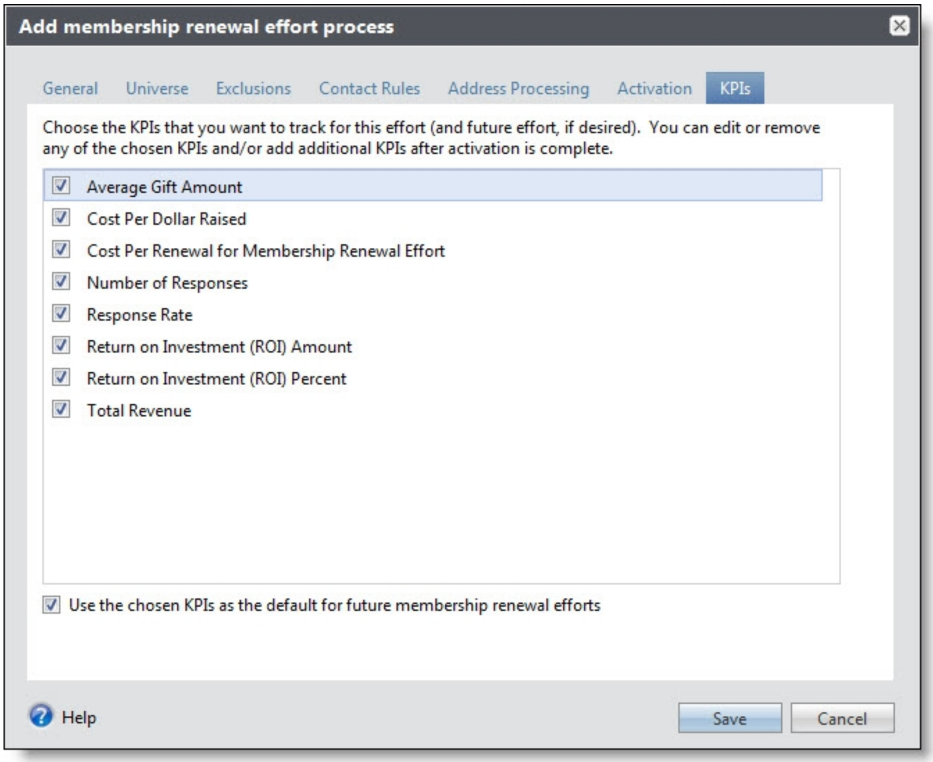
If you select **Use the following address processing and name formatting options**, select the options to use. In the **Consider seasonal addresses as of** field, select whether to use the current date or a specific date, such as the mail date, to determine whether to use seasonal addresses.

8. On the Activation tab, select whether to automatically activate and export membership renewal efforts based on the template when the process runs.



If you select **Activate and export membership renewal effort when template processing completes**, search for and select the appeal that the effort supports and select whether to refresh all selections and filters associated with the effort's segments.

9. Under **Default export options**, enter a unique description to help identify the default export definitions and search for and select the mail and email export definitions to use for packages that do not already have an export definition defined.
10. On the KPIs tab, select the key performance indicators (KPIs) to use to track the effectiveness of membership renewal efforts based on the template.



To automatically use the selected KPIs for all new templates, select **Use the chosen KPIs as the default for future membership renewal efforts**.

11. Click **Save**. You return to the Membership Renewal Efforts page.

Add Membership Renewal Effort Process Screen

The tables below explain the items on the Add membership renewal effort process screen.

General Tab

Screen Item	Description
Name	This is a required field with 100 character length field name. Enter a name for the process that is easily recognizable when you use the process again.
Description	This field has a 255 character length field name. Enter description information that further identifies the process. For example, you can enter "Only use for Annual Fund donors".

Universe Tab

Screen Item	Description
Include all records	When you mark **Include all records**, the membership effort process can potentially include all records from all sources (if you have more than one) and lists. In this case, all your records are available for inclusion. You can later specify to exclude specific sets of donors on the Exclusions tab.
Include records in these selections	When you mark **Include records in these selections**, you are specifying that only a subset of your records will be available for inclusion in the membership effort process. By specifying groups of records for inclusion, when you later create segments for the membership effort process, the potential pool of records for those segments is limited to only those records that meet the criteria of the universe selections you specify here. No matter what selections you choose for each segment, they will not include any records that do not exist in the universe selections you specify. It is important to note that by specifying universe selections, you are reducing the "universe" of potential records to include in the membership effort process to only those that meet the criteria of the selections you specify as universe filters. Click **Search** to locate a selection or **Add** to create a new one.

Exclusions Tab

Screen Item	Description
Exclude records in these selections	In the **Exclusion filter** frame when you specify selections, you define a set of donors you do not want to include in the membership effort process. When you specify exclusion selections, all record sources are still available when you later create segments for the membership effort process (unlike when you define the membership's universe). The set of excluded donors is excluded from every segment in the membership. Click **Search** to locate a selection or **Add** to create a new one. If you do not specify any exclusion selections, all constituents are available for the membership effort process (depending on the defined universe).

Activation Tab

Screen Item	Description
Activate and export effort when template processing completes	Select this option to automatically activate the effort and create the export file after the template is processed. If you do not select **Activate and export effort when template processing completes**, any values you enter in the fields on this tab are used as defaults on the Run Effort Export Process screen.

Screen Item	Description
Appeal	Select the appeal to associate with this effort.
Refresh filters, selections, and segments	Select this option to refresh all selections associated with the membership renewal effort, including those associated with the universe, exclusions, and segments.
Export description	Enter a description for the export process.
Mail/Email export definition	Select an export definition for the mail channel and/or email channel. These definitions are used for any packages that do not have an export definition defined already. While these fields are not required, if you leave them blank and have packages without export definitions defined, the export will not process automatically when **Activate and export effort when template processing completes** is selected. For that reason, we recommend that you always add export definitions to use as a defaults when you export automatically.

Copy Membership Renewal Effort Process

Once you add a membership renewal effort process, you can make a copy of the process and add it to your database.

Copy a membership renewal effort process

1. On the Templates tab, select the membership renewal effort process to copy and on the action bar, click **Copy**. A message appears to ask if you are sure you want to copy the membership template.
2. To copy the process, click **Yes**. The copied process appears in the **Membership templates** grid.

Edit Membership Renewal Effort Process

Once you create a membership renewal effort process, you may need to update the information. To do this, edit the membership effort process.

When you edit a membership renewal effort process, you can edit only information on the General tab. You cannot edit universe or exclusion information. To edit universe and exclusion information, use the Universe and Exclusions tabs on the membership process page. For more information about these tabs, see Universe Tab on page 178 and Exclusions Tab on page 180.

Note: This process is typically completed by the IT Administrator at your organization.

Edit a membership renewal effort process

1. On the Templates tab, select a membership effort process to edit and click **Edit**. The Edit membership effort process screen appears.
2. Edit the information as necessary on the screen. The items on this screen are the same as those on the Add membership effort process screen. For more information about the items on this screen, see Add Membership Renewal Effort Process Screen on page 151.
3. To save your changes and return to the Membership Efforts page, click **Save**.

Run Membership Renewal Effort Process

Once you add or edit the membership effort process, you run the process to create membership efforts for members.

Run a membership renewal effort process

1. To run membership renewal efforts, select the membership renewal effort process.
2. Click **Start process**. The Process status page appears on the Recent status tab. For more information, see Process Status Page for Membership Renewal Efforts on page 154.

Delete Membership Renewal Effort Process

You can delete a membership renewal effort process at any time. When you delete a membership renewal effort process, you also delete the history for that process.

If you delete a process and need it again, you can only retrieve the process from a good backup. We recommend you have a good backup before you delete data.

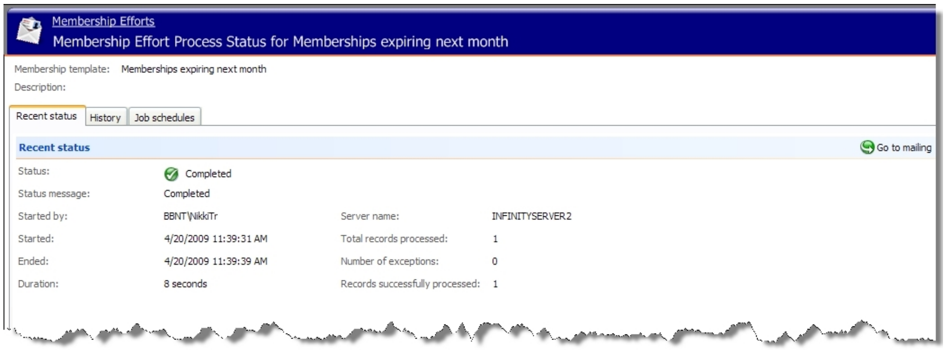
Warning: If you delete a process, you also delete the process status page and the history for the process. For more information, see Process Status Page for Membership Renewal Efforts on page 154.

Delete a membership renewal effort process

1. From the Templates tab, select a membership renewal effort process and click **Delete**. A message appears to ask if you are sure you want to delete the process.
2. Click **Yes**. The program deletes the process. You return to the Templates tab.

Process Status Page for Membership Renewal Efforts

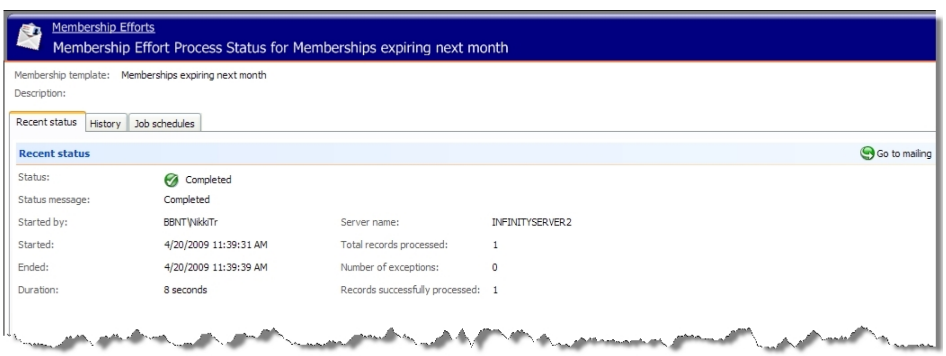
Once you run a membership renewal effort process, the process status page appears automatically.



From the Templates tab, you can click **Go to process** on the action bar to access this page. This page contains the Recent status, History, and Job schedules tabs. The top half of the page contains the parameters and properties for the membership renewal effort process. To make a change to this information, edit the membership renewal effort process.

Recent Status Tab

On the Recent Status tab, you view the details of the most recent instance of the membership renewal effort process. These details include the status of the run; the start time, end time, and duration of the run; the person who last started the process; the name of the server used to process the run; the total number of membership renewal efforts processed; and how many membership renewal efforts processed successfully and how many were exceptions.

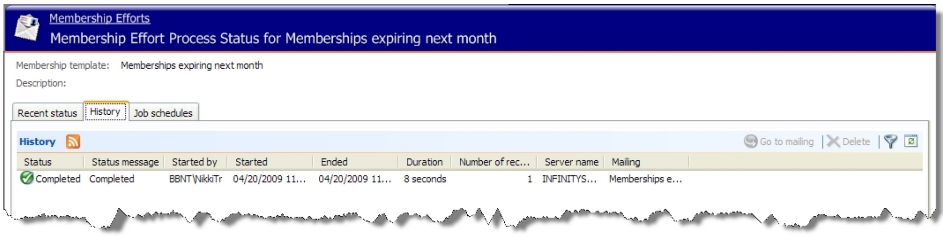


Depending on your security rights and system role, you perform functions to manage the most recent process from the action bar.

- **Go to effort**: When a membership renewal effort process completes successfully (with at least one record processed), the program automatically creates an effort from the process. To go to the effort page, click **Go to effort**.

History Tab

On the History tab, you view the history for each run of the membership renewal effort process. The details in the **History** grid include the status of the process; the start time, end time, and duration of the process; the person who last started the process; and the name of the server most recently used to process the membership renewal efforts. This information generates each time you run a membership renewal effort process. Therefore, it is likely you have multiple rows of information in this grid.



Depending on your security rights and system role, you perform functions to manage the processes from the action bar.

- **Go to effort** - When a membership renewal effort process completes successfully (with at least one record processed), the program automatically creates an effort from the process. To go to the effort page, click **Go to effort**.
- **Delete**: To delete a single instance of the process, highlight the process in the **History** grid. Click **Delete**. You can delete only rows with 0 records processed. If the process has already created an effort, you must first clear all results before you can delete the process instance.
- **Filter**: As the history list grows over time, it may be difficult to find a particular membership renewal effort process. To narrow the list, click **Filter**. A **Status** field appears for you to narrow the list by Completed, Running, or Did not finish. Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again.
- **Refresh**: To make sure you have the latest process information, click **Refresh**.

Delete Membership Renewal Effort Process History

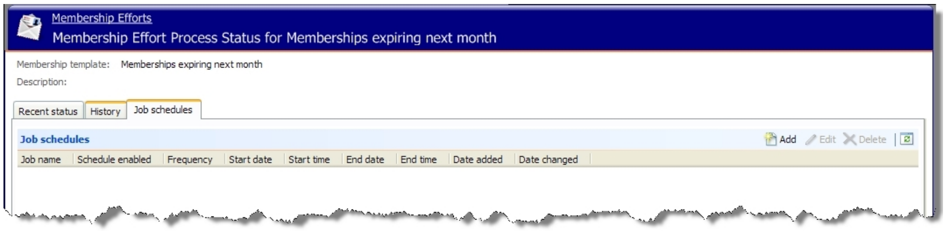
Once you run a membership renewal effort process, you can delete a single instance of the process as needed. You can delete only rows with zero records processed. If the process has already created an effort, you must first clear all results before you can delete the process instance. On the History tab of a membership renewal effort process status page, in the grid, you can select a status record to delete from the history.

Delete a status record

1. On a membership renewal effort process status page, select the History tab.
2. Select the status record (row) to delete and click **Delete**. A message appears to ask if you are sure you want to delete the status record.
3. To delete the status record, click **Yes**.

Job Schedules Tab

On the Job Schedules tab, you can view a list of all automatic jobs for a membership renewal effort process. The details in the grid include the job name and frequency; the start time, end time, and duration of the job; and the dates the job schedule was added or changed. On this tab, you can add, edit, and delete job schedules.



Note: This is typically completed by the IT Administrator at your organization.

Depending on your security rights and system role, you can add, edit, or delete a job schedule.

Create Job Schedules

Use a job schedule to run a process automatically and unattended. When you create a job schedule, you specify the frequency and scheduled time of the occurrence. Using the job schedule and *SQL Server*, the program runs the job at the scheduled time and interval.

Note: This is typically completed by the IT Administrator at your organization.

Depending on your security rights and system role, you can add, edit, or delete a job schedule.

Create Job Screen

Use a job schedule to run a process automatically and unattended. When you create a job schedule, you specify the frequency and scheduled time of the occurrence. Using the job schedule and *SQL Server*, the program runs the job at the scheduled time and interval.

Edit Job Schedules

Once you add a job schedule, you can edit details for that job schedule as needed. On the Job Schedules tab of an activated membership effort process status page, you can select a job schedule to edit. You can edit the **Schedule Type** and information about the frequency at which the job runs.

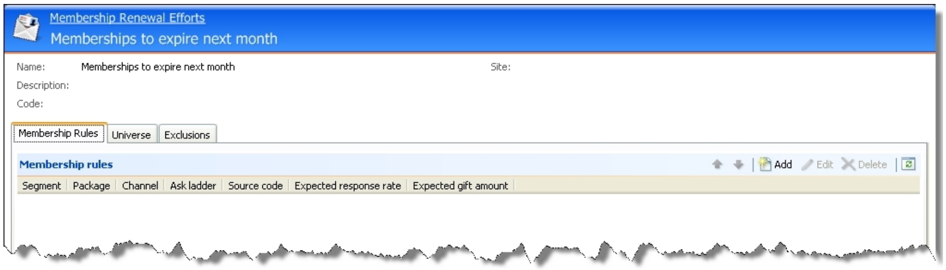
Delete Job Schedules

Once you add job schedules, you can delete a job schedule as needed. On the Job Schedules tab of an activated membership effort process status page, you can select a job schedule to delete.

Template Page for Membership Renewal Efforts

Use the template page for an individual membership renewal effort process to manage the membership rules, universe, and exclusions for that process. To access a membership renewal effort process's template page, on the Templates tab, select a membership renewal effort process and click **Go to template**. The template page for the selected process appears.

On the Membership rules tab, view any membership rules for the selected process. The tab lists information about the membership rules such as the required segment, package, and assumptions.



On this tab, you can add, edit, and delete membership rules. For more information about these tasks, see:

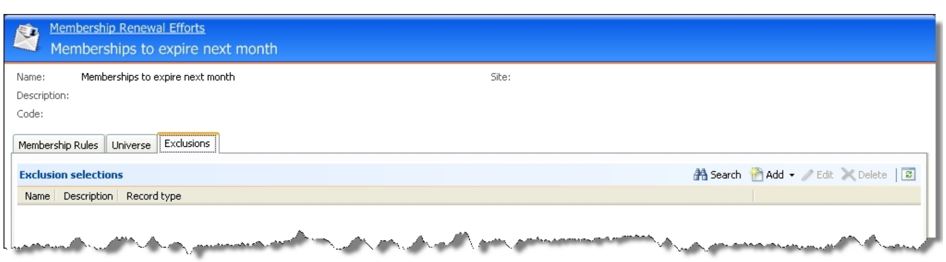
- Add Membership Renewal Effort Rules on page 159
- Edit Membership Renewal Effort Rules on page 160
- Delete Membership Renewal Effort Rules on page 160

On the Universe tab, the **Universe** grid lists any inclusions selected for the membership effort process and displays the name and description of each selection.

On this tab, you can search for a specific universe selection, and add, edit, or delete the inclusions defined for the effort. For more information about these tasks, see:

- Universe Tab on page 178
- Add Universe Selections on page 179
- Edit Universe Selections on page 180
- Delete Universe Selections on page 180

On the Exclusions tab, the **Exclusion selections** grid lists any exclusions selected for the membership effort process and displays the **Name** and **Description** of each exclusion selection.



On this tab, you can search for a specific exclusion selection, and add, edit, or delete exclusions. For more information about these tasks, see:

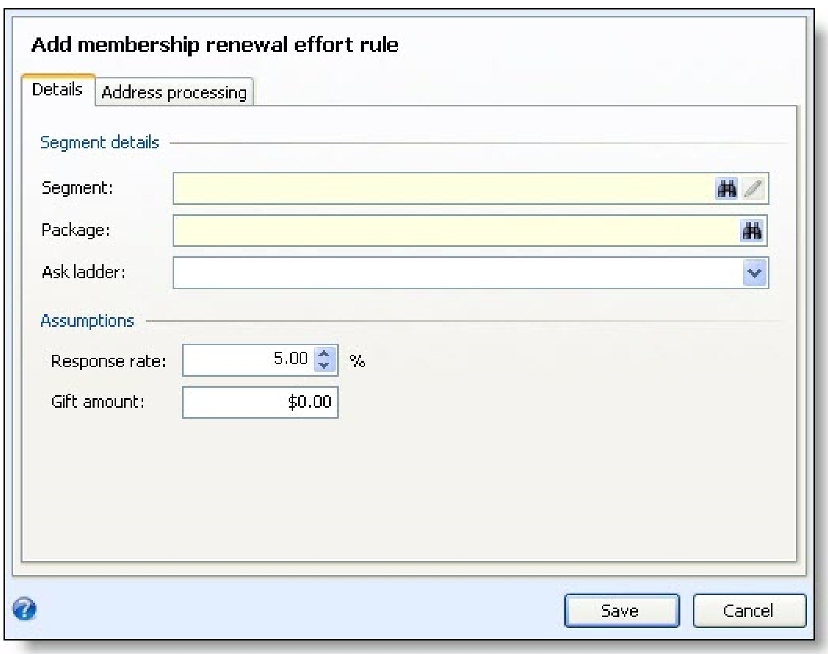
- Exclusions Tab on page 180
- Add Exclusions on page 181
- Edit Exclusions on page 182
- Delete Exclusions on page 182

Add Membership Renewal Effort Rules

Membership renewal effort rules are criteria you define to determine when and how membership renewal effort processes are run, and the segments included in the effort. You can add one or multiple membership renewal effort rules to each membership renewal effort process. Each membership renewal effort rule you add maps one-to-one with a segment in the membership effort.

Add a membership renewal effort rule

1. On a membership renewal effort template page, select the Membership rules tab.
2. On the action bar, click **Add**. The Add membership renewal effort rule screen appears.



3. On this screen, you can enter **Segment details**, **Package details**, and define **Assumptions**.

   For information about the items on this screen, see Add Membership Renewal Effort Rule Screen on page 159.

4. Click **Save**. You return to the Membership rules tab. The data you entered appears in the **Membership rules** grid.

Add Membership Renewal Effort Rule Screen

Details tab

Screen Item	Description
Segment	Use the binoculars to search for a specific segment to use for the membership renewal effort. You must select a membership segment.
Ask ladder	If you include ask ladders on a membership renewal effort, select the ask ladder you want to associate with this membership process.
Package	Click the binoculars to search for the package to associate with this segment. Packages are the different pieces available for a membership renewal effort.
Cost	The **Cost** field displays the cost for the package you select. The cost defaults from the information entered for the package on the Packages page.
Response rate	You can enter a default expected **Response rate** to your membership renewal effort. Entering this information enables you to compare the expected versus actual response rate when you analyze the membership renewal effort later.
Gift amount	You can specify a default expected **Gift amount** from respondents. Entering this information enables you to compare the expected versus actual response rate when you analyze the membership renewal effort later.

Edit Membership Renewal Effort Rules

Once you add membership renewal effort rules, you may need to update the information. For example, you may need to select a different package.

Edit a membership renewal effort rule

1. On a membership renewal effort template page, select the Membership rules tab.
2. In the **Membership rules** grid, select the rule to edit and click **Edit**. The Edit membership effort rule screen appears.
3. Edit the information as necessary on the screen. For example, select a different ask ladder.

   The items on this screen are the same as those on the Add membership renewal effort rule screen. For more information about the items on this screen, see Add Membership Renewal Effort Rule Screen on page 159.
4. To save your changes and return to the Membership rules tab, click **Save**.

Delete Membership Renewal Effort Rules

You can delete a membership renewal effort rule at any time.

Delete a membership renewal effort rule

1. On a membership renewal effort template page, select the Membership rules tab.
2. In the **Membership rules** grid, select a rule and click **Delete**. A message appears to ask if you are sure you want to delete the rule.
3. Click **Yes**. The program deletes the process. You return to the Membership rules tab.

Move Membership Renewal Effort Rules

Use the arrows to move selected rules up or down in the grid. The order of rules in the grid is important because rules are processed in order from top to bottom.

Activate Membership Renewal Efforts

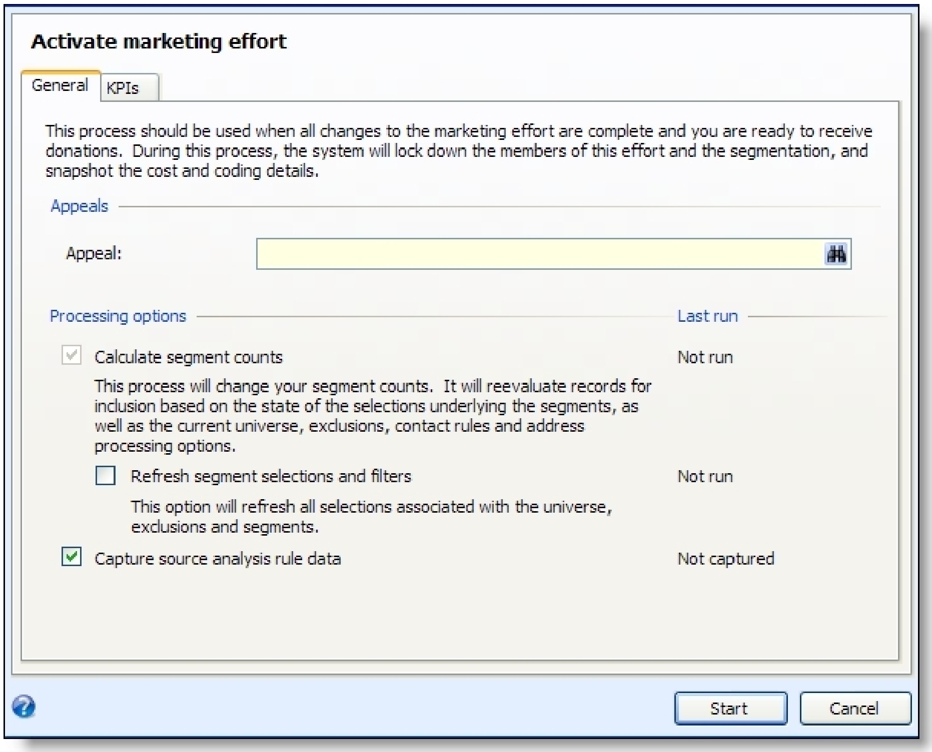
When you activate a membership renewal effort, you select an appeal that will identify gifts that come in as a result of the membership renewal effort. Because you can associate the same appeal with multiple renewal efforts, when you activate an effort, the program automatically assigns a “finder number” for each potential donor in the effort. The finder number identifies the renewal effort and the donor. For each effort, the program stores an appeal ID, marketing effort ID, and finder numbers to determine which renewal effort the gift belongs in, or whether it is an indirect response or unresolved response.

On the Selections tab of the record of an activated membership renewal effort, you can view the responses received from the membership renewal effort. You can use analysis tools to determine the effectiveness of the selections used in the renewal effort.

You can activate membership renewal efforts from a membership renewal effort’s page or from the Activations tab of the Membership Renewal Efforts page. Although you can activate only one membership renewal effort at a time, you can schedule additional renewal efforts to activate one after the other.

Activate a membership renewal effort

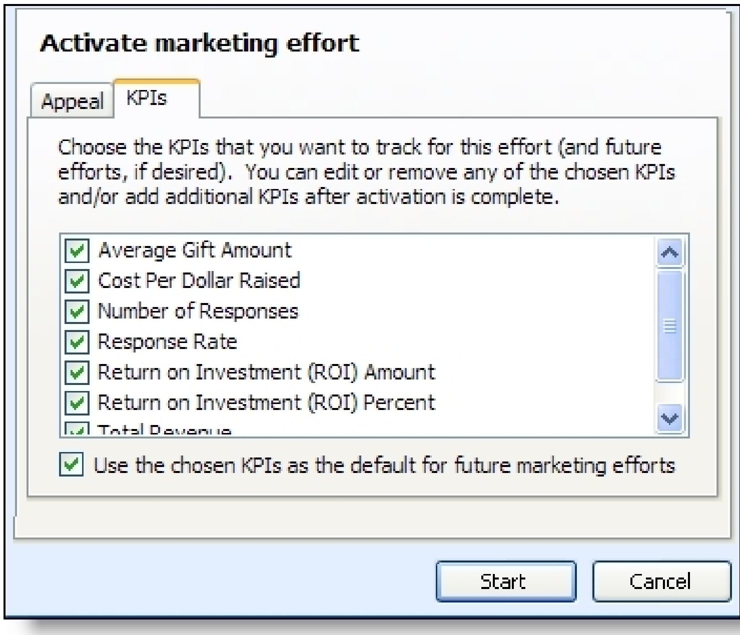
1. From a membership renewal effort’s page, select the **Activate marketing effort** task. The Activate marketing effort screen appears.



2. On the General tab, select the appeal to associate with donations received from the membership renewal effort.
3. Select **Calculate segment counts** to run the Calculate segment counts process when you activate the effort. This process calculates various counts for the membership renewal effort and its segments, such as the total number of records, total expenses, and expected revenue. Select **Refresh segment selections and filters** to refresh all selections associated with the effort, including those associated with the universe, exclusions, and segments.

Note: If you did not run Calculate segment counts at any point prior to activation, this option is marked by default. If you ran Calculate segment counts earlier and do not want to update the segment counts now, clear that option. For example, if you perform quality checks on the marketing effort file prior to activation and verify that the file is ready to send to the processing house, you probably will not want to update the counts.

4. Select the KPIs tab.

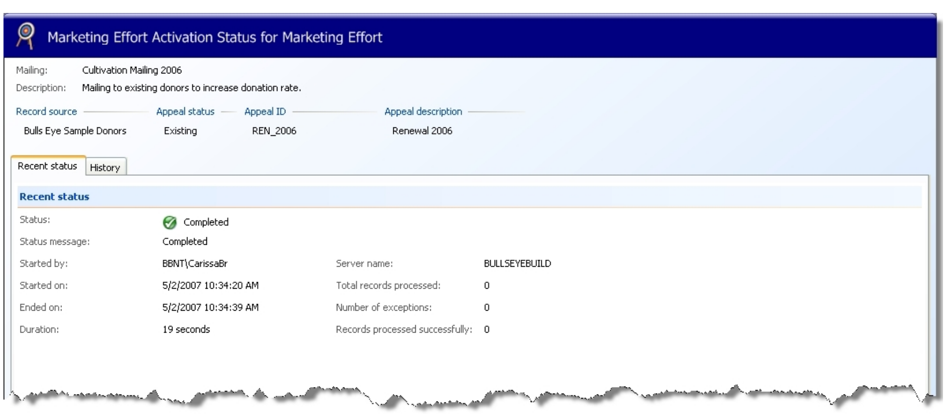


5. Select the checkbox for each KPI to track for the membership renewal effort. These appear on the KPIs tab of the membership renewal effort. For more information, see KPIs Tab on page 176.

   When you activate the membership renewal effort, the program automatically creates an instance of each membership renewal effort KPI you selected and associates it with the activated membership renewal effort. The KPIs you select also appear on a KPI dashboard.

   For more information about KPI dashboards, see the Key Performance Indicator Dashboard chapter of the *Data Management Guide*.

6. Click **Start**. While the activation processes, the Marketing Effort Activation Status page for the selected membership renewal effort appears. The activation process may take some time depending on the properties of the membership renewal effort.



7. To return to the membership renewal effort, click **Go to effort**. The record for the membership renewal effort appears.

   Summary information appears on the upper right of the membership renewal effort. If you selected to export the effort automatically after it was activated, you can click **View export status** to access the Export status page. If you did not export automatically, click **Export marketing effort** to export the membership renewal effort for a fulfillment house or another program. For more information about how to export membership renewal efforts, see Export Membership Renewal Efforts on page 166.

Edit Membership Renewal Effort Activation Processes

After you activate a membership renewal effort, you can make changes to the membership renewal effort activation process as necessary.

Edit activate criteria for a membership renewal effort

1. From an activated membership renewal effort's page, click **Edit activation criteria**. The Activate membership renewal effort screen appears.
2. On the General tab, you can change the appeal associated with the membership renewal effort.
3. Select the KPIs tab to change the KPIs assigned to the membership renewal effort.

   For more information about the options on the General tab and KPIs tab, see Activate Membership Renewal Efforts on page 161
4. Click **Start**. While the activation processes, the Marketing Effort Activation Status page for the selected membership renewal effort appears. The activation process may take some time depending on the properties of the membership renewal effort.

Delete Membership Renewal Effort Activation History

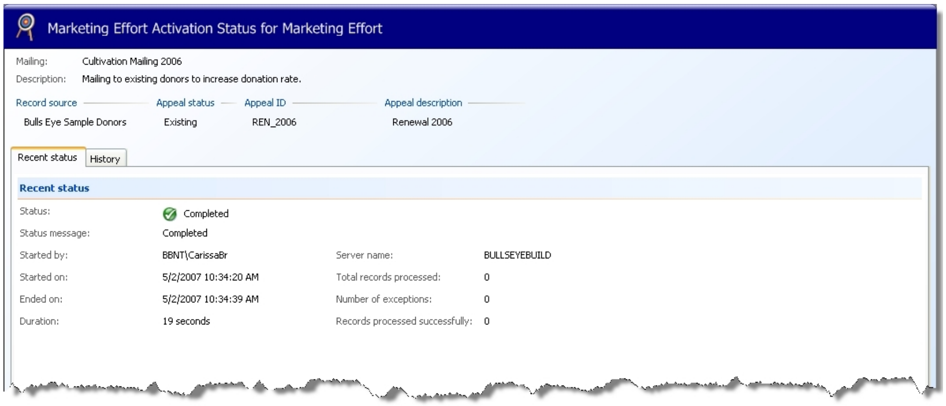
After you run a membership renewal effort activation process, you can delete the process history as needed. On the History tab of the Marketing Effort Activation Status page, in the grid, you can select a status record to delete from the history.

Delete a status record

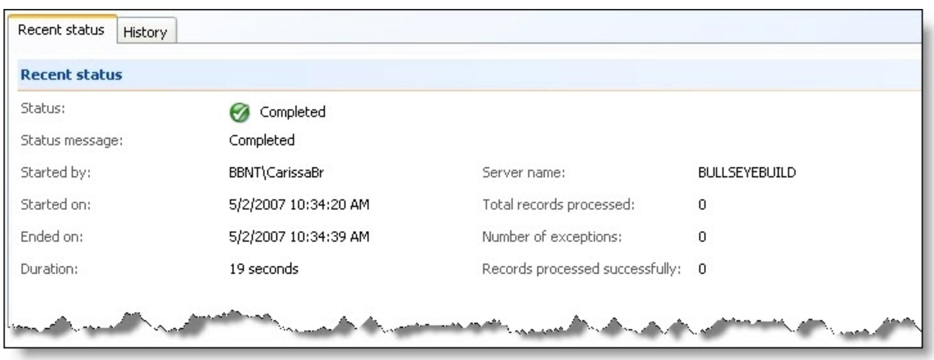
1. On the Marketing Effort Activation Status page, select the History tab.
2. Select the status record (row) to delete and click **Delete**. A confirmation message appears.
3. To delete the status record, click **Yes**.

Manage Activation Status

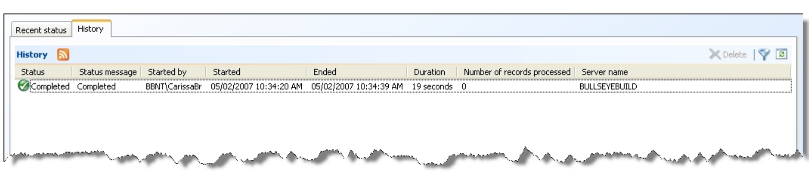
On the Marketing Effort Activation Status page, you manage the activation processes for your membership renewal efforts. To access the page, click **View activation status** from a membership renewal effort record.



On the Recent Status tab, you can view the details of the most recent operation of the activate membership renewal effort process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many records processed successfully and how many were exceptions.



Each time you run the membership renewal effort activation process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the membership renewal effort activation process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.



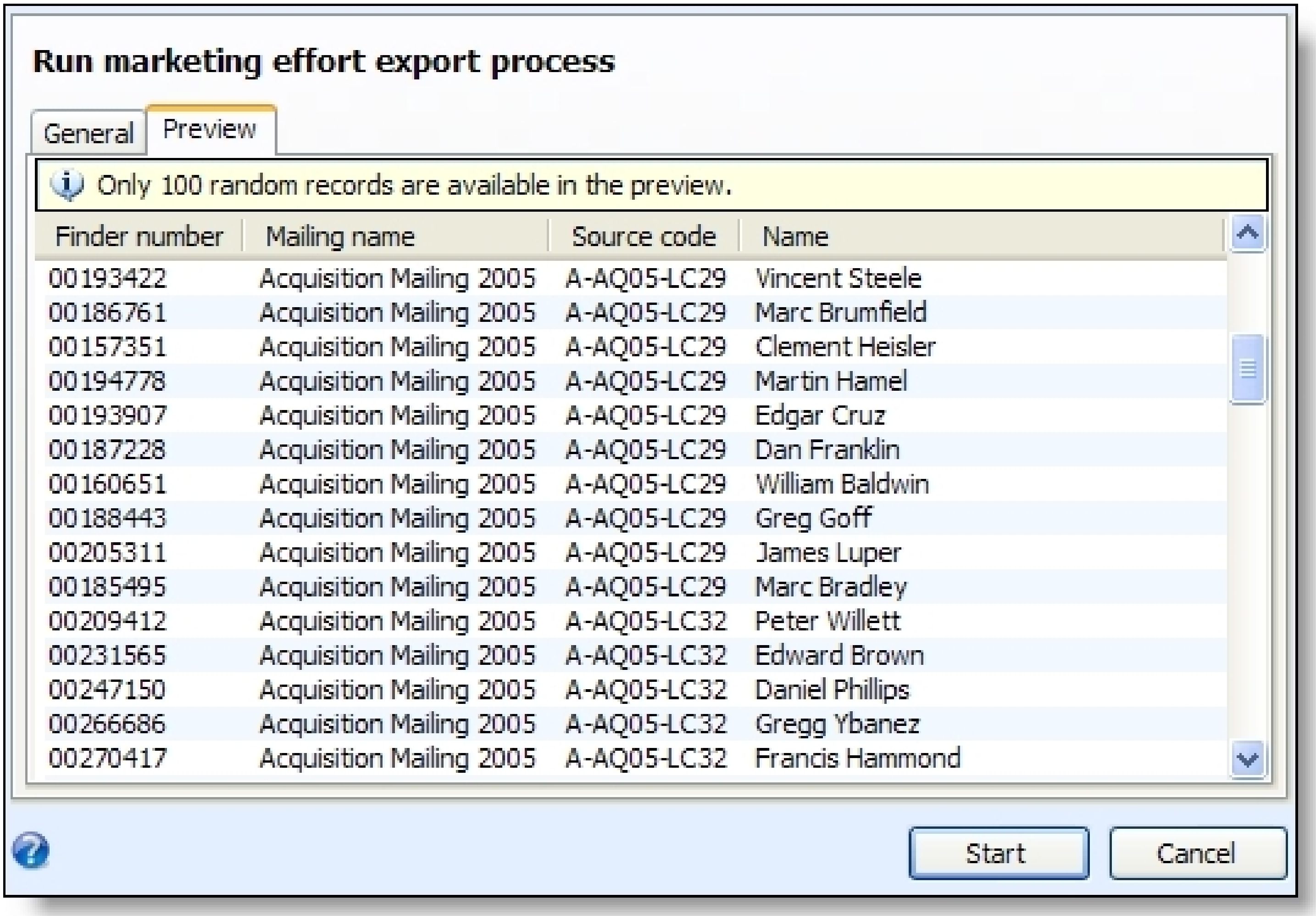
- **View RSS feed** - To subscribe to a Really Simple Syndication (RSS) feed, click **View RSS feed**. Use this to receive a notification when a process completes.
- **Filter** - As the history list grows over time, it may be difficult to find a particular status record. To narrow the list, click **Filter**. A **Status** field appears for you to narrow the list by Completed, Running, or Did not finish. Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again.
- **Refresh List** - To make sure you have the latest process information, click **Refresh List**.

Export Membership Renewal Efforts

Exports create a *.csv file according to an export definition you define. When you create an export, it is saved as a process that you can run whenever necessary. From the process record, you can download the *.csv file created by it from your database. For more information, see Download Output Files on page 169.

Export a membership renewal effort

1. From a membership renewal effort's page, select the **Export effort** task. The Run marketing effort export process screen appears.
2. In the **Export description** field, enter a description for the export process.
3. If you already selected export definitions for any of the packages in the membership renewal effort (on the associated segments or on the Activations tab of the membership renewal effort), these appear in the **Pre-selected export definitions** box.
4. Select the Preview tab. The Preview tab displays 100 random records included in the export. This enables you to spot check the records included in the export.



5. Click **Start** to begin the export.

View Membership Renewal Effort Export Status

You can view the status and history of a membership renewal effort export.

View an export's status

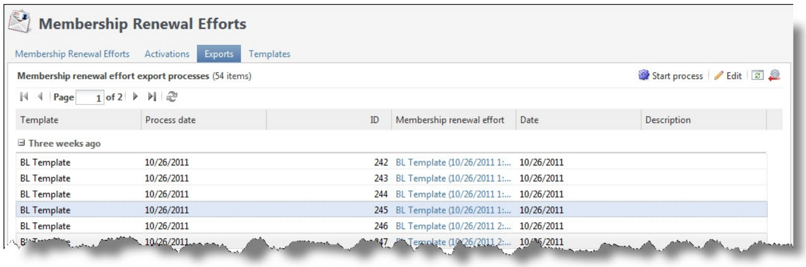
1. From a membership renewal effort's page, select the **View export status** task. The Export Status page for the membership renewal effort appears.

   On this page you can view reference information about the export. For more information, see Manage Membership Renewal Effort Exports on page 168.

2. Click the **Go to effort** task to return to the membership renewal effort.

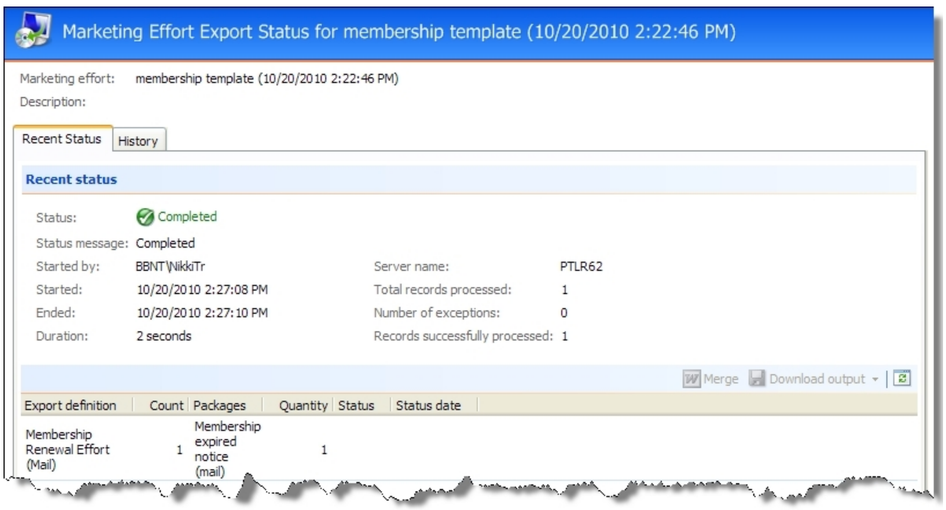
Manage Membership Renewal Effort Exports

On the Exports tab of the Membership Renewal Efforts page, you manage the export processes for your membership renewal efforts. After you create an export process, you can edit and reuse it as you update your database.



The **Marketing Effort export processes** grid includes the name and description of each membership renewal effort export process. Depending on your security rights, you can perform various tasks to manage the export processes in the database.

When you select a process and open it, the status page for that process appears.



On the Recent status tab, you view the details of the most recent operation of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

Each time you run an export process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the export process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.

Add a Membership Renewal Effort Export Process

Adding a membership renewal effort export process from the Exports tab is the same as creating an export from a membership renewal effort record, except you must first specify the renewal effort from which you are creating the process. For more information about how to run a membership renewal effort export process, see Export Membership Renewal Efforts on page 166.

Edit a Membership Renewal Effort Export Process

When you edit a membership renewal effort export process, you can specify that a different renewal effort or export definition be used, or that a different type of membership renewal effort export be created when the process is run.

Delete a Membership Renewal Effort Export Process

You can delete a membership renewal effort export process at any time. When you delete an export process, you can still use an output file previously downloaded from the process.

Delete an export process

1. From the Exports tab on the Membership Renewal Efforts page, select a process and click **Delete**. A confirmation message appears.
2. Click **Yes** to delete the export process and return to the Membership Renewal Effort Exports page.

Download Output Files

After you run an export process, you can download output files from the database for use in another application or to send to a processing house. When you download output files from the export process record, the program downloads files in comma-separated values format (.csv) to a location you specify.

You have three options for downloading output files:

- The single file download creates one output file containing all data.
- The multiple files download splits output into multiple files based on the unique values of a selected field. For example, if you split by "Package code," a separate output file is created for each package code included in the export.
- The grouped files download creates output files including data grouped by field values as specified. For example, you can create a set of files broken out by region. To do this, include the **State** field in your export definition and then select to group by **State** for the output download. Create a group for each region and add the appropriate states to each group — for example, include FL, GA, SC, and NC in the Southeast region group and CT, MA, NH, and VT in the Northeast region group. This setup produces a file for each region and each file includes data for only the states included in its region.

Download a single output file

1. On the export process status page, select the Recent status tab. When the **Status** of the export process is Completed, the **Download output** button is enabled.
2. Select an export definition and click **Download output**, **Single file**. The Save As screen appears.
3. Name the output file and map to the directory to save the downloaded output file.
4. Click **Save** to start the download. When the download finishes, a message appears to inform you that it is complete and asks whether to open the output file.
5. To open the output file in the default application set to open a .csv file, such as Microsoft *Excel*, click **Yes**. To return to the export process status page, click **No**.

Download multiple output files

1. On the export process status page, select the Recent status tab. When the **Status** of the export process is Completed, the **Download output** button is enabled.
2. Select an export definition and click **Download output**, **Multiple files**. The Download output files screen appears.
3. In the **Output path** field, map to the location to save the output files.
4. In the **Create one file per** field, select a column header from the export file. This field determines how data from the export file is split into multiple output files. For example, if you select "Package code" in this field, a separate output file is created for each package code included in the export.
5. In the **File prefix** field, you can enter a prefix to prepend to the output file names.
6. Click **Download**. When the download finishes, a message appears to inform you that it is complete and asks whether to open the output path.
7. Click **Yes**. A window opens to the folder you selected for the output path. The folder contains the downloaded output files.

Download grouped files

1. On the export process status page, select the Recent status tab. When the **Status** of the export process is Completed, the **Download output** button is enabled.
2. Select an export definition and click **Download output**, **Grouped file**. The Download grouped files screen appears.
3. In the **Output path** field, map to the location to save the grouped files.
4. In the **Group by** field, select the export field to group the files by, for example, "Packages" or "Segment code." *Note:* You cannot select an export field that has more than 500 distinct values.
5. Values for the selected **Group by** field appear in the left box of Group options. Select the checkbox for each value to include in the first group and then click right arrow to move those values to the right box. The Group file name screen appears.

6. In the **Name** field, enter a name for the grouped file and click **OK**. You return to the Download grouped files screen and the group appears in the box on the right.
7. Continue adding groups until all values on the left are included in a group on the right. To view the items included in a group, click the plus sign to expand the group.
8. Click **Download**. When the download finishes, a message appears to inform you that it is complete and asks whether to open the output path.
9. Click **Yes**. A window opens to the folder you selected for the output path. The folder contains the downloaded grouped files.

Download the output into an XLSX file

1. On the export process status page, select the Recent status tab. When the **Status** of the export process is Completed, the **Download output** button is enabled.
2. Select an export definition and click **Download output** and select **Download to XLSX**. The Save As screen appears.

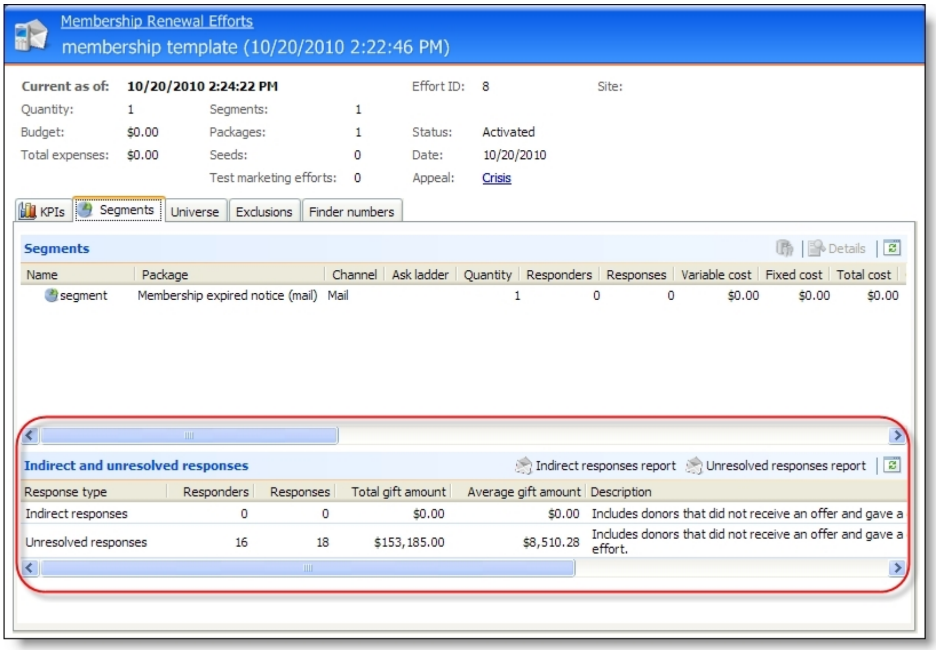
Note: On the Save As screen, the **Save as type** field automatically displays "Excel workbook (*.xlsx)". You cannot select to download another type of output file. In an ***Excel*** workbook (*.xlsx) file, data is stored in a variant of the Office Open XML format. You can open XLSX files with Microsoft ***Excel 2007*** or more recent versions. Other spreadsheet programs may support this format. For some older versions of ***Excel***, to open XLSX files, there is a compatibility pack available at Microsoft's Office website: http://office.microsoft.com.

3. Enter a name for the output file and map to the location to save the downloaded output file.
4. Click **Save**. The program downloads and saves the output file at the designated location. When the download finishes, a message appears to ask whether to open the output file.
5. To open the output file in the default application set to open a *.xlsx file such as Microsoft *Excel*, click **Yes**. To return to the export process status page, click **No**.

Refresh Membership Renewal Efforts

The purpose of refreshing a membership renewal effort is to look for any new gifts donated as a result of that membership renewal effort since the last time it was refreshed. For example, if the last refresh was yesterday and you run a renewal effort refresh now, any gifts given today are located and those gift totals are added into the membership renewal effort.

After those people start to give gifts, the gifts appear on an activated membership renewal effort in the "Indirect responses" section of the Segments tab.



In addition to refreshing membership renewal efforts from within the membership renewal effort record, the process can be scheduled by administrators in *Administration*, **Manage Queues**.

Refresh a membership renewal effort

1. From a membership renewal effort record, click the **Refresh marketing effort** task. You can also click **Start process** from the Refresh status page (which is available when you select the **View refresh status** task)
2. A message appears when the process completes. Any records that the matchback process was able to match with a segment are moved out of the indirect responses section of the grid and included as a response to the appropriate segment.

View refresh status

1. From a membership renewal effort record, click the **View refresh status** task.
2. The Refresh Status page appears with detailed information about the most recent refresh, including any exceptions that may have occurred, as well as a history of refreshes for the membership renewal effort.

Delete refresh history

1. On the Refresh Status page for a membership renewal effort, select the History tab.
2. Select an item in the grid and click **Delete**. A confirmation message appears.
3. Click **Yes**.

Requirements for Matching Gifts to Segments in Membership Renewal Efforts

The program uses a gift's appeal ID, marketing effort ID, or finder number to match a gift to a segment in a membership renewal effort. Because the gift record can also be used to identify the constituent who gave the gift, by extension the constituent is also associated with the membership renewal effort. If the appeal ID or marketing effort ID field values are changed, the association between the gift (and the constituent via the gift) and the membership renewal effort no longer exists.

The following tables show how the information on gifts is processed to determine whether the gift is matched with a segment, or considered an Indirect or Unresolved response for a membership renewal effort.

A gift is matched to a segment when:	Appeal ID	Marketing Effort ID	Source Code	Finder Number
A constituent who is in the membership renewal effort gives a gift where the following match:	**X**	**X***		**X*** *Need either Marketing Effort ID or Finder Number

A gift is an Indirect Response when:	Appeal ID	Marketing Effort ID	Source Code	Finder Number
A constituent who is NOT in the membership renewal effort gives a gift where the following match:	**X**	**X**		

A gift is an Unresolved Response when:	Appeal ID	Marketing Effort ID	Source Code	Finder Number
A constituent who is NOT in the membership renewal effort gives a gift where the following match:	**X**			

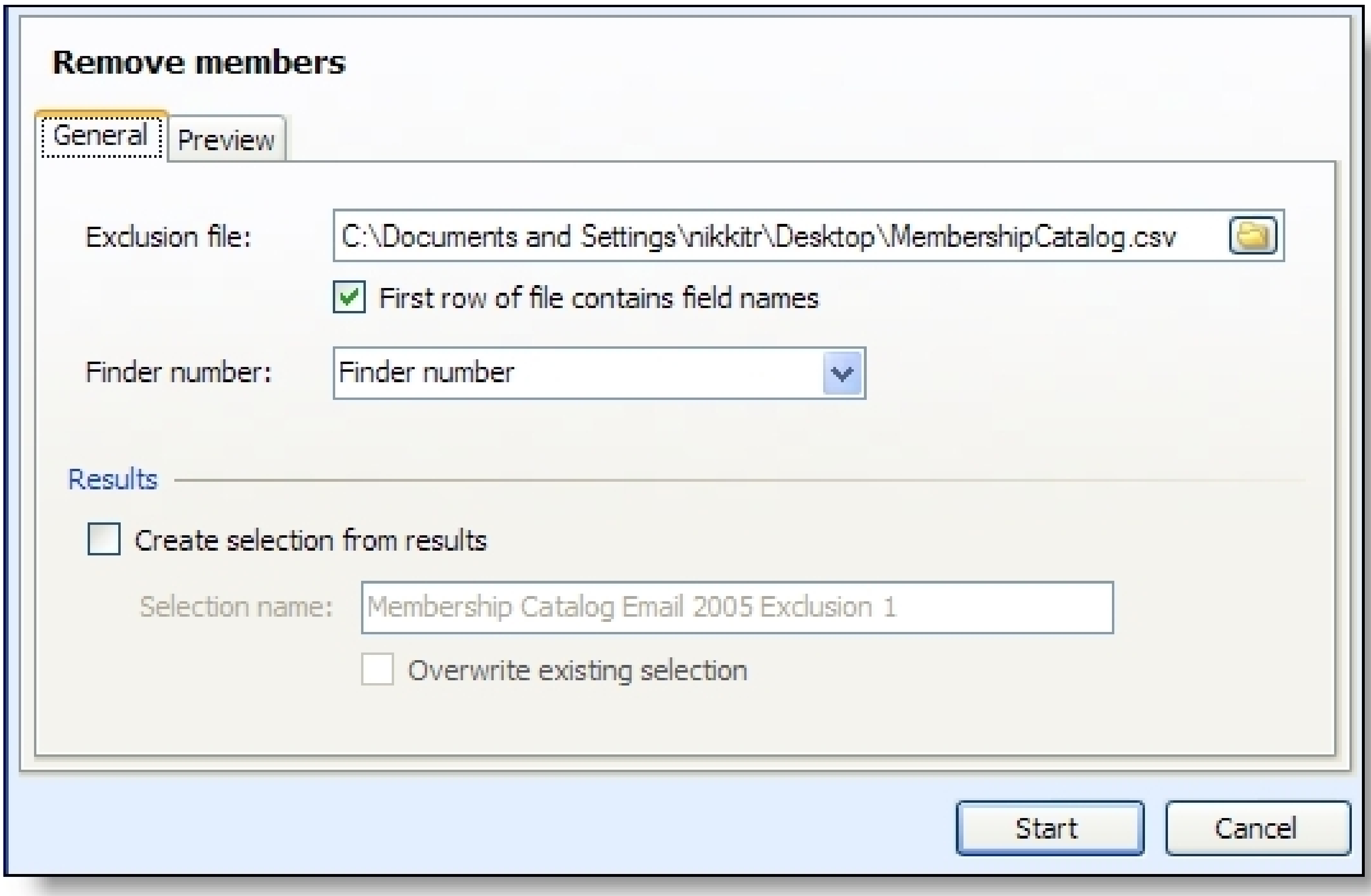
Remove Members

With the **Remove members** task from an activated membership renewal effort, you can use the UMC (Updated Mail Count) file provided by a vendor to update the quantity of records included in membership renewal effort segments so they match the vendor's numbers. For example, a vendor may remove duplicate records or those with invalid or incomplete addresses. After processing, you can view the remove members status and the Removed member counts report. For more information, see Manage Remove Members Status on page 175.

Remove members from a membership renewal effort

1. From an activated membership renewal effort, click the **Remove members** task. The Remove members screen appears.
2. In the **Exclusion file** field, select the UMC (Updated Mail Count) file.

   The UMC file must be in .csv format and must contain a column for finder numbers.
3. If the UMC file contains field names in the first row, select **First row of the file contains field names**.
4. In the **Finder number** field, select the field name for the **Finder number** column in the UMC file. Records with invalid finder numbers are saved to an exception file.
5. To create a constituent selection that includes the records removed from the membership segments, select **Create selection from results**. The **Selection name** field displays the default name for the selection. If a selection with the same name already exists, you can select **Overwrite existing selection** to overwrite the records in the existing selection.

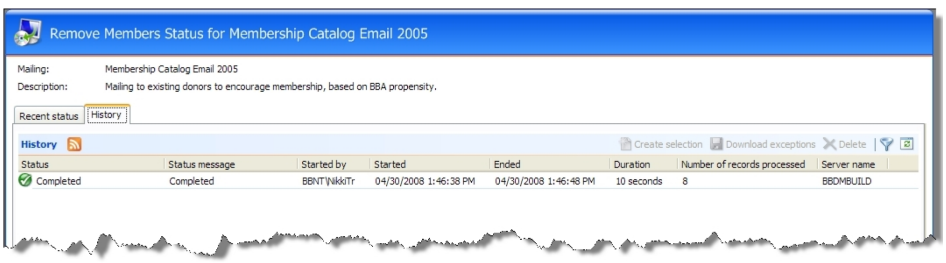


6. You can select the Preview tab to view a sample of the data included in the UMC file.
7. Click **Start**. The Remove member screen closes and the Remove Members Status page appears on the Recent Status tab. For more information, see Manage Remove Members Status on page 175.
8. To return to the membership renewal effort, click **Go to effort**.

Manage Remove Members Status

After starting the Remove Members task, you can view the status of the process on the Recent Status tab of the Remove Members Status page. When the process completes, you can view details such as the total records processed, number of exceptions, and the records processed successfully.

Each time you run the process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the remove members process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.



Other options available on the History tab include:

- **Removed member counts** - To view a report that lists information about records removed from a membership renewal effort during the Remove Members process, click **Removed member count report** under Reports.
- **Create selection** - To create a constituent selection that includes the records removed from the membership segments, click **Create selection**.
- **Download exceptions** - To save a file containing the records that were processed but not removed, click **Download exceptions**.
- **Delete** - To delete the remove members process and associated history entries for the process, click **Delete**. Deleting a process also restores all members removed from the membership renewal effort. Deleted entries will not be available in the **Process date** field when running the Removed members count report.
- **Filter** - As the history list grows over time, it may be difficult to find a particular status record. To narrow the list, click **Filter**. A **Status** field appears for you to narrow the list by Completed, Running, or Did not finish. Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again.
- **Refresh List** - To make sure you have the latest process information, click **Refresh List**.

Packages in Membership Renewal Efforts

Packages are the different pieces of mail available for a membership renewal effort. For example, you may have a package named “Glossy Calendar” that is sent to your best donors and prospects. You could also have a Glossy Brochure, Standard Brochure, and Post Card. When adding multiple segments, you can specify that one package be the default. Then after the segments are generated, where necessary you can assign other packages to segments instead of the default. For information about packages, see Packages on page 199.

Membership Renewal Effort Records

When a membership renewal effort process runs successfully, the program automatically creates a membership renewal effort record.

Using the tabs on the membership renewal effort record, you can manage all aspects of it, including editing universe or exclusion criteria, and segments, and more.

Most of the renewal effort options become locked after activation. You can only change the names of segments and package costs. The universe and exclusions tabs are locked.

To view the activation status of the membership renewal effort, click **View activation status**.

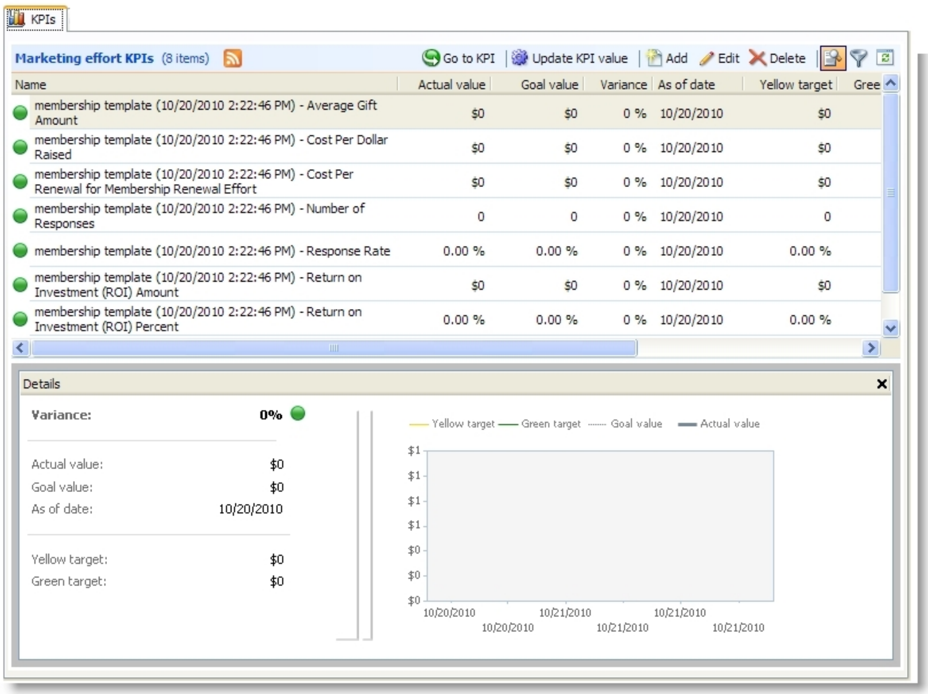
KPIs Tab

Use the KPIs tab to manage any KPIs associated with the selected membership renewal effort. On this tab, you can add additional KPIs for the membership renewal effort, or edit and delete any KPIs already associated with the membership renewal effort. From the KPIs tab, you can go to the specific instance of the KPI, and you can update the values for a KPI. You can also subscribe to an RSS feed to receive the latest KPI information.

When you activate the membership renewal effort, the program generates KPI values automatically. Each time you refresh the membership renewal effort, the program automatically updates the KPI values for the membership renewal effort. Although it is not required, you can manually refresh the KPI, or schedule the KPI to refresh as needed.

In the Details frame, you can view a color-coded line displaying the KPI status, a graph displaying KPI value trends, and the data represented in the thermometer and graph for the KPI selected in the **Marketing Effort KPIs** grid.

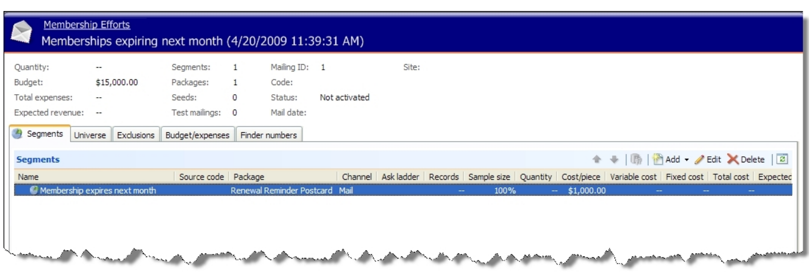
For more information about KPIs, see the Key Performance Indicators chapter of the *Data Management Guide*.



Segments Tab

On the Segments tab, you can create the different segments for a membership renewal effort before you activate it.

For information about how to generate segments, see Membership Segments on page 187.



After you activate a membership renewal effort, you can open individual segments, but you cannot edit their fields. Also after activation, the **Segments** grid displays gift counts, response counts, response rates, and more for each segment.

Additionally, for an activated membership renewal effort, the **Indirect and unresolved responses** grid appears on the Selections tab.

- Indirect responses are those from donors who did not receive an offer and gave a gift to this membership renewal effort. The donors were not part of the renewal effort but they gave a gift and it somehow got associated with the appeal and marketing effort ID. Essentially, the gift has the appeal and marketing effort ID even though the donor was not directly contacted through the membership renewal effort.

- Unresolved responses are those from donors who did not receive an offer and gave a gift to the appeal, but the gift cannot be resolved or credited to a specific membership renewal effort. The donors were not part of the membership renewal effort, but gave a gift that was somehow associated with the appeal, although it has no marketing effort ID. The gift has only the appeal.

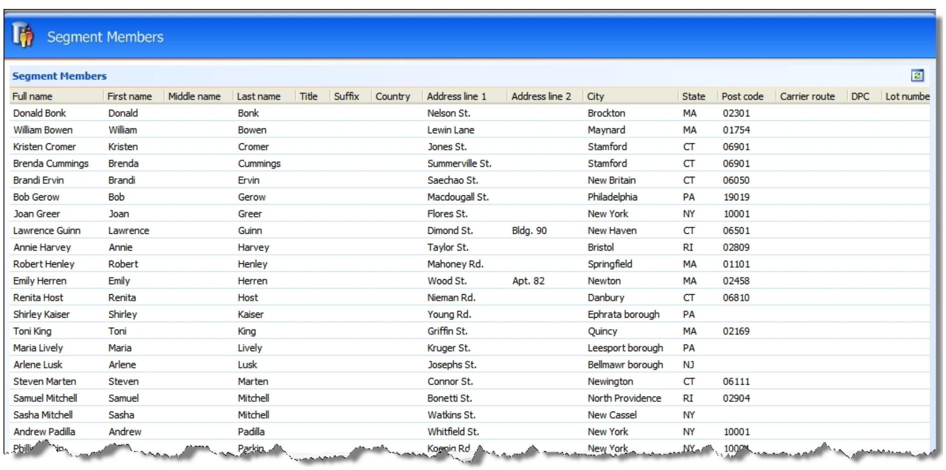
When you refresh a membership renewal effort, a “matchback” process takes place. This process tries to place gifts into specific segments and remove them from the indirect or unresolved pool based on the appeal ID or marketing effort ID on the gift record. For more information, see Refresh Membership Renewal Efforts on page 171.

Use the arrows to move selected segments up or down in the grid. The order of segments in the grid is important because you can only include records in one segment. When you activate a membership renewal effort, segments are processed from top to bottom. If a record meets the criteria for multiple segments, only the first of those segments will include the record.

If you move segments, click **Calculate segment counts** to view the updated counts. For more information about how to calculate segment counts, see Calculate Segment Counts on page 193.

View Members of a Segment

When you select a segment and click **List members**, the Segment Members page appears listing detailed information for each record included in the segment.



Full name	First name	Middle name	Last name	Title	Suffix	Country	Address line 1	Address line 2	City	State	Post code	Carrier route	DPC	Lot numbe
Donald Bonk	Donald		Bonk				Nelson St.		Brockton	MA	02301			
William Bowen	William		Bowen				Lewin Lane		Maynard	MA	01754			
Kristen Cromer	Kristen		Cromer				Jones St.		Stamford	CT	06901			
Brenda Cummings	Brenda		Cummings				Summerville St.		Stamford	CT	06901			
Brandi Ervin	Brandi		Ervin				Saechao St.		New Britain	CT	06050			
Bob Gerow	Bob		Gerow				Macdougall St.		Philadelphia	PA	19019			
Joan Greer	Joan		Greer				Flores St.		New York	NY	10001			
Lawrence Guinn	Lawrence		Guinn				Dimond St.	Bldg. 90	New Haven	CT	06501			
Annie Harvey	Annie		Harvey				Taylor St.		Bristol	RI	02809			
Robert Henley	Robert		Henley				Mahoney Rd.		Springfield	MA	01101			
Emily Herren	Emily		Herren				Wood St.	Apt. 82	Newton	MA	02458			
Renita Host	Renita		Host				Nieman Rd.		Danbury	CT	06810			
Shirley Kaiser	Shirley		Kaiser				Young Rd.		Ephrata borough	PA				
Toni King	Toni		King				Griffin St.		Quincy	MA	02169			
Maria Lively	Maria		Lively				Kruger St.		Leesport borough	PA				
Arlene Lusk	Arlene		Lusk				Josephs St.		Bellmawr borough	NJ				
Steven Marten	Steven		Marten				Connor St.		Newington	CT	06111			
Samuel Mitchell	Samuel		Mitchell				Bonetti St.		North Providence	RI	02904			
Sasha Mitchell	Sasha		Mitchell				Watkins St.		New Cassel	NY				
Andrew Padilla	Andrew		Padilla				Whitfield St.		New York	NY	10001			

Universe Tab

On the Universe tab, the **Universe** grid lists any inclusions selected for the membership effort process and displays the name and description of each selection. When you add universe selections, you reduce the “universe” of potential records to include in the membership renewal effort to only those that meet the criteria of the selections you specify as universe filters.

On this tab, you can search for a specific universe selection, and add, edit, or delete the inclusions defined for the effort.

For more information about these tasks, see:

Add Universe Selections on page 179

Edit Universe Selections on page 180

Delete Universe Selections on page 180

Add Universe Selections

By specifying Universe Selections, you are determining that only a subset of your records will be available for the membership renewal effort’s universe.

If a universe is not specified, the base set of donors includes all records from all sources (if you have more than one) and lists. In this case, whatever donors you include in your segments become the included donors (except for any groups you may exclude on the Exclusions tab).

By specifying groups of records for the universe, when you later create segments for the membership renewal effort, the potential pool of records for those segments is limited to only those records that meet the criteria of the universe selections you specify here. No matter what selections you choose for each segment, they will not include any records that do not exist in the universe selections you specify.

Add an existing selection as criteria for a membership renewal effort’s universe

1. From the Universe tab of a membership renewal effort, select **Search**. The Marketing Selection Search screen appears.
2. Locate and select the selection to use as universe criteria for the membership renewal effort.
3. You return to the Universe tab where the selection appears in the grid.

   By specifying groups of records for the universe, when you create segments for the membership renewal effort, they are limited to the available Records sources used in the universe selections you specify here. No matter what selections you choose for each segment, they are always limited to only those donors that exist in the universe selections you specify here.

Add a new selection as criteria for a membership renewal effort’s universe

1. From the Universe tab of a membership renewal effort, select **Add**. The Source view screen appears for you to select the view containing the type of record to group in the new selection query.

2. Complete the rest of the steps to create the selection.
3. After you save your query, you return to the Universe tab where the query now appears.

   By specifying groups of records for the universe, when you create segments for the membership renewal effort, they are limited to the available Records sources used in the universe selections you specify here. No matter what selections you choose for each segment, they are always limited to only those donors that exist in the universe selections you specify here.
4. Click **Search** to locate a selection or **Add** to create one.

It is important to note that by specifying universe selections, you are reducing the “universe” of potential records to include in the membership renewal effort to only those that meet the criteria of the selections you specify as universe filters.

Edit Universe Selections

You can edit the universe selections for a membership renewal effort. When you edit a selection, you edit the properties of the selection, so those changes are reflected wherever the selection is used, not just in the universe for the membership renewal effort.

Edit selections as criteria for a membership renewal effort’s universe

1. From the Universe tab of a membership renewal effort, select a query and click **Edit**. The Query screen tabs appear.
2. Make any necessary changes to the query properties. These changes are to the query itself, so they are reflected anywhere this particular query is in use.
3. After you save the changes to the query, you return to the Universe tab.

Delete Universe Selections

When you delete a universe selection, it is only deleted from the membership renewal effort. The selection is still available for use in other membership renewal efforts.

Delete selections as criteria for a membership renewal effort’s universe

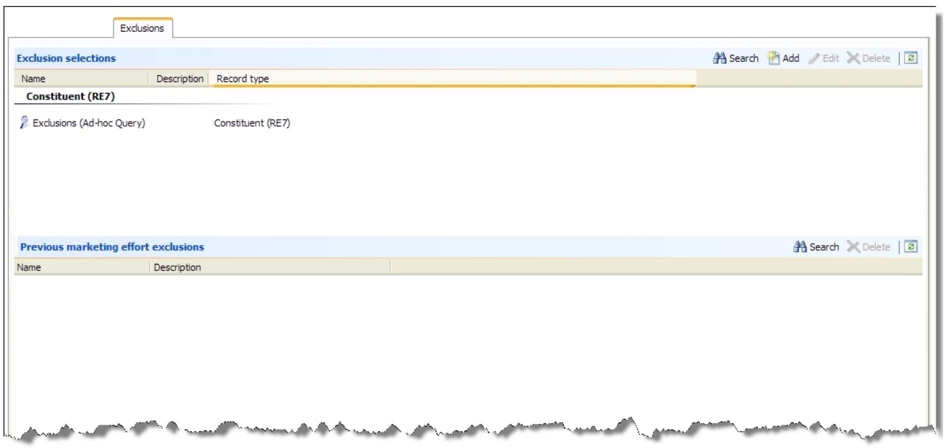
1. From the Universe tab of a membership renewal effort, select a query and click **Delete**. A confirmation message appears.
2. Click **Yes**. The selection is removed and no longer used to filter inclusions for the membership renewal effort.

Exclusions Tab

You can create two types of exclusions for inactive membership renewal efforts: Exclusion Selections and Previous Marketing Effort Exclusions. If you do not specify any exclusion selections, all constituents are available for the membership renewal effort (depending on the universe you defined).

By specifying Exclusion Selections, you define a set of donors to exclude from the membership renewal effort. When exclusions are specified, all record sources are still available on the segment screen (unlike when you define the membership renewal effort's universe). The set of excluded donors is excluded from every segment in the membership renewal effort. If you do not specify any exclusion selections, all donors are available for the membership renewal effort (depending on the universe you defined). Every time you choose a new exclusion selection, the entire membership renewal effort record page refreshes.

By specifying Previous Marketing Effort Exclusions, you define a set of donors who have been included in previous membership renewal efforts, but should not be included in the current membership renewal effort. Donors from the chosen previous membership renewal efforts are excluded in every segment in the current membership renewal effort. Every time you choose a new previous membership renewal effort exclusion, the entire page refreshes.



Add Exclusions

You can use selections to exclude records from a membership renewal effort, or specify previous membership renewal efforts whose donors should be excluded from the current membership renewal effort.

Add an existing selection as exclusion criteria for a membership renewal effort

1. From the Exclusions tab of an inactive marketing effort, under **Exclusion selections**, select **Search**. The Marketing Selection Search screen appears. For more information about this screen, see Search for Marketing Selections on page 186.
2. Locate and select the selection to use as exclusion criteria for the membership renewal effort.
3. You return to the Exclusions tab where the selection appears in the grid.

   When you specify exclusion selections, all record sources are still available when you create segments for the membership renewal effort (unlike when you define the membership renewal effort's universe). The set of excluded donors is excluded from every segment in the membership renewal effort.

Add a new selection as exclusion criteria for a membership renewal effort

1. From the Exclusions tab of an inactive membership renewal effort, under **Exclusion selections**, select **Add**. The Source view screen appears for you to select the view that contains the type of record to group in the new selection query.
2. Complete the rest of the steps to create the selection.
3. After you save your new query, you return to the Exclusions tab where the query now appears.

Add selections from a previous membership renewal effort as exclusion criteria

1. From the Exclusions tab of an inactive membership renewal effort, under **Previous marketing effort exclusions**, select **Search**. The Marketing Effort Search screen appears. For more information about this screen, see Search for Marketing Efforts on page 185.
2. Locate and select the previously activated membership renewal effort to use as exclusion criteria for this renewal effort.
3. You return to the Exclusions tab where the membership renewal effort appears in the grid.

   The donors from the selected membership renewal effort are excluded from the current renewal effort.

Edit Exclusions

You can edit the exclusion selections for a membership renewal effort. When you edit a selection, you edit the properties of the selection, so those changes are reflected wherever the selection is used, not just in the exclusions for the membership renewal effort.

Edit selections as exclusion criteria for a membership renewal effort

1. From the Exclusions tab of an inactive membership renewal effort, select a query and click **Edit**. The Query screen tabs appear.
2. Make any necessary changes to the query properties. These changes are to the query itself, so they are reflected anywhere this particular query is in use.
3. After you save the changes to the query, you return to the Exclusions tab.

Delete Exclusions

When you delete an exclusion selection, it is only deleted from the membership renewal effort. The selection is still available for use in other membership renewal efforts.

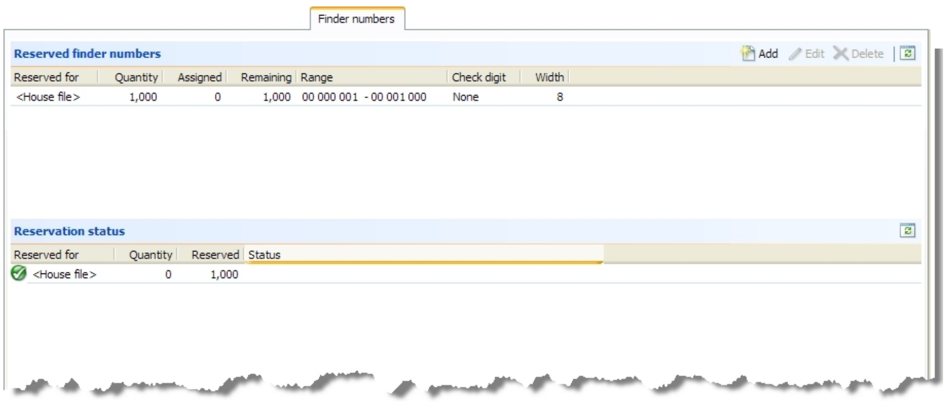
Delete selections as exclusion criteria for a membership renewal effort

1. From the Exclusions tab of a membership renewal effort, select a query and click **Delete**. A confirmation message appears.

2. Click **Yes**. The selection is removed and no longer used to filter exclusions for the membership renewal effort.

Finder Numbers Tab

On the Finder numbers tab, you can view the finder numbers reserved or assigned for a membership renewal effort. As part of the Calculate segment counts process, the program assigns and stores a finder number for each potential donor in a membership renewal effort. The finder number identifies the membership renewal effort and the donor. Additionally, if a renewal effort contains any potential donors from lists, the program uses the numbers for the list matchback process.



If the membership renewal effort is inactive, you can reserve a specific range of numbers to use for the membership renewal effort. For more information, see Reserve Finder Numbers on page 183.

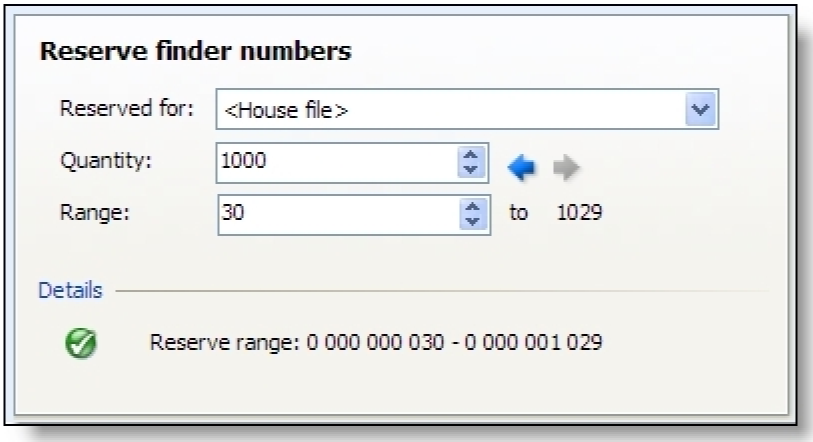
Reserve Finder Numbers

You can reserve a range of finder numbers for a vendor. Finder numbers are assigned to records when you run the Calculate segment counts process. For more information about the Calculate segment counts process, see Calculate Segment Counts on page 193.

If new records are added when you recalculate segment counts, the program automatically adds finder numbers to the existing range. If the extended range reaches the point of overlapping with another range, the program creates a new range of finder numbers. If you end up with extra finder numbers or ranges, you can delete these under certain conditions. For more information, see Delete Finder Numbers on page 184.

Reserve finder numbers

1. From the Finder numbers tab of an inactive membership renewal effort, click **Add**. The Reserve finder numbers screen appears.



2. In the **Reserved for** field, select "<House file>," an imported list, or a vendor who provides list services.
3. In the **Quantity** field, enter the range of finder numbers to reserve. The value must be less than or equal to the maximum finder number allowed by the finder number settings.

   You can use the arrows to find the next available range that accommodates the specified **Quantity**. This helps fill gaps between your ranges.
4. The **Range** field displays the starting number and a computed ending number for this set of reserved finder numbers. The default starting number is the highest assigned or reserved finder number. You can enter a different starting number that is less than or equal to the maximum finder number allowed by the finder number settings. The ending number equals the starting number plus the specified **Quantity**. If the **Quantity** changes, the starting and ending numbers for the range update automatically. After finder numbers are assigned, you can only increase the amount in the **Quantity** field up to the point that the range overlaps with another range.
5. The Details section displays the range of reserved numbers. If there are issues with the defined range, such as a starting number that results in overlapping finder numbers, an error appears in the Details section.
6. Click **Save**. You return to the Finder numbers tab.

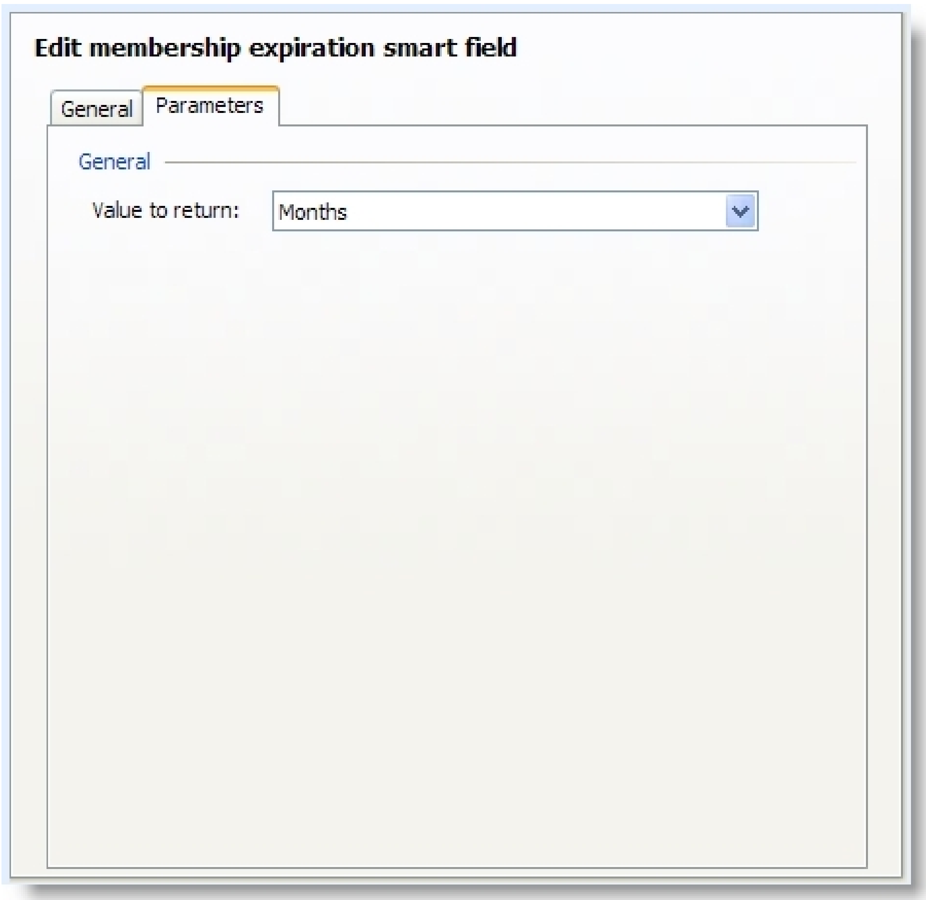
Delete Finder Numbers

To delete finder number ranges, on the Finder numbers tab, select the ranges and click **Delete**. You can delete finder numbers if they meet these requirements:

- For house files and imported lists (the program assigns the finder numbers) - Before the effort is activated, you can delete any assigned finder numbers and assign new ones. After the effort is activated, you can delete only finder number ranges that are not assigned to records.
- For imported finder files (the vendor assigns the finder numbers) - If finder numbers are assigned, you must delete the associated finder file record from the Finder Files tab before you can delete the finder number range from the Finder numbers tab.

Membership Expiration Smart Fields

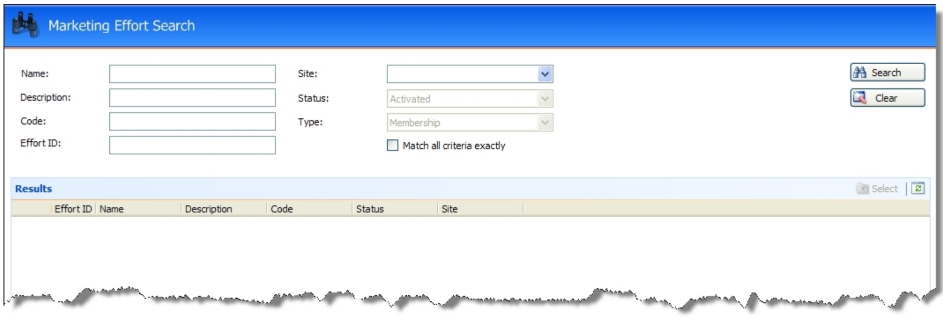
The Membership expiration smart field calculates values for membership expiration dates based on criteria you set. Based on your selection in the **Value to return** field, the smart field returns the number of days, weeks, months, quarters, or years until the membership is set to expire.



Search for Marketing Efforts

Use the Marketing Effort Search screen to locate and open a specific effort, such as to edit information, run a report, or select an effort to exclude from another effort.

You can enter partial names or individual letters in the search criteria fields. Also, the search process is not case-sensitive. You can leave the fields blank and the search will return all your marketing efforts, but if the program locates over 100 records, only the first 100 will appear in the **Results** grid.



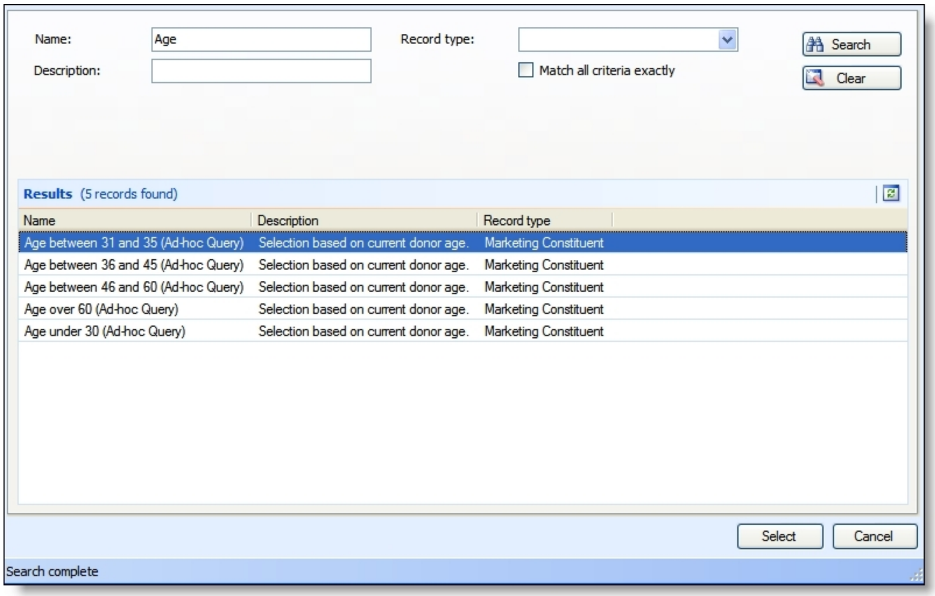
The table below explains each item on the Marketing Effort Search screen.

Screen Item	Description
Name	Name of the marketing effort. You can enter a partial name or an individual letter.
Description	Description of the marketing effort. You can enter a partial description or an individual letter.
Marketing Effort ID	ID of marketing effort.
Status	Whether the marketing effort is active or inactive.
Match all criteria exactly	Select this checkbox if you are sure the criteria you entered is an exact match.

Search for Marketing Selections

Use the Marketing Selections Search screen to locate previously defined marketing selections.

You can enter partial names or individual letters in the search criteria fields. Also, the search process is not case-sensitive. You can leave the fields blank and the search will return all your marketing selections, but if the program locates over 100 records, only the first 100 will appear in the **Results** grid.



The table below explains each item on the Marketing Selections Search screen.

Screen Item	Description
Name	Enter the name of the selection. You can enter a partial name or an individual letter.
Description	Enter all or part of the description of the selection.
Record type	Select the type of record that the selection includes.
Match all criteria exactly	Select this checkbox if you are sure your criteria is an exact match.

Membership Segments

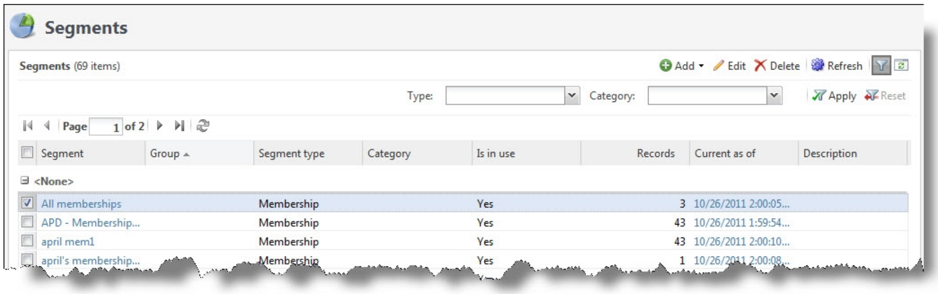
With segments, you can group constituents on the basis of a wide variety of different characteristics, such as recent giving history and membership activity. Segmentation is key to the effectiveness of your membership programs, as it allows you to target your members with customized membership renewal efforts. Segmentation also helps you determine where you can generate the greatest return on your investment. You may want to base segments on previous marketing campaigns, statistical scoring (such as recency, frequency, monetary values), or biographical traits (such as age or gender).

Segments Workflow

The main reason to use segmentation is that different groups of constituents will have different responses to membership renewal efforts. To increase the effectiveness of your membership programs, you can create different membership renewal packages targeted for specific segments of your constituents.

Selections form the backbone of your segments. When you create a membership segment, you specify the selections to use to determine the membership records to include in the segment. You can create the selections in advance or as you add the membership segments.

The Segments page offers a central location to create and manage segments.

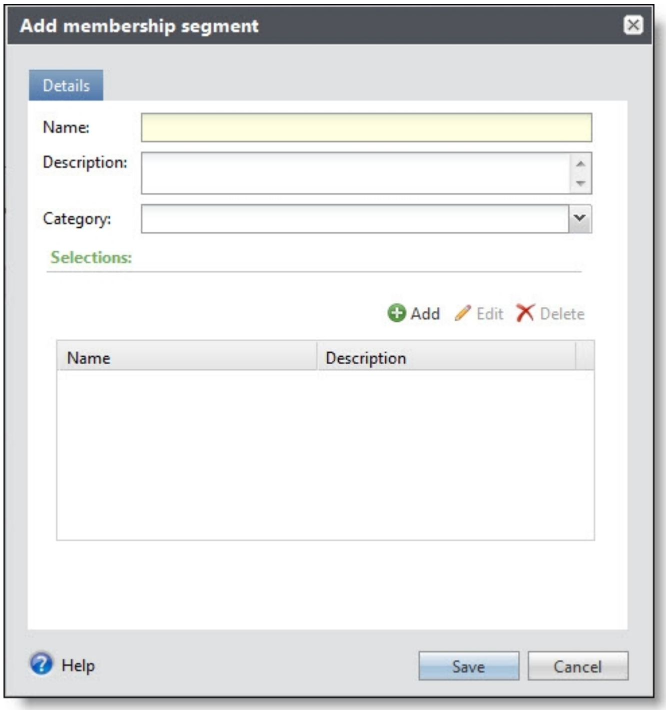


Add Membership Segments

You can create membership segments to group constituents based on membership information. For example, you can create a segment to identify constituents with the highest membership level whose membership is set to expire in 20 weeks.

Add a membership segment

1. From *Marketing and Communications*, click **Segments** and then **View segments**. The Segments page appears.
2. On the action bar, click **Add** and select **Membership segment**. The Add membership segment screen appears. For information about the items on this screen, see Add Membership Segment Screen on page 189.



3. Enter a unique name and description to help identify the segment.
4. To group the segment with similar segments for comparison and analysis, select its applicable category such as "Expires in 20 weeks."
5. Under **Selections**, add the membership selections to include in the segment.
6. Click **Save**. You return to the Segments page.

Add Membership Segment Screen

Screen Item	Description
Name	Name of the membership segment.
Description	Enter the description to identify the segment in efforts and analyses.
Category	Select a category to group related lists for comparison and reporting. For example, “Expires in 20 weeks.”
Selections	Add the selections of membership records to include in the segment. The order of the selections is not important, as the order is the equivalent to an AND operator between them. The segment includes only records that appear in each selection you select. If you include the exact same selections as another segment,a warning appears to inform you of the duplicate segment. If necessary, you can click **Ignore** to create the segment anyway.

Edit Membership Segments

You can edit membership segments at any time. Editing segments from the Segments page does not affect segments you have already generated for membership efforts. The change affects only membership efforts assigned the membership segment after the edit.

Edit a membership segment

1. From *Marketing and Communications*, click **Segments** and then **View segments**. The Segments page appears.
2. Under **Segments**, select the segment you want to edit.
3. On the action bar, click **Edit**. The Edit membership segment screen appears. The options on the screen are the same as those on the Add membership segment screen. For more information, see Add Membership Segment Screen on page 189.
4. Edit the information or selections as necessary.
5. Click **Save**. You return to the Segments page.

Delete Segments

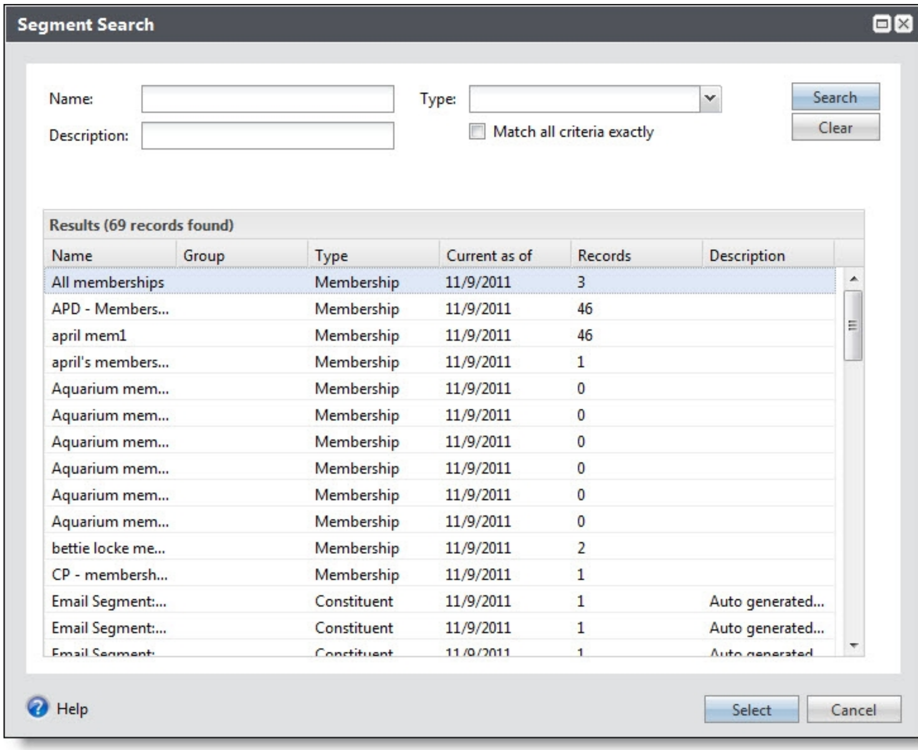
You cannot delete a segment that is already used in a membership renewal. When you delete a segment that is not in use, the segment is no longer available to add to membership renewals.

Delete a segment

1. From *Marketing and Communications*, click **Segments** and then **View segments**. The Segments page appears.
2. Under **Segments**, select the segment to delete.
3. On the action bar, click **Delete**. A message appears to ask whether to delete the segment.
4. Click **Yes**.

Segment Search

When you analyze your segments, you can search for membership segments by criteria such as name and description.



Search for a segment

When you select a segment for a membership renewal or for analysis, the Segment Search screen appears so you can find the segment to use. To access the Segment Search screen, such as to search for and access the record of a segment, on the Segments page, click **Search for a segment** under **Tasks**.

1. On the Segment Search screen, enter the criteria of the segment to find, such as name and description. To match the search criteria exactly as entered, select **Match all criteria exactly**.

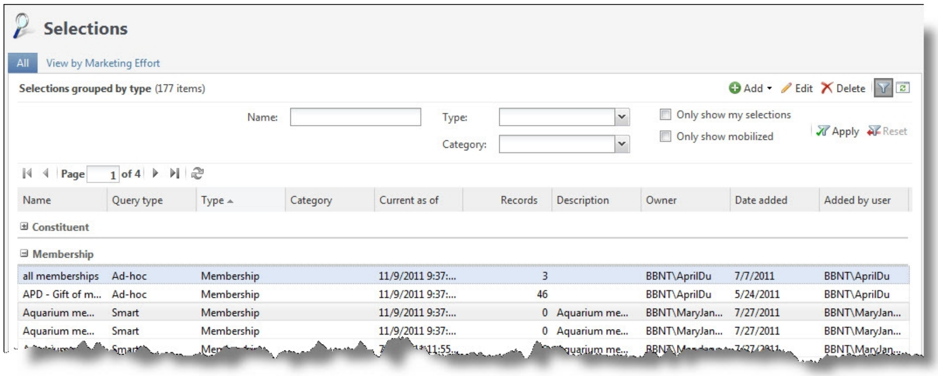
   You can enter a partial name or individual letter in these fields. Also, the search process is not case-sensitive, so you can enter rfm, Rfm, and RFM and get the same results. You can leave the fields blank and search all your segments, but if the program locates over 100 records, only the first 100 will appear under **Results**.

2. Click **Search**. The program searches the database for segments that match the search criteria entered. Under **Results**, the segments that match the criteria appear. Depending on the search criteria you enter, the search may return one segment or many.

3. Under **Results**, click the row of the segment to use or view.

Manage Segment Selections

The Selections page provides a central location to manage any selections used in your segments. Selections are sets of records that form building blocks for your segments. Selections can be based on ad-hoc or smart queries, and they enable you to select and name a given set of records that can then be used or combined in segments.



You can view all available selections, or view only those used in specific marketing efforts. You can also add queries and selections based on those queries. Additionally, when you can edit the query for a selection.

You can also delete selections from this page, but only those selections that are not in use. You cannot delete selections that are used by segments or in other areas of the program.

All selections used in activated marketing efforts are automatically “static.” A static selection is like a snapshot of your database. Only the records included when the selection is first run are included whenever the selection is used again. The same records are included in the selection until it is refreshed manually or as part of an automated process. Using static selections in activated efforts enhances processing speed and enables them to open faster.

Refresh Segments

From the Segments page, you can refresh each segment individually or all your segments at one time. When you refresh segments, the program creates a list of all static selections used by the segments and processes these selections and all their dependencies.

- To refresh an individual segment, select it under **Segments** and click **Refresh** on the action bar. The segment refresh process begins. When the process completes, a message appears and the process status page appears.
- To refresh all segments at one time, click **Refresh all segments** under **Tasks**. The segment refresh process begins. Depending on the number of segments and selections used in those segments, this process may take some time to complete. When the process completes, a message appears and the process status page appears.

Tip: To ensure all inactive membership renewal efforts are up to date, administrators can schedule the process (in *Administration*, **Manage Queues**).

To see detailed information about your refresh process, click **View refresh status** under **Tasks**. From the status record, you can view the status and history of the process. You can also delete the history of an instance of the process as necessary.

Delete refresh history

1. On the Refresh Status page for segments, select the History tab.

2. Select an item in the grid and click **Delete**. A message appears to ask whether to delete the item.
3. Click **Yes**.

Calculate Segment Counts

To calculate various counts for the membership renewal effort and its segments, such as the total number of records, total expenses, and expected revenue, run the Calculate segment counts process. This process also assigns finder numbers to each record included in the renewal effort. When you run Calculate segment counts, you can choose to refresh all the selections associated with the membership renewal effort.

Calculate segment counts

1. On the record of the membership renewal effort, click **Calculate segment counts** under **Tasks**. The Calculate segment counts screen appears.
2. To refresh all selections associated with the membership renewal effort, including those associated with the universe, exclusions, and segments, select **Refresh segment selection and filters**.
3. After the process is complete and you return to the membership renewal effort record, the Segments tab displays updated counts.

View Calculation Status

On the Marketing Effort Segment Record Count Calculation Status page, you can manage the process to calculate segment counts for a membership renewal effort. To access the page, click **View calculation status** under **Tasks** on the membership renewal effort record.

On the Recent Status tab, you can view the details of the most recent operation of the **Calculate segments counts** process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many records processed successfully and how many were exceptions.

Each time you run the **Calculate segments counts** process, the program generates a status record of the instance. On the History tab, you can view historical status record information about each instance of the process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.

List Members of a Segment

When you select a segment in a membership renewal effort record and click **List members**, the Segment Members page appears with detailed information for each record included in the segment.

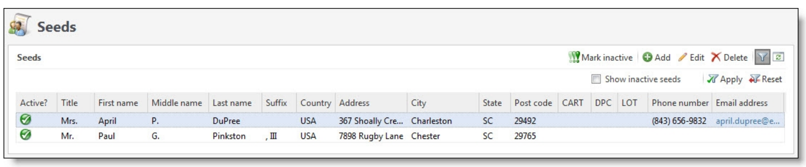
Manage Seeds

Seeds are usually internal people at your organization who you include in your membership renewal efforts to verify that the fulfillment house does its job and sends out the marketing pieces correctly. Or, you may want to include seeds such as Board Members because they want to see each membership renewal effort you send out.

You can associate one or multiple seeds with a membership renewal effort. Every seed associated with a renewal effort receives each package included in the effort. Because you know seeds will not give based on that membership renewal effort, they are not included in any ROI calculations and do not affect ROI numbers for the effort. They only appear in the export file once for each package in the membership renewal effort when you export the effort to the fulfillment house.

Note: Seeds are intended to be separate from source records. When you add a seed, that person should not also exist in your source. If seeds also exist in your record source, the program treats them just like any other potential donor, which defeats the purpose of them being seeds.

You can manage all aspects of your seeds from the Seeds page. To access the Seeds page, from *Marketing and Communications*, click **Seeds**.



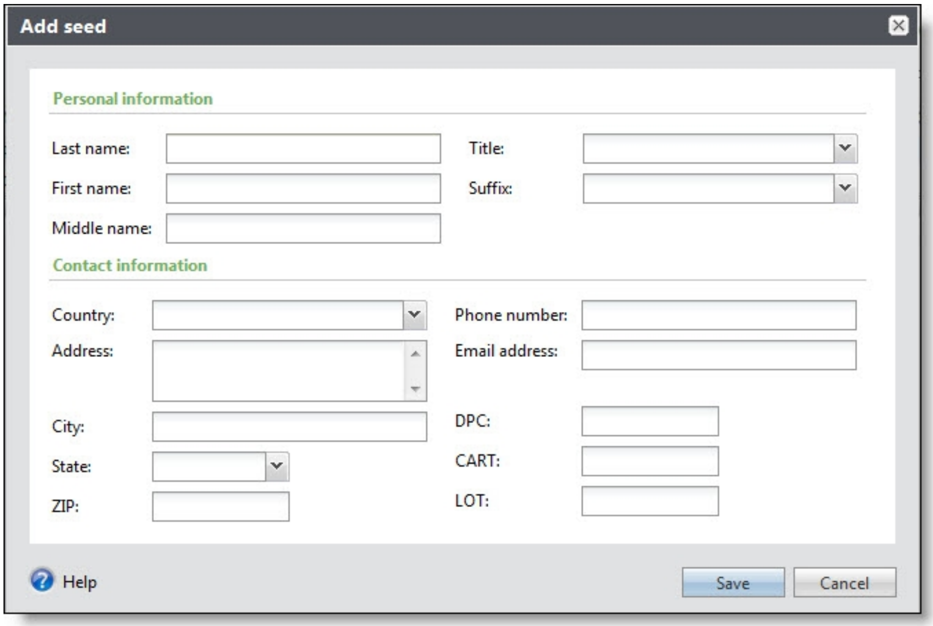
You can add, edit, or delete seeds from this page. Rather than delete a seed from the database, you can also mark a seed as inactive when it is not needed anymore.

Add Seeds

You can add seeds to your membership renewal efforts. Seeds receive one piece of mail for each package in the renewal effort. The more information you provide about the seed, the more information the program can export during a membership renewal effort for that seed. For optimum reporting, seeds should not also exist as donors in your record source.

Add a seed

1. From *Marketing and Communications*, click **Seeds**. The Seeds page appears.
2. Under **Seeds**, click **Add** on the action bar. The Add seed screen appears.



3. Enter personal and contact information for the seed. We recommend you enter as much information as possible about the seed so you can have as much information as possible to export for the seed during a membership renewal effort.
4. Click **Save**. You return to the Seeds page. Under **Seeds**, the new seed appears.

Edit a Seed

You can edit or update the information about seeds as necessary.

Edit a seed

1. From *Marketing and Communications*, click **Seeds**. The Seeds page appears.
2. Under **Seeds**, select the seed to edit.
3. On the action bar, click **Edit**. The Edit seed screen appears. The items on this screen are the same as the Add seed screen. For information about the items on this screen, see Add Seeds on page 194.
4. Edit the information as necessary.
5. Click **Save**. You return to the Seeds page.

Delete a Seed

You can delete seeds at any time. We recommend that seeds not also be constituents in your record source, but if they are, deleting them as a seed has no effect on their constituent record. Seeds that are already included in membership renewal efforts are also unaffected, but users cannot add the deleted seed to future membership renewal efforts.

Delete a seed

1. From *Marketing and Communications*, click **Seeds**. The Seeds page appears.
2. Under **Seeds**, select the seed to delete.
3. On the action bar, click **Delete**. A message appears to ask whether to delete the seed.
4. Click **Yes**. You return to the Seeds page.

Mark a Seed as Inactive

Rather than delete seeds you no longer use, you can mark them inactive. Inactive seeds are not available when users select seeds to receive a membership renewal effort.

Mark a seed as inactive

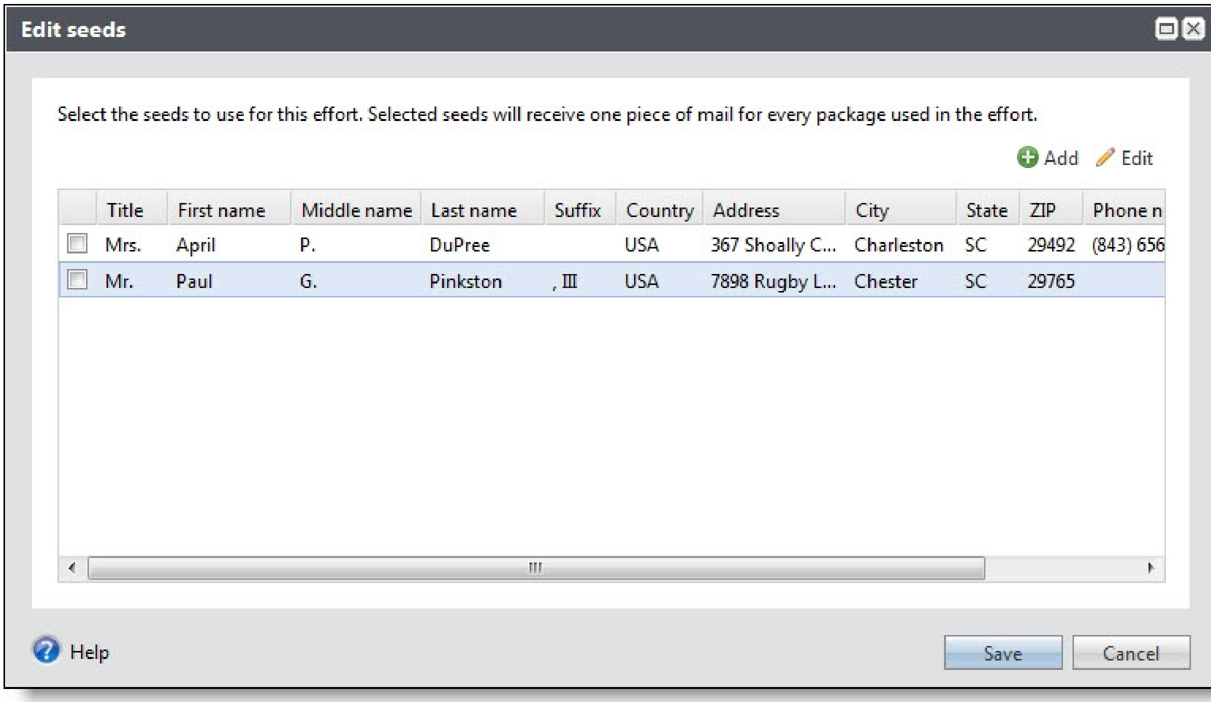
1. From *Marketing and Communications*, click **Seeds**. The Seeds page appears.
2. Under **Seeds**, select the seed to mark as inactive.
3. On the action bar, click **Mark Inactive**. A message appears to ask whether to mark the seed as inactive.
4. Click **Yes**. You return to the Seeds page.

Assign Seeds to a Membership Renewal Effort

You can associate one or more seeds with a membership renewal effort. Every seed associated with a membership renewal effort receives one of each package contained in the effort. Because you know seeds will not give based on that membership renewal effort, they are not included and do not affect any calculations or ROI numbers for the renewal effort. They only appear in the export file once for every package in the membership renewal effort when you export the effort to the fulfilment house.

Assign seeds to a membership renewal effort

1. From a membership renewal effort, click **Edit seeds** under **Tasks**. The Edit seeds screen appears.



2. Select the seeds to receive this membership renewal effort.

   To include someone who does not appear in the grid, click **Add** to add the new seed.
3. Click **Save**. You return to the membership renewal effort.

Membership Renewal Reports

Membership renewal reports help you evaluate the performance of your efforts to communicate with your members to promote membership involvement. You can generate and view several reports to determine and compare the effectiveness of your ask ladders and membership renewal efforts.

Ask Ladder Response Report

The ask ladder response report provides information about how ask ladders perform across a selection of marketing efforts. For each ask ladder, the report displays the response rate to each ask amount. To run the report, on the Membership Renewal Efforts page, click **Ask ladder response** under **Reports**, search for and select the selection of marketing efforts to analyze, and click **View report**.

Membership Renewal Efforts Report

The Membership Renewal Efforts report provides details about the response rate to a membership renewal marketing effort. The report includes renewal, upgrade, and downgrade statistics for the effort as a whole and for segments. To run the report, on the Membership Renewal Efforts page, click **Membership renewal efforts** under **Reports**, search for and select the effort to analyze, and click **View report**.

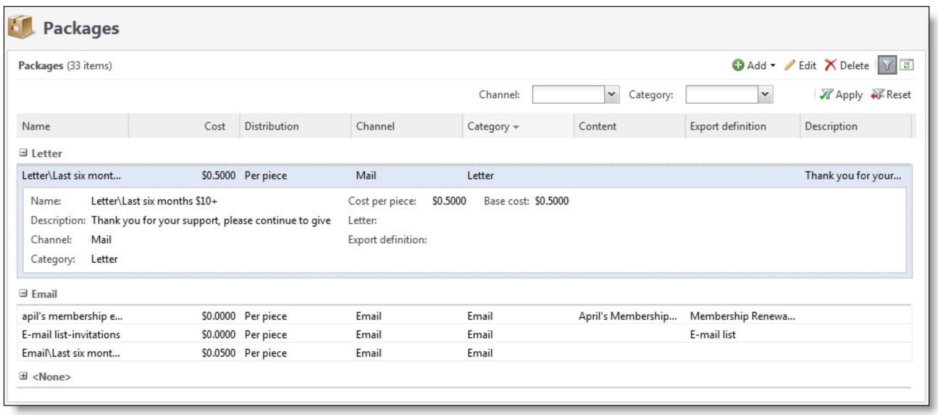
Packages

With packages, you can group items delivered to a constituent or recipient in a communication. For example, a package may contain an appeal letter or it may include tickets to an event enclosed in an appeal card. You can deliver packages electronically by way of email or traditionally through the mail.

From *Marketing and Communications*, you can manage the packages and their associated letters.

Manage Packages

Packages enable you to group content and items delivered with a membership renewal notice or event invitation. To view information about the package your organization uses, from *Marketing and Communications*, click **Packages** and then **View packages**. The Packages page appears.



Under **Packages**, you can view information about each package, such as code, cost and distribution, content, and export definition. To view additional information about a package, such as the number of creatives and total per piece cost, select its row in the grid.

To help find a package in the grid, you can filter the packages that appear by criteria such as category. On the action bar, click **Filter**, select the criteria of the packages to view, and click **Apply**. Under **Packages**, only the packages that meet the filter criteria appear. To display all packages in the grid, click **Reset**.

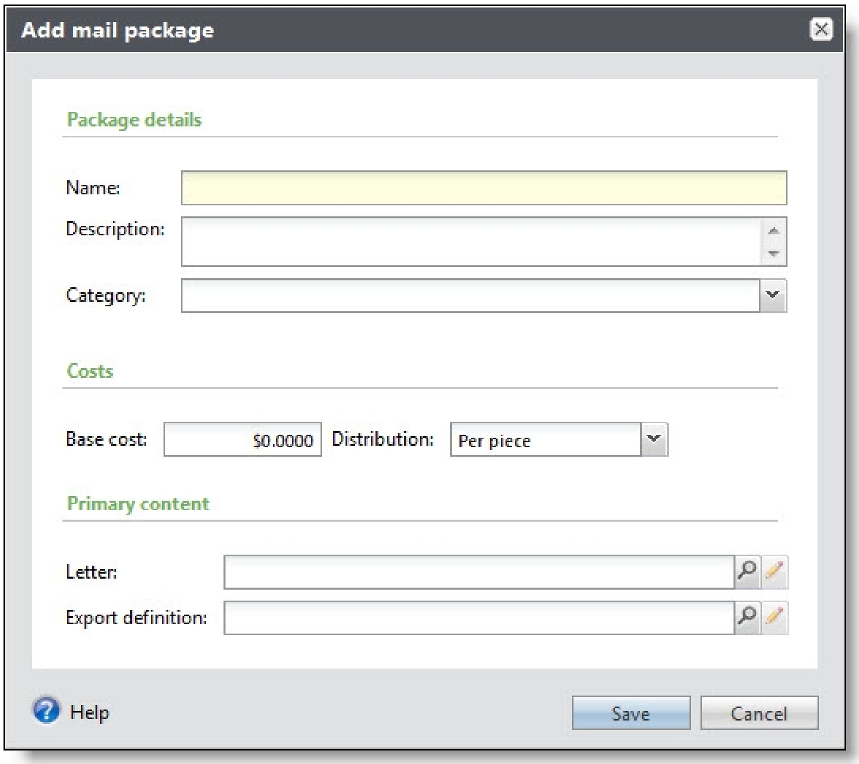
From the grid, you can add and manage packages for marketing efforts as necessary.

Add Mail Packages

You can add packages for items that you intend to send through the mail. When you add a package, you must enter its name and base cost. You can also provide a description to help identify the package.

Add a mail package

1. From *Marketing and Communications*, click **Packages**. The Packages page appears.
2. Under **Tasks**, click **Add a mail package**. The Add mail package screen appears. For information about the items on this screen, see Add Mail Package Screen on page 201.



3. Under **Package details**, enter a unique name and description to help identify the package.
4. To group the package with similar packages, in the **Category** field, select the category for the package. Your system administrator configures the available package categories. For example, to group the package with other mail packages, select Mail.
5. Under **Costs**, enter the cost of the package. Select whether the cost is per piece, response, marketing effort, or per thousand. To not include the package in the overall cost of the marketing effort, select Do not include.
6. Under **Primary content**, search for and select the letter to include in the package. When you select a letter, the **Export definition** displays the export definition used with the letter.
7. Click **Save**. You return to the Packages page.

Add Mail Package Screen

The table below explains the items on the Add mail package screen. For information about how to access this screen, see Add Mail Packages on page 200.

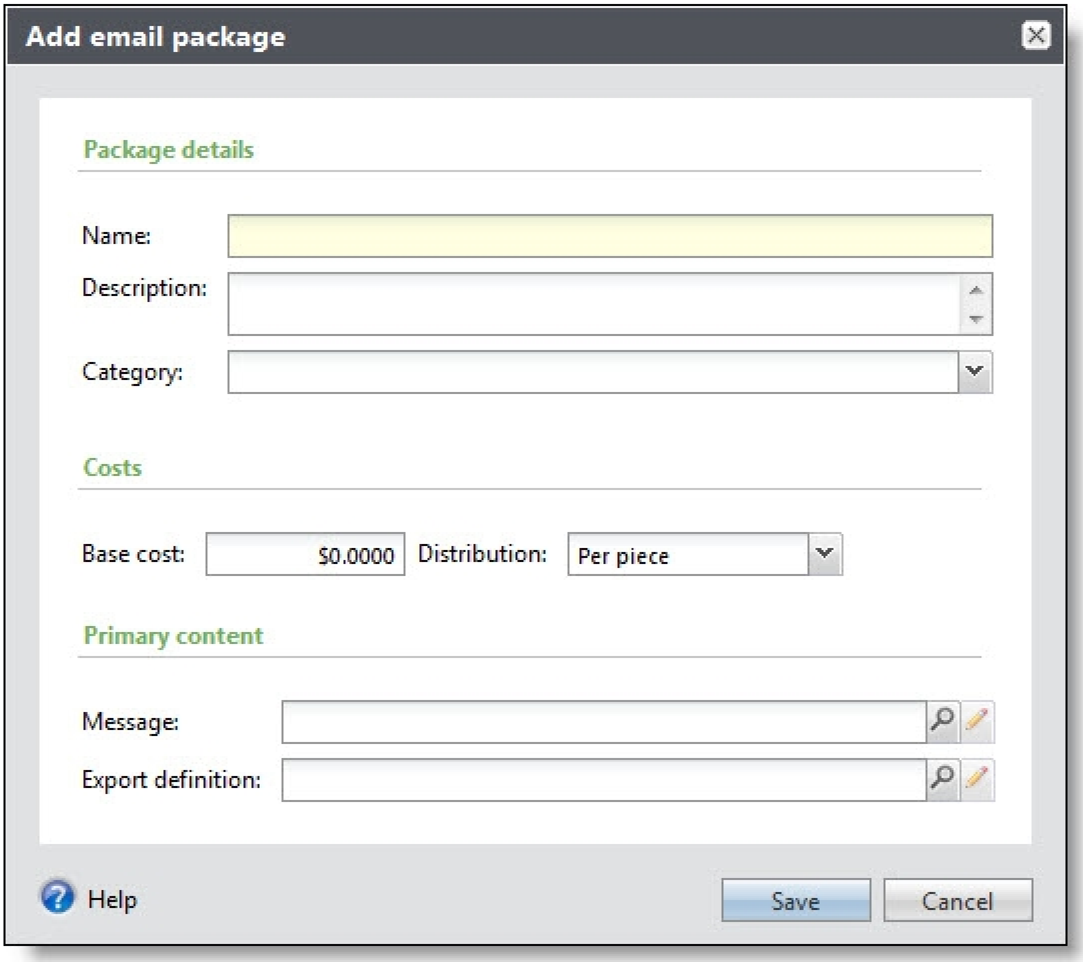
Screen Item	Description
Name	Enter a unique name to help identify the package.
Description	Enter additional information to further identify the package, such as an explanation of its content or intended recipients.
Category	To group the package with other similar packages, select the category of the package such as Mail or Letter.
Costs	In the **Base cost** field, enter the cost of the package and select whether the cost is per piece, response, marketing effort, or per thousand. If you select Per marketing effort, the program distributes the base cost across all segments that use the package within a marketing effort. To not include the package in the overall cost of the marketing effort, select Do not include.
Letter	Search for and select the letter to include in the package. For information about how to search for letters, see Search for Letters on page 209.
Export definition	Search for and select the export definition to use with the package. When you select the letter to include in the package, this field displays the export definition used with the letter. For information about how to edit the export definition used with a letter, see Edit a Letter on page 207.

Add Email Packages

You can add packages for items that you intend to send electronically through email. When you add a package, you must enter its name and base cost. You can also provide a description to help identify the package.

Add an email package

1. From *Marketing and Communications*, click **Packages**. The Packages page appears.
2. Under **Tasks**, click **Add an email package**. The Add email package screen appears. For information about the items on this screen, see Add Email Package Screen on page 203.



3. Under **Package details**, enter a unique name and description to help identify the package.
4. To group the package with similar packages, in the **Category** field, select the category for the package. Your system administrator configures the available package categories. For example, to group the package with other email packages, select Email.
5. Under **Costs**, enter the cost of the package. Select whether the cost is per piece, response, marketing effort, or per thousand. To not include the package in the overall cost of the marketing effort, select Do not include.
6. Under **Primary content**, search for and select the export definition to use with the package.
7. Click **Save**. You return to the Packages page.

Add Email Package Screen

The table below explains the items on the Add email package screen. For information about how to access this screen, see Add Email Packages on page 202.

Screen Item	Description
Name	Enter a unique name to help identify the package.
Description	Enter additional information to further identify the package, such as an explanation of its content or intended recipients.
Category	To group the package with other similar packages, select the category of the package such as Email.
Costs	In the **Base cost** field, enter the cost of the package and select whether the cost is per piece, response, marketing effort, or per thousand. If you select Per marketing effort, the program distributes the base cost across all segments that use the package within a marketing effort. To not include the package in the overall cost of the marketing effort, select Do not include.
Message	Search for and select the email message to include in the package. For information about how to create an email message, see Create Email Messages on page 210.
Export definition	Search for and select the export definition to use with the package.

Edit a Package

You can edit a package at any time. When you edit a package, the changes affect only inactive communications associated with the package. To preserve the integrity of communications, you do not affect activated communications when you edit a package.

Edit a package

1. From *Marketing and Communications*, click **Packages**. The Packages page appears.
2. Click **View packages**. The Packages page appears.
3. Under **Packages**, select the package to edit.
4. On the action bar, click **Edit**. The Edit package screen appears. The items on this screen are the same as when you add the package.
   - For information about the items available for a mail package, see Add Mail Package Screen on page 201.
   - For information about the items available for an email package, see Add Email Package Screen on page 203.
5. Edit the information as necessary.
6. Click **Save**. You return to the Packages tab.

Delete a Package

You can delete packages that are not currently associated with a communication. You cannot delete packages used by a communication.

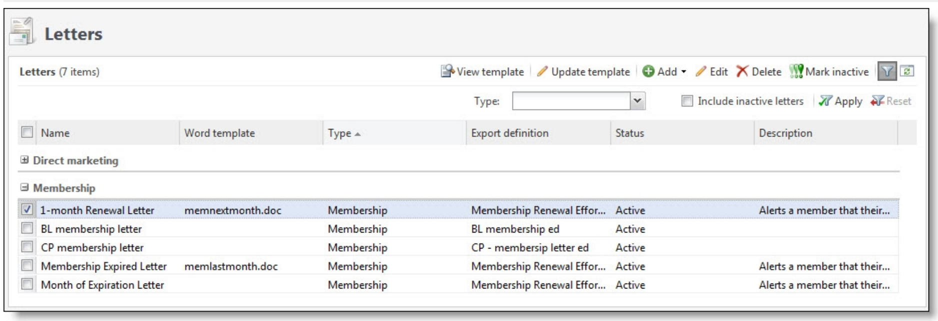
Delete a package

1. From *Marketing and Communications*, click **Packages**. The Packages page appears.
2. Click **View packages**. The Packages page appears.
3. Under **Packages**, select the package to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the package.
5. Click **Yes**. You return to the Packages tab.

Manage Letters

You can include letters in mail packages you send to constituents as part of a membership renewal or event invitation. To view information about the letters your organization includes in mail packages, from *Marketing and Communications*, click **Letters** and then **View letters**. The Letters page appears.

Note: All letters must have a .docx file extension.



For each letter, you can view its type, export definition, and status. The **Word template** column displays the file name of the Microsoft *Word* document used to create each letter. To open and view a template in *Word*, select it in the grid and click **View template** on the action bar.

To help find a letter in the grid, you can filter the letters that appear by type and select whether to display inactive letters. On the action bar, select the criteria of the letters to view and click **Apply**. In the grid, only the letters that meet the filter criteria appear. To display all letters in the grid, click **Reset**.

Tip: To view or edit information about a specific letter, you can search the database for the letter. For information about how to search for a letter, see Search for Letters on page 209.

From the tab, you can add and manage letters for packages as necessary.

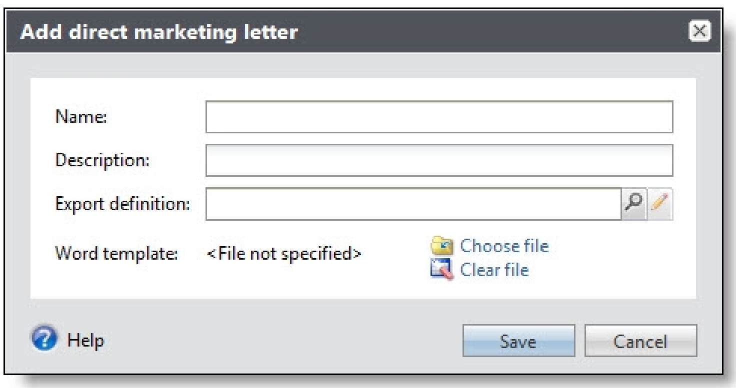
Add Letters for Mail Packages

When you create a package for an event invitation or membership renewal, you can add a letter that contains the content to include in the package. Before you add a letter, we recommend you create a template for the letter in Microsoft *Word*. When you add the letter, the program can merge information from your database with the template to generate content specific to each recipient. For information about the merge process in *Word*, see the *Word* help file or visit www.blackbaud.com for Knowledgebase articles about the merge process with Blackbaud programs.

Add a letter

1. From *Marketing and Communications*, click **Letters**. and then **Add a direct marketing letter** or **Add a membership letter**.
   - To add a letter for an event invitation, select **Add a direct marketing letter**.
   - To add a letter for a membership renewal, select **Add a membership letter**.

   The Add letter screen appears. For information about the items on this screen, see Add Letter Screen on page 206.



2. Enter a unique name and description to help identify the letter.
3. Search for and select the export definition to use with the letter. The export definition determines the fields available to merge with the Microsoft *Word* template used with the letter.
4. In the **Word template** field, click **Choose file** and browse to the *Word* document to use as a template for the letter.
5. Click **Save**. The Letters page appears.

Add Letter Screen

The table below explains the items on the Add letter screen. For information about how to access this screen, see Add Letters for Mail Packages on page 206.

Screen Item	Description
Name	Enter a unique name to help identify the letter.
Description	Enter additional information to further identify the creative, such as an explanation of its content or intended recipients, such as "Only use for Annual Fund donors".
Export definition	Your system administrator configures the export definitions available for use with letters. The export definition determines the fields available to merge with the Microsoft *Word* template to generate the letters. To view the fields available to export, select the Preview tab of the marketing effort process or view the header row in your *.csv file after you run the process.
Word template	This field displays the Microsoft *Word* document file used as a template for the letter. To use a *Word* document from your hard drive or network, click **Choose file** and browse to the file location. To edit the document file, open the document in *Word*. To use a different document file, click **Clear file** and then choose the file to use. After you save the letter, to open the document in *Word*, click its link when you edit the letter, or select the letter on the Letters and Documents tab and click **View template** on the action bar. For information about how to select a different template for a saved letter, see Update the Microsoft Word Template for a Letter on page 208.

Edit a Letter

After you add a letter, you can edit it as necessary, such as to select a different *Word* template or export definition.

Edit a letter

1. From *Marketing and Communications*, click **Letters** and then **View letters**. The Letters page appears.
2. Under **Letters**, select the letter to edit and click **Edit** on the action bar. The Edit letter screen appears. The items on this screen are the same as the Add letter screen. For information about the items on this screen, see Add Letter Screen on page 206.
3. Edit the information as necessary.
4. Click **Save**. You return to the Letters page.

Delete Letters

You can delete a letter, such as if your organization no longer uses it. You cannot delete letters used by a marketing effort.

Tip: Rather than delete a letter, you can mark it as inactive. Inactive letters remain in the database, but users cannot select them for use with marketing effort processes or packages. For information about how to mark a letter as inactive, see Mark a Letter as Inactive on page 209.

You can retrieve a deleted letter only from a good backup. Before you delete a letter, we recommend you first have a good backup.

Delete a letter

1. From *Marketing and Communications*, click **Letters** and then **View letters**. The Letters page appears.
2. Under **Letters**, select the letter to delete
3. On the action bar, click **Delete**. A message appears to ask whether to delete the letter.
4. Click **Save**. You return to the Letters page.

View the Microsoft Word Template for a Letter

If you edit the template file in its view-only mode, you must select **File**, **Save As** from the menu bar in Microsoft *Word* and overwrite the file to apply your changes. To edit the template, we recommend open the file directly in *Word*.

Update the Microsoft Word Template for a Letter

After you add a letter, you can update the Microsoft *Word* document used as its template to select a different template.

Update a letter template

1. From *Marketing and Communications*, click **Letters** and then **View letters**. The Letters page appears.
2. Under **Letters**, select the letter for which to update its template.
3. On the action bar, click **Update template**. The Update template screen appears.
4. In the **Word template** field, the file name of the *Word* document used as the letter template appears. To select a different file, click **Clear file** and then **Choose file** to browse to the file to use.
5. Click **Save**. You return to the Letters page.

Mark a Letter as Inactive

If a letter is no longer current and your organization no longer uses it for a mail package, you can mark it as inactive from the Letters page. Under **Letters**, select the letter to mark as inactive and click **Mark inactive**. When a confirmation message appears to ask whether to mark the letter as inactive, click **Yes**. You return to the Letters page.

To view inactive letters under **Letters**, click **Filter**. select **Include inactive letters**, and click **Apply**.

Mark a Letter as Active

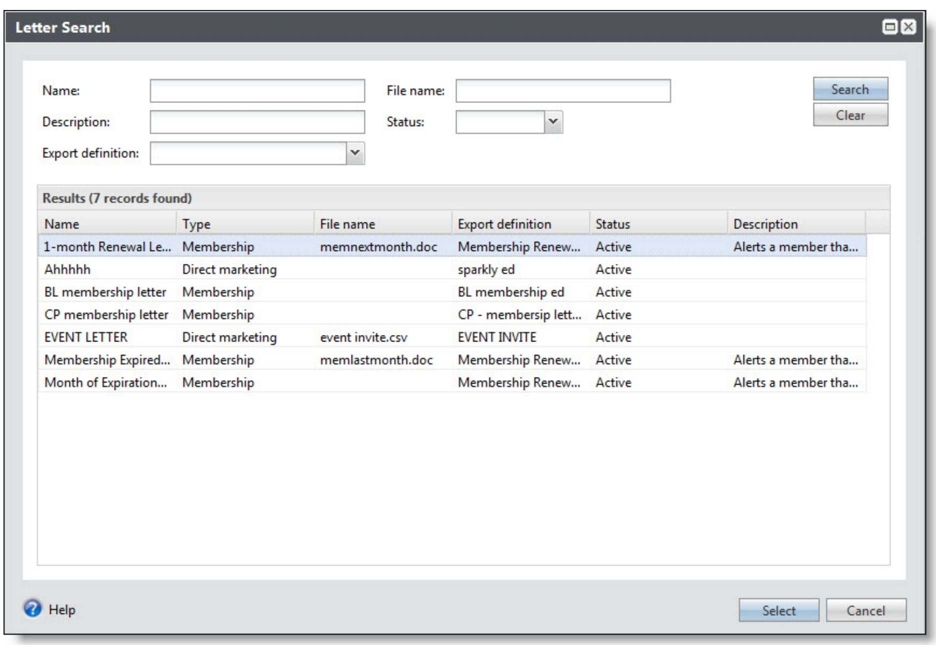
After you mark a letter as inactive, you can mark it as active from the Letters page to resume its use.

Tip: To view inactive letters under **Letters**, click **Filter**. select **Include inactive letters**, and click **Apply**.

Under **Letters**, select the letter to mark as active and click **Mark active**. When a confirmation message appears to ask whether to mark the letter as active, click **Yes**.

Search for Letters

To locate and open a specific letter, such as to edit its information, you can use the Letter Search screen.



When you search for a letter, you can enter criteria about the letter such as name, description, and status. You can enter partial names or individual letters in the search criteria fields. Also, the search process is not case-sensitive. You can leave the fields blank and the search will return all your letters, but if the program locates over 100 records, only the first 100 will appear in the **Results** grid.

Search for a letter

1. From *Marketing and Communications*, click **Letters** and then **Letter search**. The Letter Search screen appears.
2. Enter the criteria to use to search for the letter.
3. Click **Search**. Under **Results**, the letters that match the search criteria appear.
4. Under **Results**, select the letter to view.
5. Click **Select**. The Edit letter screen for the selected letter appears. The items on this screen are the same as the Add letter screen. For information about the items on this screen, see Add Letter Screen on page 206.

Email Marketing

From *Marketing and Communications*, you can add and manage email messages for use with email packages for event invitations and membership renewals. For a communication with an email package that includes an export definition, the activation process page also provides options to manage the email job.

Create Email Messages

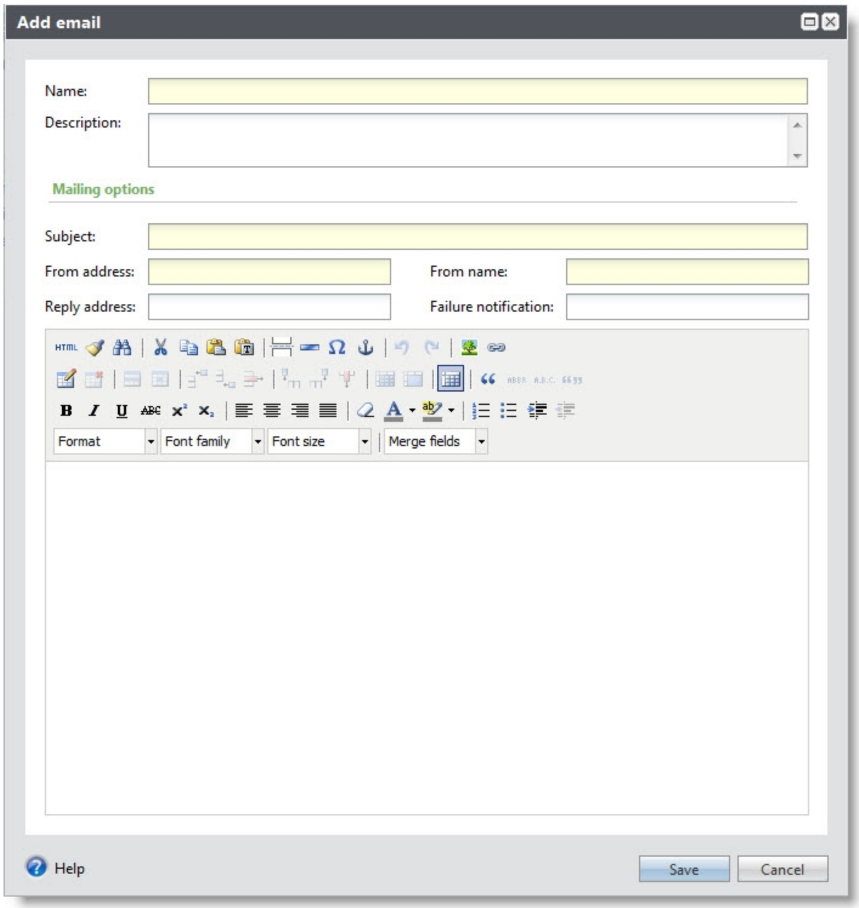
From *Marketing and Communications*, you can create and manage email messages to use with email packages for event invitations or membership renewals.

Note: When you create an email message, you must select an export definition to determine the merge fields to use with the message. At a minimum, the selected definition must include the **Finder number**, **Full name**, and **Email address** fields. For information about export definitions, see Export Definitions on page 213.

Add an email message

1. From *Marketing and Communications*, click **Email marketing** and then **Add a direct marketing email** or **Add a membership email**.
   - To add an email message for an event invitation, click **Add a direct marketing email**.
   - To add an email message for a membership renewal, click **Add a membership email**.

   The Add Email screen appears.
2. Select the email export definition to use with the email message and click **Continue**. The Add email screen appears.



3. Enter a unique name and description to help identify the email message.
4. Under **Mailing options**, enter the subject line to appear for the message.
5. In the **From address** and **From name** fields, enter the email address and name to appear as the sender of the message.
6. In the **Reply address** field, enter the email address to receive replies from recipients of the message.
7. In the **Failure notification** field, enter the email address to receive notifications if delivery to a recipient is unsuccessful.
8. In the HTML editor, compose the content of the email message.
9. Click **Save**. You return to the Emails page.

Edit an Email Message

After you add an email message, you can edit its information or content as necessary.

Edit an email message

1. From *Marketing and Communications*, click **Email marketing** and then **View emails**. The Emails page appears.
2. Select a message and click **Edit**. The Edit email screen appears. The items on this screen are the same as those on the Add email screen. For more information, see Create Email Messages on page 210.
3. Edit the information as necessary.
4. Click **Save**. You return to the Emails page.

Copy Email Messages

To add an email message with content similar to another message, you can create and modify a copy of the existing message. On the Emails page, select the existing message and click **Copy** on the action bar. When a message appears to ask whether to copy the message, click **Yes**. Under **Emails**, a new message named "Copy of <Email>" appears. The new message includes all the content and information from the copied message, such as subject, email addresses, and message content. Edit this information as necessary for the new message.

Delete Email Messages

After you add an email message, you can delete it, such as if your organization no longer uses it. On the Emails page, select the message to delete and click **Delete** on the action bar. When a message appears to ask whether to delete the message, click **Yes**.

Search for an Email Message

To view or edit an email message from *Marketing and Communications*, click **Email marketing** and then **Email search**. On the Email Message Search screen, enter the criteria of the message to view, such its name, description, export definition, and subject, and click **Search**. Under **Results**, the email messages that match the criteria entered appear. To view or edit a message, click its name under **Results**.

Start an Email Job for a Mailing

After you activate a communication with an email package that includes an export definition, the process status page displays the email job options. When you start an email job, the program places it in a queue to process it at the scheduled time. In the final email messages, the program merges data from the export definition into the appropriate fields in the email messages. The web services processes the merged email messages and submits them to a Mail Transfer Agent (MTA) server for delivery.

Send email messages

1. On the process status page for the communication, click **Start Blackbaud Internet Solutions email job**. The Start Blackbaud Internet Solutions email job screen appears.
2. In the **Start date** and **Time** fields, enter the date and time to start the email job.
3. Select the packages to include in the email job.
4. Click **Start**. You return to the process status page.

   As the job processes, the **Status** column changes from Pending to Completed or Failed. To view the most recent job status, click **Refresh**. To view information about the email job, select the job and click **View Blackbaud Internet Solutions email job status detail**.

View Email Job Status Details

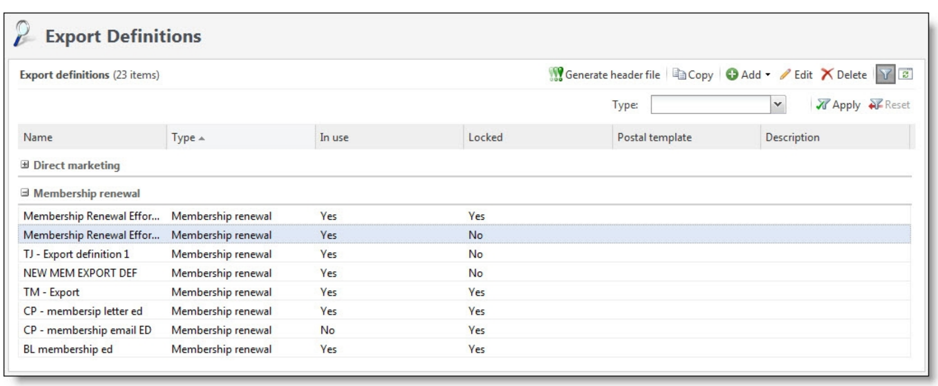
To view information about an email job for a communication, on the process status page, select the job and click **View Blackbaud Internet Solutions email job status detail**. On the email job status page, you can check the job's status, status date, and status message. To view the most recent job status, click **Refresh**.

Refresh Email Job Status Details

To view an email job's most recent status details, on the process status page, select the job and click **Refresh**.

Export Definitions

An export definition serves as a template you can use to export data for an active communication. You can create as many export definitions as necessary, such as for different processing houses. To access the Export Definitions page from *Marketing and Communications*, click **Export definitions**.



Under **Export definitions**, the export definitions used with letters and email messages for event invitations and membership renewals appear. Under **Direct marketing**, the export definitions used with event invitation packages appear. Under **Membership renewal**, the export definitions used with renewal notices appear. For each export definition, you can view whether it is in use or locked.

From the grid, you can add and manage export definitions as necessary.

Add Export Definitions

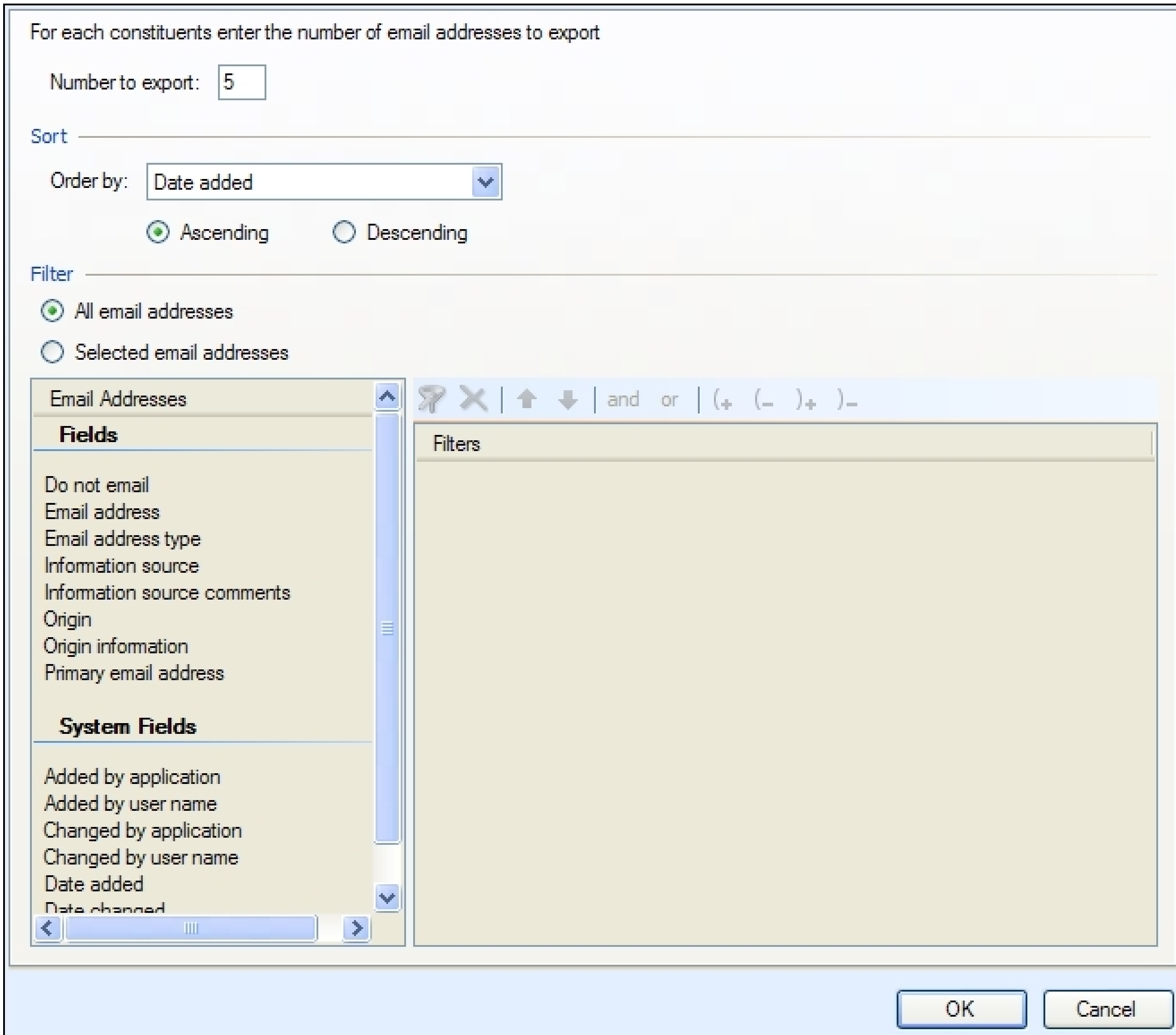
When you add an export definition, you select the fields to include in its export file. You select the fields to export from a list that contains marketing effort fields, all your available sources, and the fields associated with each. You can then apply the definition to a communication so the specified fields are exported from it.

When you create an export definition, the applicable query view determines the available export fields.

- For a direct marketing export definition used with event invitations, the constituent query view determines the available export fields.
- For a membership export definition used with membership renewals, the membership query view determines the available export fields.

In export definitions, you can select one-to-many fields in addition to one-to-one export fields. A one-to-one export field contains one value in your database. For example, **Last name** is a one-to-one export field because a segment member can have only one last name. A one-to-many export field contains several values in your database. For example, **Interests** is a one-to-many export field because constituents can have multiple interests assigned to their record.

The Criteria screen appears when you move a one-to-many export field to the **Selected fields and criteria** box.

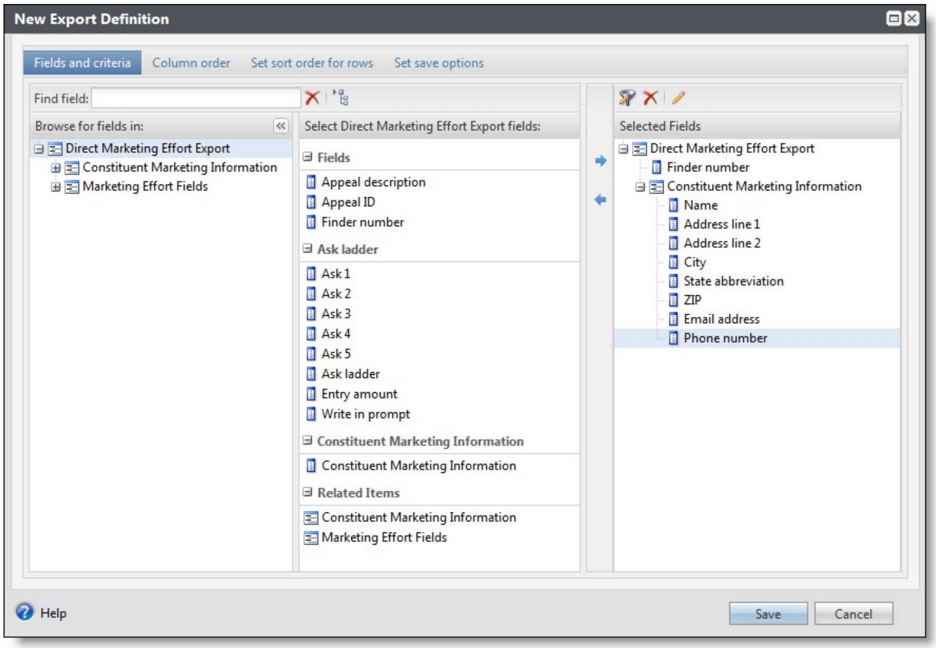


On this screen, you define how many instances of the field you want to export and the sort order for the field. Additional filter options appear to help you determine the data to export.

Add an export definition

1. On the action bar, click **Add** and select the export definition type.
   - To add an export definition for an event invitation, select **Direct marketing**.
   - To add an export definition for a membership renewal, select **Membership renewal**.

   The New Export Definition screen appears.



2. Select the fields for each record in the export output.

   Under **Browse for fields in**, the tables available for the selected type of export definition. You can expand a table to see its available fields.

Tip: To quickly search and find a field, enter its name in the **Find** field and press **ENTER** on your keyboard.

   Under **Select Export fields** or **Find results**, the fields for the selected table or search criteria appear.

3. To specify output fields for the export, select them**Select Export fields** or **Find results** and drag them under **Selected Fields**. Selected fields correspond to the information you want to see in the export. These fields appear as column headings on the export output. You can rename the column headings if necessary. You must specify at least one output field.

   When you select a one-to-many field, the Criteria screen appears. For more information about how to set criteria for a one-to-many field, see Export Definitions Criteria on page 217.

4. On the Column order tab, reorder and rename column headings for the export file as necessary.

   - To reorder the column names, use the up and down arrows.
   - To change the column header name, select its field and click**Change Column Heading**. Enter the new name in the field.

5. On the Sort order for rows tab, specify a sort order for the export. The sort order helps ensure that mail merge documents, such as envelopes or labels, are in the correct order.

   - To add a sort field, double-click or drag and drop a field from the **Available fields** pane.
   - To change the sort order, use the up and down arrows.
   - To reverse the sort order within a column, click the **Sort Ascending** or **Sort Descending** buttons.

6. On the Set save options tab, enter a unique name and description to help identify the export definition and select whether to use the definition in other areas of the program, whether to use field names for one-to-one column headers, and whether to use short header names.
7. Click **Save**. You return to the Export Definitions page.

Export Definitions Criteria

When you select a one-to-many field when you create an export definition, the Criteria screen appears. From this screen, you can select the number to export and define how the export sorts and filters the fields.

Define criteria for one-to-many records

1. From the Criteria screen, enter the number to export. This number refers to the node or record that contains the field.

   When you add another field to the same node in the **Selected Fields** box on the New Export Definition screen, the Criteria screen does not appear again. To access the screen for that field, under **Selected Fields**, select the field and click **Edit Filter**.
2. Under **Sort**, from **Order by**, select the field to sort the records by. This sorts the one-to-many records for one column in the export output. You can click to sort in ascending or descending order.
3. To filter by fields, under **Filter**, select **Selected <table>**.
4. Drag the field by which to filter to the **Filters** pane. The Apply Criteria screen appears.
5. From the Apply Criteria screen, select how to apply the criteria. For example, you can select "Less Than."
6. From **Value**, enter the values for the criteria.
7. Click **OK**. You return to the Criteria screen.
8. Click **OK**. You return to the New Export Definition screen.

Edit an Export Definition

When you edit an export definition, you affect only marketing efforts you export in the future. You do not impact previously created exports.

Edit an export definition

1. From *Marketing and Communications*, click **Export definitions**. The Export Definitions page appears.
2. Select the export definition to edit.
3. Edit the information as necessary.
4. Click **Save** to save your changes.

Copy Export Definitions

If you want to create a new export definition that has many of the same settings as an existing definition, you can copy the existing export definition to use as a starting point for your new definition instead of creating it from scratch.

Copy an export definition

1. From *Marketing and Communications*, click **Export definitions**. The Export Definitions page appears.
2. Select the export definition to copy.
3. On the action bar, click **Copy**. A message appears to ask whether to copy the export definition.
4. Click **Yes**. You return to the Export Definitions page. The new definition appears with the name "Copy of existing export definition name."

Delete Export Definitions

When you delete an export definition, you do not affect previously created exports that use the definition. However, users cannot base exports on the deleted definition in the future.

Delete an export definition

1. From *Marketing and Communications*, click **Export definitions**. The Export Definitions page appears.
2. Select the export definition to delete.
3. On the action bar, click **Delete**. A message appears to ask whether to delete the definition.
4. Click **Yes**. You return to the Export Definitions page.

Generate a Header File for an Export Definition

You can export the field names for an export definition in a comma-separated values (*.csv) format. You can then use the field list in Microsoft *Word* to create a mail merge document.

Generate a header file for an export definition

1. From *Marketing and Communications*, click **Export definitions**. The Export Definitions page appears.
2. Select the definition for which to generate a header file.
3. On the action bar, click **Generate header file**. The Generate header file screen appears.
4. Browse to the location at which to save the header file.
5. Click **OK**. You return to the Export Definitions page.

Acknowledgements

Altru now provides a new, enhanced acknowledgement process to easily thank donors for charitable giving. However, you can still access your existing acknowledgement processes as necessary, such as to copy letter content to letters for the new process. You can also use your existing processes for tribute acknowledgements. To access your existing acknowledgement processes from the Acknowledgements page, click **Archived acknowledgements** under **Tasks**.

Warning: You can access your archived acknowledgement processes on a temporary basis only. To continue to acknowledge your donors without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new acknowledgement process, see Revenue Acknowledgements on page 91.

Acknowledgement Process Workflow

From *Marketing and Communications*, you can manage a process to send acknowledgement letters to constituents based on revenue transactions such as payments and pledges. The acknowledgement process requires a Microsoft *Word* document that contains the template and content for its acknowledgement letter. We recommend you use multiple acknowledgement letters to create targeted content. For example, you can create a letter to acknowledge pledges and another to acknowledge payments. You can generate separate acknowledgements for revenue transactions and for tributes. To use the process effectively, you must perform several steps.

- ☐ From *Marketing and Communications*, generate the header file to include personalized information such as constituent name and revenue amount in the letter content. For information about how to generate a header file, see Generate a Header File on page 268.
- ☐ In Microsoft *Word*, create the templates used to generate letter output and label output through the acknowledgement process. To include merge fields in your content, perform a mail merge and import the header file as a comma-separated value (*.csv) file. For information about how to create the acknowledgement letter template in *Word*, see Microsoft Word for Acknowledgements on page 221.

- From *Marketing and Communications*, add the acknowledgement letter templates to the database. For information about how to add an acknowledgement letter, see Add a Letter on page 243.
- Create and run an Assign letter process to determine the criteria of the revenue transactions to receive each letter. For information about how to add or run this process, see Add an Assign Letter Process on page 250 or Run an Assign Letter Process on page 252.
- Create the Acknowledgement process. When you create the process, you select the letter template and label template to use and the revenue transactions to acknowledge. For information about how to add this process, see Add Acknowledgement Process on page 222.
- To generate the acknowledgement letter output file, run the Acknowledgement process. When you run the process, you can select whether to mark all included revenue transactions as Acknowledged. For information about how to run this process, see Run Acknowledgement Process on page 226.
- From the record of the acknowledgement process, generate and print the letter and label output through *Word*. You can also download the output file, such as to send to a mailing house. For information about how to manage the process and its output file, see Go To Process Status Page for Acknowledgements on page 228.

Microsoft Word for Acknowledgements

Before you run acknowledgements, we recommend you create an acknowledgement form template in *Word*. The *Word* form template is the form you merge acknowledgement data with to create the acknowledgements you send to constituents. For example, the letter can read "Thank you for your gift of [gift amount merge field] to restore the Adamson Science Center."

When you create the *Word* form template the first time, generate a header file from the program to use in the form template for merged fields. The header file exports in *.csv format. For more information, see Generate a Header File on page 268 and Add a Letter Screen on page 244.

After you create the *Word* form template, you must add a letter to the program. The letter is assigned to the revenue group to acknowledge. By creating the *Word* form template and adding letter information first, you can generate merged acknowledgements easily after you run the acknowledgement process.

> ***Note:*** After you merge the acknowledgement *Word* form template with acknowledgement data, you can print the acknowledgements to mail to constituents. You can send acknowledgements via email by including the merged file as an attachment to the email.

For assistance with *Word* merge help, see the Microsoft *Word* help file. Also, visit www.blackbaud.com for Knowledgebase articles about the merge process with Blackbaud programs.

Acknowledgement Tasks

> ***Warning:*** You can access your archived revenue acknowledgement processes on a temporary basis only. To continue to acknowledge your donors without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new acknowledgement process, Revenue Acknowledgements on page 91.

On the Acknowledgements page, you can manage the archived revenue and tribute acknowledgement processes in your database. For example, you can access your archived revenue acknowledgement letters to create content for the new acknowledgement process. You can also continue to use tribute acknowledgments to notify tributees of revenue transactions received as tributes. To access the archived Acknowledgements page from the new Acknowledgements page, click **Archived acknowledgements** under **Tasks**.

On the Review Acknowledgements tab, view details from multiple processes for revenue and tribute acknowledgements. The tab displays recently run processes and lists information such as the **Status** of the process, when it was **Started**, and the **Number of records processed**.

On the Acknowledgements tab, the **Acknowledgement processes** grid lists the acknowledgement processes in the database and displays the **Type**, **Name**, **Description**, **Letter**, and **Acknowledgement date** of each process. You select the acknowledgement type when you create the acknowledgement and you enter the remaining information when you add the acknowledgement process to the database. Depending on your security rights and system role, you perform functions to manage acknowledgement processes in the database.

To add letters to the database and assign the letter to revenue, select the Letters tab. These letters and letter processes are used during the acknowledgement process.

The **Letters** grid displays the *Word* documents available for revenue and tribute acknowledgement processes. The grid lists the type and name of the **Letter** in the program and the **Word template** used for the letter. In addition, the grid lists the **Selection** of revenue that the letter applies to.

The **Assign letter processes** grid lists the letters assigned to revenue. A letter process assigns the letter name to the revenue type (or types) you specify. For example, you can send the Pledge Thank You letter to all revenue with a gift type of Pledge. The grid lists information such as **Date last run** and the **Selection** the process uses.

Warning: Before you create a revenue acknowledgement process, you must add letters and assign the letters to revenue.

When a tribute is applied to a transaction, the tribute letter defaults automatically on the Letters tab on a revenue record. At that time, the letter is associated with the acknowledgees for the tribute. Therefore, tribute letters do not require an assign letter process in **Acknowledgements**.

Depending on your security rights and system role, you perform functions to manage acknowledgement processes in the database.

Add Acknowledgement Process

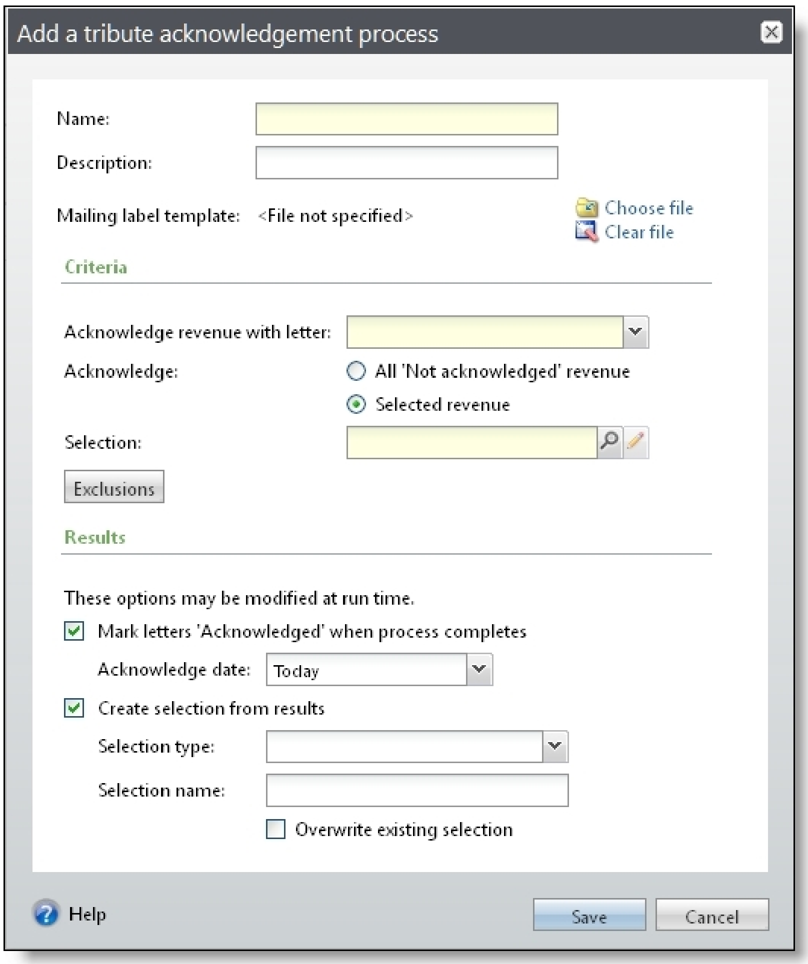
Warning: Altru now provides a new, enhanced acknowledgement process to easily thank donors for charitable giving. However, you can access your archived acknowledgement processes on a temporary basis. To continue to acknowledge your donors without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new acknowledgement process, Revenue Acknowledgements on page 91.

Note: Advance notice letters are sent only if your organization uses paperless mandates for direct debits. For more information about paperless mandates, see the *Revenue Guide*.

You can add an acknowledgement process to send acknowledgements to notify acknowledgees when you receive donations toward tributes.

Add acknowledgement process

1. From *Marketing and Communications*, click **Acknowledgements**. The Acknowledgements page appears.
2. Under **Tasks**, click **Archived acknowledgements**. The Acknowledgements page appears.
3. Under **Acknowledgement processes**, click **Add tribute acknowledgement process**. The Add a tribute acknowledgement process screen appears.



4. Enter a name and description for the process, and select criteria details and results information.

   For information about the items on this screen, see Add Acknowledgement Process Screen on page 224.

   For a detailed list of the default export fields, see Acknowledgement Output on page 232.
5. Click **Save**. You return to the Acknowledgements page. The data you entered appears in the **Acknowledgement processes** grid.

Add Acknowledgement Process Screen

The table below explains the items on this screen. Review the table for revenue and tribute acknowledgement processes.

Screen Item	Description
Name	This required field has a limit of 100 characters. Enter a name for the process that is easily recognizable when you use the process again.
Description	This field has a limit of 255 characters. Enter description information that further identifies the process. For example, you can enter "Only use for Annual Fund donors."
Mailing label template	You must use a *Word* template to print labels. To navigate to the label file on your hard drive or network, click **Choose file**. After you save a process, the document name becomes a link. To change the file, edit the document in *Word*. To update the file, click **Clear file** and select the document in this field again.
Acknowledge revenue with letter	Click the drop down arrow to select a letter for the process. For more information about letters, see Letter Tasks on page 243.
Acknowledge: All 'Not acknowledged' revenue	To generate an acknowledgement letter for revenue with an **Acknowledge status** of Not acknowledged, select this option.
Acknowledge: Selected revenue	To specify a Revenue selection to acknowledge, select this option. Revenue in the selection that has not been assigned the letter in the Acknowledge revenue with letter field will not be acknowledged. When you select this, the **Selection** field enables.
Selection	To specify a Revenue selection, click the binoculars. The Selection Search screen appears for you to add or select an existing query to use for acknowledgements. If the selection you need does not appear in search results, check to confirm that the **Record type** is Revenue. If you choose an Ad-hoc or Smart query, you can click **Edit Query** to modify the query.
Exclusions	To exclude constituents who request not to be contacted or solicited in certain ways, click **Exclusions**. The Exclusions screen appears. Exclusions help eliminate constituents from the process. For example, Mark Adamson requests that you not send email messages to him. If on his constituent page, through **Communications**, you add a solicit code that states "Do not email," Mark will be removed from the process output when a matching exclusion is listed on the Exclusions screen.
Mark letters 'Acknowledged' when process completes	To change the **Acknowledge status** from Not acknowledged to Acknowledged on revenue, select this checkbox. To preview the data for accuracy after you run the process, do not select the checkbox. You can mark letters acknowledged at a later time on the Recent Status tab or History tab. You can also mark letters acknowledged on the Review Acknowledgements tab.

Screen Item	Description
Acknowledge date	When you select the **Mark letters acknowledged when process completes** checkbox, this field enables. This date defaults on revenue on the Letters tab. To select a date other than today's date, click the drop down arrow and select <Specific date>. An additional field appears on the right for you to enter a date. To use a calendar to select the date, click the drop down arrow in this field.
Create selection from results	To create a selection for the individuals or gifts contained in the acknowledgement process, select this checkbox. If you select this checkbox, the remaining checkbox and fields enable.
Selection type	When you select **Create selection from results**, this is a required field. Choose to create a Constituent or Revenue type of selection.
Selection name	When you select **Create selection from results**, this is a required field. Enter the name for the new selection the process generates.
Overwrite existing selection	To overwrite the selection selected in the **Selection name** field, select this checkbox.

Edit Acknowledgement Process

Warning: Altru now provides a new, enhanced revenue acknowledgement process to easily thank donors for charitable giving. However, you can access your archived acknowledgement processes on a temporary basis. To continue to acknowledge your donors without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new acknowledgement process, Revenue Acknowledgements on page 91.

After you create a revenue or tribute acknowledgement process, you may need to update the information. For example, you may need to select another selection for the process or change the acknowledgement sent date. To do this, edit the acknowledgement process.

Note: The system administrator at your organization typically completes this process.

Edit acknowledgement process

1. From *Marketing and Communications*, click **Acknowledgements**. The Acknowledgements page appears.
2. Under **Tasks**, click **Archived acknowledgements**. The Acknowledgements page appears.
3. Under **Acknowledgement processes**, select the process to edit.
4. On the action bar, click **Edit**. The Edit acknowledgement process screen appears. The items on this screen are the same as on the Add acknowledgement process screen. For a detailed explanation of the options, see Add Acknowledgement Process Screen on page 224.
5. Edit the information as necessary.

   For a detailed list of the default export fields, see Acknowledgement Output on page 232.
6. Click **Save**. You return to the Acknowledgements page.

Run Acknowledgement Process

Warning: Altru now provides a new, enhanced revenue acknowledgement process to easily thank donors for charitable giving. However, you can access your archived acknowledgement processes on a temporary basis. To continue to acknowledge your donors without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new acknowledgement process, Revenue Acknowledgements on page 91.

After you add or edit the acknowledgement process, you run the process to generate acknowledgements for donors.

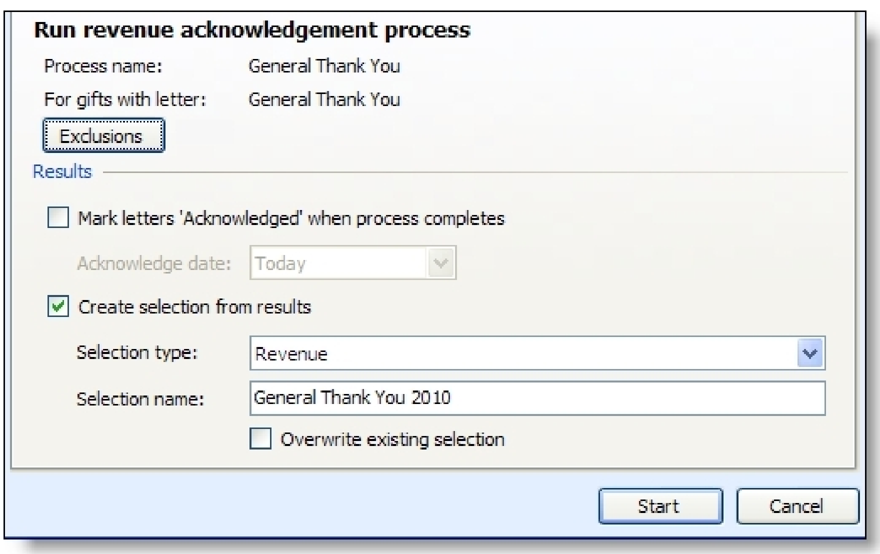
Warning: If a gift is split more than two ways between designations or benefits, the revenue acknowledgement output contains only two designations or benefits. For example, Mark Adamson splits a single gift between the Annual Fund, the Campaign for Excellence, and the Library Fund. When you run the revenue acknowledgement process, only two designations appear in the output.

Note: When you run an acknowledgement process, it automatically excludes acknowledgments for transactions from donors marked as deceased from the output. For tribute acknowledgements, this includes acknowledgements for any acknowledgees of the transaction.

Run acknowledgement process

When you run a revenue acknowledgement process, you send an acknowledgement to thank the constituent for the revenue. When you run a tribute acknowledgement process, you send an acknowledgement to notify acknowledgees that a donation has been made for a tribute.

1. To run acknowledgements, select the acknowledgement process, and click **Start Process**. The Run acknowledgement process screen appears.



For information about the items on this screen, see Run Acknowledgement Process Screen on page 227.

For a detailed list of the default export fields, see Acknowledgement Output on page 232.

2. To create acknowledgements, click **Start**. The process begins. After the process completes, the process status page appears. For more information, see Go To Process Status Page for Acknowledgements on page 228.

   When you run an acknowledgement process, the date automatically defaults on revenue on the Letters tab in the **Process date** column. This date informs you when the process was last run. The **Acknowledge date** (also stored on the Letters tab) informs you when the assigned letters were marked acknowledged.

Run Acknowledgement Process Screen

The table below explains the items on this screen. Review the table for revenue and tribute acknowledgement processes.

Screen Item	Description
Process name	The process name defaults from the **Name** field on the Add (or Edit) acknowledgement process screen. This field is disabled. To change the process name, access the Edit acknowledgement process screen.
For gifts with letter	The letter defaults from the **Acknowledge revenue with letter** field on the Add (or Edit) acknowledgement process screen. This field is disabled. To select another letter, access the Edit acknowledgement process screen.
Exclusions	To exclude constituents who request not to be contacted or solicited in certain ways, click **Exclusions**. The Exclusions screen appears. Exclusions help eliminate constituents from the process. For example, Mark Adamson requests that you not send email messages to him. If on his constituent page, through **Communications**, you add a solicit code that states “Do not email,” Mark will be removed from the process output when a matching exclusion is listed on the Exclusions screen.
Mark letters ‘Acknowledged’ when process completes	To change the **Acknowledge status** from Not acknowledged to Acknowledged on revenue, select this checkbox. To preview the data for accuracy after you run the process, do not select the checkbox. You can mark letters acknowledged at a later time on the Recent Status tab or History tab. You can also mark letters acknowledged on the Review Acknowledgements tab.
Acknowledge date	When you select the **Mark letters ‘Acknowledged’ when process completes** checkbox, this field enables. This date defaults on revenue on the Letters tab. To select a date other than today’s date, click the drop down arrow and select <Specific date>. An additional field appears on the right for you to enter a date. To use a calendar to select the date, click the drop down arrow in this field. When you run an acknowledgement process, the date automatically defaults on revenue on the Letters tab in the **Process date** column. This date informs you when the process was last run. The **Acknowledge date** informs you when the assigned letters were marked acknowledged.

Screen Item	Description
Create selection from results	To create a selection for the individuals or gifts contained in the acknowledgement process, select this checkbox. If you select this checkbox, the remaining checkbox and fields enable.
Selection type	When you select **Create selection from results**, this field is required. Choose to create a Constituent or Revenue type of selection.
Selection name	When you select **Create selection from results**, this field is required. Enter the name for the new selection the process generates.
Overwrite existing selection	To overwrite the selection in the **Selection name** field, select this checkbox.

Delete Acknowledgement Process

You can delete a revenue or tribute acknowledgement process at any time. When you delete an acknowledgement process, you also delete the history for that process. If you delete a process and need it again, you can only retrieve the process from a good backup. We recommend you have a good backup before deleting data.

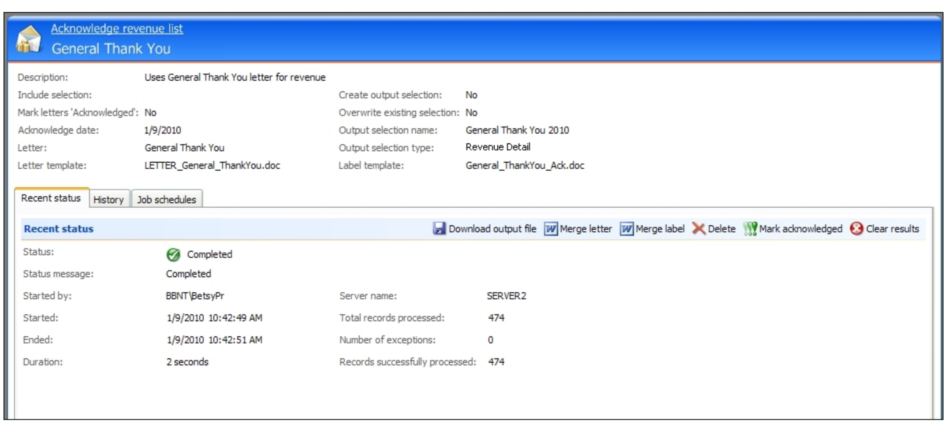
Warning: If you delete a process, you also delete the process status page and the history for the process. For more information, see Go To Process Status Page for Acknowledgements on page 228.

Delete acknowledgement process

1. From the Acknowledgements page, select an acknowledgement process and click **Delete**. A confirmation message appears.
2. Click **Yes**. The process deletes. You return to the Acknowledgements page.

Go To Process Status Page for Acknowledgements

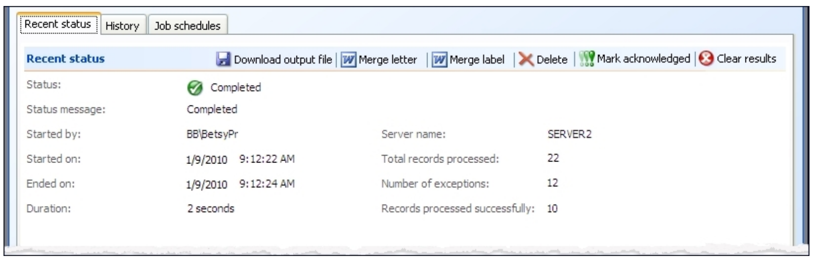
After you run an acknowledgement process, the process status page appears automatically.



From the Acknowledgements tab, click **Go to process** to access this page. This page contains the Recent status, History, and Job schedules tabs. The top half of the page contains the parameters and properties for the acknowledgement process. To make a change to this information, edit the acknowledgement process.

Recent Status Tab

On the Recent Status tab, you view the details of the most recent instance of the acknowledgement process. These details include the status of the run; the start time, end time, and duration of the run; the person who last started the process; the name of the server used to process the run; the total number of acknowledgements processed; and how many acknowledgements processed successfully and how many were exceptions.



Depending on your security rights and system role, you perform functions to manage the most recent process.

- **Download output file**: To save a copy of the output file to your hard drive or network, click **Download output file**. A Save as screen appears for you to name your file and browse to a location on your hard drive or network to save the output file.
- **Merge letter**: To merge the letters for your acknowledgements, click **Merge letter**. The acknowledgements merge automatically in Word. Save the merged acknowledgement document on your hard drive or network.
- **Merge label**: To merge the data for your labels, click **Merge label**. The labels merge automatically in Word. Save the merged label document on your hard drive or network.

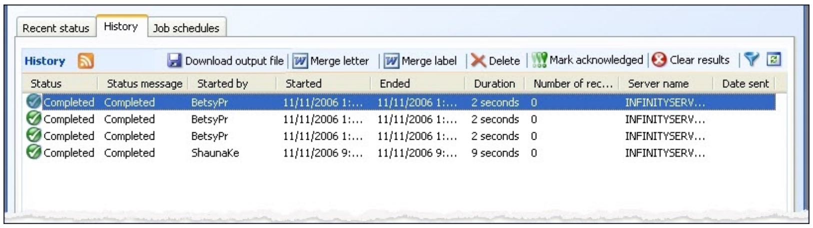
Warning: If **Merge letter** is disabled, check your letter to confirm you selected the *Word* form template in the **Word template** field on the Update letter Word template screen or in the **Word template** field on the Edit a letter screen. If **Merge label** is disabled, check your acknowledgement process to confirm you selected the *Word* template in the **Mailing label template** field.

- **Delete**: To delete the most recent instance of the process, click **Delete**.
- **Mark acknowledged**: If you do not select the **Mark letters 'Acknowledged' when process completes** checkbox when you add or edit the process, this button is enabled. To mark assigned letters for revenue acknowledged, click **Mark acknowledged**. A confirmation message appears. Click **Yes**.
- **Clear results**: To run an acknowledgment process again, use **Clear results** to reverse the process. For example, you process acknowledgements with the wrong acknowledgement date. To undo the process, click **Clear results**. Then, run the process again with the correct acknowledgement date. When you clear results, the output and merged documents are deleted, the acknowledgement

date is deleted on the revenue, and the acknowledgement status becomes Not acknowledged on the revenue.

History Tab

On the History tab, you view the history for each run of the acknowledgement process. The details in the **History** grid include the status of the process; the start time, end time, and duration of the process; the person who last started the process; and the name of the server most recently used to process the acknowledgements. This information generates each time you run an acknowledgement process. Therefore, it is likely you have multiple rows of information in this grid.



Depending on your security rights and system role, you perform functions to manage the processes.

- **View RSS feed**: To subscribe to a Really Simple Syndication (RSS) feed, click **View RSS feed**. Use this to receive a notification when a process completes.
- **Download output file**: To save a copy of the output file to your hard drive or network, click **Download output file**. A Save as screen appears for you to name your file and browse to a location on your hard drive or network to save the output file.
- **Merge letter**: To merge the letters for your acknowledgements, click **Merge letter**. The acknowledgements merge automatically in Word. Save the merged acknowledgement document on your hard drive or network.
- **Merge label**: To merge the data for your labels, click **Merge label**. The labels merge automatically in Word. Save the merged label document on your hard drive or network.

Warning: If **Merge letter** is disabled, check your letter to confirm you selected the *Word* form template in the **Word template** field on the Update letter Word template screen or in the **Word template** field on the Edit a letter screen. If **Merge label** is disabled, check your acknowledgement process to confirm you selected the *Word* template in the **Mailing label template** field.

- **Delete**: To delete a single instance of the process, highlight the process in the **History** grid. Click **Delete**.
- **Mark acknowledged**: If you do not select the **Mark letters 'Acknowledged' when process completes** checkbox when you add or edit the process, this button is enabled. To mark assigned letters for revenue acknowledged, click **Mark acknowledged**. A confirmation message appears. Click **Yes**.
- **Clear results**: To run an acknowledgment process again, use **Clear results** to reverse the process. For example, you process acknowledgements with the wrong acknowledgement date. To undo the process, click **Clear results**. Then, run the process again with the correct acknowledgement date. When you clear results, the output and merged documents are deleted, the acknowledgement date is deleted on the revenue, and the acknowledgement status becomes Not acknowledged on the revenue.

- **Filter**: As the history list grows over time, it may be difficult to find a particular acknowledgement process. To narrow the list, click **Filter**. A **Status** field appears for you to narrow the list by Completed, Running, or Did not finish. Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again.
- **Refresh List**: To make sure you have the latest process information, click **Refresh List**.

Job Schedules for Acknowledgements

Use job schedule to run a process automatically and unattended. When you create a job schedule, you specify the frequency and scheduled time of the occurrence. Using the job schedule and *SQL Server*, the program runs the export at the scheduled time and interval.

Note: The system administrator at your organization typically completes this process.

You can create a job schedule for a process from its status page.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select **Occurs once at** and enter the start time. To run a process at intervals, select **Occurs every** and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

Acknowledgement Output

When you export acknowledgements, a set of data exports based on the **Output format** selection on your letter. Review the tables in this section for field information contained in an export.

Acknowledgement Type: Revenue

If the acknowledgement type for the process is revenue, the available output formats are Standard acknowledgement output, Pledge acknowledgement output, Seasonal address acknowledgement output, Formatted mail pledge acknowledgement output, Formatted mail acknowledgement output, and Email acknowledgement output. For more information about these output formats, see Output Formats for Acknowledgements on page 249.

The following extended output formats are also available: Pledge acknowledgement output - extended, Formatted mail acknowledgement output - extended, and Email acknowledgement output - extended. With extended output formats, specific fields are exported multiple times. Extended output allows you to export multiple categories of fields, such as multiple benefits and tributes per transaction. For more information about extended output format fields, see Extended Output Formats on page 235.

Warning: For a constituent's information to appear in fields of both the Email acknowledgement output and Email acknowledgement output - extended output formats, you must designate a mail preference of “Email” on the Preferences tab of a constituent's Communications page. For more information, see the *Constituents Guide*.

The following table explains the items contained in the acknowledgement output formats. The asterisk (*) fields in the **Output** column indicate seasonal address fields. If you select the Seasonal output, these fields consider **Seasonal information** on the constituent record to select the address to export.

Output	Example
Business process output PKID	1
Revenue ID	24ffdc3a-31fc-47a8-a2ce-00ca801248eb
Constituent name	John J. Smith (individual) or ABC, Inc. (organization)
Constituent ID	Constit 123
Primary addressee	Mr. John J. Smith, Jr.
Primary salutation	Mr. Smith
Primary contact	Mr Smith
Position	Sales Manager
Address block*	100 Main Street, Apartment D

Output	Example
City	Charleston
State	SC
Zip code*	29492
Country*	USA
Email address	jjsmith@somewhere.com
Revenue Type	Examples include: Payment and Pledge
Date	05/10/2009
Payment method	Check
Anonymous	No
First gift	No
Amount	$40.00
Receipt amount	$40.00
Appeal name	2009 Direct Mailing
Designation 1 name (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	President's Scholarship Fund
Designation 1 public name	President Walter B. Murray Scholarship Fund
Designation 1 amount	$40.00
Designation 2 name (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	Building Fund
Designation 2 public name	Building for Greatness Fund
Designation 2 amount	$40.00
Revenue benefits waived	No
Benefit 1 name	Free Admission
Benefit 1 quantity	1
Benefit 1 value	$15.00
Benefit 1 total value	$15.00

Output	Example
Benefit 2 name	Membership Pin
Benefit 2 quantity	1
Benefit 2 value	$5.00
Benefit 2 total value	$5.00
Stock issuer	Blackbaud
Stock symbol	BLKB
Stock number of units	100
Stock median price	$15.00
Property/GIK subtype	Acreage, Computers
Process date	05/10/2009
Letter code name	General Thank You

The following table explains the items contained in the pledge acknowledgement output formats.

Output	Example
Business process output PKID	1
Revenue ID	24ffdc3a-31fc-47a8-a2ce-00ca801248eb
Constituent name	John J. Smith (individual) or ABC, Inc. (organization)
Constituent ID	Constit 123
Primary addressee	Mr. John J. Smith, Jr.
Primary salutation	Mr. Smith
Primary contact	Mr. Smith
Position	Sales Manager
Address block*	100 Main Street, Apartment D
City	Charleston
State	SC
Zip code*	29492
Country*	USA
Email address	jjsmith@somewhere.com
Total pledge amount	$1,200.00

Output	Example
Pledge date	05/12/2009
Frequency	Monthly
Start date	05/10/2009
Number of installments	12
First installment due date	05/10/2009
First installment amount	$120.00
Send pledge reminders	Yes
Anonymous	No
First gift	Yes
Appeal name	Spring Appeal 2008
Designation 1 name (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	President's Scholarship Fund
Designation 1 public name	President Walter B. Murray Scholarship Fund
Designation 1 amount	$1,200.00
Designation 2 name (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	Building Fund
Designation 2 public name	Building for Greatness Fund
Designation 2 amount	$1,200.00
Process date	05/10/2009
Letter code name	Pledge Thank You

Extended Output Formats

The following table explains the items contained in the formatted mail acknowledgement output - extended and email acknowledgement output - extended output formats.

The double asterisk (**) fields in the **Output** column indicate fields that are exported multiple times. With extended output formats, you can export the following fields multiple times:

- 5 benefits per transaction
- 5 tributes per transaction
- 3 matching gift applications per transaction

- 5 applications per transaction
- 10 campaigns per application
- 10 recognition credits per application

Output	Example
Business process output PKID	1
Revenue ID	24ffdc3a-31fc-47a8-a2ce-00ca801248eb
Constituent name	John J. Smith (individual) or ABC, Inc. (organization)
Constituent ID	Constit 123
Primary addressee	Mr. John J. Smith, Jr.
Primary salutation	Mr. Smith
Primary contact	Mr. Smith
Position	Sales Manager
Address block	100 Main Street, Apartment D
City	Charleston
State	SC
Zip code	29492
Country	USA
Email address	jjsmith@somewhere.com
Revenue Type	Examples include: Payment and Pledge
Date	05/05/2009
Payment method	Check
Anonymous	No
First gift	No
Amount	$40.00
Receipt amount	$40.00
Appeal name	2009 Direct Mailing
Application type**	Donation

Output	Example
Designation name** (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	President's Scholarship Fund
Designation public name**	President Walter B. Murray Scholarship Fund
Designation amount**	$40.00
Designation administrator**	Mark Adamson (the administrator on the associated fundraising purpose)
Designation ID**	President Walter B. Murray Scholarship Fund
Campaign**	Playground Campaign
Revenue benefits waived**	No
Benefit name**	Free Admission
Benefit quantity**	1
Benefit value**	$15.00
Benefit total value**	$15.00
Stock issuer	Blackbaud
Stock symbol	BLKB
Stock number of units	100
Stock median price	$15.00
Property/GIK subtype	Acreage, Computers
Revenue letter ID	A5693F6D-2F1F-4E55-A622-423E13D32DAF (the record ID of the revenue letter row)
Donor addressee	Ms. Mary M. Smith
Donor address block	200 Main Street, Apartment G
Donor city	Charleston
Donor state	SC
Donor Zip code	29492
Donor Country	USA
Donor email address	mmsmith@somewhere.com

Output	Example
Amount with Gift Aid	£101.85 (total transaction amount with Gift Aid)
Other payment method	Wire transfer
Transaction reference	Additional information existing in the **Reference** field on a payment record
Tribute type**	In honor of
Tributee**	Michelle and Mark Walker
Tribute text**	Thank you for all your hard work
Tribute default designation**	Playground Site
Tribute amount**	$100
Matching gift organization**	Carolina Bank
Matching gift condition type**	Employee
Matching gift claim amount**	$25
Membership program	Adopt a Sea Turtle (if applicable)
Membership level	Individual (if applicable)
Membership expiration date	08/08/2011 (if applicable)
Constituent on pledge	Adam Johnson (if applicable)
Pledge amount	$2,000 (if applicable)
Pledge date	05/05/2009 (if applicable)
Pledge balance	$2,000 (if applicable)
Recognition credit recipient**	Amy Smith
Recognition credit amount**	$40
Recognition type**	Spouse
Recognition credit date**	05/05/2009
Recognition program (Last added)	President's Club
Recognition level (Last added)	Gold
Process date	05/05/2009
Letter code name	General Thank You

The following table explains the items contained in the pledge acknowledgement output - extended format.

Output	Example
Business process output PKID	1
Revenue ID	24ffdc3a-31fc-47a8-a2ce-00ca801248eb
Constituent name	John J. Smith (individual) or ABC, Inc. (organization)
Constituent ID	Constit 123
Primary addressee	Mr. John J. Smith, Jr.
Primary salutation	Mr. Smith
Primary contact	Mr. Smith
Address block	100 Main Street, Apartment D
City	Charleston
State	SC
Zip code	29492
Country	USA
Email address	jjsmith@somewhere.com
Total pledge amount	$1,200.00
Pledge date	05/12/2009
Frequency	Monthly
Start date	05/10/2009
Number of installments	12
First installment due date	05/10/2009
First installment amount	$120.00
Send pledge reminders	Yes
Anonymous	No
First gift	Yes
Appeal name	Spring Appeal 2008
Application type**	Donation
Designation name** (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	President's Scholarship Fund
Designation public name**	President Walter B. Murray Scholarship Fund

Output	Example
Designation amount**	$1,200.00
Designation administrator**	Mark Adamson (the administrator on the associated fundraising purpose)
Designation ID**	President Walter B. Murray Scholarship Fund
Campaign**	Playground Campaign
Position	Sales Manager
Revenue letter ID	A5693F6D-2F1F-4E55-A622-423E13D32DAF (the record ID of the revenue letter row)
Donor addressee	Ms. Mary M. Smith
Donor address block	200 Main Street, Apartment G
Donor city	Charleston
Donor state	SC
Donor Zip code*	29492
Donor country	USA
DDI account holder address block	100 Main Street, Apartment D
DDI account holder postcode	M11
DDI account number	123456789123
DDI account branch	Manchester
Amount with Gift Aid	£101.85 (total transaction amount with Gift Aid)
Other payment method	Wire transfer
Transaction reference	Additional information existing in the **Reference** field on a payment record
Tribute type**	In honor of
Tributee**	Michelle and Mark Walker
Tribute text**	Thank you for all your hard work
Tribute default designation**	Playground Site
Tribute amount**	£100
Matching gift organization*	Carolina Bank
Matching gift condition type**	Employee

Output	Example
Matching gift claim amount**	£25
Benefit name**	Free Admission
Benefit quantity**	1
Benefit unit value**	£15
Benefit total value**	£15
Membership program	Adopt a Sea Turtle (if applicable)
Membership level	Individual (if applicable)
Membership expiration date	08/08/2011 (if applicable)
Constituent on pledge	Adam Johnson (if applicable)
Pledge amount	£2000 (if applicable)
Pledge date	05/05/2009 (if applicable)
Pledge balance	£2000 (if applicable)
Recognition credit recipient**	Amy Smith
Recognition credit amount**	£40
Recognition type**	Spouse
Recognition credit date**	05/05/2009
Recognition program (Last added)	President's Club
Recognition level (Last added)	Gold
Process date	05/10/2009
Letter code name	Pledge Thank You

Acknowledgement Type: Tribute

If the acknowledgement type for the process is tribute, the available output formats are Standard tribute acknowledgement output, Formatted mail tribute acknowledgement output, and Email tribute acknowledgement output. For more information about these output formats, see Output Formats for Acknowledgements on page 249.

The following table explains the items contained in the tribute acknowledgement output formats.

Output	Example
Business process output PKID	1

Output	Example
Revenue ID	24ffdc3a-31fc-47a8-a2ce-00ca801248eb
Acknowledgee name	John Smith
Acknowledgee primary addressee	Mr. Smith
Acknowledgee primary salutation	Mr. Smith
Acknowledgee address block	100 Main Street, Apartment D
Acknowledgee city	Charleston
Acknowledgee state	SC
Acknowledgee Zip code	29492
Acknowledgee country	USA
Tribute text	In celebration of John J. Smith
Tribute amount	$100.00
Gross amount	$128.21 (tribute amount including Gift Aid)
Constituent name	John J. Smith (individual) or ABC, Inc. (organization)
Constituent ID	Constit 123
Primary addressee	Mr. John Smith
Primary salutation	Mr. Smith
Primary contact	Mr. Smith
Position	Sales Manager
Address block	100 Main Street, Apartment D
City	Charleston
State	SC
Zip code	M11
Zip code	29492
Country	USA
Email address	jjsmith@somewhere.com
Revenue Type	Examples include: Payment and Pledge
Date	05/10/2009
Anonymous	No

Output	Example
Amount	$100.00
Receipt amount	$100.00
Appeal name	2008 Direct Mailing
Designation 1 name (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	President's Scholarship Fund
Designation 1 public name	President Walter B. Murray Scholarship Fund
Designation 1 amount	$100.00
Designation 2 name (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	Building Fund
Designation 2 public name	Building for Greatness Fund
Designation 2 amount	$100.00
Process date	05/10/2009
Tribute letter code name	In celebration of

Letter Tasks

Warning: Altru now provides a new, enhanced acknowledgement process to easily thank donors for charitable giving. However, you can access your archived acknowledgement processes on a temporary basis. To continue to acknowledge your donors without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new acknowledgement process, Revenue Acknowledgements on page 91.

Before you can generate letters from an acknowledgement process, letters must be created and assigned. After this is done, it is likely you will not change letter information.

Add a Letter

Before you can generate a revenue and tribute acknowledgement process, you must add letters for revenue and tribute acknowledgements.

We recommend creating an acknowledgement form template in *Word*. The *Word* form template is the document you merge acknowledgement data with to create acknowledgements to send to constituents.

For assistance with *Word* merge help, see the Microsoft Word help file. Also, visit www.blackbaud.com for Knowledgebase articles about the merge process with Blackbaud programs.

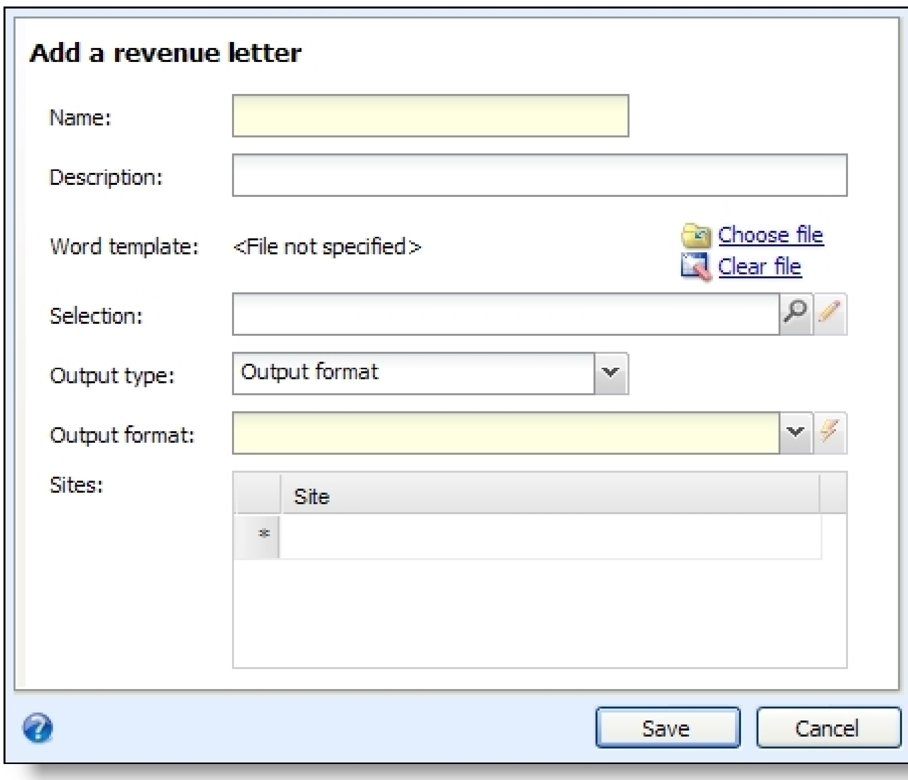
Note: The system administrator at your organization typically completes this process.

Add a letter

Two types of letters exist: revenue and tribute. When a constituent makes a payment, you send a revenue letter to thank the constituent for the revenue. You send a tribute letter to acknowledgees to notify that a donation has been made for a tribute.

1. To add a revenue letter, go to the Letters tab and click **Add**, **Revenue letter** in the **Letters** grid. The Add a letter screen appears.

   To add a tribute letter, go to the Acknowledgements page and click **Add**, **Tribute letter**.



   For information about the items on this screen, see Add a Letter Screen on page 244.

2. Click **Save**. You return to the Letters tab. The data you entered appears in the **Letter** grid.

Add a Letter Screen

The table below explains the items on this screen. Review the table for revenue and tribute letters.

Screen Item	Description
Name (this field also appears on the Update template screen when you click **Update template**)	This required field has a limit of 100 characters. Enter a name for the letter that is easily recognizable when you add or edit the acknowledgement process.
Description	This field has a limit of 255 characters. Enter description information that further identifies the letter. For example, you can enter “Only use for Annual Fund donors.”
Word template (this field also appears on the Update template screen when you click **Update template**)	To generate acknowledgements, select a *Word* form template. To navigate to your acknowledgement document on your hard drive or network, click **Choose file**. After you save a process, the document name becomes a link. To open the document in *Word*, click the link or click **View template**. To change the file, edit the document in *Word*. To update the file, click **Clear file** and select the document in this field again. To update the *Word* document for the letter, click **Update template**.
Selection (appears on the Add a revenue letter screen only)	You must specify a selection for a revenue acknowledment letter. To specify a Revenue selection, click the binoculars. The Selection Search screen appears for you to add or choose an existing selection. If the selection you need does not appear in search results, confirm that the **Record type** is Revenue. If you choose an Ad-hoc or Smart query, you can click **Edit Query** to modify the query. Revenue in the selection is assigned to this letter during the assign letter process.Tribute letters do not require the assign letter process.
Output type	You must select whether to generate acknowledgements using fields from an output format or fields from an export definition. The program defines the fields to export for each output format. You define the fields to export for an export definition.

Screen Item	Description
Output format (this field also appears on the Generate header file screen **Generate header file** under **Tasks**)	You must select an acknowledgement output. This determines the fields to export for acknowledgements with the *Word* form template. If you are creating a revenue letter, the acknowledgement output options are Standard acknowledgement output, Pledge acknowledgement output, Seasonal address acknowledgement output, Formatted mail pledge acknowledgement output, Formatted mail acknowledgement output, and Email acknowledgement output. If you are creating a tribute letter, the acknowledgement output options are Standard tribute acknowledgement output, Formatted mail tribute acknowledgement output, and Email tribute acknowledgement output. For more information, see Generate a Header File on page 268, Output Formats for Acknowledgements on page 249, and Acknowledgement Output on page 232. To view the fields to export, view the header row in your *.csv file after you run the process.
Export definition (this field also appears on the Generate header file screen **Generate header file** under **Tasks**)	This field appears when you select Export definition in the **Output type** field. You define the fields to export for an export definition and then merge the acknowledgement data with the *Word* form template. To select an export definition, click the binoculars. A search screen appears for you to add or select an existing export definition to use for acknowledgements. For more information, see Generate a Header File on page 268. To view the fields to export, view the header row in your .csv file after you run the process.

Edit a Letter

Warning: Altru now provides a new, enhanced acknowledgement process to easily thank donors for charitable giving. However, you can access your archived acknowledgement processes on a temporary basis. To continue to acknowledge your donors without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new acknowledgement process, Revenue Acknowledgements on page 91.

After you create a revenue or tribute letter, you may need to update the information. For example, you may need to select the *Word* template again to update recent changes you made to the form document.

Note: The system administrator at your organization typically completes this process.

If you edit a letter name, the name updates on existing revenue that contains the letter.

Edit a letter

1. From the Letters tab, select a letter and click **Edit**. The Edit a letter screen appears.
2. Edit the information as necessary.

3. Make changes as necessary. The items on this screen are the same as on the Add a letter screen. For a detailed explanation of the options, see Add a Letter Screen on page 244.
4. Click **Save**. You return to the Letters tab.

Delete a Letter

You can delete a revenue or tribute letter at any time. If you delete a letter and need it again, you can only retrieve the information from a good backup. We recommend you have a good backup before you delete data.

You can delete a letter if these conditions exist.

- The revenue or tribute letter is not assigned to any revenue.
- The revenue or tribute letter is not assigned to an acknowledgement process.
- The revenue letter is not assigned to a process in the **Assign letters processes** grid.

If the letter cannot be deleted, you can mark the letter inactive. For more information, see Mark Inactive on page 247.

Delete a letter

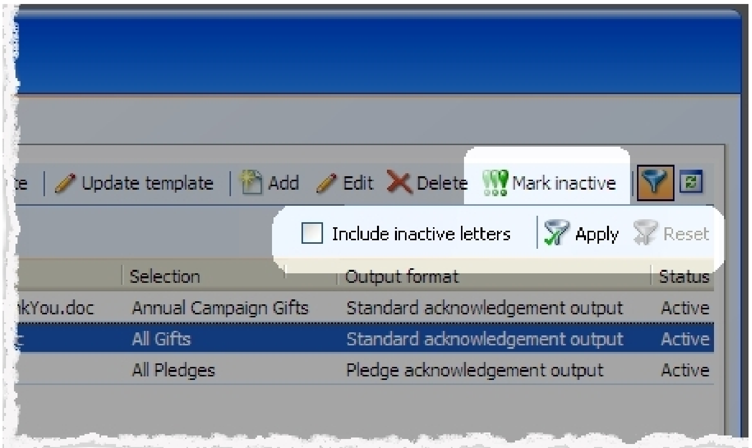
1. From the Letters tab, select a letter in the **Letters** grid and click **Delete**. A confirmation message appears.
2. Click **Yes**. The letter deletes. You return to the Letters tab.

View Template

To open the acknowledgement template in *Word*, click **View template**. The view only *Word* file opens. If you change the file from this screen, you must select **File**, **Save As** from the menu bar and overwrite your existing file to apply the changes. To make changes to the template, it is best to open the file directly in *Word*.

Mark Inactive

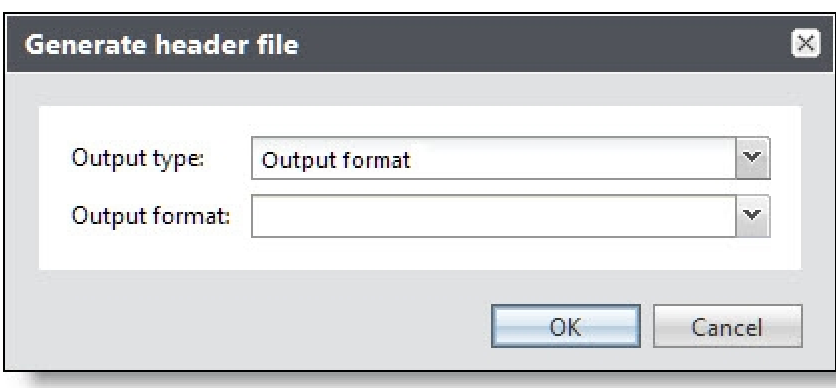
If a letter is no longer current and should not be assigned to revenue or used by a current acknowledgement process, you can mark it inactive. To do this, select the letter, and click **Mark inactive**. A confirmation message appears. Click **Yes**. The letter no longer appears in the **Letters** grid.



To view inactive letters, click **Filter**, select **Include inactive letters**, and click **Apply**. Inactive letters appear in the **Letters** grid. To mark a letter active again, select it and click **Mark active**.

Generate a Header File

To personalize a communication with information specific to its topic or recipient, you can use merge fields in your Microsoft *Word* (.docx) document. To specify the merge data to include in the document, you must generate a header file that includes the merge fields. When you generate a header file, you create a comma-separated values (*.csv) file based on an output format, with fields defined by the program, or an export definition, with fields you define. In *Word*, you can use this header file to merge the data with your document. To generate a header file for a communication, click **Generate header file** under **Tasks**. The Generate header file screen appears.



In the **Output type** field, select whether to use fields from a standard output format or an export definition.

- If you select Output format, select the output format that contains the merge fields to include.
- If you select Export definition, search for and select the export definition that includes the merge fields to include. For information about how to set up an export definition, refer to the *Query and Export Guide*.

When you click **OK**, the browser downloads the header file, based on the selected output format or export definition, for use in *Word*.

Output Formats for Acknowledgements

Output formats determine the fields to export for revenue and tribute acknowledgements. Output formats are dependant upon the acknowledgement process type. If the acknowledgement type is revenue, the applicable output formats are standard, pledge, seasonal address, formatted mail pledge, formatted mail, and email. Extended output formats exist for pledge, formatted mail, and email. If the acknowledgement type is tribute, the applicable output formats are standard, formatted mail, and email.

For more information about output formats, see Acknowledgement Output on page 232.

Revenue:

- Standard acknowledgement output - exports standard gift fields to merge with the *Word* form template. Examples include REVENUETYPE and PAYMENTMETHOD. This output format always uses primary address.
- Pledge acknowledgement output - exports pledge fields to merge with the *Word* form template. Examples include TOTALPLEDGEAMOUNT and PLEDGEDATE.
- Pledge acknowledgement output (extended) - exports pledge fields to merge with the *Word* form template. Examples include TOTALPLEDGEAMOUNT and PLEDGEDATE.

In an extended output format, specific fields are exported multiple times. Extended output allows you to export multiple categories of fields, such as benefits and tributes per transaction. For more information, see Extended Output Formats on page 235.

- Seasonal address acknowledgement output - exports standard acknowledgement fields with seasonal address data, if applicable. Using this output format, the primary address exports unless a seasonal address is in effect. In this situation, the seasonal address exports.
- Formatted mail pledge acknowledgement output - uses address process options for pledge acknowledgements. If a default address process option set has been added from the **Manage address processing options** configuration task, it defaults here. If one has not been added, click the pencil to access the Processing options screen. On this screen, select an address format and a name format and click **Save**. Name formats must already be set up on the Names tab of the constituent page and Name format defaults should already be set up from the **Manage name format options** configuration task.
- Formatted mail acknowledgement output - uses address process options for revenue acknowledgements. If a default address process option set has been added from the **Manage address processing options** configuration task, it defaults here. If one has not been added, click the pencil to access the Processing options screen. On this screen, select an address format and a name format and click **Save**. Name formats must already be set up on the Names tab of the constituent page and Name format defaults should already be set up from the **Manage name format options** configuration task.
- Formatted mail acknowledgement output (extended) - uses address process options for revenue acknowledgements. If a default address process option set has been added from the **Manage address processing options** configuration task, it defaults here. If one has not been added, click the pencil to access the Processing options screen. On this screen, select an address format and a name format and click **Save**. Name formats must already be set up on the Names tab of the

constituent page and Name format defaults should already be set up from the **Manage name format options** configuration task.

In an extended output format, specific fields are exported multiple times. Extended output allows you to export multiple categories of fields, such as multiple benefits and tributes per transaction. For more information, see Extended Output Formats on page 235.

- Email acknowledgement output - uses only mail preferences set for the primary email address.
- Email acknowledgement output (extended) - uses only mail preferences set for the primary email address. In an extended output format, specific fields are exported multiple times. Extended output allows you to export multiple categories of fields, such as benefits and tributes per transaction. For more information, see Extended Output Formats on page 235.

Tribute:

- Standard tribute acknowledgement output - exports standard gift fields and acknowledgee fields to merge with the *Word* form template. The output contains name, primary addressee, primary salutation, address block, city, state, zip, and country information for an acknowledgee.
- Formatted mail tribute acknowledgement output - uses address process options for tribute acknowledgements. If a default address process option set has been added from the **Manage address processing options** configuration task, it defaults here. If one has not been added, click the pencil to access the Processing options screen. On this screen, select an address format and a name format and click **Save**. Name formats must already be set up on the Names tab of the constituent page and Name format defaults should already be set up from the **Manage name format options** configuration task.
- Email tribute acknowledgement output - uses only mail preferences set for the primary email address.

Add an Assign Letter Process

After you create a revenue letter, you must assign it to the revenue that the letter acknowledges. For example, you create the Pledge Thank You letter to acknowledge all new pledges. After the letter is created, you must assign it to revenue with a gift type of Pledge.

When a tribute is applied to a gift or pledge, the tribute letter defaults automatically on the Letters tab on a revenue record. At that time, the letter is associated with the acknowledgees for the tribute. Therefore, tribute letters do not require an assign letter process in **Acknowledgements**.

Note: The system administrator at your organization typically completes this process.

Add an assign letters process

1. From the Letters tab, in the **Assign letters processes** grid, click **Add**. The Add an assign letters process appears.
2. Enter a name and description for the process, and select criteria deals and results information.

   For information about the items on this screen, see Add an Assign Letters Process Screen on page 251.

3. To close the Add a letter screen, click **Save**. You return to the Letters tab. The data you entered appears in the **Assign letters processes** grid.

Add an Assign Letters Process Screen

The table below explains the items on this screen.

Screen Item	Description
Name	This required field has a limit of 100 characters. Enter a name for the letter process that is easily recognizable when you assign letters to revenue.
Description	This field has a limit of 255 characters. Enter description information that further identifies the process. For example, you can enter "Only use pledges."
Include: Assign all letters	To assign all letters to revenue without assigned letters, select this option. The process does not assign the same letter twice to revenue. However, you can assign multiple letters to one gift.
Include: Assign selected letters	To assign selected letters to revenue, select this option. When you select this, the **Letter** table enables. The process does not assign the same letter twice to revenue. However, you can assign multiple letters to one gift.
Letter	To assign a specific letter to the process you add, click the drop down arrow. The letters that appear in the list default from the **Letters** grid. If a letter does not appear in the list, check to confirm a selection exists in the **Selection** field for the letter. For more information, seeAdd a Letter Screen on page 244.
Acknowledgees	To only include donors in the acknowledgement process, select **Include donor**. To only include recognition recipients (for example, someone other than the donor that is recognized for the gift), select **Include recognition recipients**. To include both, select both checkboxes.
Assign letters to: All revenue	To generate acknowledgements for all revenue, select this option.
Assign letters to: Selected revenue	To choose a Revenue query to assign a letter, select this option. When you select this, the **Selection** field enables.
Selection	To specify a Revenue selection, click the binoculars. The Selection Search screen appears for you to add or select an existing query to use for letters. If the selection you need does not appear in search results, confirm that the **Record type** is Revenue. If you choose an Ad-hoc or Smart query, you can click **Edit Query** to modify the query.
Only consider revenue added since last run	To assign letters to new revenue added to the database since the assign letters process last run, select this checkbox.
Create selection from results	To create a selection for the individuals or gifts contained in the acknowledgement process, select this checkbox. If you select this checkbox, the remaining checkbox and fields enable.

Screen Item	Description
Selection type	When you select **Create selection from results**, this is a required field. Choose to create a Constituent or Revenue type of selection.
Selection name	When you select **Create selection from results**, this is a required field. Enter the name for the new selection the process generates.
Overwrite existing selection	To overwrite the selection selected in the **Selection name** field, select this checkbox.

Edit Assign Letter Process

Warning: Altru now provides a new, enhanced revenue acknowledgement process to easily thank donors for charitable giving. However, you can access your archived acknowledgement processes on a temporary basis. To continue to acknowledge your donors without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new acknowledgement process, Revenue Acknowledgements on page 91.

After you assign a letter process, you may need to update the information. For example, you may need to assign selected revenue instead of all revenue.

Note: The system administrator at your organization typically completes this process.

Edit assign letters process

1. From the Letters tab, select a letter process in the **Assign letters processes** grid and click **Edit**. The Edit assign letters process screen appears.
2. Edit the information as necessary.
3. Make changes as necessary. The items on this screen are the same as on the Add assign letters process screen. For a detailed explanation of the options, see Add an Assign Letters Process Screen on page 251.
4. Click **Save**. You return to the Letters tab.

Run an Assign Letter Process

Warning: Altru now provides a new, enhanced revenue acknowledgement process to easily thank donors for charitable giving. However, you can access your archived acknowledgement processes on a temporary basis. To continue to acknowledge your donors without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new acknowledgement process, Revenue Acknowledgements on page 91.

After you add or edit the revenue letter process, you assign the letters to revenue by running the process.

When a tribute is applied to a transaction, the tribute letter defaults automatically on the Letters tab on a revenue record. At that time, the letter is associated with the acknowledgees for the tribute. Therefore, tribute letters do not require an assign letter process in **Acknowledgements**.

Run an assign letter process

1. To process your letters, select the letter process in the **Assign letter processes** grid, and click **Start Process**. The Run assign letters process screen appears.

   For information about the items on this screen, see Run Assign Letters Process Screen on page 253.

2. To assign letters, click **Start**. The process begins. After the process completes, the process status page appears. For more information, see Go To Process Status Page for Assign Letters on page 254.

Run Assign Letters Process Screen

The table below explains the items on this screen.

Screen Item	Description
Process name	The process name defaults from the **Name** field on the Add (or Edit) assign letters process screen. This field is disabled. To change the process name, access the Edit assign letters process screen.
Only consider revenue added since	To assign letters to new revenue added to the database since the assign letters process last run, select this checkbox.
Last run	To assign letters to new revenue added to the database since acknowledgements were last processed, select this option.
Specific date	To assign letters to new revenue as of a date, select this option. To select a date other than today's date, click the drop down arrow and select <Specific date>. An additional field appears on the right for you to enter a date. To use a calendar to select the date, click the drop down arrow in this field.
Create selection from results	To create a selection for the individuals or gifts contained in the acknowledgement process, select this checkbox. If you select this checkbox, the remaining checkbox and fields enable.
Selection type	When you select **Create selection from results**, this is a required field. Choose to create a Constituent or Revenue type of selection.
Selection name	When you select **Create selection from results**, this is a required field. Enter the name for the new selection the process generates.
Overwrite existing selection	To overwrite the selection selected in the **Selection name** field, select this checkbox.

Delete an Assign Letter Process

You can delete an assign letter process at any time. When you delete a letter process, you also delete the history for that process. If you delete a process and need it again, you can only retrieve the file from a good backup. We recommend you have a good backup before you delete data.

Warning: If you delete a process, you also delete the process status page and the history for the process. For more information, see Go To Process Status Page for Assign Letters on page 254.

Delete an assign letter process

1. From the Letters tab, select a letter process in the **Assign letters processes** grid and click **Delete**. A confirmation message appears.
2. Click **Yes**. The process deletes. You return to the Letters tab.

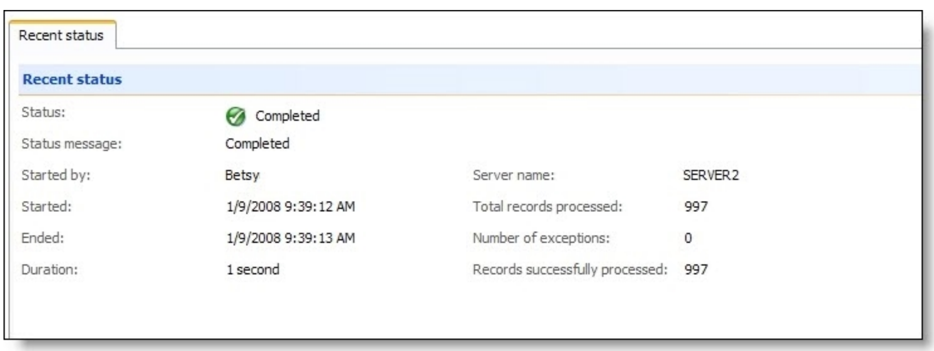
Go To Process Status Page for Assign Letters

After you run a letter process, the process status page appears automatically.

From the **Assign letters processes** grid, click **Go to process** to access this page. This page contains the Recent status, History, and Job schedules tabs. The top half of the page contains the parameters and properties for the letter process. To make a change to this information, edit the letter process.

Recent Status Tab

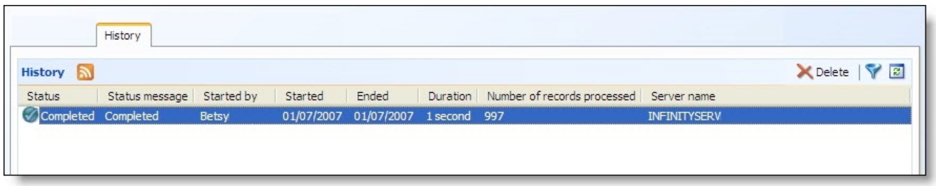
On the Recent Status tab, you view the details of the most recent instance of the assign letter process. These details include the status of the run; the start time, end time, and duration of the run; the person who last started the process; the name of the server used to process the run; the total number of letters processed; and how many letters processed successfully and how many were exceptions.



Depending on your security rights and system role, you perform functions to manage the most recent process.

History Tab

On the History tab, you view the history for each run of the assigned letter process. The details in the **History** grid include the status of the process; the start time, end time, and duration of the process; the person who last started the process; and the name of the server most recently used to process the letters. This information generates each time you run a letter process. Therefore, it is likely you have multiple rows of information in this grid.



Depending on your security rights and system role, you perform functions to manage the processes.

- **Delete**: To delete a single instance of the process, highlight the process in the **History** grid. Click **Delete**.
- **Filter**: As the history list grows over time, it may be difficult to find a particular letter process. To narrow the list, click **Filter**. A **Status** field appears for you to narrow the list by Completed, Running, or Did not finish. Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again.
- **Refresh List**: To make sure you have the latest process information, click **Refresh List**.

Job Schedule for Assign Letter Process

Use job schedule to run a process automatically and unattended. When you create a job schedule, you specify the frequency and scheduled time of the occurrence. Using the job schedule and *SQL Server*, the program runs the export at the scheduled time and interval.

Note: The system administrator at your organization typically completes this process.

You can create a job schedule for a process from its status page.

Create Job Screen for Assign Letter Process

The table below explains the items on this screen. Options on this screen vary depending on your selection in the **Schedule Type** field. This field determines options available in the **Frequency** and **Daily Frequency** frames.

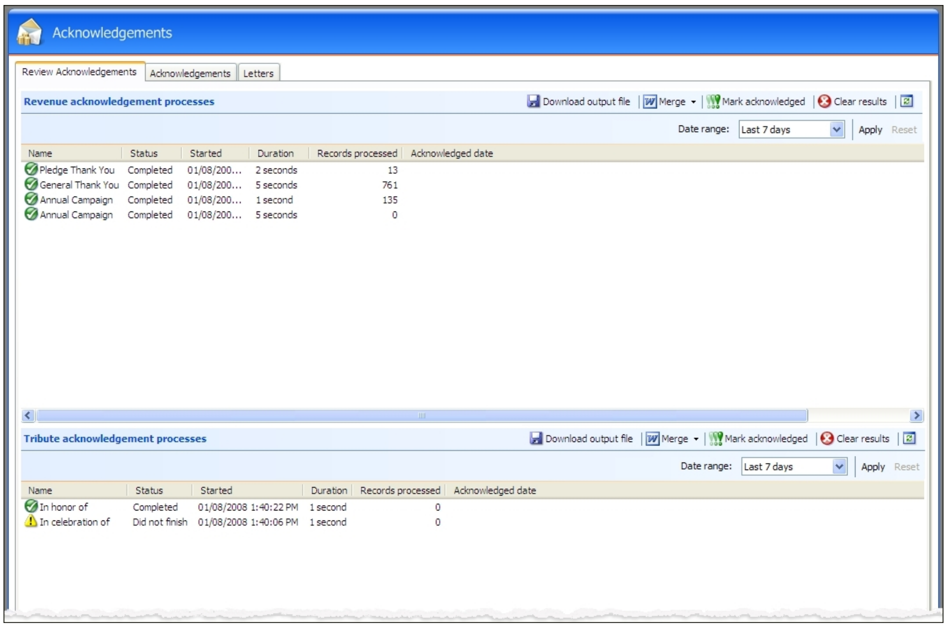
Re-Acknowledgements

You can process a new acknowledgement for a gift that was previously acknowledged. For example, if a constituent receives an acknowledgement with incorrect information, you can generate a new acknowledgement that contains the correct information. The Letters tab on the revenue record includes an **Out of date** column. If a checkmark appears in this column for the current acknowledgement, you can generate a new acknowledgement for the revenue.

For more information about the Letters tab on a revenue record, see the *Revenue Guide*.

Review Acknowledgements

From the Review Acknowledgements tab, view details for each run of your acknowledgement processes. For example, you can view **Status** information for processes in the **Revenue acknowledgement processes** and **Tribute acknowledgement processes** grids at the same time on the tab.



The grids list information such as the **Status** of the process, when it was **Started**, and the **Number of records processed**. Depending on your security rights and system role, you perform functions to manage acknowledgement processes in the database.

- **Download output file**: To save a copy of the output file to your hard drive or network, click **Download output file**. A Save as screen appears for you to name your file and browse to a location on your hard drive or network to save the output file.
- **Merge**: To merge the letters for your acknowledgements, click **Merge, letter**. The acknowledgements merge automatically in Word. Save the merged acknowledgement document on your hard drive or network. To merge the data for your labels, click **Merge, label**. The labels merge automatically in Word. Save the merged label document on your hard drive or network.
- **Mark acknowledged**: If you do not select the **Mark letters 'Acknowledged' when process completes** checkbox when you add or edit the process, this button is enabled. To mark assigned letters for revenue acknowledged, click **Mark acknowledged**. A confirmation message appears. Click **Yes**.
- **Clear results**: To run an acknowledgment process again, use **Clear results** to reverse the process. For example, you process acknowledgements with the wrong acknowledgement date. To undo the

process, click Clear results. Then, run the process again with the correct acknowledgement date. When you clear results, the output and merged documents are deleted, the acknowledgement date is deleted on the revenue, and the acknowledgement status becomes Not acknowledged on the revenue.

- **Refresh List**: To make sure you have the latest process information, click **Refresh List**.
- **Date range**: You can also search for a process by date range. In the **Date range** field, select "Last 7 days," "Last 30 days," or "All." Click **Apply**. To remove the date range filter, click **Reset**.

Reminders

Altru now provides a new, enhanced reminders process to send reminders to donors when they miss their due dates for commitments such as pledges. However, you can still access your existing reminders processes as necessary, such as to copy letter content to letters for the new process. To access your existing reminders processes from the Reminders page, click **Archived reminders** under **Tasks**.

Warning: You can access your archived reminders processes on a temporary basis only. To continue to remind your donors of revenue commitments without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new reminders process, see Reminders on page 102.

To begin learning how to use Reminders, see Microsoft Word for Reminders on page 259 and Reminder Tasks on page 259.

Microsoft Word for Reminders

Before you run reminders, we recommend creating a reminder form template in Microsoft *Word* first. This form template contains the text you want to repeat in each reminder. You merge the template with reminder data to create the reminders you send to constituents. By creating the *Word* form template first, you can generate merged reminders easily after you run the reminder process task in this program.

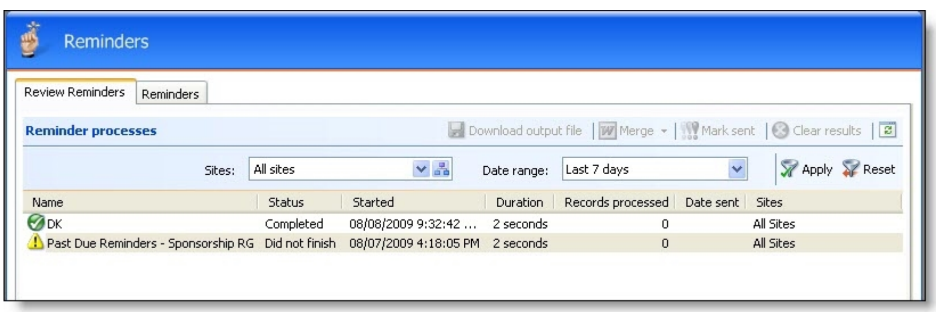
When you create the *Word* form template the first time, generate a header file from the program to use in the form template for merged fields. The header file exports in.csv format. For more information, see Generate a Header File on page 268 and Add Reminder Process Screen on page 261.

Note: After you merge the reminder *Word* form template with reminder data, you can print the reminders to mail to constituents. You can send reminders via email by including the merged file as an attachment to the email.

For assistance with *Word* merge help, see the Microsoft Word help file. Also, visit www.blackbaud.com for Knowledgebase articles about the merge process with Blackbaud programs.

Reminder Tasks

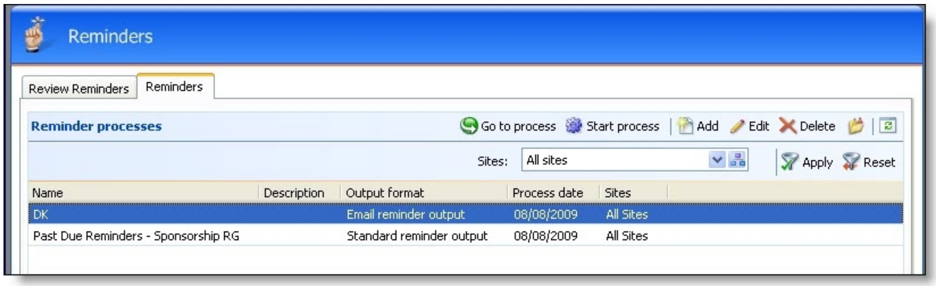
Use **Reminders** to manage reminder processes in your database. To access **Reminders**, select **Marketing and Communications**, **Reminders** from the menu bar. The Reminders page appears.



On the Review Reminders tab, view details for multiple recently run processes. The **Reminder processes** grid displays recently run processes. The grid lists information such as the **Status** of the process, when it was **Started**, and the **Number of records processed**.

Several of these processes may have been run at the same time using a job schedule. For more information, see Job Schedules for Reminders on page 271.

Select the Reminders tab to view the **Reminder processes** grid that lists the reminder processes in the database and displays the **Name**, **Description**, **Output format**, and **Process date** of each process. You enter this information when you add the reminder process to the database.



Depending on your security rights and system role, you perform functions to manage reminders processes in the database.

Add Reminder Process

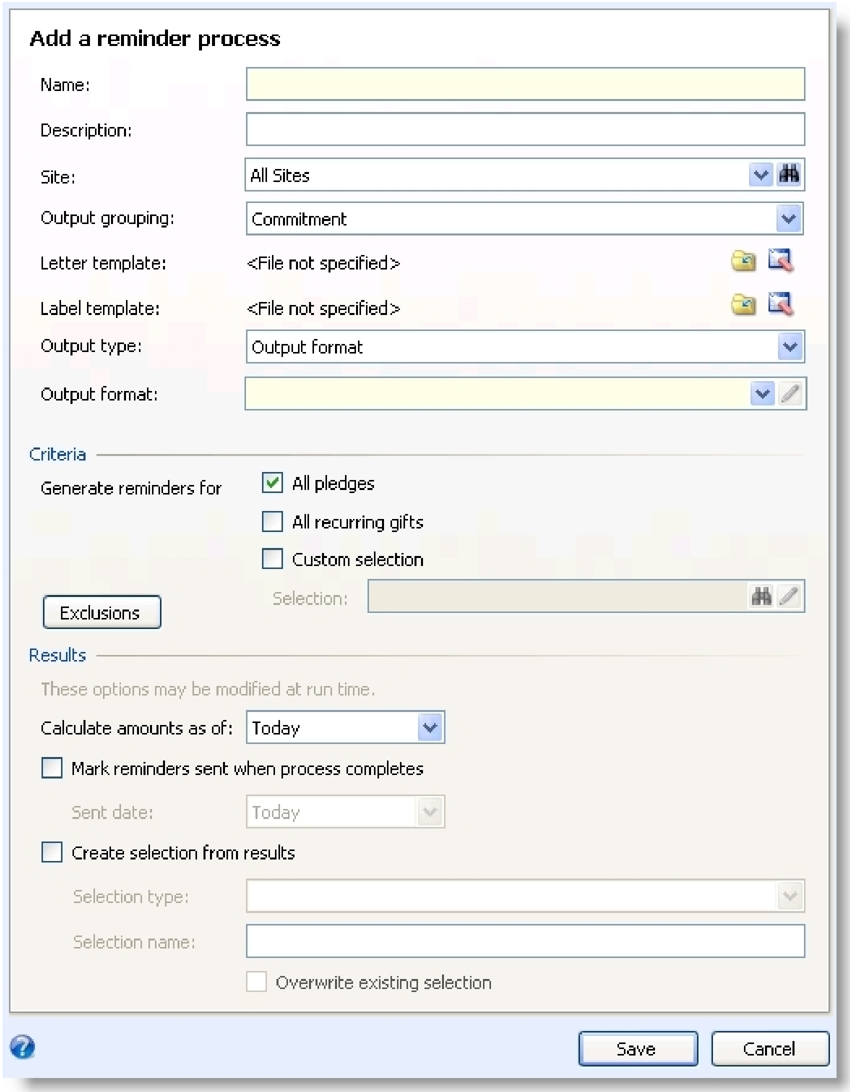
You establish a process to generate different types of reminders. For example, you can create monthly reminders for pledges greater than $1000 and save the settings you select as a reminder process. Each month, you can call up the process to generate the same reminders again.

Note: You can also use the **Reminders** process to generate reminders for recurring gifts.

Add reminder process

The system administrator at your organization typically completes this process.

1. On the Reminders page, click **Add**. The Add a reminder process screen appears.



2. On this screen, you can add **Name** and **Description** information. You can also select **Criteria** details and **Results** information.

   For information about the items on this screen, see Add Reminder Process Screen on page 261.

   For a detailed list of the default export fields, see Reminder Output on page 271.

3. Click **Save**. You return to the Reminders page. The data you entered appears in the **Reminder processes** grid.

Add Reminder Process Screen

The table below explains the items on this screen.

Screen Item	Description
Name	This required field has a limit of 100 characters. Enter a name for the process that is easily recognizable when you use the process again.
Description	This field has a limit of 255 characters. Enter description information that further identifies the process. For example, you can enter "Only use for Annual Fund donors."
Output grouping	To generate a single output file that includes one row per pledge, select Commitment. To generate two output files, select Constituent. When you do this, the first file includes one row per constituent and the second file includes one row per pledge.
Letter template	You must use a *Word* form template to generate a reminder. To navigate to the reminder form on your hard drive or network, click **Choose file**. After you save a process, the document name becomes a link. To change the file, edit the document in *Word*. To update the file, click **Clear file** and select the document in this field again.
Label template	You must use a *Word* template to print labels. To navigate to the label file on your hard drive or network, click **Choose file**. After you save a process, the document name becomes a link. To change the file, edit the form template in *Word*. To update the file, click **Clear file** and select the document in this field again.

Screen Item	Description
Output type	You must select whether to generate reminders using fields from an output format or fields from an export definition. The program defines the fields to export for each output format. You define the fields to export for an export definition.
Output format (this field also appears on the Generate header file screen **Generate header file** under **Tasks**)	This field appears when you select Output format in the **Output type** field. The output format determines the fields to export for reminders to merge with the *Word* form template. Select the email output to use only mail preferences set for the primary email address. Select the formatted mail output to include address process options for reminders. If a default address process option set has been added from the **Manage address processing options** configuration task, it defaults here. If one has not been added, click the pencil to access the Processing options screen. On this screen, select an address format and a name format and click **Save**. Name formats must already be set up on the Names tab of the constituent page and Name format defaults should already be set up from the **Manage name format options** configuration task. Select the seasonal address output to export standard reminder fields with seasonal address data, if applicable. Using this output format, the primary address exports unless a seasonal address is in effect. In this situation, the seasonal address exports. Select the standard output to export standard reminder fields to merge with the *Word* form template. Examples include TOTALPLEDGEAMOUNT and PLEDGEBALANCE. This output format always uses primary address. For more information, see Generate a Header File on page 268 and Reminder Output on page 271. To view the fields to export, view the header row in your .csv file after you run the process.
Export definition (this field also appears on the Generate header file screen **Generate header file** under **Tasks**)	This field appears when you select Export definition in the **Output type** field. You define the fields to export for an export definition and then merge the reminder data with the *Word* form template. To select an export definition, click the binoculars. A search screen appears for you to add or select an existing export definition to use for reminders. For more information, see Generate a Header File on page 268. To view the fields to export, view the header row in your.csv file after you run the process.
Generate reminders for: All pledges	To generate reminders for all pledges with an outstanding balance, select this option.

Screen Item	Description
Generate reminders for: All recurring gifts	To generate reminders for all recurring gifts with an outstanding balance, select this option.
Generate reminders for: Custom selection	To choose a Revenue query for the reminder process, select this option. When you select this, the **Selection** field enables.
Selection	To specify a Revenue selection, click the binoculars. The Selection Search screen appears for you to add or select an existing query to use for reminders. If the selection you need does not appear in search results, confirm that the **Record type** is Revenue. If you choose an Ad-hoc or Smart query, you can click **Edit Query** to modify the query.
Exclusions	To exclude constituents who request not to be contacted or solicited in certain ways, click **Exclusions**. The Exclusions screen appears. Exclusions help eliminate constituents from the process. For example, Mark Adamson requests that you not send email messages to him. If on his constituent page, through **Communications**, you add a solicit code that states “Do not email,” Mark will be removed from the process output when a matching exclusion is listed on the Exclusions screen.
Calculates amounts as of	To select a date other than today’s date, click the drop down arrow and select <Specific date>. An additional field appears on the right for you to enter a date. To use a calendar to select the date, click the drop down arrow in this field.
Mark reminders sent when process completes	To mark reminders sent in the **Reminder history** grid (Letters tab) on the pledge, select this checkbox. To preview the data for accuracy after you run the process, do not select the checkbox. You can mark reminders sent at a later time on the Recent Status tab or History tab. You can also mark reminders sent on the Review Reminders tab.
Sent date	When you select **Mark reminders sent when process completes**, you enable this field. This date defaults in the **Date sent** column in the **Reminder history** grid (Letters tab) on the pledge. To select a date other than today’s date, click the drop down arrow and select <Specific date>. An additional field appears on the right for you to enter a date. To use a calendar to select the date, click the drop down arrow in this field.
Create selection from results	To create a new selection for a group of constituents or pledges contained in the reminder process, select this checkbox. When you select this checkbox, you enable the remaining fields and checkbox.
Selection type	When you select **Create selection from results**, this is a required field. Choose to create a Constituent or Revenue type of selection.
Selection name	When you select **Create selection from results**, this is a required field. Enter the name for the new selection the process generates.
Overwrite existing selection	To overwrite the selection selected in the **Selection name** field, select this checkbox.

Edit Reminder Process

Warning: Altru now provides a new, enhanced reminders process to easily remind donors of revenue commitments. However, you can access your archived reminders processes on a temporary basis. To continue to generate reminders without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new reminders process, Reminders on page 102.

After you create a reminder process, you may need to update the information. For example, you may need to select another selection for the process or change the reminder sent date. To do this, edit the reminder process.

Note: The system administrator at your organization typically completes this process.

Edit reminders

1. From *Marketing and Communications*, click **Reminders**. The Reminders page appears.
2. Under **Tasks**, click **Archived reminders**. The Reminders page appears.
3. Under **Reminder processes**, select the process to edit.
4. On the action bar, click **Edit**. The Edit reminder process screen appears. The items on this screen are the same as on the Add reminder process screen. For a detailed explanation of the options, see Add Reminder Process Screen on page 261.
5. Edit the information as necessary.

   For a detailed list of the default export fields, see Reminder Output on page 271.
6. Click **Save**. You return to the Reminders page.

Run Reminder Process

Warning: Altru now provides a new, enhanced reminders process to easily remind donors of revenue commitments. However, you can access your archived reminders processes on a temporary basis. To continue to generate reminders without interruption, we recommend you set up the new process and its letters as soon as possible. For information about the new reminders process, Reminders on page 102.

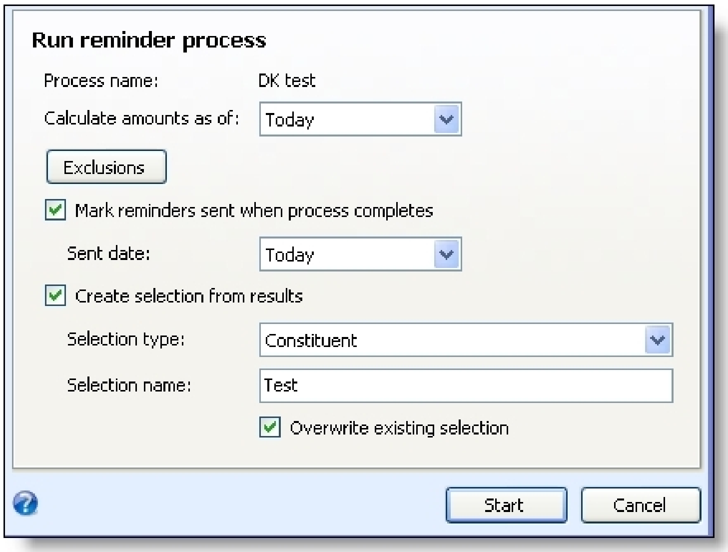
After you add or edit the reminder process, you run the process to generate the reminders for donors. A reminder generates for each pledge a constituent makes. For example, if Mark Adamson has a pledge for the Annual Fund and the Scholarship Fund, a reminder generates for each pledge.

Warning: If a pledge is split more than two ways between designations, the reminder output contains only two designations. For example, Mark Adamson splits a pledge between the Annual Fund, the Campaign for Excellence, and the Library Fund. When you run the reminder process, only two designations appear in the output.

Note: You can also use the **Reminders** process to generate reminders for recurring gifts.

Run reminder process

1. To run reminders, select the process, and click **Start process**. The Run reminder process screen appears.



   For information about the items on this screen, see Run Reminder Process Screen on page 266.

   For a detailed list of the default export fields, see Reminder Output on page 271.

2. To create reminders, click **Start**. The process begins. After the process completes, the process status page appears. For more information, see Go To Process Status Page for Reminders on page 269.

   When you run a reminder process, the date automatically defaults on pledges on the Letters tab. View this date in the **Reminder history** grid in the **Process date** column. This date informs you when the process was last run. The **Date sent** (also stored in the **Reminder history** grid) informs you when the reminders were marked sent.

Run Reminder Process Screen

The table below explains the items on this screen.

Screen Item	Description
Process name	The process name defaults from the **Name** field on the Add (or Edit) reminder process screen. This field is disabled. To change the process name, access the Edit reminder process screen.

Screen Item	Description
Calculate amounts as of	To select a date other than today's date, click the drop down arrow and select <Specific date>. An additional field appears on the right for you to enter a date. To use a calendar to select the date, click the drop down arrow in this field.
Exclusions	To exclude constituents who request not to be contacted or solicited in certain ways, click **Exclusions**. The Exclusions screen appears. Exclusions help eliminate constituents from the process. For example, Mark Adamson requests that you not send email messages to him. If on his constituent page, through **Communications**, you add a solicit code that states "Do not email," Mark will be removed from the process output when a matching exclusion is listed on the Exclusions screen.
Mark reminders sent when process completes	To mark reminders sent in the **Reminder history** grid (Letters tab) on the pledge, select this checkbox. To preview the data for accuracy after you run the process, do not select the checkbox. You can mark reminders sent at a later time on the Recent Status tab or History tab. You can also mark reminders sent on the Review Reminders tab.
Sent date	When you select **Mark reminders sent when process completes**, you enable this field. This date defaults in the **Date sent** column in the **Reminder history** grid (Letters tab) on the pledge. To select a date other than today's date, click the drop down arrow and select <Specific date>. An additional field appears on the right for you to enter a date. To use a calendar to select the date, click the drop down arrow in this field. When you run a reminder process, the date automatically defaults on pledges on the Letters tab. View this date in the **Reminder history** grid in the **Process date** column. This date informs you when the process was last run. The **Date sent** informs you when the reminders were marked sent.
Create selection from results	To create a new selection for a group of constituents or pledges contained in the reminder process, select this checkbox. When you select this checkbox, you enable the remaining fields and checkbox.
Selection type	When you select **Create selection from results**, this is a required field. Choose to create a Constituent or Revenue type of selection.
Selection name	When you select **Create selection from results**, this is a required field. Enter the name for the new selection the process generates.
Overwrite existing selection	To overwrite the selection selected in the **Selection name** field, select this checkbox.

Delete Reminder Process

You can delete a reminder process at any time. When you delete a reminder process, you also delete the history for that process. If you delete a process and need it again, you can only retrieve the process from a good backup. We recommend you have a good backup before deleting data.

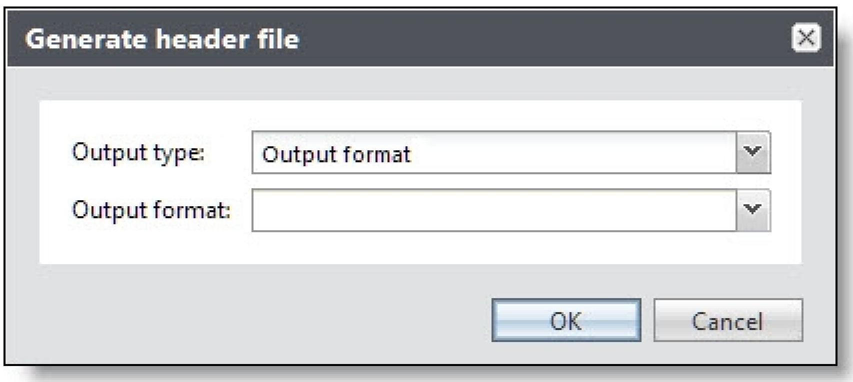
Warning: If you delete a process, you also delete the process status page and the history for the process. For more information, see Go To Process Status Page for Reminders on page 269.

Delete reminder process

1. From the Reminders page, select a reminder process and click **Delete**. A message appears to ask if you are sure you want to delete the process.
2. Click **Yes**. The process deletes. You return to the Reminders page.

Generate a Header File

To personalize a communication with information specific to its topic or recipient, you can use merge fields in your Microsoft *Word* (.docx) document. To specify the merge data to include in the document, you must generate a header file that includes the merge fields. When you generate a header file, you create a comma-separated values (*.csv) file based on an output format, with fields defined by the program, or an export definition, with fields you define. In *Word*, you can use this header file to merge the data with your document. To generate a header file for a communication, click **Generate header file** under **Tasks**. The Generate header file screen appears.



In the **Output type** field, select whether to use fields from a standard output format or an export definition.

- If you select Output format, select the output format that contains the merge fields to include.
- If you select Export definition, search for and select the export definition that includes the merge fields to include. For information about how to set up an export definition, refer to the *Query and Export Guide*.

When you click **OK**, the browser downloads the header file, based on the selected output format or export definition, for use in *Word*.

Output Formats for Reminders

Output formats determine the fields to export for reminders. Applicable output formats include standard reminder output, seasonal address reminder output, formatted mail reminder output, and email reminder output. An extended output format exists for formatted mail reminder.

For more information about output formats, see Reminder Output on page 271.

- Email reminder output - uses only mail preferences set for the primary email address.

- Formatted mail pledge reminder output (extended) - uses address process options. If a default address process option set has been added from the **Manage address processing options** configuration task, it defaults here. If one has not been added, click the pencil to access the Processing options screen. On this screen, select an address format and a name format and click **Save**. Name formats must already be set up on the Names tab of the constituent page and Name format defaults should already be set up from the **Manage name format options** configuration task.

  In an extended output format, specific fields are exported multiple times. Extended output allows you to export multiple categories of fields, such as multiple recognition credits per application.

- Formatted mail reminder output - uses address process options. If a default address process option set has been added from the **Manage address processing options** configuration task, it defaults here. If one has not been added, click the pencil to access the Processing options screen. On this screen, select an address format and a name format and click **Save**. Name formats must already be set up on the Names tab of the constituent page and Name format defaults should already be set up from the **Manage name format options** configuration task.
- Seasonal address reminder output - exports standard reminder fields with seasonal address data, if applicable. Using this output format, the primary address exports unless a seasonal address is in effect. In this situation, the seasonal address exports.
- Sponsorship reminder output - exports standard reminder fields with sponsorship address data.
- Standard reminder output - exports standard reminder fields to merge with the *Word* form template. Examples include PLEDGEDATE and PLEDGEBALANCE. This output format always uses primary address.

Go To Process Status Page for Reminders

After you run a reminder process, the process status page appears automatically.

From the Reminders page, you can click **Go to process** to access this page. This page contains the Recent status, History, and Job schedules tabs. The top half of the page contains the parameters and properties for the reminder process. To make a change to this information, edit the reminder process.

Recent Status Tab

On the Recent Status tab, you view the details of the most recent instance of the reminder process. These details include the status of the run; the start time, end time, and duration of the run; the person who last started the process; the name of the server used to process the run; the total number of reminders processed; and how many reminders processed successfully and how many were exceptions.

Depending on your security rights and system role, you perform functions to manage the most recent process.

- **Download output file**: To save a copy of the output file to your hard drive or network, click **Download output file**. A Save as screen appears for you to name your file and browse to a location on your hard drive or network to save the output file.

- **Merge letter**: To merge the letters for your reminders, click **Merge letter**. The reminders merge automatically in Word. Save the merged reminder document on your hard drive or network.
- **Merge label**: To merge the data for your labels, click **Merge label**. The labels merge automatically in Word. Save the merged label document on your hard drive or network.

Warning: If the **Merge letter** and **Merge label** buttons are disabled, check your reminder process to confirm you selected the *Word* templates in the **Letter template** and **Label template** fields.

- **Delete**: To delete the most recent instance of the process, click **Delete**.
- **Mark sent**: If you do not select **Mark reminders sent when process completes** when you add or edit the process, this button is enabled. To default the current date in the **Date sent** column in the **Reminder history** grid (Letters tab) on the pledge, click **Mark sent**.
- **Clear results**: To run a reminder process again, use **Clear results** to reverse the process. For example, you process reminders with the wrong reminder date. To undo the process, click **Clear results**. Then, run the process again with the correct reminder date. When you clear results, the output and merged documents are deleted, and the reminder information is deleted on the pledge.

History Tab

On the History tab, you view the history for each run of the reminder process. The details in the **History** grid include the status of the process; the start time, end time, and duration of the process; the person who last started the process; and the name of the server most recently used to process the reminders. This information generates each time you run a reminder process. Therefore, it is likely you have multiple rows of information in this grid.

Depending on your security rights and system role, you perform functions to manage the processes.

- **View RSS feed**: To subscribe to a Really Simple Syndication (RSS) feed, click **View RSS feed**. Use this to receive a notification when a process completes.
- **Download output file**: To save a copy of the output file to your hard drive or network, click **Download output file**. A Save as screen appears for you to name your file and browse to a location on your hard drive or network to save the output file.
- **Merge letter**: To merge the letters for your reminders, click **Merge letter**. The reminders merge automatically in Word. Save the merged reminder document on your hard drive or network.
- **Merge label**: To merge the data for your labels, click **Merge label**. The labels merge automatically in Word. Save the merged label document on your hard drive or network.

Warning: If the **Merge letter** and **Merge label** buttons are disabled, check your reminder process to confirm you selected the *Word* templates in the **Letter template** and **Label template** fields.

- **Delete**: To delete a single instance of the process, highlight the process in the **History** grid. Click **Delete**.
- **Mark sent**: If you do not select **Mark reminders sent when process completes** when you add or edit the process, this button is enabled. To default the current date in the **Date sent** column in the **Reminder history** grid (Letters tab) on the pledge, click **Mark sent**.

- **Clear results**: To run a reminder process again, use **Clear results** to reverse the process. For example, you process reminders with the wrong reminder date. To undo the process, click **Clear results**. Then, run the process again with the correct reminder date. When you clear results, the output and merged documents are deleted, and the reminder information is deleted on the pledge.
- **Filter**: As the history list grows over time, it may be difficult to find a particular reminder process. To narrow the list, click **Filter**. A **Status** field appears for you to narrow the list by Completed, Running, or Did not finish. Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again.
- **Refresh List**: To make sure you have the latest process information, click **Refresh List**.

Job Schedules for Reminders

Use job schedule to run a process automatically and unattended. When you create a job schedule, you specify the frequency and scheduled time of the occurrence. Using the job schedule and *SQL Server*, the program runs the export at the scheduled time and interval.

Note: The system administrator at your organization typically completes this process.

You can create a job schedule for a process from its status page.

Create Job Screen for Reminders

The table below explains the items on this screen. Options on this screen vary depending on your selection in the **Schedule Type** field. This field determines options available in the **Frequency** and **Daily Frequency** frames.

Reminder Output

Available reminder output formats are Formatted mail reminder output, Seasonal address reminder output, Standard reminder output, and Email reminder output. For more information about these output formats, see Output Formats for Reminders on page 268.

A Formatted mail pledge reminder output - extended output format is also available. With an extended output format, specific fields are exported multiple times. Extended output allows you to export multiple categories of fields, such as multiple recognition credits per application. For more information about extended output format fields, see Extended Output Formats on page 273.

Warning: For a constituent's information to appear in fields of the Email reminders output format, you must designate a mail preference of “Email” on the Preferences tab of a constituent’s Communications page. For more information, see the *Constituents Guide*.

The following table explains the items contained in the reminder output formats. The asterisk (*) fields in the **Output** column indicate seasonal address fields. If you select the Seasonal output, these fields consider **Seasonal information** on the constituent record to select the address to export.

Output	Example
Business process output PKID	1
Revenue ID	24ffdc3a-31fc-47a8-a2ce-00ca801248eb
Constituent name	John J. Smith (individual) or ABC, Inc. (organization)
Constituent ID	Constit 123
Primary addressee	Mr. John J. Smith, Jr.
Primary salutation	Mr. Smith
Primary contact	Mr. Smith
Position	Sales Manager
Address block*	100 Main Street, Apartment D
City*	Charleston
State*	SC
Post code*	29492
Country*	USA
Email address	jjsmith@somewhere.com
Total pledge amount	$1,200.00
Anonymous	No
Pledge date	09/11/2008
Pledge balance	$360.00
Amount paid	$840.00
Appeal name	Spring Appeal 2010
Designation 1 name (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	President's Scholarship Fund
Designation 1 public name	President Walter B. Murray Scholarship Fund
Designation 1 amount	$40.00
Designation 2 name (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	Building Fund
Designation 2 public name	Building for Greatness Fund

Output	Example
Designation 2 amount	$40.00
Revenue lookup ID	rev-10000924
Amount due	$360.00
Process date	09/11/2008
Past due amount	$100
Current due amount	$50
Amount received since last reminder sent	$50
Paid through - next installment date	09/11/2009
Date of last payment	10/11/2009

Extended Output Formats

The following table explains the items contained in the Formatted mail pledge reminder output - extended output format.

The double asterisk (**) fields in the **Output** column indicate fields that are exported multiple times. With extended output formats, you can export the following fields multiple times:

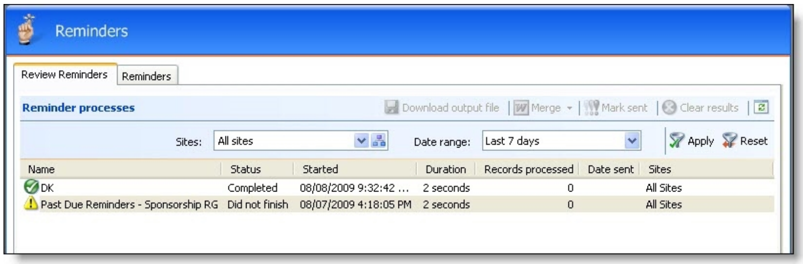
- 5 applications per transaction
- 10 recognition credits per application

Output	Example
Business process output PKID	1
Revenue ID	24ffdc3a-31fc-47a8-a2ce-00ca801248eb
Constituent name	John J. Smith (individual) or ABC, Inc. (organization)
Constituent ID	Constit 123
Primary addressee	Mr. John J. Smith, Jr.
Primary salutation	Mr. Smith
Primary contact	Mr. Smith
Position	Sales Manager
Address block	100 Main Street, Apartment D

Output	Example
City	Charleston
State	SC
Post code	29492
Country	USA
Total pledge amount	$1,200.00
Anonymous	No
Pledge date	05/05/2009
Pledge balance	$360
Amount paid	$840
Appeal name	Spring Appeal 2010
Date of last payment	10/11/2009
Last payment amount	$100
Designation name** (exports from the **Public name** field on the designation. If **Public name** is blank or does not exist, the designation **Name** exports)	President's Scholarship Fund
Designation public name**	President Walter B. Murray Scholarship Fund
Designation amount**	$40.00
Designation ID**	President Walter B. Murray Scholarship Fund
Recognition credit recipient**	Amy Smith
Recognition credit amount**	$150
Recognition type**	Spouse
Recognition credit date**	08/05/2009
Revenue lookup ID	rev-10000924
Amount due	$360
Process date	08/05/2009

Review Reminders

From the Review Reminders tab, view details for each run of your reminder processes. For example, you can view output information for the Overdue Reminder and Monthly Reminder processes at the same time in the **Reminder processes** grid.



The **Reminder processes** grid lists information such as the **Status** of the process, when it was **Started**, and the **Number of records processed**. Depending on your security rights and system role, you perform functions to manage reminder processes in the database.

- **Download output file**: To save a copy of the output file to your hard drive or network, click **Download output file**. A Save as screen appears for you to name your file and browse to a location on your hard drive or network to save the output file.
- **Merge**: To merge the letters for your reminders, click **Merge, letter**. The reminders merge automatically in Word. Save the merged reminder document on your hard drive or network. To merge the data for your labels, click **Merge, label**. The labels merge automatically in Word. Save the merged label document on your hard drive or network.

Warning: If the **Merge letter** and **Merge label** buttons are disabled, check your reminder process to confirm you selected the *Word* templates in the **Letter template** and **Label template** fields.

- **Mark sent**: If you do not select **Mark reminders sent when process completes** when you add or edit the process, this button is enabled. To default the current date in the **Date sent** column in the **Reminder history** grid (Letters tab) on the pledge, click **Mark sent**.
- **Clear results**: To run a reminder process again, use **Clear results** to reverse the process. For example, you process reminders with the wrong sent date. To undo the process, click **Clear results**. Then, run the process again with the correct reminder date. When you clear results, the output and merged documents are deleted, and the reminder information is deleted on the pledge.
- **Refresh List**: To make sure you have the latest process information, click **Refresh List**.
- **Date range**: You can also search for a process by date range. In the **Date range** field, select Last 7 days, Last 30 days, or All. Click **Apply**. To remove the date range filter, click **Reset**.