

Communications Guide

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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**.

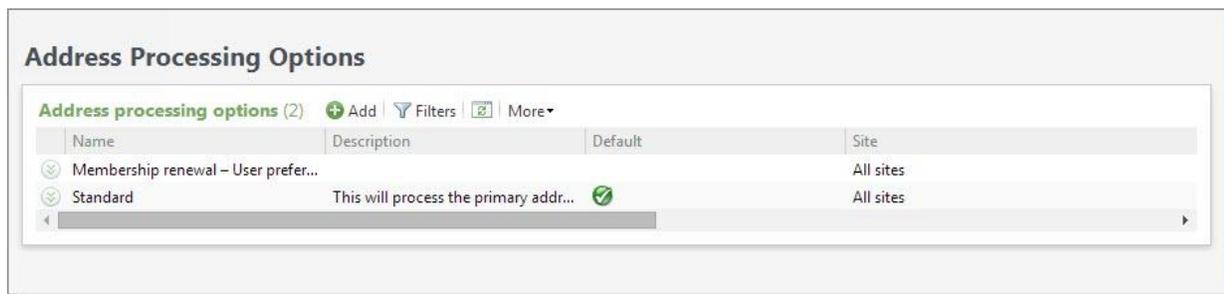
Address Processing Options

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.

Add address processing options

Name:

Description:

Site:

Individuals | Organizations | Households & Groups

Select the address to use when processing a mailing for an individual:

Use individual's mail preferences, if specified.

Otherwise, use these addresses:

1st choice:

2nd choice:

Use seasonal address, if available.

If address is not found:

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. If your organization uses site security, in the **Site** field, select which site to associate with the address processing option. Only users associated with the selected site can use this option.
5. 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.
6. Select the Organizations tab to choose the address types to use for organization constituents included in the communication effort.

Add address processing options

Name:

Description:

Site:

Individuals **Organizations** Households & Groups

Select the address to use when processing a mailing for an organization:

Use organization's mail preferences, if specified.

Otherwise:

Contact type
*

Mail to each contact found.

If no contact is found:

If contact will also receive the mailing as an individual:

Help Save Cancel

- 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.

Individuals Organizations Households & Groups

Select the address to use when processing a mailing for an organization:

Use organization's mail preferences, if specified.

Otherwise: Mail to organization only

1st choice:

2nd choice:

If address is not found:

Remove from results

7. 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.
8. 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**.

Name	Entry amount	Is in use	Record source	Status
Largest gift	Smart Field \ Constituent lifetime ...	No	Constituent Marketing Information	Active

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,

Amounts at or above	Type	Ask 1	Ask 2	Ask 3	Round up to	Ask Ladder
						\$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. If your organization uses site security, in the **Site** field, select which site to associate with the ask ladder. Only users associated with the selected site can use this ask ladder.
6. 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, refer to Smart Fields for Ask Ladders on page 10.

7. 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.

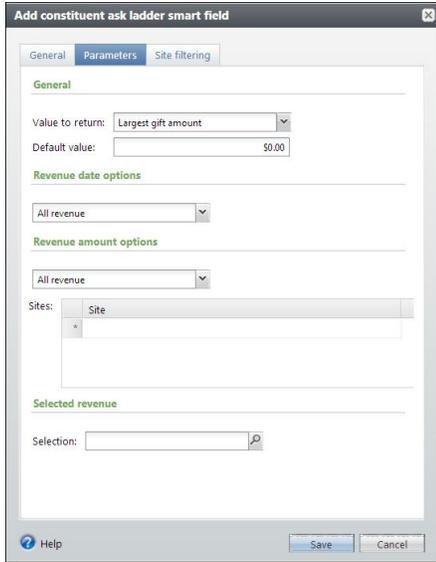
- d. In the **Prompt** field, enter the text to appear on the marketing effort for write-in ask amounts, such as “Other Amount.”
- e. In the **Round up to** field, enter a whole number to round up calculated ask amounts. For example, if you enter 10, the program rounds all calculated ask amounts up to 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.

- 8. 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.
- 9. 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, refer to 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

Screen Item	Description
	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 <i>Query</i> . Use this field for more specific filtering; for example, finding revenue based on gift type.

Communication Templates

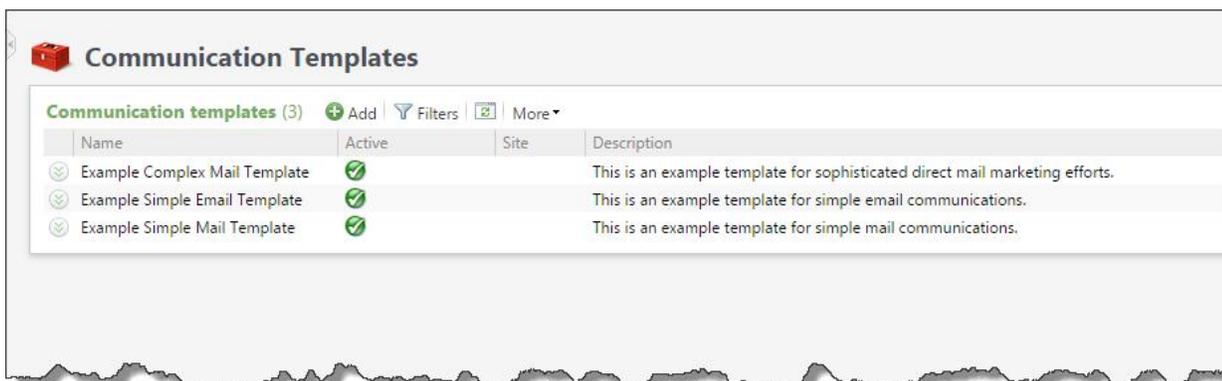
Use communication templates to streamline and standardize the creation process for direct marketing efforts. Administrators can build templates that include only the features and options your organization uses for direct marketing efforts. To maintain consistency and simplify setup, you can lock settings on a template so they cannot be viewed or edited by users who create marketing efforts from the template. You can also enter default values for fields on a template but leave them unlocked so users can change the values on marketing efforts.

Communication templates define default settings for direct marketing efforts and simplify the setup process by including only the options you need to create the effort. With communication templates, you can create direct marketing efforts that are as simple or complex as your organization needs. You can choose which features to make available for a direct marketing effort. For example, if your organization does not track KPIs, you can leave the KPIs grid blank and lock it so the KPIs tab is completely hidden for users who create marketing efforts based on that template.

The program provides 3 template examples you can evaluate and modify to meet your organization’s needs. The program also includes an example name pattern used by the simple email and mail templates.

- Example Complex Mail Template: This is an example for sophisticated direct mail marketing efforts. All features are turned on and unlocked.
- Example Simple Email Template: This is an example for simple email communications. Features not typically used with email efforts are turned off. Other options, such as activation and export formats, are set to use the program defaults and locked.
- Example Simple Mail Template: This is an example for simple mail communications. Features not typically used with simple mailings are turned off. Other options, such as activation and export formats, are set to use the program defaults and locked.

To access the Communication Templates page from *Marketing and Communications*, click **Communication templates** under **Configuration**. From the Communication Templates page, you can create new templates and manage existing ones.



Add Communication Templates

From the Marketing and Communications page, click **Communication templates** under **Configuration**. The Communication Templates page appears.

Click **Add**. The Add communication template screen appears. On this screen is a series of forms that walk you through the communication template setup process. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form you are currently working on. If you have not entered required information on a form, a yellow warning appears.

Start Setup

On the Start setup form, define basic properties for the communication template.

► Define template properties on the Start setup form

1. From the Communication Templates page, click **Add**. The Add communication template screen appears displaying the Start setup form.

Add communication template

Start setup | Select features and defaults | Confirm and make active

Welcome to the communication template setup process.
Use communication templates to define the types of communication efforts users can build. Templates determine the setup process for communication efforts and which features are available.

First, define the basic properties of the template:

Communication template properties

Name:

Description:

Site:

Optional template features

Customize the features available for this template and the communication efforts that use it.

Include options to:

- Override segment ask ladders
- Override appeal business units in the effort and/or in segments
- Include seeds in communication

Help Previous Next Save Cancel

2. Under **Communication template properties**, enter a name and description for the communication template.
3. If your organization uses site security, in the **Site** field, select which site to associate with the template. Only users associated with the selected site can access the template.
4. Under **Optional template procedures**, select additional features to configure for the template. If your organization does not use these features, leave the options unmarked to keep the tabs hidden on the template.
 - **Override segment ask ladders**—Displays the Ask Ladders tab.
 - **Override appeal business units in the effort and/or in segments**—Displays the Business Units tab.
 - **Include seeds in communication**—Displays the Seeds tab.
5. Click **Next** to continue the setup process or **Save** to save and close the communication template.

Select Features and Defaults

On the Select features and defaults form, configure features and settings for the communication template. This form is divided into a series of tabs you can navigate between to set up various parts of the template.

The screenshot shows a software window titled "Add communication template" with three tabs: "Start setup", "Select features and defaults", and "Confirm and make active". The "Select features and defaults" tab is active. A green banner at the top of the main area says "Next, configure the setup process for communication efforts that use this template:". On the left is a vertical sidebar with a list of categories: General (selected), Source code, Export format, Activation, Address processing, KPIs, Universe, and Exclusions. The main area is divided into two sections: "General information" and "Additional options".

General information

- Name scheme: [Text input field]
- Description: [Text input field with placeholder "Enter default description"]
- Appeal: [Dropdown menu with placeholder "Select default appeal"]
- Channel: [Dropdown menu with "Multi-channel" selected]
- Due date: <Unique per marketing effort>
- Launch date: <Unique per marketing effort>

Additional options

For this marketing effort, include options to:

- Reserve a specified range of finder numbers
- Specify effort budget, expenses, and goals

At the bottom of the window are buttons for "Help", "Previous", "Next", "Save", and "Cancel".

On each tab of the Select features and defaults form, you can:

Enter Default Values

Enter default values for fields on marketing efforts created from the template. For example, you can enter a default source code for marketing efforts.

Lock and Unlock Fields

You can choose which fields are editable by users who create marketing efforts from the template. If a field is unlocked, users can edit its value on the marketing effort. If a field is locked, the field is hidden on the marketing effort and the value selected on the template is always used. For example, if you lock the appeal selected for a template, users cannot edit that appeal on marketing efforts created from the template. If you lock all fields and options on a tab, in most cases that tab will not appear at all on marketing efforts created from the template. To display hidden tabs as well as the values defined for locked fields and options, users can click **Show locked fields** on the marketing effort.

General Tab

On the General tab, define basic information for marketing efforts created from the communication template.

► Define general information for marketing efforts on the General tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the General tab.

The screenshot shows a software interface with a left-hand navigation menu containing the following items: General, Source code, Export format, Activation, Address processing, KPIs, Universe, and Exclusions. The 'General' tab is selected. The main content area is titled 'General information' and contains the following fields and options:

- Name scheme:** A text input field with a search icon and a lock icon.
- Description:** A text input field with the placeholder text 'Enter default description' and a lock icon.
- Appeal:** A dropdown menu with the placeholder text 'Select default appeal', a search icon, and a lock icon.
- Channel:** A dropdown menu with the selected value 'Multi-channel' and a lock icon.
- Due date:** A text input field with the placeholder text '<Unique per marketing effort>'.
- Launch date:** A text input field with the placeholder text '<Unique per marketing effort>'.

Below the 'General information' section is the 'Additional options' section, which includes the following options:

- For this marketing effort, include options to:
 - Reserve a specified range of finder numbers (with a lock icon)
 - Specify effort budget, expenses, and goals (with a lock icon)

3. In the **Name pattern** field, select a name pattern or create a new one. For more information, refer to Communication Name Patterns on page 28.
4. To add a default description that identifies marketing efforts created from the template, enter it in the **Description** field.
5. In the **Appeal** field, select the appeal to associate with marketing efforts created from the template.
6. In the **Channel** field, select the means of distribution for marketing efforts created from the communication template—mail, email, phone, or multi-channel.

Note: You can lock individual fields and options on the General tab. Users who create marketing efforts from the template can view values for locked fields, but they cannot edit them.

7. **Due date** and **Launch date** are completed by the users who create marketing efforts from the template. Use these fields for planning and tracking purposes. For example, **Due date** is typically the date by which the marketing effort must be completed with segment counts for the vendor or printing house. **Launch date** is the date to send the marketing effort to the post office.
8. If your organization uses finder numbers, you can select **Reserve a specified range of finder numbers** to allow users to reserve a range of finder numbers for marketing efforts created from the template. Finder numbers are assigned to each potential donor included in the marketing effort when you run the Calculate segment counts process. If you do not select this option, the Finders Numbers tab is hidden on the marketing effort. For more information about finder numbers, refer to Reserve Finder Numbers on page 1.
9. To use the budgeting tools for marketing efforts created from the template, select **Specify effort budget, expenses, and goals**. When you select this option, users can enter the amount budgeted for the effort and quickly view whether the effort exceeds the budget. If you do not select this option, the Budgets/Expenses tab is hidden on the marketing effort. For more information about budgets and expenses, refer to Budget/Expenses for Marketing Efforts on page 1.

Note: If you leave the **Reserve a specified range of finder numbers** or **Specify effort budget, expenses, and goals** options unlocked on the template, users can set these options on the Create effort form when they create efforts with this template. If you unmark and lock these options, the options and tabs are completely hidden on all marketing efforts created from this template.

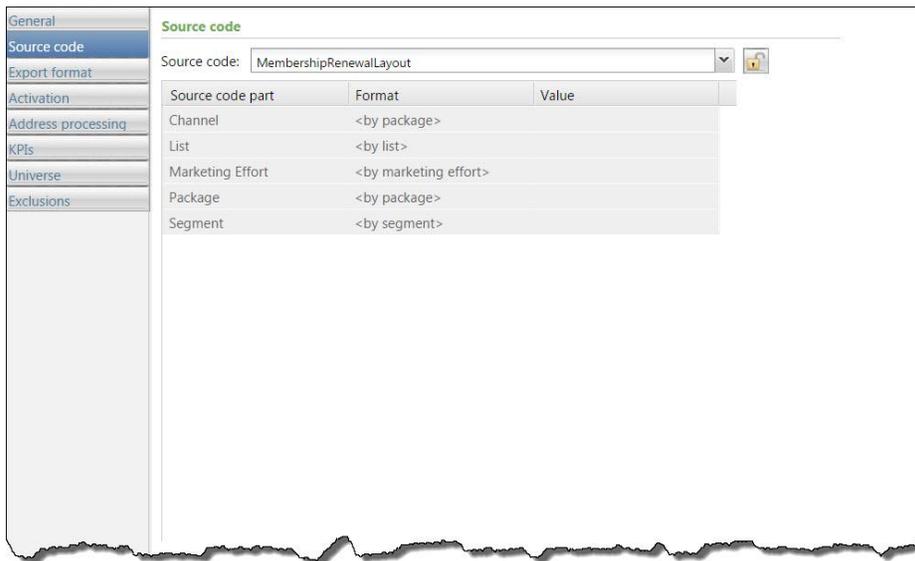
10. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Source Code Tab

On the Source code tab, select the source code layout to apply to marketing efforts created from the communication template.

► Define source code information for marketing efforts on the Source code tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Source code tab.



Source code part	Format	Value
Channel	<by package>	
List	<by list>	
Marketing Effort	<by marketing effort>	
Package	<by package>	
Segment	<by segment>	

3. In the **Source code** field, select a source code layout. The grid displays the source code parts defined for the selected layout.

Source code layouts are configured from the Source Codes page in *Marketing and Communications*. For more information, refer to [Manage Source Codes](#) on page 1.

Note: You can lock the source code layout so it cannot be changed on marketing efforts created from the template. However, if the layout includes user-defined source code parts, users can enter or select values for those parts on the marketing effort. To automate the source code on marketing efforts created from a template, select **Automatically increment source code values during data entry** on the source code parts for the template and tell users not to edit the resulting source code on the marketing effort.

4. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Export Format Tab

On the Export format tab, specify how to format exports for marketing efforts created from the communication template.

► Define export format information for marketing efforts on the Export format tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Export format tab.

3. Under **Export format**, select an export definition for the mail, phone, and/or email channel. These definitions are used for any packages assigned to the marketing effort that do not have an export definition defined already.

Tip: If you select **Export marketing effort when activation completes** on the template or marketing effort, we recommend that you always add export definitions to use as defaults. While export definitions are not required on marketing efforts, if you include packages without export definitions, the marketing effort will not export automatically when activated. For more information about export definitions, refer to Export Definitions on page 1.

In the **Export description** field, you can enter a description that identifies the export process.

4. Under **Currency export options**, you can specify how to format currency in the export file.
 - a. **Currency symbol:** Select the currency symbol to use. You can choose one of these options:
 - Use currency setting — Uses the currency setting you selected for the currency. This can be the ISO code, symbol, or both depending on the default currency type for the region.
 - Display ISO code — Uses the ISO code associated with the currency.
 - Display symbol — Uses the currency symbol associated with the currency.
 - Display no symbol — Uses no currency symbol.
 - b. **Number of digits after decimal:** Select the number of digits to use after decimals. You can choose one of these options:
 - Use currency setting — Uses the number of digits associated with the currency.
 - Use custom value — Uses the number of digits you enter in the field.
 - c. **Digit grouping symbol:** Select the digit grouping symbol to use. You can choose one of these options:
 - Use system setting — Uses Windows Region and Language settings.
 - Display space — Uses a blank space rather than a symbol.
 - Display custom symbol — Uses the custom symbol you enter in the field.
 - Display no symbol — Digits are not grouped.

- d. **Decimal symbol:** Select the decimal symbol to use. You can choose one of these options:
 - Use system setting — Uses Windows Region and Language settings.
 - Display space — Uses a blank space rather than a symbol.
 - Display custom symbol — Uses the custom symbol you enter in the field.
5. Under **Date and time export options**, select how to format dates and times in the export.
 - a. **Date format:** specify the format to use to display complete dates in the exported data. You can select the format from the drop-down list or enter date specifiers to create a new format.

Note: Marketing efforts are exported as CSV or XLSX output files and formatted as specified. For example, if you open the CSV file in a text editor, you can see dates in the date format you specified. However, if you open the CSV file in *Excel*, *Excel* tries to recognize what the different fields and values represent and format them according to your system date settings, which may not match the date format you specified.

- b. **Fuzzy date format:** Specify the format to use to display incomplete, or fuzzy, dates in the exported data. You can select the format from the drop-down list or enter date specifiers to create a new format.
 - c. **Month/day format:** Specify the format to use to display dates that include only the month and day in the exported data. You can select the format from the drop-down list or enter date specifiers to create a new format.
 - d. **Hour/minute format:** Specify the format to use to display times in the exported data. You can select the format from the drop-down list or enter time specifiers to create a new format. You cannot include seconds or timezone offsets in the format.
6. Under **Line break character options**, select the line break character(s) to use in export files for letter merges and communications exported to CSV:
 - a. **Unchanged:** Displays the line spacing of the export file in the line spacing of the output.
 - b. **CR:** Displays carriage return breaks in the line spacing of the output.
 - c. **LF:** Displays line feed breaks in the line spacing of the output.
 - d. **CR+LF:** Displays both carriage return breaks and line feed breaks in the line spacing of the output.
 7. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Activation Tab

On the Activation tab, select which tasks occur when a user activates a marketing effort created from the communication template.

► Define activation tasks for marketing efforts on the Activation tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Activation tab.

The screenshot shows a configuration interface with a sidebar on the left containing tabs: General, Source code, Export format, Activation, Address processing, KPIs, Universe, and Exclusions. The main content area is divided into two sections:

Counts processing options

When segment counts are calculated:

- Refresh universe, segments and exclusions
- Capture data for marketing exclusions report
- Capture historical record of current data for all recipients (SAR)

Activation processing options

When the marketing effort is activated:

- Recalculate segment counts
- Refresh universe, segments and exclusions
- Capture data for marketing exclusions report
- Capture historical record of current data for all recipients (SAR)
- Export marketing effort

3. Under **When generating counts for a communication, which actions would you like to perform?**, select which actions should occur as part of the Calculate segment counts process prior to activation.
 - **Refresh all selections used in the communication:** Select this option to refresh all selections associated with the marketing effort, including those associated with the universe, exclusions, and segments.
 - **Generate data for marketing exclusions report:** Select this option to capture data for the marketing exclusions report before you activate the effort. Running this report can hinder performance so you may want to turn it off for certain efforts, such as weekly acknowledgement mailings.
 - **Capture source analysis rule (SAR) data for all recipients:** Select this option to snapshot donor attributes as defined by your **source analysis rules**. For more information about source analysis rules, refer to the *Administration Guide*.
4. Under **When activating a communication, what actions would you like to perform?**, select which actions should occur as part of the activation process.
 - To run the calculate segments counts process again after activation, select **Recalculate segment counts**. When you select **Recalculate segment counts**, you can also select which actions should occur as part of the refresh.
 - a. **Refresh all selections used in the communication:** Select this option to refresh all selections associated with the marketing effort, including those associated with the universe, exclusions, and segments. Because segments and selections are refreshed from ad-hoc queries, you may want to turn this option off for some marketing efforts to avoid performance issues.
 - b. **Generate data for marketing exclusions report:** Select this option to capture data for the marketing exclusions report before you activate the effort. Running this report can hinder performance so you may want to turn it off for certain efforts, such as weekly acknowledgement mailings.
 - To snapshot donor attributes as defined by your source analysis rules, select **Capture source analysis rule (SAR) data for all recipients**. For more information about source analysis rules, refer to the *Administration Guide*.
 - To export the marketing effort automatically when activated, select **Export the communication**.
5. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Address Processing Tab

On the Address processing tab, select the address processing and name format options to use for marketing efforts created from the communication template.

Note: Configure name format and address processing options in *Marketing and Communications*, under **Configuration**. For more information, refer to *Address Processing Options* on page 1.

► Define address processing and name format options for marketing efforts on the Address processing tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Address processing tab.

3. Under **Effort level address processing/name formats**, select which name format and address processing options to use:

- **Use primary address, primary addressee, and primary salutation**—Select this option to use the primary address, addressee, and salutation selected for records included in the marketing effort. If a constituent has no primary address, primary addressee, or primary salutation, then the record is exported with a blank address, addressee, or salutation. To ensure that every constituent has a proper addressee and salutation, make sure to define at least one default name format with a specified primary addressee and primary salutation.
- **Use the following address processing and name formatting options**—Select this option to choose custom address processing and name format options for the marketing effort. For example, you can use a unique address processing option set for your holiday appeal.

Address processing options — Select a pre-defined set of address processing options or create a new set.

Consider seasonal addresses as of — Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a vacation home in December, you can send your marketing effort there rather than the primary address.

Name format options — Select a pre-defined set of name format options or create a new set.

4. To allow users to choose different addressing processing or name formats for segments, under **Segment level address processing/name formats**, select **Allow individual segments to override the addressing processing/name formats of the effort**.
5. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

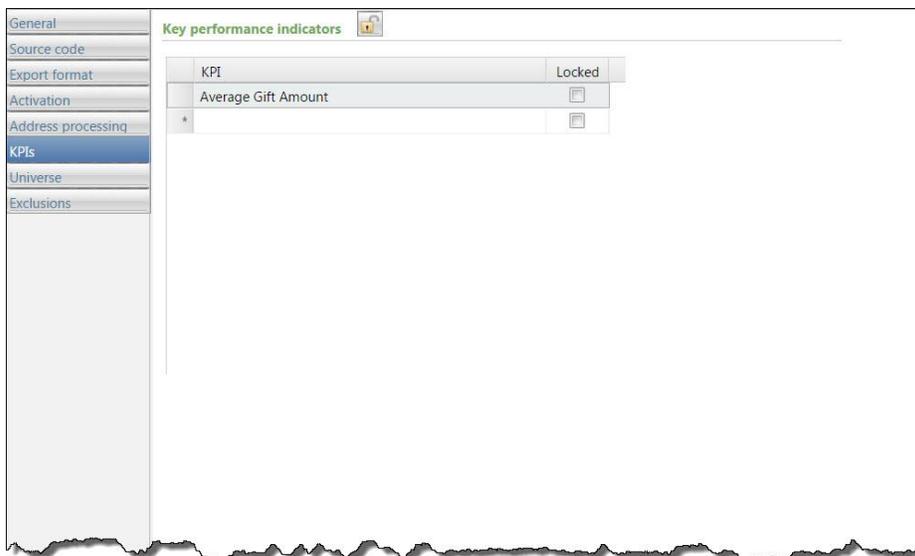
KPIs Tab

On the **KPIs** tab, select which KPIs (Key Performance Indicators) to include on marketing efforts created from the communication template. Use KPIs to monitor your progress toward goals set for the effort, such as the average gift amount, **response rate**, and return on investment (ROI). When a user creates a marketing effort, the program automatically creates an instance of each selected KPI.

For more information about how to configure marketing Key Performance Indicators, refer to the *Reports and KPIs Guide*.

► Select key performance indicators for marketing efforts on the KPIs tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the KPIs tab.



3. Use the **Key performance indicators** grid to select which KPIs to track for marketing efforts created from the template. In the **KPI** column, select a KPI.

Note: If you lock the grid, the selected KPIs always appear on marketing efforts created from the template—users cannot remove these KPIs or add different ones. If you lock an individual KPI row, that KPI always appears on the marketing effort and users cannot remove it.

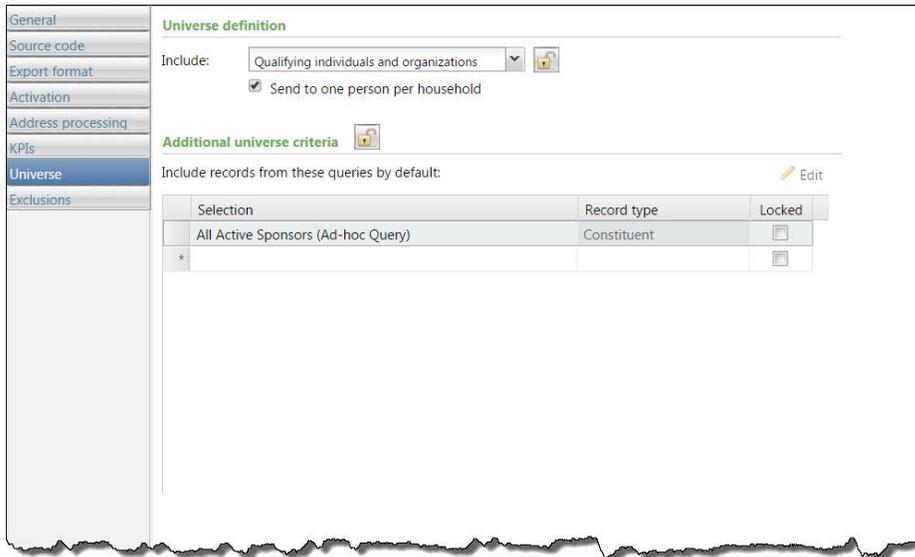
4. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Universe Tab

On the **Universe** tab, define the pool of potential records to explicitly include in marketing efforts created from the communication template.

► **Define the universe for marketing efforts on the Universe tab**

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Universe tab.



3. Under **Universe definition**, select one of these options in the **Include** field:
 - All qualifying constituents — Sends the marketing effort to all constituent records (individual/organization or household) that meet the segmentation criteria.
 - Qualifying individuals and organizations — Sends the marketing effort to all individual and organization constituent records that meet the segmentation criteria.

If you select Qualifying individuals and organizations, the **Also include qualifying households which do not have any members** option appears. Select this option to include households that do not have members. If a household is linked to any individual or organization in the database, then the household is excluded, but not the individual or organization.

If you select "Qualifying individuals and organizations," the **Send to one person per household** option also appears. Select this option to send the marketing effort to only one person in each household, even if other household members are included in the selection.
 - Qualifying households — Sends the marketing effort to all household constituent records that meet the segmentation criteria.

If you select "Qualifying households," the **Also include qualifying individuals who are not members of any household** option appears. Select this option to also include individual constituents that are not members of a household. If an individual is linked to any household in the database, then the individual is excluded, but not the household.
4. Under **Additional universe criteria**, in the **Include records from these queries by default** grid, you can select universe selections to reduce the universe of potential records to only those that meet the specified criteria. In the row, browse to the selection to include in the universe.

Note: By specifying groups of records for inclusion, when you later create segments for the marketing 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 which selections you choose for each segment, they will not include any records that do not exist in the universe selections you specify.

5. You can lock individual rows of the grid. Users who create marketing efforts from the template can view a locked selection, but they cannot edit it. If you lock the entire universe grid, the grid is hidden on marketing efforts created from the template.
6. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Exclusions Tab

On the **Exclusions** tab, specify which records to explicitly exclude from marketing efforts created from the communication template.

► Define exclusions for marketing efforts on the Exclusions tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Exclusions tab.

3. Under **Selections to exclude**, in the **Exclude records from these queries by default** grid, you can define a set of donors to exclude from the marketing effort.

In the row, browse to the selection to exclude.

Note: When you specify exclusion selections, all record sources are still available when you later create segments for the marketing effort (unlike when you define the marketing effort’s universe). Excluded constituents are excluded from every segment in the marketing effort. If you do not specify any exclusion selections, all constituents in the defined universe are available for the marketing effort.

4. You can lock individual rows of the grid. Users who create marketing efforts from the template can view a locked selection, but they cannot edit it. If you lock the entire exclusions grid, the grid is hidden on marketing efforts created from the template.
5. Under **Contact rule exclusions**, define exclusions by contact rules.
6. To exclude deceased constituents from the marketing effort, select **Exclude deceased constituents**. When an individual is marked deceased, a status of “Deceased” appears in the profile summary frame of

the constituent page. This option appears only for system administrators and other users who were granted the **Show Exclude Deceased Constituent Checkbox** system permission found under Configuration, Exclusions in *System Roles*.

7. To exclude inactive constituents from the marketing effort, select **Exclude inactive constituents**. When an individual or organization is marked inactive, a status of “Inactive” appears in the profile summary frame of the constituent page. This option appears only for system administrators and other users who were granted the **Show Exclude Inactive Constituent Checkbox** system permission found under Configuration, Exclusions in *System Roles*.
8. Use the **Exclude constituents with the following solicit code** grid to exclude constituents from a marketing effort based on the contact preferences stored on their constituent records. In the **Solicit codes** column, select the solicit codes to exclude from the marketing effort.

For example, one way to remove constituents with invalid or missing addresses is to add “Do not mail” as the solicit code on their constituent records. Then select the “Do not mail” solicit code in this grid to exclude those constituents from the marketing effort.

A solicit code can be marked optional, default, or required. If the solicit code is optional, you can add it to the exclusions of the marketing effort as applicable. If the solicit code is a default, it will automatically appear as an exclusion for a marketing effort, but you can remove it. If a solicit code is required, it will automatically appear as an exclusion for the marketing effort and cannot be removed.

Note: If you lock a solicit code, users who create marketing efforts from the template can view the code, but they cannot edit it.

9. For the **Consider exclusions as of** field, select whether to determine exclusion status based on solicit code as of today or a specific date in the future.
10. To allow users to select activated marketing efforts as exclusion criteria, under **Previous marketing effort exclusions**, select **Allow the exclusion of constituents who received previous communications**. If you do not select this option, the **Previous marketing effort exclusions** grid is hidden on the marketing effort's Exclusions tab.
11. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

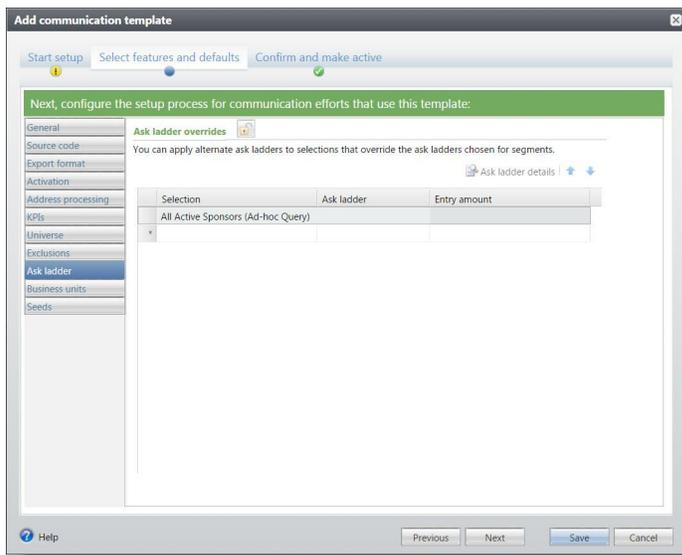
Ask Ladder Tab

Note: The Ask Ladder tab appears only when you select **Override segment ask ladders** on the Start setup form of the communication template.

You assign ask ladders to segments to ensure each recipient receives the appropriate ask amount on their marketing effort. On the Ask Ladder tab, you can choose alternate ask ladders for selections that override the one specified for a segment. For example, you can create an override for high-value constituents to ensure they receive the same ask ladder regardless of which segment they may fall into. For more information about how to configure ask ladders, refer to Ask Ladders on page 7.

► Select ask ladder overrides for marketing efforts on the Ask ladder tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Ask Ladder tab.



3. In the **Selection** column of the grid, choose the marketing selection the ask ladder applies to.
4. In the **Ask ladder** column, select the ask ladder to apply to the selection. The **Entry amount** column displays the type of entry amount assigned to the selected ask ladder, such as a smart field or dollar amount.
5. If you add multiple ask ladder overrides, use the arrows to define the order in which they are applied. The program applies overrides from top to bottom. For example, if a constituent falls into more than one selection in the grid, the program applies the override closest to the top.
6. You can lock individual rows of the grid. Users who create marketing efforts from the template can view a locked ask ladder, but they cannot edit it. If you lock the entire ask ladders grid, the grid is hidden on marketing efforts created from the template.
7. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

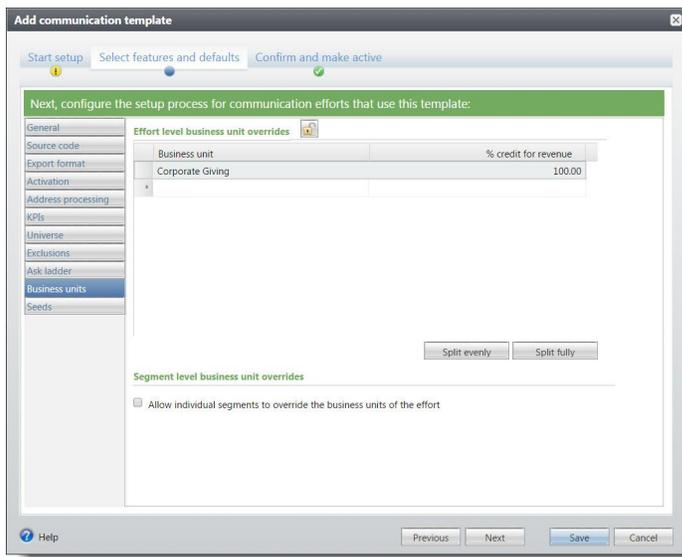
Business Units Tab

Note: The Business units tab appears only when you select **Override appeal business units in the effort and/or in segments** on the Start setup form of the communication template.

On the Business units tab, you can override business units associated with the communication template's selected appeal. You can define which business units to credit with revenue generated as a result of marketing efforts created from the template. You can specify overrides that occur at the marketing effort level and/or segment level.

► Define business unit overrides for marketing efforts on the Business units tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Business units tab.



3. Under **Effort level business unit overrides**, you can specify which business units to override for the marketing effort. In the **Business unit** column, select a unit to credit for the revenue.
4. In the **% Credit for revenue** column, enter the percentage of the revenue to credit to the selected business unit.
5. To divide the credit amount evenly among the selected business units, click **Split evenly**. To give each unit full credit for the revenue, click **Split fully**.

Note: If you lock the business units grid, the grid is hidden on marketing efforts created from the template.

6. To allow users to choose different business units for segments, under **Segment level business unit overrides**, select **Allow individual segments to override the business units of the effort**.
7. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

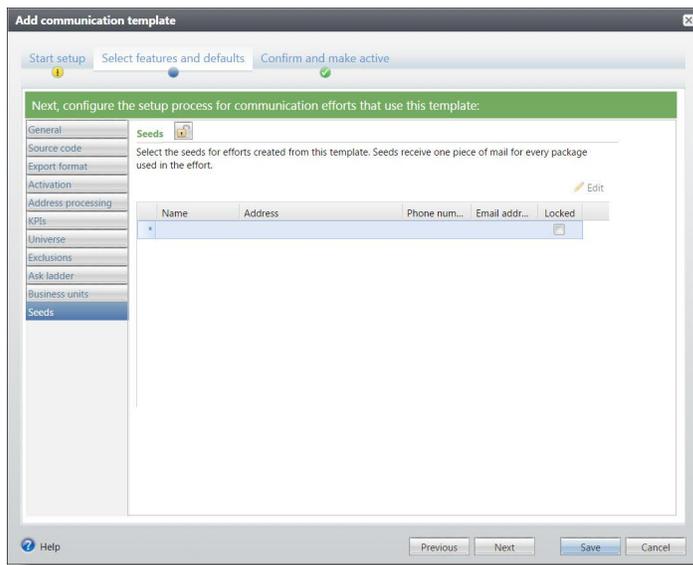
Seeds Tab

On the Seeds tab, you can assign seeds to marketing efforts created from the communication template. Seeds are usually people at your organization you include in marketing efforts to verify that the vendor or printing house sends out marketing effort pieces correctly.

Note: The Seeds tab appears only when you select **Include seeds in communication** on the Start setup form of the communication template.

► Select seeds for marketing efforts on the Seeds tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Seeds tab.



3. In the **Name** column on the grid, select a seed to associate with marketing efforts created from the template. The selected seed's address, phone number, and email address appear in the grid.
4. To edit a seed's name or contact information, select the seed in the grid and click **Edit**.
5. You can lock individual rows of the grid. Users who create marketing efforts from the template can view a locked seed, but they cannot edit it. If you lock the entire seeds grid, the grid is hidden on marketing efforts created from the template.
6. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Confirm and Make Active

On the Confirm and make active form, you can review the settings defined for the communication template and make changes before you make it available for use.

► Confirm settings for the communication template on the Confirm and make active form

1. From the Add a communication template screen, select **Confirm and make active**.

The screenshot shows the 'Add communication template' dialog box with the 'Confirm and make active' tab selected. The dialog is divided into two main sections: 'Basic properties' and 'Features and defaults'. In the 'Basic properties' section, there are three checked options under 'Include options to:': 'Override segment ask ladders', 'Override appeal business units in the effort and/or in segments', and 'Include seeds in communication'. The 'Features and defaults' section is expanded to show three sub-sections: 'General', 'Source code', and 'Export format'. Each sub-section contains a list of settings and an 'Edit' link. At the bottom of the dialog, there is a checkbox labeled 'Update template status: Make this template active on Save'.

- Under **Basic properties**, you can view properties defined on the Start setup form including optional template procedures.
 - Under **Features and defaults**, you can view settings defined on the various tabs of the Select features and defaults form. To open a tab and make changes to its settings, click **Edit**.
2. To make the template active and available to users, select **Make this template active on Save**.
 3. Click **Save** to save and close the communication template.

Tip: After you save a communication template, you can quickly preview its settings from the Communication Templates page.

Edit Communication Templates

From the Communication Templates page, you can view the defined settings for saved communication templates, such as the universe and source code. To edit a template's settings, select the template in the list and click **Edit**.

Note: When you edit a communication template, changes apply to only new marketing efforts created from the template, not existing marketing efforts.

Communication Name Patterns

On the Communication Name Patterns page, you can manage name patterns for marketing efforts. Name patterns allow you to generate unique but consistent names for all marketing efforts created from a communication template.

To access the Communication Name Patterns page, from the Marketing and Communications page, click **Communication name patterns** under **Configuration**.

The **Communication name patterns** grid displays the name patterns saved in your database. From this grid, you can edit existing name patterns or add new ones.

Note: The program includes a simple name pattern you can use as an example for how to create your own.

Add Communication Name Patterns

When you build a communication name pattern, you select parts that make up the name. Some parts are dynamic and will populate automatically when a user creates a marketing effort from the communication template. For example, if you include the Appeal code or Channel part, those values are pulled from the appeal or channel assigned to the communication template. The Static identifier and Counter parts are defined on the name pattern and populate automatically when a user creates a marketing effort from the template. If you include a Free-form part, the user who creates the marketing effort must enter a text value for that part of the name.

► Add a communication name pattern

1. From the Marketing and Communications page, under **Configuration**, click **Communication name patterns**. The Communication name patterns page appears.
2. On the action bar of the **Communication name patterns** grid, click **Add**. The Add a communication name pattern screen appears.

Name part	Name part options	Value	Trailing separator
<Select name part>			<None>

3. In the **Name** field, enter a unique name to help identify the name pattern. For example, enter a name that reflects the type of communication template that will use this name pattern.
4. If your organization uses site security, in the **Site** field, select which site to associate with the name pattern. Only users associated with the selected site can access this name pattern.
5. In the grid, select parts to build the name pattern.
 - a. In the **Name part** column, select the type of part to include.

If you select an Appeal code, Channel, Date created, Due date, Launch date, or Site name part, the **Value** column displays "<set by communication effort>". These values are pulled from their

respective fields on the General tab of the communication template or from the marketing efforts generated from the template if those fields are blank and unlocked on the template.

- b. If you select a Date created, Due date, or Launch date name part, in the **Name part options** column, select the date format to use, such as MM-DD-YY.
- c. If you select a Counter name part, in the **Name part options** column, select the number of leading zeros to use for the counter. The number of zeroes plus the # sign represent the number of digits required for the first number of the count. In the **Value** column, enter the starting number for the count. For example, if you selected "00#", enter a 3 digit starting number such as "001". The program will automatically increase the count each time you add a marketing effort that uses this name pattern.

Note: The leading zeros format does not determine the maximum number of digits allowed; the program will continue adding digits as the count increases. To maintain consistency among marketing efforts that use this name pattern, select the leading zeros format for the maximum number of digits you plan to use. For example, if you plan to increment marketing efforts to a maximum of 3 digit numbers, select 00# for the leading zeros format and enter "001" in the **Value** column.

- d. If you select a Static identifier name part, in the **Value** column, enter a text value that is not editable by users who create marketing efforts from the template. For example, you can enter "Reminder" if this name pattern will always be used by the communication template for reminders.
- e. If you select a Free-form name part, in the **Name part options** column, enter placeholder text that describes what the user who creates the marketing effort should enter, such as "Enter program name."
- f. In the **Trailing separator** column, select the separator to use between name parts.

Note: The **Current name pattern** displays the selected parts and separators in the order you defined. The **Sample name** displays the defined name pattern using sample part values.

6. Click **Save**. You return to the Communication Name Patterns page. The new name pattern appears in the grid.

Edit Communication Name Patterns

After you add a communication name pattern to the database, you can edit its name or default settings. To edit a name pattern, select it in the **Communication name patterns** grid and click **Edit**.

Note: When you edit a name pattern, those changes do not apply to marketing efforts that currently use the scheme.

Finder Number Settings

A finder number is a unique, sequential number assigned to each record in a marketing effort. Finder numbers provide an identifier for each list name in the finder file or acquisition list, as well as each constituent in a house mailing. Finder numbers are typically printed on the **reply device** and can be formatted for barcode scanners. Using finder numbers for prospects and current donors ensures greater accuracy and efficiency when entering responses to marketing efforts. During gift entry, users enter or scan the finder number and the batch automatically populates the donor's name, address, and source code.

In *Configuration*, specify the first number of the finder number sequence and the number of characters available. These settings are typically configured once and never changed. However, the settings are editable if you need to make a change such as increasing the number of characters in the **Fixed Width** field.

When you calculate segment counts, the program automatically assigns a finder number to every record in the marketing effort using the next available number in the sequence. On the Finder Numbers tab of a marketing effort, you can reserve a range of finder numbers for a vendor or for internal use with imported lists.

► 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, refer to [Calculate Check Digits](#) on page 32.

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 $X \text{ mod } Z$) 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, $29 \text{ mod } 10 = 9$. (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, refer to *Manage Subcategories* on page 34.

Add Interaction Categories

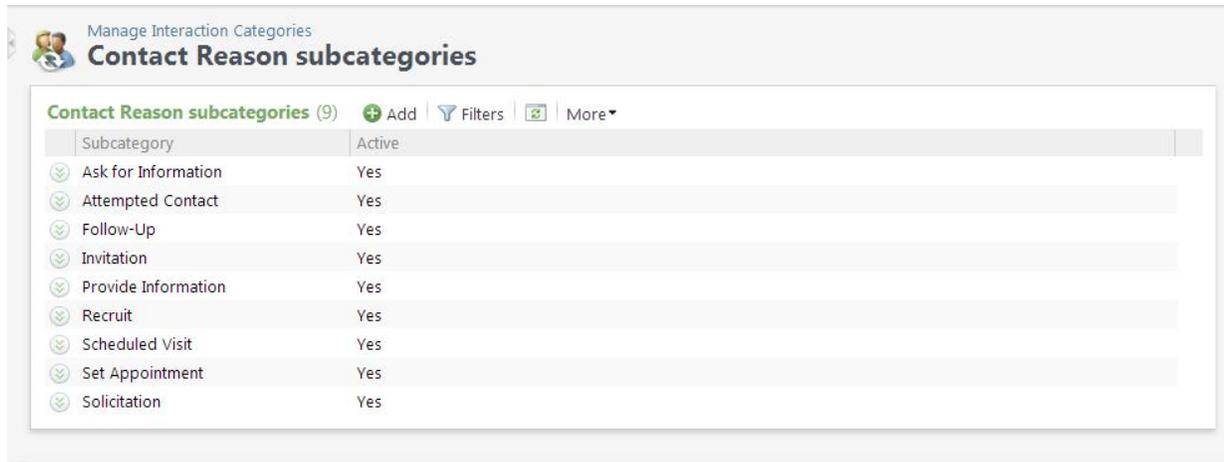
In *Constituents*, you use interaction categories and subcategories to track communication activities and actions taken to build a relationship with a constituent. From *Marketing and Communications*, you can add the types of interactions available to users in *Constituents*.

► 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 correspondence with constituents. For example, after you add a constituent letter template, you can use it to send letters to constituents. To send a letter to a constituent, from the constituent's record, click **Write a letter** on the Contact tab or under **Tasks**. For more information about the Write a Letter feature, refer to the *Constituents Guide*.

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.

- 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, refer to the *Query and Export Guide*.
- 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.

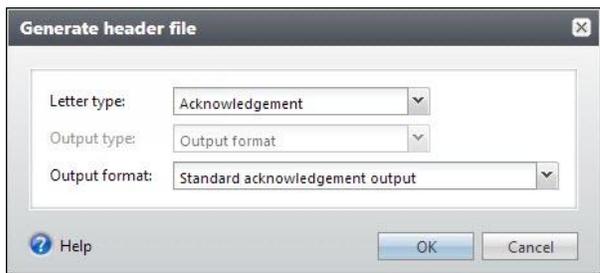
- To restrict use of the template to a specific site at your organization, in the **Site** field, select the site to use the template.
- Click **Save**. You return to the Letter Template Library page. The template appears in the **Letter template** grid.

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

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



- In the **Letter type** field, select the type of communication to generate a header file for.
- 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.

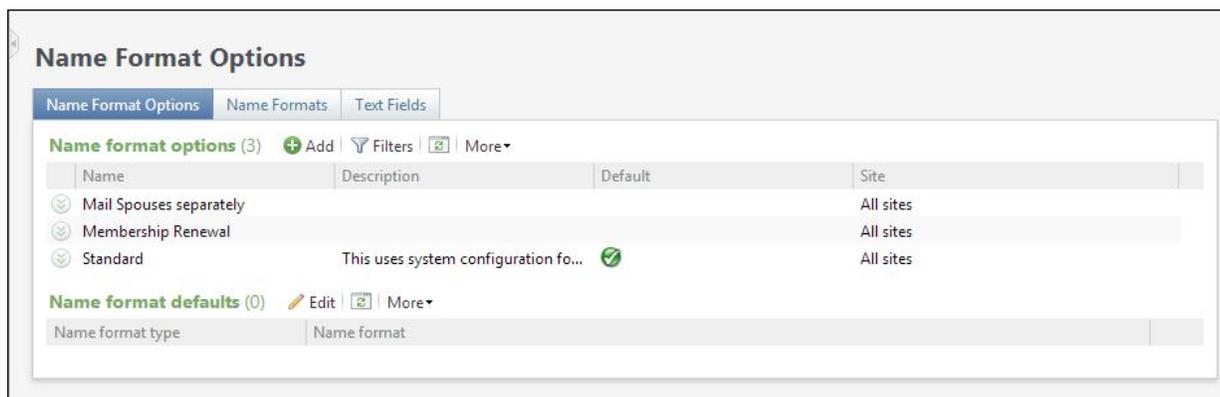
- If you selected “Export definition” as the output type, select a constituent export definition in the **Export definition** field. Only constituent export definitions created in *Administration* with **Allow definition to be used by other areas of the application** selected on the Set save options tab can be used for constituent letters.
- 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**.

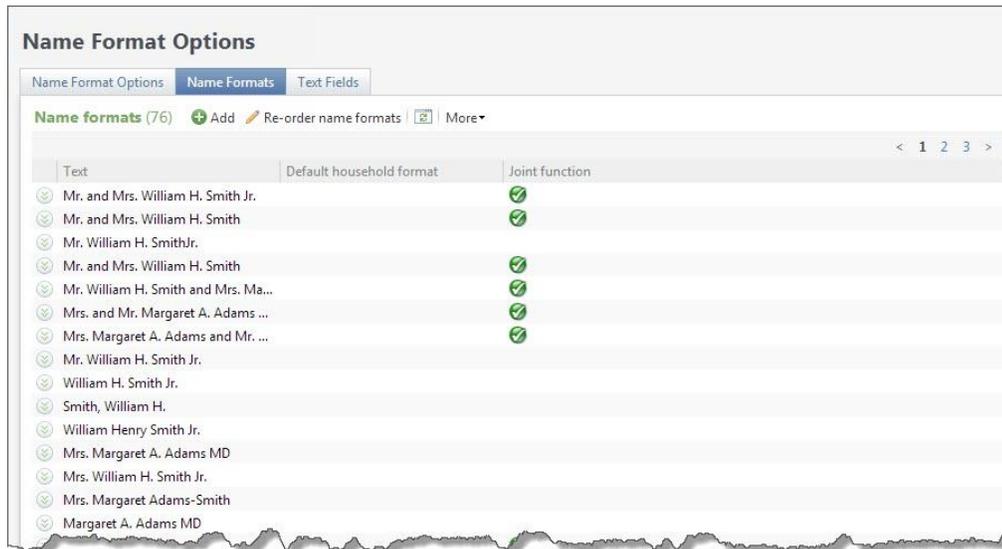


Name Formats

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.

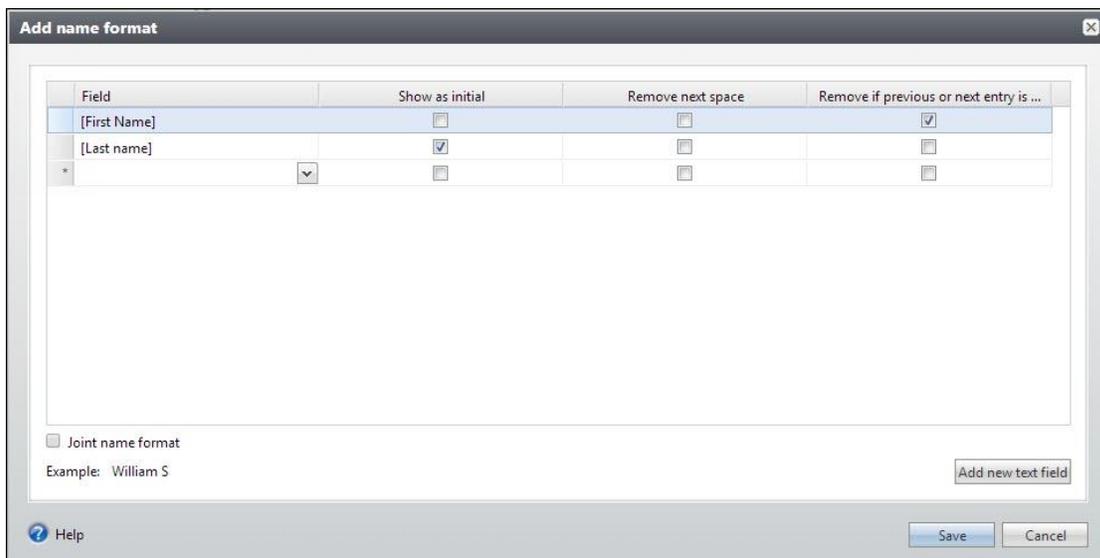


Add Name Formats

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, refer to Text Fields for Name Formats on page 39.

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 as “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.

Name format type	Name format	Primary addressee	Primary salutation
Formal Addressee	Mr. and Mrs. William H. Smith	<input type="checkbox"/>	<input type="checkbox"/>
* [dropdown]		<input type="checkbox"/>	<input type="checkbox"/>

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.
5. If your organization uses site security, in the **Site** field, select which site to associate with the name format option. Only users associated with the selected site can use this name format 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**.

6. 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.
7. 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.
8. 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.
9. 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.
10. 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.

Receipt and Acknowledgement Preferences

Constituents can choose how they want to receive receipts — one receipt for each payment or one receipt that includes multiple payments. If a constituent has a receipt preference, it is stored under **Mail preferences** on the Communications tab of the constituent record. On the Receipt and Acknowledgement Preferences page, you can configure how to receipt payments for recurring gift payments and pledge payments for constituents who do not have a receipt preference. Other gifts, such as a one-time cash gift, default to a per payment receipt type automatically.

You can also specify whether users can re-receipt and re-acknowledge payments to generate new receipts and acknowledgements for previously receipted and acknowledged payments. For re-receipts, you can choose to generate new receipt numbers and/or use the same receipt numbers.

You can also create receipt stacks which allow you to configure groups of receipts. After you create a receipt stack, you can select it from the Receipt process and enter the criteria for the program to include in the process. For example, if you have paper and online receipts, you can create stacks for each and configure the process to only include online receipts for the online stack and paper receipts for the paper stack. For information about receipt stacks, refer to Receipt Stacks on page 45.

Note: Using separate receipt stacks to track different types of receipts is required by law in Canada and other countries. Check with your local tax authority.

To configure the preferences for acknowledgements and receipts, from *Marketing and Communications*, click **Receipt and acknowledgement preferences** under **Configuration**. The Receipt and Acknowledgement Preferences page appears.

Receipt and Acknowledgement Preferences

Receipt preferences ✎ Edit 2

Recurring gift payments: Consolidated

Pledge payments: Per payment

Allow new receipt numbers for re-receipt payments: Yes

Allow the same receipt numbers for re-receipt payments: Yes

Apply strict receipt rules: No

Acknowledgement preferences ✎ Edit 2

Re-acknowledge revenue:

Receipt stacks (1) ➕ Add | ⏮ Filters | 2 | More ▾

Name	Short name	Next available number	Type	Active	Default
📌 Default		5155378	Default	Yes	✔

► Configure system receipt preferences

1. From *Marketing and Communications*, click **Receipt and acknowledgement preferences** under **Configuration**. The Receipt And Acknowledgement Preferences page appears.
2. Under **Receipt preferences**, click **Edit**. The Configure system receipt preferences screen appears.

Configure system receipt preferences

Recurring gift payments:

Pledge payments:

Apply strict receipt rules

Strict receipt rules require a reason code to be entered for all re-receipted payments. It also prevents combined acknowledgements/receipts in Direct Mail. Select this option if receipts are subject to regulations regarding the tracking of receipt numbers.

Re-receipt payments

To allow users to re-receipt payments, select the available methods to handle receipt numbers. Re-receipt payments can generate new receipt numbers or use the same receipt numbers. To not allow re-receipt payments, clear both checkboxes.

Allow new receipt numbers for re-receipt payments

Allow the same receipt numbers for re-receipt payments

3. The "Per payment" preference processes a receipt for each payment from a constituent. The "Consolidated" preference processes one receipt for multiple payments from one constituent. By default, the program is set to receipt recurring gifts and pledge payments per payment. To change the system default setting to consolidate receipts, select "Consolidated" in the **Recurring gift payments** field or **Pledge payments** field. These settings apply to constituents who do not have a receipt preference on the constituent record.
4. To comply with regulations that require an explanation for reprinted or reissued receipts, select **Apply strict receipt rules**. When you select this option, the program requires a reason code when users re-receipt payments. **Apply strict receipt rules** also disables the option to include receipts with marketing acknowledgement letters.
5. To allow users to process new receipts for payments previously receipted, select which methods to allow for receipt numbers. The selected methods appear as options when users mark a payment for re-receipt and on the receipt process.
 - To generate new receipt numbers for previously receipted payments, select **Allow new receipt numbers for re-receipt payments**. With this option selected, users can opt to generate a new receipt number when they mark a receipt for re-receipt.
 - To process the same receipt number for previously receipted payments, select **Allow the same receipt numbers for re-receipt payments**.
6. Click **Save**. You return to the Receipt And Acknowledgement Preferences page.

► Configure system acknowledgement preferences

1. From *Marketing and Communications*, click **Receipt and acknowledgement preferences** under **Configuration**. The Receipt And Acknowledgement Preferences page appears.
2. Under **Acknowledgement preferences**, click **Edit**. The Configure system acknowledgement preferences screen appears.
3. To process new acknowledgements for previously acknowledged revenue, select **Re-acknowledge revenue**.
4. Click **Save**. You return to the Receipt And Acknowledgement Preferences page.

Receipt Stacks

Receipt stacks allow you to re-use receipt numbers and still meet regulatory requirements. For example, if your organization has multiple departments that receipt gifts, rather than make everyone share a single group of receipt numbers, you can create a receipt stack for each department so they each have their own set of receipt numbers. To do this, you would add a "short name" to the receipt stack that identifies the department. When departments print receipts from their stacks, the receipt numbers include their department identifier so there is no issue if the same receipt number is used more than one department. For example, the resulting receipt numbers might be Department A, Receipt Number 102 and Department B, Receipt Number 102.

After you add a receipt stack, from *Receipts* you can create a process that includes specific receipts for that stack. If receipt stacks have not yet been configured, a default receipt stack is used that has a blank short name.

► Add a receipt stack

1. From *Marketing and Communications*, under **Configuration**, click **Receipt and acknowledgement preferences**. The Receipt and Acknowledgement Preferences page appears.
2. Under **Receipt stacks**, click **Add**. The Add a receipt stack screen appears.

Add a receipt stack

Name:

Receipt IDs are the combination of the short stack name and the next available number. For example, a short name of 'EML' will generate receipts EML1, EML2, ...

Short name:

Type:

Next number:

3. In the **Name** field, enter the name of the receipt stack
4. In the **Short name** field, enter a short name for the receipt stack. For example, if the receipt stack is for preprinted forms used for gifts to the General Fund, you can enter GF. The short name is used by the receipt process along with the next available receipt number to generate a unique receipt number for each payment. For example, "GF1011."
5. In the **Type** field, enter a description for the receipt stack. For example, if the receipt stack is for pre-printed receipts, you could enter pre-printed.

6. In the **Next number** field, enter the receipt stack start number for the process. For example, if the process should begin the receipt stack count with 3 then enter “3.”
7. Click **Save**. You return to the Receipt and Acknowledgement Preferences page.

► **Set receipt stack as default**

1. From *Marketing and Communications*, under **Configuration**, click **Receipt and acknowledgement preferences**. The Receipt and Acknowledgement Preferences page appears.
2. Select the receipt stack to make default and click **Set as default**.

Response Categories and Responses

From the Response Categories and Responses page, you define response categories used by your organization. Within each category, you also define valid responses. Use these to track responses constituents provide to specific contacts. For example, you can include a response card in a communication that asks whether the recipient is interested in volunteer work at your organization. To track this contact, you create a response category of "Volunteer Interest" and responses of "Interested" and "Not Interested." When the recipient returns the completed response card, you can enter their response on the Communications tab of their constituent record.

Response categories and responses are available for constituent interactions, appeals, and correspondence. To access the Response Categories and Responses page, from *Marketing and Communications*, click **Response categories and responses** under **Configuration**.



The screenshot shows the 'Response Categories and Responses' page. At the top, there is a header with a person icon and the title 'Response Categories and Responses'. Below the header, there is a sub-header 'Response categories (2)' with an 'Add' button, a 'Filters' icon, and a 'More' dropdown menu. The main content is a table with three columns: 'Name', 'Sort method', and 'Active'. There are two rows of data: 'Preference' and 'Volunteer Interest'. Both rows have 'Alpha' as the sort method and 'Yes' as the active status.

Name	Sort method	Active
Preference	Alpha	Yes
Volunteer Interest	Alpha	Yes

Add Response Categories

You can configure the response categories available for constituent interactions, appeals, and correspondences. Use response categories to track the responses you receive from constituents, such as an interest in volunteer opportunities.

► **Add a response category**

1. From *Marketing and Communications*, click **Response categories and responses** under **Configuration**. The Response Categories and Responses page appears.
2. Under **Response categories**, click **Add**. The Add a response category screen appears.

3. Enter a unique name to help identify the response category. The name appears in the **Response Categories** grid of the Response Categories page and in the areas of the program that use response categories, such as constituent interactions, appeals, and correspondences.
4. In the **Sort Method** field, select whether to arrange the responses alphabetically or in a user-defined order.
5. Click **Save**. You return to the Response Categories page. Under **Response categories**, the new category appears.

Add Responses to a Response Category

After you configure response categories, you need to add response options to the category. For example, if you ask constituents if they would like to learn more about planned giving, you have a category for "Planned Giving Interest," you may add responses for "Interested" and "Not Interested."

Note: For information about how to add responses categories, refer to [Add Response Categories](#) on page 46.

► Add a response to a response category

1. From *Marketing and Communications*, click **Response categories and responses** under **Configuration**. The Response Categories and Responses page appears.
2. Under **Response categories**, select a response category and click **Add**. The Add a Response screen appears.

3. In the **Response** field, enter a unique name to help identify the new response. The name appears in the **Responses** grid of the Responses page and in the areas of the application that use the associated response category, such as constituent interactions, appeals, and correspondences.
4. In the **Code** field, enter a code to associate with the response. The code must be unique within its response category.
5. Click **Save**. You return to the Responses page. In the grid, the new response appears.

Reorder Responses

For a response category with a user-defined sort order, you can easily change the order of responses to make them easier to find in a list. On the responses page for the response category, click **Re-order responses**. On the Re-order responses screen, use the arrows to move responses up and down in the list.

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, refer to 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.

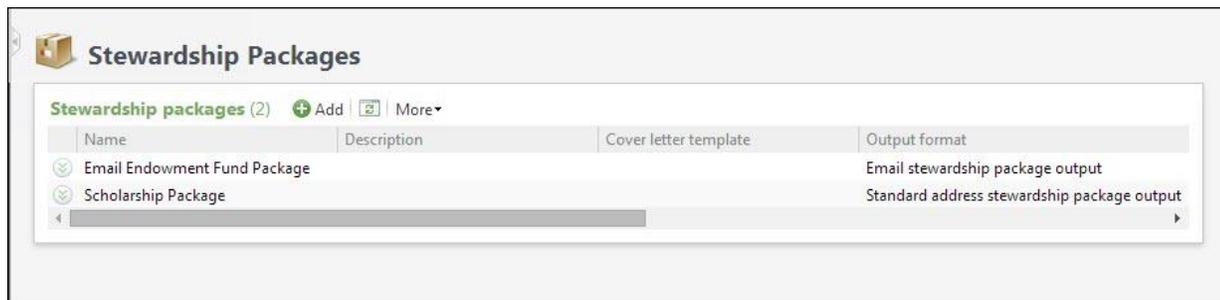
3. Enter a unique name to help identify the solicit code.
4. In the **Type** field, select whether the solicit code is optional, default, or required when users generate communications.

- 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. To restrict use of the solicit code to a specific site at your organization, in the **Site** field, select the site to use the code. If it is valid for all sites, select **All sites**.
 6. Click **Save**. You return to the Solicit Codes page.

Stewardship Packages

A stewardship package is a mail merge process you create for fundraising purposes. The package includes a cover letter and a stewardship report. You determine how often you generate the package and which donors and constituents receive the information. Before you configure a stewardship package process, you can create a cover letter for each fundraising purpose you intend to steward.

You can create and link a stewardship package to a fundraising purpose at any time. You can add a different package to each fundraising purpose or you can use the same package for multiple purposes. To view all stewardship packages, click **Stewardship packages** under **Configuration** in *Marketing and Communications*.



► Add a stewardship package

1. From *Marketing and Communications*, click **Stewardship packages** under **Configuration**. The Stewardship Packages page appears.
2. Click **Add**. The Add a stewardship package screen appears.

3. In the **Name** and **Description** fields, enter a name and description for the package.
4. To select a cover letter, click **Choose file**. For *Microsoft Word* documents, after you select a file, you can click the link to edit the document. To remove the file, click **Clear file**.
5. To determine how to export address information, select an output format. For example, a standard output format uses the constituent's primary address, while a seasonal output format uses a seasonal address. To change the name and address outputs for the format, click **Edit processing options** and select an **Address format** and **Name format**.
6. To select the mail or solicitation preferences to exclude, click **Exclusions**. For example, you can exclude inactive constituents or constituents with a "Do not mail" solicit code.
7. To create a selection based on the process results, select the **Create selection from results** checkbox and enter a name in the **Selection name** field. To overwrite the previous selection results the next time you run the process, select the **Overwrite existing selection** checkbox. The selection appears on the Selections tab in *Query*.
8. Click **Save**. You return to the Stewardship Packages page.

Set Exclusions for a Stewardship Package

When you create a stewardship package, you can exclude certain constituents from its selection of recipients. You can select whether to exclude deceased or inactive constituents or constituents with selected solicit codes.

► Exclude constituents from a stewardship package

1. On the Add a stewardship package screen, click **Exclusions**. The Exclusions screen appears.

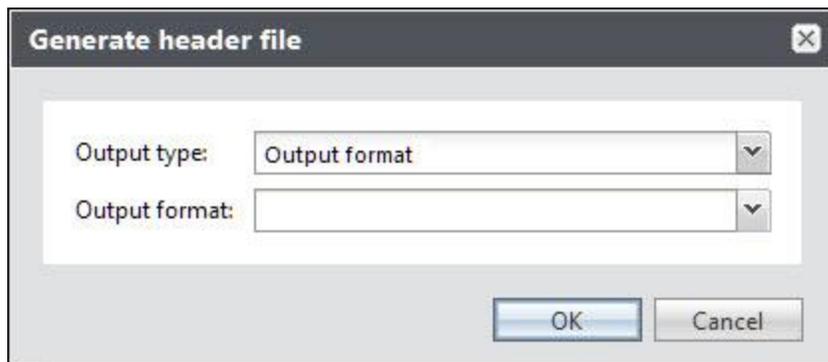
2. In the **Consider exclusions as of** field, select whether to exclude constituents that meet the exclusion criteria as of the current date or another date. If you select **Specific date**, select the date in the additional field that appears.
3. Under **Exclusions**, select the solicit codes of the constituents to exclude from the stewardship package and select whether to exclude deceased or inactive constituents.
4. Click **Show required exclusions** to see the solicit codes that are automatically excluded from the stewardship package.

Note: Under **Required Exclusions**, solicit codes that have been configured as required by your system administrator appear. The program automatically excludes constituents with these solicit codes from all stewardship packages and all other communication processes.

5. Click **Save**. You return to the Add a stewardship package screen.

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*.

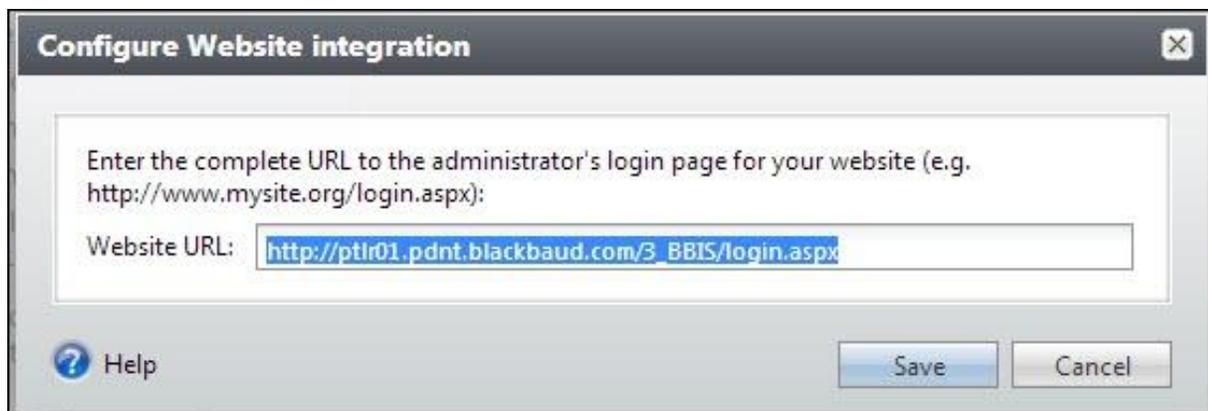
Website Integration

When **Blackbaud Direct Marketing** integrates with **Blackbaud Internet Solutions**, you can send email messages targeted to segments in a marketing effort. Emails are merged with data from **Blackbaud Direct Marketing** to personalize the content of each message. After the emails are sent, you can track their effectiveness using reports and KPIs.

Before you send emails from **Blackbaud Direct Marketing**, the system administrator must configure the integration with **Blackbaud Internet Solutions** so the two programs can share information.

After the integration package is loaded, the **Website integration** link appears under **Configuration** on the Marketing and Communications page. Click this link to access the Configure Website integration screen.

For more information about how to configure integration with **Blackbaud Internet Solutions**, refer to the **Blackbaud Direct Marketing Blackbaud Internet Solutions Integration Guide**.



Appeals

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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 55.

Add an appeal

Name:

Description:

Business units:

Business unit	% credit for revenue

Category:

Report code:

Site:

Membership:

Start date:

End date:

Goal:

2. Enter a unique name and description to help identify the appeal.
3. For **Business units**, select the methods used to deliver the appeal to potential donors, such as Annual Programs, Direct Marketing, and e-Marketing.
Under **% credit for revenue**, enter the amount of credit each unit receives for revenue received in response to the appeal. To split the credit evenly between all units, click **Split evenly**. To assign 100% credit to each unit, click **Split fully**.
4. To group the appeal with like appeals, in the **Category** field, select the category of the appeal.
5. In the **Report code** field, enter a code to help identify the appeal for analysis.
6. To restrict access to the appeal to a specific site at your organization, in the **Site** field, select the site to use the appeal.
7. If the appeal supports a membership renewal campaign, in the **Membership** field, select the applicable membership program.
8. Enter the start and end dates for the appeal. If the appeal occurs on a single day, enter only a start date.
9. In the **Goal** field, enter the monetary amount you hope to raise through the appeal.
10. 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 56.

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 53.

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.
Business units	Under Business unit , select the methods used to deliver the appeal to potential donors, such as Special Events, Direct Marketing, and Corporate Giving. Under % credit for revenue , enter the percentage of the credit to assign each business unit for revenue received in response to the appeal. To split the credit evenly between all units, click Split evenly . To assign 100% credit to all units, click Split fully .
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.
Site	To restrict use of the appeal to a specific site at your organization, select the site to use the appeal.
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.

Appeal Search

Name: Category:

Business unit: Report code:

Include inactive Event:

Site:

Results (22 records found)

Name	Description	Category	Is active	Site	Event
2000BREAKFAST	2000 President's Bre...	Annual	Yes		
2000DIRECT	Millennium Direct Mail...	Direct Mail	Yes		
2000PHONE	2000 Annual Phonat...	Annual	Yes		

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 53.

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 55.
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 55.
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 57.

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.

The screenshot shows the 'General' tab of an appeal record. It features two main sections: 'Designations' and 'Benefits'.

Designations Section: Includes a 'Go to designation' button and an 'Edit designations' button. A table lists designations with a 'Default designation' column. 'Building Fund' is highlighted in blue and has a green checkmark in the 'Default designation' column. Other designations listed are 'President's' and 'Development Fund'.

Benefits Section: Includes a 'View Benefits Catalog' button and 'Add', 'Edit', and 'Delete' buttons. A table lists benefits with columns for 'Level', 'From', 'To', and 'Benefits'.

Level	From	To	Benefits
1	\$10.00	\$49.99	Coffee mug
2	\$50.00		T-shirt

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 58.

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

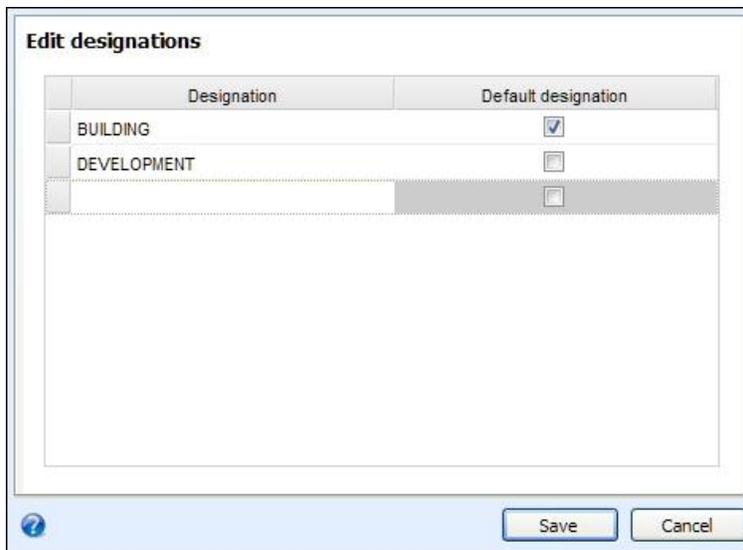
can view its giving level and applicable revenue amount range. To view additional information about benefits, click **View Benefits Catalog**. From the grid, you can add and manage the appeal's benefit program as necessary.

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 55.
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 55.
2. Under **Benefits**, click **Add**. The Add benefit level screen appears.

Add benefit level

Minimum gift amount:

Benefit	Quantity	Value	Percent

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 55.
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.

The screenshot shows a search interface with the following elements:

- Name:** A text input field.
- Category:** A dropdown menu.
- Value:** A text input field containing "0.00".
- Monetary values
- Percent values
- Search** button
- Clear** button
- Results** section with a table:

Name	Category	Value	Percent
- Add** button (with a plus icon)
- Select** button
- Cancel** button

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, direct marketing efforts, and **Blackbaud Internet Solutions** email used with the appeal.

Tip: You can view the message report online for **Blackbaud Internet Solutions** email. To view the report, select the message in the **Blackbaud Internet Solutions emails** grid and click **Go to mailing**. The message report opens for the email.

The screenshot shows a web interface for managing mailings. It is divided into three main sections:

- Appeal mailings:** Includes a table with columns: Name, Mail date, Activated, Package, Selection, Description. A row for "Annual Newsletter" is visible.
- Direct marketing efforts:** Includes a table with columns: Code, Name, Description, Mail date, Activated.
- Blackbaud Internet Solutions emails:** Includes a table with columns: Date, Message, Email Sent, Responders, Response Rate, Responses, Total, Average, Open rate, Click throughs. Two rows are shown:

Date	Message	Email Sent	Responders	Response Rate	Responses	Total	Average	Open rate	Click throughs
04/4/2011	Black & White	200	0	0%	0	0.00	0.00	0%	0
04/4/2011	Blue & Yellow	200	0	0%	0	0.00	0.00	0%	0

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 78.

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

Under **Direct marketing efforts**, you can view the marketing efforts your organization uses to request donations toward the appeal. For each effort, you can view its name and description, mail date, and activation status. To view additional information about a marketing effort, select it in the grid and click **Go to mailing**. The record of the marketing effort appears.

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

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

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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 53.

- ❑ 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 68.
- ❑ Create the packages to include in your appeal mailings. For example, an appeal mailing may include a newsletter or an appeal card. When you create a package, you specify the content of the mailing and the budget for that content.
- ❑ 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 82.
- ❑ On the mail date for the mailing, you can activate the mailing to send it to its recipients. When you activate the mailing, the program use the package and recipient information to create personalized output for the mailing. For information about how to activate an appeal mailing, see Start an Appeal Mailing on page 79.
- ❑ From the record of the activated mailing, download the mailing output for delivery to its recipients. For information about how to manage the output of the most recent instance of the activation, see Recent Status on page 89.
- ❑ After you send the mailing to its recipients, track the responses received from the mailing, including the return on investment (ROI) amounts and percentages. For information about the response data, see Response Information on page 80. For information about how to refresh this information to ensure current data, see Refresh an Activated Appeal Mailing on page 81.
- ❑ 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 85.

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 69.

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.

Add an appeal mailing

Name:

Description:

Mail date:

Appeal:

Selections | Tasks

Select your selections:

Selection

Save Cancel

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. On the **Selections** tab, under **Selection**, search for and select the constituent selections to receive the mailing.
7. To add tasks required in preparation for the mailing, select the **Tasks** tab.
Under **Subject**, the tasks associated with the mailing appear. To add a task, click **Add task**. To edit a task, select it under **Subject** and click **Edit a task**. For information about tasks, see *Appeal Mailing Tasks* on page 82.
8. 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

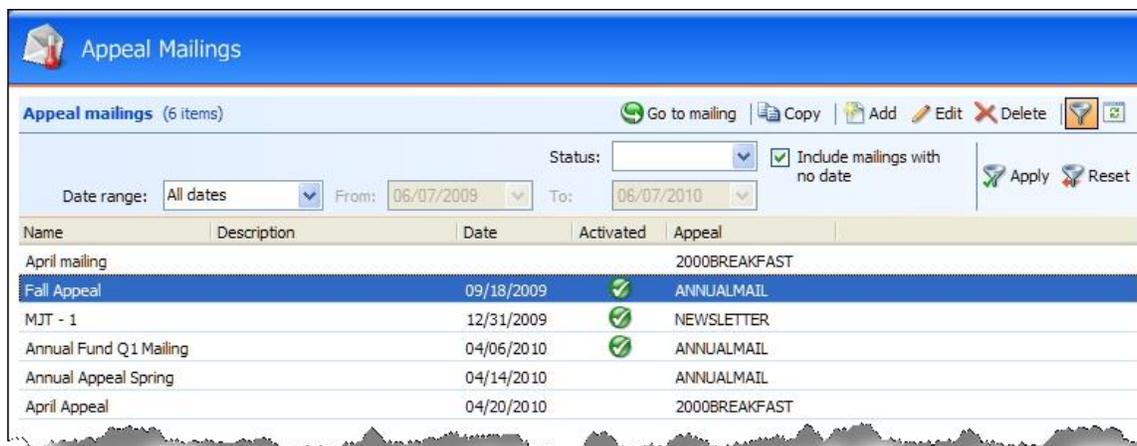
1. From *Marketing and Communications*, click **Planning calendar**. The Planning calendar page appears.
2. On the calendar, select a mailing and click **Edit**. The Edit appeal mailing screen appears.

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

3. Make changes as necessary. 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 69.
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, 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 78.

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

Add Appeal Mailings

You can add multiple mailings to support an appeal. When you add a mailing, you can base its recipients on a specific selection of constituents. You can also specify criteria to exclude constituents from the mailing as well as the addresses, name formats, and packages to use.

You can add an appeal mailing from the Appeal Mailings page or the Mailings tab on an appeal record.

► 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 appeal mailing screen appears. For information about the items on this screen, see *Add Appeal Mailing Screen* on page 74.

Add appeal mailing

General Exclusions Processing options Output KPIs

Name:

Description:

Date:

Fixed cost:

Budget:

Appeal:

Package details

Selection:

Package: Cost: \$0.00

Label template: <File not specified>

Include:

Send to one person per household

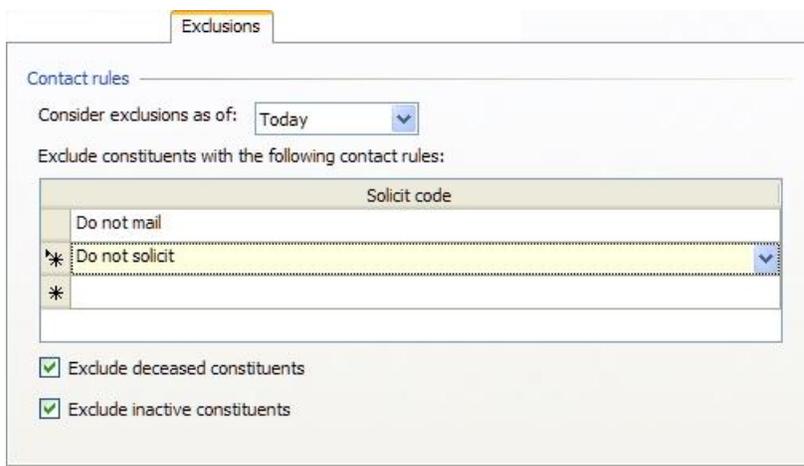
Also include qualifying households which do not have any members

Save Cancel

3. On the General tab, enter a unique name and description to help identify the mailing.
4. In the **Date** field, select the date you plan to send the mailing to the post office for delivery.
5. In the **Fixed cost** field, enter the total cost of the mailing, such as the cost to send it to a fulfillment house.
6. In the **Budget** field, enter the total amount of the budget for the mailing.
7. When you add a mailing from the Appeal Mailings page, the **Appeal** field appears. Search for and select the appeal that the mailing supports.
8. Under **Package details**, search for and select the static selection of constituents and the package to use with the mailing.
9. In the **Label template** field, click **Choose file** and browse to and select the Microsoft *Word* document file to use to generate labels for the mailing.
To remove a selected template to select another, click **Clear file** in the **Label template** field.
10. In the **Include** field, select the types of constituents from the constituent selection to include in the mailing.

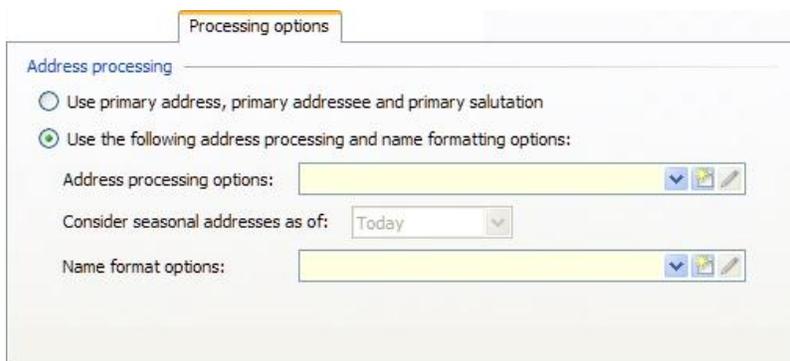
- If you select All qualifying constituents, the mailing includes all constituents that meet the selection and exclusion criteria.
- If you select Qualifying individuals and organizations, the mailing includes all individual and organization constituents that meet the selection and exclusion criteria. Select whether to also include individuals who are not members of a household.
- If you select Qualifying households, the mailing includes all constituent households that meet the selection and exclusion criteria. Select whether to include only one person per household when multiple qualifying individuals share a household and whether to also include qualifying households that do not have members.

11. To specify the solicit codes to consider to exclude constituents from the mailing, select the Exclusions tab.



- In the **Consider exclusions as of** field, select whether to exclude constituents with the selected solicit codes as of the current date or a specific date. If you select Specific date, select the date as of when to consider exclusion criteria.
- For **Exclude constituents with the following contact rules**, select the solicit codes to use to exclude constituents from the mailing. For example, to exclude constituents with addresses marked as Do not mail, select “Do not mail” under **Solicit code**.
- Select whether to exclude deceased or inactive constituents from the mailing.

12. To specify the address processing, name formats, and packages to use with the mailing, select the Processing options tab.



13. Under **Address processing**, select whether to use the primary address, addressee, and salutation or use specific address processing and name format options with the mailing. If you select **Use the following address processing and name formatting options**, select the options to use.
 - a. In the **Address processing options** field, select the option to use to determine which address types to use with each type of constituent included in the mailing. From the field, you can add or edit an address processing option as necessary.
 - b. In the **Consider seasonal address as of** field, select whether to consider seasonal addresses as of the current date or a specific date, such as the mail date. If you select Specific date, select the date to consider seasonal addresses.
 - c. In the **Name format options** field, 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.
14. On the Output tab, select whether to create a selection of the constituents who receive the mailing. 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.

15. To generate key performance indicators (KPIs) when you start or activate the mailing to track its effectiveness, select the KPIs tab.

Select the marketing KPIs to generate when you activate the mailing. To use the same KPIs as the default when you add future appeal mailings, select **Use the chosen KPIs as the default for future mailings**.

16. Click **Save**. The record of the new appeal mailing appears. For information about the items on this record, see Appeal Mailing Record on page 78.

Add 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 71.

Screen Item	Description
Name	On the General tab, enter a name to help identify the mailing.
Description	Enter a description to help identify the mailing, such as the appeal it supports.
Date	Select the date to send the mailing to the post office for delivery.
Fixed cost	Enter the total cost for the mailing, such as to send it to a fulfillment house. The program uses this amount to calculate the overall budget required for the mailing.
Budget	Enter the total amount of the budget for the mailing. The program uses this amount to calculate the overall budget required for the mailing.
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.
Selection	Search for and select the selection of constituents to include in the mailing. You can only include a static constituent selection with an appeal mailing.
Package	Search for and select the package to send with the mailing. The package determines the items delivered in the mailing.
Label template	Click Choose file and browse to and select the Microsoft <i>Word</i> document file to use to generate labels for the mailing. To remove a selected template, such as to choose another file, click Clear file .
Include	Select the types of constituents to include in the mailing, based on the constituent selection and exclusions. You can select to include all constituents, only individual and organization constituents, or only constituent households.
Send to only one person per household	If you select to include Qualifying individuals and organizations, this checkbox appears. Select whether to include only the head of household when multiple qualifying individuals are members of the same constituent household.
Also include qualifying individuals who are not members of any household	If you select to include Qualifying individuals and organizations, this checkbox appears. Select whether to include individual constituents who meet the selection and exclusion criteria but are not members of a household.
Also include qualifying households which do not have any members	If you select to include Qualifying households, this checkbox appears. Select whether to include constituents households that meet the selection and exclusion criteria but do not have members.
Consider exclusions as of	On the Exclusions tab, select whether to base the exclusion criteria as of the current date or a specific date such as the mail date. If you select Specific date, select the date as of when to consider the exclusion criteria.
Exclude constituents with the following contact rules	Select the solicit codes of the constituents to exclude from the mailing, such as Do not mail or Do not solicit.
Exclude deceased constituents	To exclude constituents marked deceased from the mailing, select this checkbox.
Exclude inactive constituents	To exclude constituents marked inactive from the mailing, select this checkbox.
Address processing	On the Processing options tab, select whether to use the primary address, addressee, and salutation of the recipients with the mailing or other addresses, addressees, and salutations based on specific address and name format options. If you select Use the following address processing and name formatting options , select the address processing option to use to determine the addresses to use with the mailing. In the Consider seasonal addresses as of field, select whether to consider seasonal address criteria as of the current date or a specific date such as the mail date. If you select Specific date, select the date as of when to consider the seasonal addresses. From the Address processing options field, you can add or edit an address processing option as necessary. If you select Use the following address processing and name formatting options ,

Screen Item	Description
	select the name format option to use to determine the addressees and salutations to use with the mailing. From the Name format options field, you can add or edit a name format option as necessary.
Create selection from results	On the Output tab, 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 .
KPIs	On this tab, select the marketing key performance indicators (KPIs) to automatically generate when you start or activate the mailing. You can use these KPIs to track the effectiveness of the mailing. To use the selected KPIs as the default when you add future appeal mailings, select Use the chosen KPIs as the default for future mailings .

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 create the copy, you can use the same appeal as the original appeal mailing or select a different one.

To copy an appeal mailing from the Appeal Mailings page, select the mailing and click **Copy**. Two options appear:

- To same appeal — This option creates a copy that uses the same appeal as the original mailing.
- To different appeal — This option opens the Appeal Search screen so you can select the appeal to use for the copy.

For both options, the copy opens to the Add an appeal mailing screen. You can change any parameters before you save. For information about the Add an appeal mailing screen, see *Add Appeal Mailing Screen* on page 74.

Note: When you copy an activated mailing, the new mailing is not activated.

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.

Tip: You can edit and manage the letters and recipients of the mailing from the Letters tab on the mailing's record. For information about how to manage letters, see *Appeal Mailing Letters* on page 81.

► 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.
3. Make changes as necessary. The items on this screen are the same as on the Add appeal mailing screen. For a detailed explanation of the options, see *Add Appeal Mailing Screen* on page 74.

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

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)	Displays the primary phone number information as it appears on the constituent record.

Merge field	Description
number)	
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, select it on the Appeal Mailings page and click **Go to mailing**.

You can assign tasks to staff members involved with the mailing, such as to prepare the mailing for production. Under **Tasks**, you can view and manage the tasks associated with the mailing. For information about the tasks for an appeal mailing, see Appeal Mailing Tasks on page 82.

After you create a mailing and configure its recipients, you can activate the mailing. For information about how to activate an appeal mailing, see Start an Appeal Mailing on page 79.

For an activated mailing, multiple tabs appear so you can view and manage the response information and refresh process of the mailing.

When you add a mailing, you can select to automatically generate key performance indicators (KPIs) to track the effectiveness of the mailing. To add or edit KPIs from the mailing record, 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**.

Start an Appeal Mailing

After you create the mailing and configure its selection of recipients, you can start the mailing. After you start 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 the same appeal with multiple mailings, when you start a mailing, the program automatically assigns a “finder number” for each potential donor in the mailing. The finder number identifies the mailing and the donor. For each mailing, the program stores a mailing ID and finder numbers to determine which mailing the gift belongs in, or whether it is an indirect response or unresolved response.

After you start the mailing, you can export its output or generate its output letters or labels in Microsoft *Word*. You can also use analysis tools to determine the effectiveness of the mailing.

► Start an appeal mailing

1. Access the record of the appeal mailing to activate.
2. Under **Tasks**, click **Start mailing** or **Restart mailing**. The Start mailing screen appears.

Note: To run the appeal mailing activation process from its status page, click **Start process** or **Restart process** under **Tasks**.

The screenshot shows a dialog box titled "Start mailing". It is divided into two main sections: "Criteria" and "Results".

- Criteria:**
 - Selection:** A dropdown menu showing "All Constituents (Ad-hoc Query)".
 - Package:** A dropdown menu showing "Package 2". To its right, the text "Cost: \$1.10" is displayed.
 - Label template:** A text field showing "<File not specified>". To its right are two small icons: a folder and a document.
- Results:**
 - A checkbox labeled "Create selection from results" is checked.
 - Selection type:** A dropdown menu showing "Constituent".
 - Selection name:** An empty text field.
 - An unchecked checkbox labeled "Overwrite existing selection".

At the bottom of the dialog box, there are two buttons: "Start" and "Cancel".

3. Under **Criteria**, the selection, package, and label template selected for the mailing appears. Edit this information as necessary.
4. Under **Details**, select the label template to use with the mailing. To select a template, click **Choose file** and browse to the template file to use. To remove a selected template, click **Clear file**.

5. Under **Results**, select whether to create a selection of the constituents who receive the mailing.
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.
6. Click **Start**. The program activates the mailing. The status page of the appeal mailing activation process appears so you can track its status and history. For information about the items on this page, see Appeal Mailing Activation Status Page on page 80.

Refresh an Activated Appeal Mailing

For an activated mailing, you can view 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. To update this information, you can run a process to refresh the mailing. To run this process from a mailing record, click **Refresh mailing** under **Tasks**. The status page of the process appears. For information about the items on this page, see Appeal Mailing Refresh Status Page on page 80.

To return to the appeal mailing from the status page, click **Go to appeal mailing** under **Tasks**.

Appeal Mailing Refresh Status Page

After you activate an appeal mailing, you can run a process to refresh its response information. With the response information, you can track the responses and revenue received from the mailing and the overall return on investment (ROI). When you run the refresh status process, the status page for the process appears.

Note: You can also run the refresh process from the status page of the process. Under **Tasks**, click **Start process** or **Restart process**.

Each status page includes information about the most recent instance of the process and historical data about the process. From the status page, you can also manage job schedules for the process, such as to refresh the mailing on a nightly basis. To help manage this information, each status page contains multiple tabs. For information about these tabs, see Appeal Mailing Process Status Page on page 88.

Appeal Mailing Activation Status Page

After you create the mailing and configure its recipients, you can run a process to activate, or start, the mailing. After you start 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. To view the status of this process from a mailing record, click **View activation status** under **Tasks**. The status page for the process appears.

Note: To run the activation process from its status page, click **Start process** or **Restart process** under **Tasks**.

Each status page includes information about the most recent instance of the process and historical data about the process. To help manage this information, each status page contains multiple tabs. For information about these tabs, see Appeal Mailing Process Status Page on page 88.

Response Information

After you start an appeal mailing, the Response information tab appears on the mailing record. Under **Response information**, you can view 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.

Under **Response information**, you can view information about the direct, indirect, and unresolved responses associated with the mailing.

Response type	Description
Direct	Responses from constituents who were included in the mailing and gave a donation associated with the appeal and mailing ID as a response.
Indirect	Responses from constituents who were not included in the mailing but gave a donation associated with the appeal and mailing ID regardless. Essentially, the donation has both the appeal and mailing ID, though the donor was not directly contacted through the mailing.
Unresolved	Responses from constituents who were not part of the mailing and gave a donation toward the appeal, but the donation cannot be associated with a specific mailing. The donors were not included in the mailing, but gave a donation toward the appeal regardless.

To update the response information, you can refresh the mailing. For information about how to refresh a mailing, see Refresh an Activated Appeal Mailing on page 81.

Refresh an Activated Appeal Mailing

For an activated mailing, you can view 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. To update this information, you can run a process to refresh the mailing. To run this process from a mailing record, select the Response information tab and click **Refresh mailing** on the action bar. The program refreshes the response information. When the process completes, a message appears. Click **OK** to return to the Response Information tab.

Appeal Mailing History

Each time you run the mailing, the program retains a record of the activation process. On the History tab, you can view historical status page information about each instance of the process.

Under **Recent status**, you can 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 records processed successfully and how many were exceptions.

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

For information about how to manage the outputs of an appeal mailing, see Letter Output and History on page 1.

Appeal Mailing Letters

When you set up an appeal mailing, you create or select the letters to use with the mailing. You can use multiple letters with an appeal mailing, such as to target constituents differently based on revenue activity. On the record of an appeal mailing, you can add and manage the letters used with the mailing from the Letters tab.

Under **Letters**, the letters used with the mailing 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**.

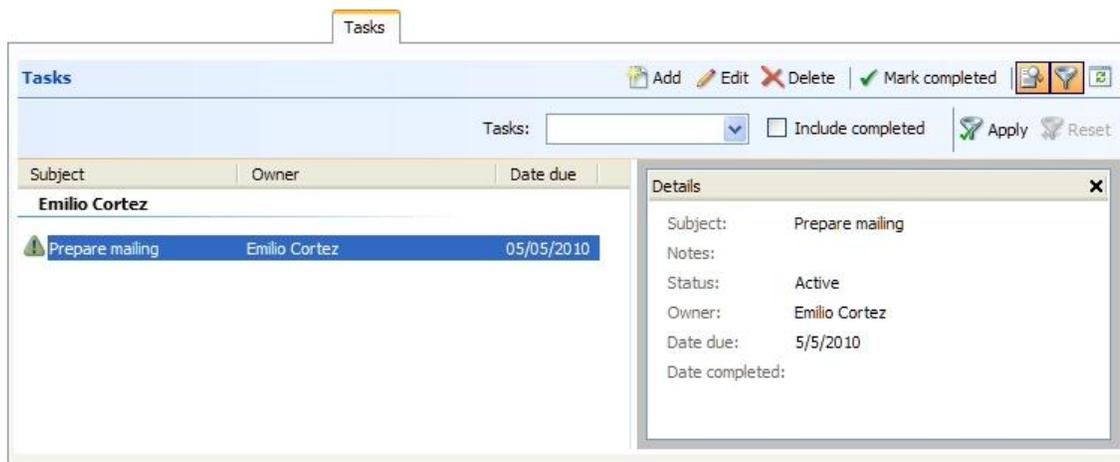
When you run the mailing, the program generates the letters in the order in which they appear under **Letters**. From the grid, you can adjust the order in which the program generates the letters for the mailing. For example, you can generate letters for board members and major givers before you generate the letter used as a general solicitation for all other constituents. To adjust a letter's position in the order, select it under **Letters** and click the up or down arrow on the action bar. From the grid, you can add and manage letters for the mailing as necessary.

Note: For information about how to view or delete appeal mailing letters, see [View Appeal Mailing Setup Letters](#) on page 86.

For information about how to add or manage letters for an appeal mailing, see [Manage Letters for a Communication](#) on page 1.

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 it in the grid and click **Show Details**. The details window appears on the tab and displays information about the selected task, such as status and any additional notes. For a completed task, you can view its completion date. To close the details window, click **Hide Details**.

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, 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. Access the appeal mailing record. For an activated mailing, 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 83.

Add task

Subject:

Notes:

Owner:

Date due:

Reminders

Name	Date

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 83.

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.
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 <i>Administration</i> . 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.

Edit task

Subject:

Notes:

Owner:

Date due:

Status:

Date completed:

Reminders

Name	Date	Sent
		<input type="checkbox"/>

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 83.

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

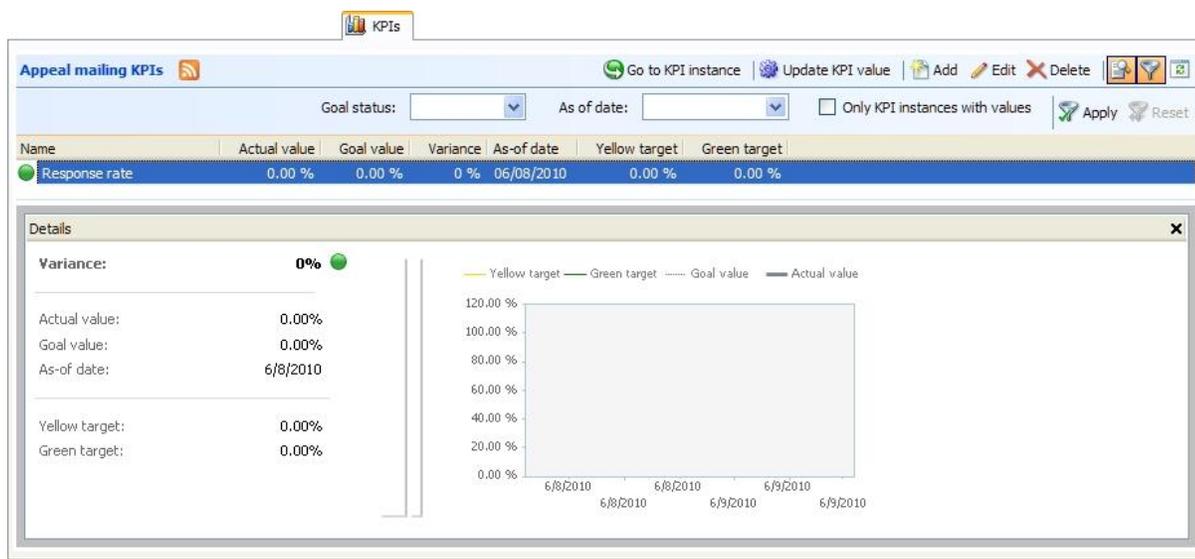
When a task owner completes a task, you can mark the task as completed. You can mark a mailing task as completed from the record of the appeal mailing. Select the task to mark as completed and click **Mark completed**. You return to the record of the mailing or plan. In the grid, a checkmark appears 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 84](#).

Appeal Mailing Key Performance Indicators

When you add a mailing, you can select to automatically generate key performance indicators (KPIs) to 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.

When you add a 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.



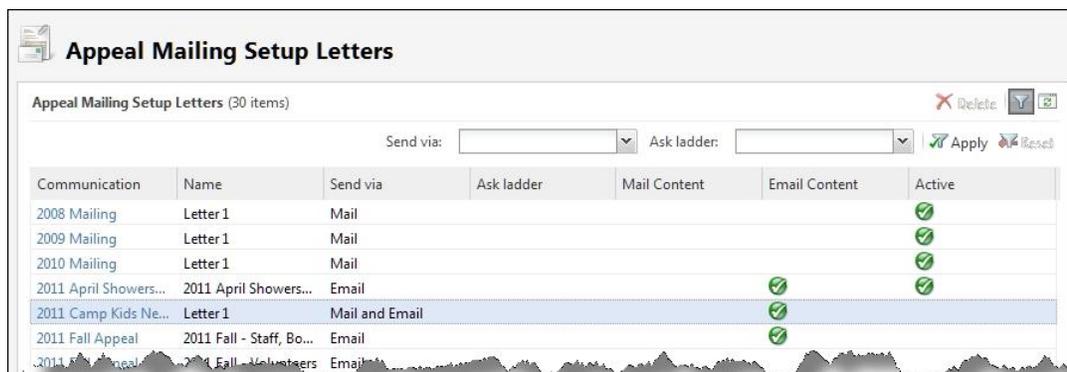
Tip: To add or edit KPIs associated with the mailing, you can also click **Manage KPIs** under **More information**.

When you add a mailing, you can select to automatically generate key performance indicators (KPIs) to track the effectiveness of the mailing. 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*.

View Appeal Mailing Setup Letters

On the Appeal Mailing Setup Letters page, you can view and manage all letters created for appeal mailings. To access this page, on the Appeal Mailings page, click **View letters** under **Tasks**.



The screenshot shows the 'Appeal Mailing Setup Letters' page with a table of 30 items. The table has the following columns: Communication, Name, Send via, Ask ladder, Mail Content, Email Content, and Active. The 'Active' column contains green checkmarks. The 'Mail Content' and 'Email Content' columns contain green checkmarks for the selected row.

Communication	Name	Send via	Ask ladder	Mail Content	Email Content	Active
2008 Mailing	Letter 1	Mail				✓
2009 Mailing	Letter 1	Mail				✓
2010 Mailing	Letter 1	Mail				✓
2011 April Showers...	2011 April Showers...	Email		✓	✓	✓
2011 Camp Kids Ne...	Letter 1	Mail and Email		✓	✓	
2011 Fall Appeal	2011 Fall - Staff, Bo...	Email		✓		
2011 Fall Appeal	2011 Fall - Volunteers	Email				

Under Appeal Mailing Setup Letters, you can view all appeal mailing letters in your database. For each letter, you can view its communication, channel, and ask ladder. You can also view whether a letter is active or has mail and email content. You can select whether to display only letters with a specific channel or ask ladder. To filter the grid, click **Filter**, select the criteria of the letters to view, and click **Apply**. To remove the filter, click **Reset**.

From the grid, you can delete a letter from your database, such as if your organization no longer uses it.

Delete an Appeal Mailing Letter

From an appeal mailing, you can remove a letter from the communication, such as to prevent its delivery to mailing recipients. To completely remove a letter from the database, such as to prevent its use with any appeal mailing, you can delete it from the Appeal Mailing Setup Letters page.

Warning: Before you can delete an appeal mailing letter, you must first remove it from its mailing. For information about how to remove a letter from an appeal mailing, see *Remove a Letter from a Communication* on page 1.

► Delete an appeal mailing letter

1. From *Marketing and Communications*, click **Appeal mailings**. The Appeal Mailings page appears.
2. Under **Tasks**, click **View letters**. The Appeal Mailing Setup Letters page appears.
3. Under **Appeal mailing setup letters**, select the letter to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the letter.
5. Click **Yes**. You return to the Appeal Mailing Setup Letters page.

Archived Appeal Mailing Content

To create content for an appeal mailing, you use an HTML editor to create letters through the appeal mailing process. Prior to the Q3 2011 update, you created appeal mailing letters in Microsoft *Word* and associated a letter to an appeal mailing process through a package. To use appeal mailing letters created before the Q3 2011 update, you must download the content from its archived *Word* document into the HTML editor. To view and manage your archived appeal mailing content, from the Appeal Mailings page, click **View archived content** under **Tasks**. The Archived Appeal Mailing Content page appears.



Under **Archived appeal mailing content**, the appeal mailing letters archived with the Q3 2011 update appear. For each letter, you can view its mailing process and *Word* document file name. To view the record of an archived appeal mailing, click its name in the grid. From the grid, you can also download and delete archived appeal mailing letters.

Download an Archived Appeal Mailing Letter

To create content for an appeal mailing, you use an HTML editor to create letters through the appeal mailing process. Prior to the Q3 2011 update, you created appeal mailing letters in Microsoft *Word* and associated a letter to an appeal mailing process through a package. To use appeal mailing letters created before the Q3 2011 update, you must download the content from its archived *Word* document into the HTML editor. After you download archived appeal mailing content, you may need to format the content and merge fields within the HTML editor.

► Download archived appeal mailing content

1. From *Marketing and Communications*, click **Appeal mailings**. The Appeal Mailings page appears.
2. Under **Tasks**, click **View archived content**. The Archived Appeal Mailing Content page appears.
3. Under **Archived appeal mailing content**, select the letter to download.

Note: To download content from the record of an archived appeal mailing process, click **Archived mail content** under **Tasks**.

4. On the action bar, click **Download**. The browser downloads the letter as a Microsoft *Word* document (*.doc) file.
5. To create a new letter, copy and paste the content from *Word* as necessary. For information about how to use content from *Word*, see *Copy and Paste Letter Content from Microsoft Word* on page 1.

Delete an Archived Appeal Mailing Letter

From the Archived Appeal Mailing Content page, you can delete an archived appeal mailing letter, such as after you download its content from Microsoft *Word*.

Warning: If you delete an archived appeal mailing letter before you download its content, you cannot use its content to create new appeal mailings. For information about how to download the content of an archived appeal mailing letter, see [Download an Archived Appeal Mailing Letter](#) on page 87.

► Delete an archived appeal mailing letter

1. From *Marketing and Communications*, click **Appeal mailings**. The Appeal Mailings page appears.
2. Under **Tasks**, click **View archived content**. The Archived Appeal Mailing Content page appears.
3. Under **Archived appeal mailing content**, select the letter to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the letter.
5. Click **Yes**. You return to the Archived Appeal Mailing Content page.

Appeal Mailing Process Status Page

Each appeal mailing process has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

Response Information

After you start an appeal mailing, the Response information tab appears on the mailing record. Under **Response information**, you can view 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.

Response information

Response information (Current as of 4/6/2010 9:49:20 PM)

Response type	Responders	Responses	Total gift amount	Average gift amount	Cost/dollar raised	Response rate	ROI (Amount)	ROI (Percent)
Total (Direct + Indirect)	7	7	\$5,350.00	\$764.29	\$0.03	5.60	\$5,196.25	3,379.67
Direct	6	6	\$5,000.00	\$833.33	\$0.03	0.00	\$4,846.25	3,152.03
Indirect	1	1	\$350.00	\$350.00	\$0.00	0.00	\$0.00	0.00
Unresolved	0	0	\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00

Refresh status

Status: ✔ Completed

Status message: Completed

Started by: BBNT\EmilyCu Server name: PTLR66

Started: 4/6/2010 9:49:19 PM Total records processed: 7

Ended: 4/6/2010 9:49:20 PM Number of exceptions: 0

Duration: 1 second Records successfully processed: 7

Under **Response information**, you can view information about the direct, indirect, and unresolved responses associated with the mailing.

Response type	Description
Direct	Responses from constituents who were included in the mailing and gave a donation associated with the appeal and mailing ID as a response.
Indirect	Responses from constituents who were not included in the mailing but gave a donation associated with the appeal and mailing ID regardless. Essentially, the donation has both the appeal and mailing ID, though the donor was not directly contacted through the mailing.
Unresolved	Responses from constituents who were not part of the mailing and gave a donation toward the appeal, but the donation cannot be associated with a specific mailing. The donors were not included in the mailing, but gave a donation toward the appeal regardless.

To update the response information, you can refresh the mailing. For information about how to refresh a mailing, see Refresh an Activated Appeal Mailing on page 80.

Under **Recent status**, you can view the details of the most recent instance of the refresh 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.

Recent Status

For the activation process of an appeal mailing, the Recent Status tab appears. On this tab, you can 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 records processed successfully and how many were exceptions.

From the Recent Status tab, you can download the output of the most recent instance of the activation process. You can also generate the letter or labels for the most recent instance of the process in Microsoft *Word*.

- Download the Mailing Output into a Single File on page 90
- Download the Mailing Output into Multiple Files on page 91
- Download the Mailing Output into Grouped Files on page 92
- Generate Microsoft Word Documents for a Mailing on page 93
- Generate Microsoft Word Labels for a Mailing on page 94

For an appeal mailing with an email package that includes a **Blackbaud Internet Solutions** export definition, the activation process page also provides options to manage the email job.

- “Start an Email Job for a Mailing” on page 14
- “View Email Job Status Details” on page 15
- “Refresh Email Job Status Details” on page 15

Download the Mailing Output into a Single File

After you run an activation process for an appeal mailing, you can download its output into a file for use in another application. For example, you may take data from the program to send to a fulfillment house. When you download the output, the program generates and saves a comma-separated value (*.csv) file at a location you specify.

Tip: You can also download the output into multiple files, based on the information exported. For example, you can download the output into multiple files based on the states where constituents live. For information about how to download multiple files or groups files, see [Download the Mailing Output into Multiple Files on page 91](#) or [Download the Mailing Output into Grouped Files on page 92](#).

► Download the output into a single file

1. On the status page of the process, select the instance of the process to download.
 - To download the output of the most recent instance, select the Recent status tab.
 - To download the output of a previous instance, select the History tab. Under **History**, select the instance to download.
2. In the Details window, select an export definition to download.
3. Click **Download output** and select **Single file**. The Save As screen appears.

Note: On the Save As screen, the **Save as type** field automatically displays “Comma separated value (*.csv).” You cannot select to download another type of output file. In a comma-separated value (*.csv) file, each piece of data is separated by a comma. A *.csv file is also referred to as a “comma-delimited” or “ASCII” file.

4. Enter a name for the output file and map to the location to save the downloaded output file.
5. 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.
6. 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 process status page, click **No**.

Download the Mailing Output into Multiple Files

After you run an activation process for an appeal mailing, you can download its output into multiple files based on the information in the output. For example, you can download the mailing information into multiple files based on the states where recipients reside. When you download the output, the program generates and saves comma-separated value (*.csv) files at a location you specify.

Note: In a comma-separated value (*.csv) file, each piece of data is separated by a comma. A *.csv file is also referred to as a “comma-delimited” or “ASCII” file.

► Download the output into multiple files

1. On the status page of the process, select the instance of the process to download.
 - To download the output of the most recent instance, select the Recent status tab.
 - To download the output of a previous instance, select the History tab. Under **History**, select the instance to download.
2. In the Details window, select the export definition to download.
3. Click **Download output** and select **Multiple files**. The Download multiple files screen appears.

4. On the Details tab, in the **Output path** field, click the folder icon. The Browse For Folder screen appears so you can map to the location to save the downloaded output files.
5. In the **Create one file per** field, select the output field to use to generate multiple files. For example, to download multiple files based on the states where recipients reside, select to create one file per state.

Tip: The program saves the output of each instance of the process. To divide the data in multiple ways, you can download the output multiple times with a different output field selected as the basis of the files generated.

6. When the program downloads multiple files, it generates file names based the values of the field selected in the **Create one file per** field. For example, if you download an output file for each state, the program generates files named Alabama.csv, Alaska.csv, and so on.

To help further identify the information in each output file, in the **File prefix** field, enter text to appear at the beginning of the file names generated for the export output. For example, enter “Recipients in -” to download files named Recipients in - Alabama.csv and Recipients in - Alaska.csv.

7. To view the names and record counts of the multiple files the program will download, select the Preview tab.
8. Click **Download**. The program downloads and saves the output files at the designated output path. When the download finishes, a message appears to ask whether to open the output path.
9. To open the output path to access the output files, click **Yes**. To return to the process status page, click **No**.

Download the Mailing Output into Grouped Files

After you run an activation process for an appeal mailing, you can download its output into grouped files based on the information in the output. For example, you can download the mailing information into multiple files based on region, with the information grouped based on the states where recipients reside. When you download the output, the program generates and saves comma-separated value (*.csv) files at a location you specify.

► Download the output into grouped files

1. On the status page of the process, select the instance of the process to download.
 - To download the output of the most recent instance, select the Recent status tab.
 - To download the output of a previous instance, select the History tab. Under **History**, select the instance to download.
2. In the Details window, select the export definition to download.
3. Click **Download output** and select **Grouped files**. The Download grouped files screen appears.



4. In the **Output path** field, click the folder icon. The Browse For Folder screen appears so you can map to the location to save the downloaded output files.
5. In the **Group by** field, select the output field to use to generate grouped files. For example, to group information based on the states where recipients reside, select to group by state.
6. Under **Group options**, create each group of information to download.
 - a. In the box on the left, select the items to include in the group. For example, to group recipients by state into regions, select the states to include in the region group.
 - b. Click the right arrow. The Group file name screen appears.



- c. Enter a name to save the grouped file, such as “Southeast Region.”
 - d. Click **OK**. You return to the Download grouped files screen. In the box on the right, the new group appears. To expand the group to see the items it includes, click the plus sign.
7. After you create all the groups, click **Download**. The program downloads and saves the output files at the designated output path. When the download finishes, a message appears to ask whether to open the output path.
8. To open the output path to access the output files, click **Yes**. To return to the process status page, click **No**.

Generate Microsoft Word Documents for a Mailing

If you associate a Microsoft *Word* letter template with a package, you can generate the letter output for an appeal mailing that uses the package. When you generate the output, the selected data fields automatically merge with the documents generated in *Word*. From the status page of the activation process, you can generate *Word* documents for the most recent instance or a previous instance of the process.

► Generate Microsoft Word documents for a mailing

1. Access the status page of the activation process for the mailing.
2. Select the instance of the process with the documents to generate.
 - To generate documents of the most recent instance of the process, select the Recent Status tab.
 - To generate documents of a previous instance of the process, select the History tab. In the grid, select the instance to generate. In the Details window, information about the selected process appears.
3. In the Details window, select an export definition and click **Merge letter**. The program merges the data fields and document file selected for the process and opens the merged documents in Microsoft *Word*.
4. In *Word*, save the merged documents on your workstation or network.

Generate Microsoft Word Labels for a Mailing

If you associate a Microsoft *Word* label template with an appeal mailing, you can generate the label output for the mailing in *Word*. When you generate the labels, the selected data fields automatically merge with the template generated in *Word*. From the status page of the activation process, you can generate *Word* documents for the most recent instance or a previous instance of the process.

► Generate Microsoft Word labels for a mailing

1. Access the status page of the activation process for the mailing.
2. Select the instance of the process with the labels to generate.
 - To generate labels of the most recent instance of the process, select the Recent Status tab.
 - To generate labels of a previous instance of the process, select the History tab. In the grid, select the instance to generate. In the Details window, information about the selected process appears.
3. In the Details window, select an export definition and click **Merge label**. The program merges the data fields and labels selected for the process and opens the merged labels in Microsoft *Word*.
4. In *Word*, save the merged labels on your workstation or network.

History

Each time you run the process, the program generates a status page of the instance. On the History tab, you can view historical status page 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.

Each time you run the refresh process, the program retains a record of the instance. On the History tab, you can view historical status page 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.

From the History tab, you can delete the status record of a specific instance of the process. For the activation process, you can download the output of an instance of the process. You can also generate the letter or labels for an instance of the process in Microsoft *Word*.

From the History tab, you can delete the status record of a specific instance of the process. For information about how to delete an instance, see [Delete a Status Record of a Process Instance](#) on page 94.

Delete a Status Record of a Process Instance

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the process and all of its history. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the output file, after you delete the process, you can no longer use its output file that contains the data extracted from your database.

► Delete a status record from the History tab

1. On the process status page, select the History tab.

Note: You can filter the status records that appear in the grid by the process status. If you filter the records in the grid, it can reduce the amount of time it takes to find an process instance. For example, if you search for a instance that completed its operation, you can select to view only status records with a **Status** of "Completed." To filter the records that appear in the grid, click **Filters**. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid.

2. In the grid, click the double arrows beside the status record to delete.
3. Click **Delete**. A message appears to confirm the deletion of the status record.
4. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Activation History

Each time you run the activation process, the program retains a record of the instance. On the Activation history tab, you can view historical status page 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.

From the Activation history tab, you can delete the status record of a specific instance of the process. For information about how to delete an instance, see [Delete a Status Record of a Process Instance](#) on page 94.

Export History

Each time you run the activation process, the program retains a record of the instance. On the Export history tab, you can view historical status page 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.

To view additional information about an instance, select it in the grid and click **Show Details**. In the Details window, you can view information about the export definitions included in an instance. From the Details window, you can download the output of an instance of the process. You can also generate the letter or labels for an instance of the process in Microsoft *Word*. From the Activation history tab, you can also delete the status record of a specific instance of the process.

Delete an Appeal Mailing Export Process

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

► Delete a status record from the Export history tab

1. On the process status page, select the Export history tab.

Note: To reduce the amount of time it takes to find an process instance, you can filter the status records that appear in the grid by the process status. For example, you can select to view only status records with a status of Completed. To filter the records that appear in the grid, click **Filter**. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid.

2. In the grid, select a status record and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Export history tab. The selected status record no longer appears.

Job Schedules

For a mailing refresh process, the Job schedules tab appears. To view the job schedules set for the business process, select this tab. In the grid, you can view the job schedules set for the process. For example, you can create a job schedule or refresh response information on a nightly basis. For each job schedule, you can view its job name, whether it is enabled, its frequency, its start date and time, its end date and time, and the dates the schedule was added and changed in the database.

Tip: From the process status page, you can also generate a Windows Scripting File for the process. You can then use Microsoft Windows *Task Scheduler* to schedule tasks to run the Windows Scripting File through the other application at a time that is most convenient to your organization. For information about how to generate a *.wsf, see [Generate a Windows Scripting File on page 96](#).

From the **Job schedules** grid, you can manage the job schedules set for the business process.

Add a Job Schedule

To automate a process, you can create a job schedule for the process. When you create a job schedule, you define when the job begins to run.

Edit a Job Schedule

You can edit the settings for a job schedule, such as to adjust its frequency. You can edit a job schedule from the status page of the process.

Delete a Job Schedule

You can delete a job schedule from a business process, such as if you no longer use it. You can delete a job schedule from the status page of the process.

Generate a Windows Scripting File

A Windows Scripting File (.wsf) is an executable script file format for Windows that can incorporate VBScript (.vbs) routines and include XML elements. From the process status page, you can generate a Windows Scripting File for the process. You can then use Microsoft Windows *Task Scheduler* to schedule tasks to run the Windows Scripting File through the other application at a time that is most convenient to your organization.

Appeal Reports

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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.

Appeal Profile Report

Include: Appeal Information Designations Benefits Mailings
 Revenue Summary Gift History Team Fundraisers [View Report](#)

1 of 1 Page Width Find | Next

Appeal Profile Report

Name: ANNUALMAIL
Description: Annual Mailing
Start date: 1/1/2010
End date:

Appeal Information

Category: Annual **Goal:** \$1,000,000.00
Business unit: **Status:** Active

Revenue Summary

Total revenue: \$5,350.00 **Number gifts:** 7
Percent of goal: 0.53% **Number donors:** 7
Average gift: \$764.29

Gift History

Name	Type	Date	Amount	Balance
+ Campbell A. Phan	Payment	4/6/2010	\$1,000.00	
2000 Annual Fund	Donation		\$1,000.00	
+ Emma V. Terrell	Payment	1/22/2010	\$300.00	

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 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. 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**.

Appeal Performance

Appeal filters | Revenue filters | Display options

Include... 2000BREAKFAST

Category: Business unit: Report code: Site:

View Report

1 of 8 100% Find | Next

Appeal Performance

Dates: All dates Category: All Categories Site: All Sites

Report code: All Report Codes Business unit: All Business Units

Appeal Revenue Summary

Greatest average gift amount:	2000BREAKFAST (\$132.17)	Lowest average gift amount:	2000BREAKFAST (\$132.17)
Highest response rate:	2000BREAKFAST (0.23%)	Lowest response rate:	2000BREAKFAST (0.23%)

Appeal Revenue Performance by Designation

Appeal	Goal	Total Raised	% of Goal	Total Received	Number Solicited	Response Rate	Number of Donors	Number of Gifts	Average gift
2000BREAKFAST	\$10,000.00	\$3,462.95	35 %	\$3,462.95	2705	0.59 %	3	16	\$216.43
2000 Annual Fund		\$1,258.56		\$1,258.56					
Designation 0		\$2,204.39		\$2,204.39					
Total:	\$13,315,000.00	\$3,462.95		\$3,462.95	4027		10	32	\$108.22

Appeal Revenue Performance by Mailing

Appeal	Mailing	Goal	Total Raised	% of Goal	Total Received	Number	Response rate	Number of Donors	Number of Gifts	Average gift
2000BREAKFAST	3	\$10,000.00	\$925.18	9.25 %	\$925.18	1314	0.53%	3	7	\$132.17
	Selection Mailing Active 0		\$666.00		\$666.00	438	0.68%	1	3	\$222.00
	Selection Mailing Active 1		\$108.06		\$108.06	438	0.68%	1	3	\$36.02
	Mailing Performance Test selection 0		\$151.12		\$151.12	438	0.23%	1	1	\$151.12
Total		\$13,315,000.00	\$925.18		\$925.18	1314	0.53%	3	7	\$132.17

7/30/2009 at 12:25 PM Prepared by: BBNT\SteveSt Page 1 of 8

- 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 100.

- 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 98.

Month	WALK-A-THON			HOLIDAY		
	Number of Donors	Number of Gifts	Total Revenue	Number of Donors	Number of Gifts	Total Revenue
1	1	1	\$100.00	1	1	\$101.00
2	1	1	\$150.00			
3				1	1	\$103.00
7	1	1	\$107.00			
10	1	1	\$110.00			
11	1	1	\$111.11			
				1	1	\$113.00

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 Revenue by Constituency Report

The Appeal Revenue by Constituency report provides information about the effectiveness of your appeals by constituency response. When you generate the report, you can select to include information about a single appeal or about multiple appeals, such as to compare effectiveness. To access the report from *Analysis*, click **Appeal reports**. On the Appeal reports page, click **Appeal revenue by constituency**. The Appeal Revenue by Constituency Report page appears.

		2000BREAKFAST		Total	
Constituency	Revenue Type	Constituent Count	Revenue Amount	Constituent Count	Revenue Amount
<input type="checkbox"/> Alumnus (u)	All	3	\$1,100.00	3	\$1,100.00
<input type="checkbox"/> Board Member	All	3	\$1,600.00	3	\$1,600.00
<input type="checkbox"/> Event Registrant	All	7	\$9,275.00	7	\$9,275.00
<input type="checkbox"/> Friend	All	2	\$5,050.00	2	\$5,050.00
<input type="checkbox"/> Grandparent	All	1	\$5,000.00	1	\$5,000.00
<input type="checkbox"/> Volunteer	All	6	\$6,208.33	6	\$6,208.33
	Payment	3	\$658.33	3	\$658.33
	Pledge	3	\$5,550.00	3	\$5,550.00

To run the report, select the appeals to include in the report and click **View 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.

The report displays a breakdown of the constituencies of the constituents who responded to the selected appeals. For each appeal, you can view how many constituents of each constituency responded and the revenue amount received from each constituency. You can also break down the revenue received from each constituency by revenue type such as payments and pledges.

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

Appeal Mailing Indirect Responses Report

The Indirect Responses report provides detailed information about responses from donors who did not receive the appeal mailing, but gave a gift that was associated with the appeal mailing anyway. As long as they are unresolved, these gifts cannot be credited to a specific mailing. The gift is associated with the appeal itself, but not a specific appeal mailing. This report is available from an appeal mailing, under **Reports**.

Appeal Mailing Unresolved Responses Report

The Unresolved Responses report provides detailed information about responses from donors who received the appeal mailing, but gave a gift that was associated to the appeal, but not the specific mailing. As long as they are unresolved, these gifts cannot be credited to a specific mailing. The revenue is counted toward the appeal, but not toward the specific mailing. This report is available from an appeal mailing, under **Reports**.

Appeal Mailing Revenue Report

The Revenue report displays the revenue a specific mailing generates for your organization. Revenue from unresolved or indirect responses to the appeal mailing is not counted toward the appeal mailing; however, that revenue is counted toward the appeal itself. This report is available from an appeal mailing, under **Reports**.

Correspondence

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Correspondence is any communication that supports the mission and fundraising efforts of your organization, such as acknowledgements, receipts, pledge reminders, appeals, and general correspondence. You can create processes to generate mailing lists, letters, and labels for correspondence with your constituents. You can also create correspondence codes to help organize the types of correspondence your organization uses.

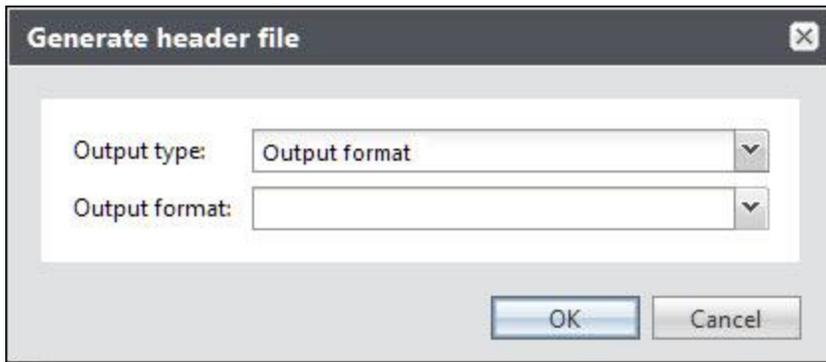
Manage Correspondence

On the Manage Correspondence page, you can view and manage the correspondence processes and codes in your database. To access the Manage Correspondence page, from *Marketing and Communications*, click **Manage correspondence**. To help you navigate through this information, the Manage Correspondence page contains multiple tabs.

From the Manage Correspondence page, you can also generate header files for Microsoft *Word* documents that include merge fields and are associated with your correspondence. With the header files, the program can export the selected data fields and merge them with the merge fields in the *Word* documents when you generate the correspondence output.

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.



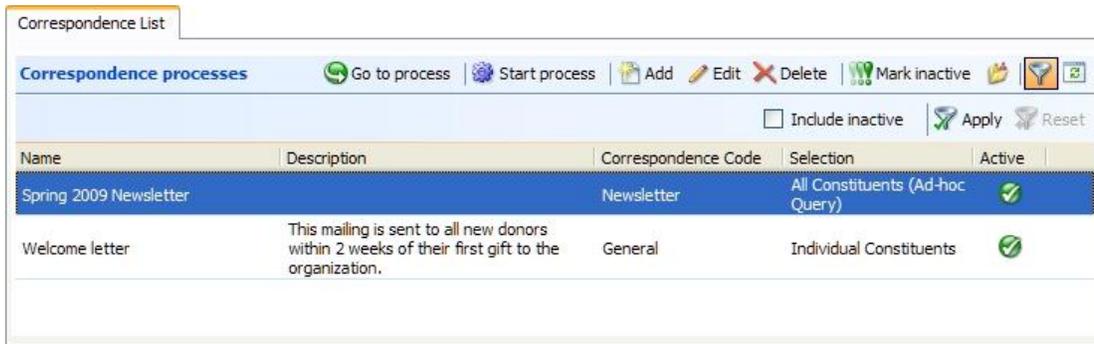
In the **Output type** field, select whether to use fields from a standard output format or an export definition.

- 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*.

Correspondence List

To manage your correspondence processes, select the Correspondence List tab. The **Correspondence processes** grid displays the correspondence processes in your database. For each process, you can view its name, description, and correspondence code; the selection of constituents to receive the correspondence; and whether the correspondence is active.



From the **Correspondence processes** grid, you can access the record of an existing correspondence process. Select the process in the grid and click **Go to process**. The status page of the correspondence process appears. On the status page, you can view the status of the most recent instance of the process, as well as historical information about older instances. For information about the items on the status page, see Correspondence Process Status Page on page 117.

To include correspondence processes marked inactive, click **Filter**, select **Include inactive**, and click **Apply**. To update the information in the grid, click **Refresh List**.

From the grid, you can also perform multiple tasks to manage your correspondence processes.

Add Correspondence Processes

You can create correspondence processes to promote your organization's mission or solicit gifts. With a correspondence process, you can automate standard processes such as the collection of data for mail merges and the selection of addresses to include. When you create a correspondence process, you specify the selection of constituents to receive the correspondence and the letter to use with the correspondence. You can also specify constituents in the selection to exclude from the correspondence.

► Add a correspondence process

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. Select the Correspondence List tab.
3. Under **Correspondence processes**, click **Add**. The Add correspondence process screen appears. For information about the items on this screen, see *Add Correspondence Process Screen* on page 109.

Add correspondence process

Name:

Description:

Letter template:

Mailing label template:

Output type:

Output format:

Criteria

Selected constituents:

Results

Update constituent record with correspondence detail

Correspondence code:

Comments:

Create constituent selection from results

Selection type:

Selection name:

Overwrite existing selection

4. Enter a unique name and description to identify the correspondence. For example, enter a description to explain the reason for the correspondence and its recipients.

5. To generate a document with the correspondence such as a letter or solicitation, in the **Letter template** field, click **Choose file**. The Open screen appears so you can browse to and select the document file to use. To personalize the document with information specific to the selected recipients, select a document that includes merge fields. The selected document can also include envelopes designed in *Word*. To remove a selected document, click **Clear**.

Note: If you use Microsoft *Word 2007*, you can use the Blackbaud Communications add-in to easily select and insert merge fields with information from the database while you create a document in *Word*.

6. To generate mailing labels with the correspondence, in the **Mailing label template** field, click **Choose file**. The Open screen appears so you can browse to and select the label document file to use. To remove a selected document, click **Clear**.

Note: To generate only a comma-separated values (*.csv) file of the merge fields and constituents selected for the correspondence such as for a mailing house, leave the **Letter template** and **Mailing label template** fields blank.

7. In the **Output type** field, select whether to generate correspondence 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.
8. When you select Output format, the **Output format** field appears. In this field, select the type of correspondence output to create with the process. The selected output format determines the address used with the correspondence. We recommend the selected output format match the output format selected for the header file used with the process.

If you select Formatted mail correspondence, you can set the processing options for the correspondence, such as the formats of the addresses and names generated for the output. To set the processing options, click the pencil. The Processing options screen appears. For information about how to set the options and formats for the correspondence process, see *Set Format Options for a Correspondence Process* on page 111.

9. When you select Export definition, the **Export definition** field appears. 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 correspondence. You define the fields to export for an export definition. For more information, see the *Query and Export Guide*.
10. Under **Criteria**, click the binoculars in the **Mail to** field. The Selection Search screen to select the constituents to receive the correspondence.

To specify additional constituents in the selection to not receive the correspondence, click **Exclusions**. The Exclusions screen appears. For information about how to exclude constituents, see *Set Exclusions for a Correspondence Process* on page 110.

11. Under **Results**, select how to handle the constituents selected to receive the correspondence.
 - To track the constituents' inclusion in the correspondence process, select **Update constituent record with mailing** and select the correspondence code to describe the correspondence. In the Comments field, enter any additional information about the correspondence. When you run the process, the program automatically adds the correspondence code on the Communications pages of the constituents included in the process, along with any comments entered.
 - To create a selection of the constituents included in the correspondence process when you run the process, select **Create constituent selection from results**. In the **Selection name** field, enter a name to help identify the selection. To replace any existing selection with the same name when the program creates the selection, select **Overwrite existing selection**.

12. Click **Save**. If you select to associate a *Word* document file with the correspondence, the program saves the document in your database. The correspondence process status page appears so you can manage the process. For information about the status page, see Correspondence Process Status Page on page 117.

Add Correspondence Process Screen

The following table explains the items on this screen. For information about how to access this screen, see Add Correspondence Processes on page 107.

Screen Item	Description
Name	Enter a unique name to identify the correspondence process.
Description	Enter a unique description to help identify the correspondence process, such as the reason for the correspondence or an explanation of its recipients.
Letter template	To generate a document with the process, click Choose file and use the Open screen to find the Microsoft <i>Word</i> document to associate with the process. To personalize the output with information specific to the constituents included in the correspondence, include merge fields in the document. The selected document file can also include an envelope designed in Microsoft <i>Word</i> . To remove a selected document file, click Clear file .
Mailing label template	To generate mailing labels with the process, click Choose file and use the Open screen to find the Microsoft <i>Word</i> document file to associate with the correspondence process. To personalize the output with information specific to the constituents included in the correspondence, include merge fields in the document. To remove a selected document, click Clear file .
Output type	You must select whether to generate correspondence 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	Select the type of correspondence output to generate with the process. The output format determines the address to use with the correspondence. To use the primary addresses for the constituents, select Standard correspondence output. To use the seasonal addresses for the constituents, select Seasonal address correspondence output. To use the address processing options configured in <i>Administration</i> to select the addresses for the constituents, select Formatted mail correspondence output. To configure the format options for the correspondence, click the pencil. For information about format options, see Set Format Options for a Correspondence Process on page 111. To use the primary email addresses for the constituents, select Email output. We recommend the output format match the output format selected for the header file used with 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 correspondence data with the <i>Word</i> 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 correspondence. For more information, see Generate a Header File on page 204. To view the fields to export, view the header row in your .csv file after you run the process.
Selected constituents	Select the selection of constituents to receive the correspondence. To search for a selection, click the binoculars and use the Selection Search screen. If you select an ad-hoc query, click the pencil to edit the query.
Exclusions	To select the solicit codes or status of constituents to not include in the

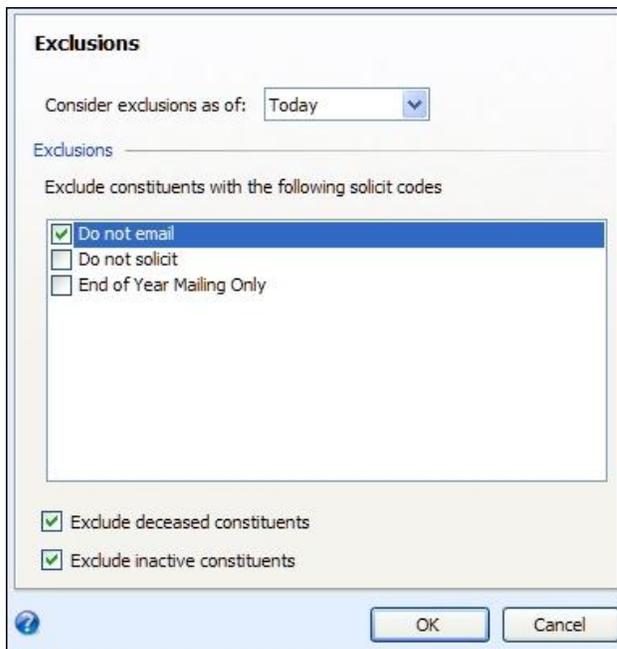
Screen Item	Description
	correspondence, click this button. For information about how to exclude constituents, see Set Exclusions for a Correspondence Process on page 110.
Update constituent record with correspondence detail	To update the constituent records processed with correspondence codes and comments, select this checkbox. When you select this checkbox, the program automatically adds the correspondence to the Communications pages of the selected constituents. In the Correspondence code field, select the code to use to indicate the constituent has been sent the correspondence. For more information about correspondence codes, see Correspondence Codes on page 114. In the Comments field, enter any additional information about the correspondence to appear on the Communications pages of the constituents.
Create constituent selection from results	To generate a selection of the constituents included in the process, select this checkbox. When you mark this checkbox, the Selection name field and Overwrite existing selection checkbox are enabled. In the Selection name field, enter a name to identify the constituent selection generated when you run the process. To replace any existing selection with the same name when the program creates the selection, select Overwrite existing selection .

Set Exclusions for a Correspondence Process

When you generate a correspondence process, you specify a selection of constituents to receive the correspondence. You can also select whether to exclude deceased or inactive constituents or constituents with selected solicit codes in the selection from the correspondence.

► Exclude constituents from a correspondence

1. On the Add correspondence process screen or Edit correspondence process screen, click **Exclusions**. The Exclusions screen appears.



2. In the **Consider exclusions as of** field, select whether to exclude constituents that meet the exclusion criteria as of the current date or another date. If you select "<Specific date>," select the date in the additional field that appears.
3. Under **Exclusions**, select the checkboxes of the solicit codes of the constituents to exclude from the correspondence process and select whether to exclude deceased or inactive constituents.
4. Click **OK**. You return to the previous screen.

Set Format Options for a Correspondence Process

When you generate a correspondence process, you can select the default addressing processing formats and name formats to use with the correspondence. You can also select whether to send multiple pieces of a correspondence to a single household.

Note: The address processing option determines the address types used in the correspondence. For information about address processing options, see [Address Processing Options](#) on page 1.

► Set format options for a correspondence process

1. On the Add correspondence process screen or Edit correspondence process screen, in the **Output format** field, select "Formatted mail correspondence output" and click the pencil. The Processing options screen appears.

Tip: If the **Output format** field does not appear, select "Output format" in the **Output type** field on the Add correspondence process screen or Edit correspondence process screen.

The screenshot shows a dialog box titled "Processing options". It has two dropdown menus: "Address format:" and "Name format:". Below these is a checkbox labeled "Include household member processing". At the bottom of the dialog are "Save" and "Cancel" buttons.

2. In the **Address format** field, select the address processing option to use with the correspondence. To edit or add an address processing option, click **Edit** or **New**. For information about how to add or edit address processing options, see [Address Processing Options](#) on page 1.
3. In the **Name format** field, select the name format processing options to use for addressees and salutations in the correspondence. To edit or add a name format processing option, click **Edit** or **New**. For information about how to add or edit name format processing options, see [Name Format Options](#) on page 37.
4. To ensure a household does not receive duplicate copies of the correspondence, select **Include household member processing**. When you select this checkbox, if the selection includes individual constituents recognized as members of the same household in your database, the household receives only one piece of correspondence.
5. Click **Save**. You return to the previous screen.

Edit a Correspondence Process

You can edit the properties of a correspondence process, such as to adjust its exclusions or default settings.

► Edit a correspondence process

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence List tab, select a correspondence process and click **Edit**. The Edit correspondence process screen appears. The items on this screen are the same as on the Add correspondence process screen. For a detailed explanation of the options, see *Add Correspondence Process Screen* on page 109.

Note: To edit a correspondence process from its status page, click **Edit process** under **Tasks**.

3. Make changes as necessary. For information about how to edit the exclusions or set the format options for the correspondence, see *Set Exclusions for a Correspondence Process* on page 110 or *Set Format Options for a Correspondence Process* on page 111.

Note: To view the document associated with the correspondence, click its file name in the **Letter template** or **Mailing label template** field.

4. Click **Save**. You return to the Manage Correspondence page.

Delete a Correspondence Process

If your organization no longer uses a correspondence process, you can delete it from your database.

Tip: To avoid the loss of data, we recommend you mark a correspondence process inactive rather than delete it. Inactive processes remain in the database as archived information, but you cannot use them to generate correspondence. For information about how to mark a correspondence process inactive, see *Mark a Correspondence Process Inactive or Active* on page 113.

Note: When you delete a correspondence process from the database, you remove all instances of the process from your database and from the records of the constituents included in the process. To remove a single instance of the process from your database and constituent records, you can clear its results. For information about how to clear the results of a correspondence, see *Clear the Results of a Correspondence Process Instance* on page 120.

► Delete a correspondence process

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence List tab, select a correspondence process click **Delete**. A confirmation message appears.

Note: To delete a correspondence process from its status page, click **Delete process** under **Tasks**.

3. Click **Yes**. You return to the Manage Correspondence page. On the Correspondence List tab, the selected process no longer appears.

Start a Correspondence Process

To generate the output for a correspondence, you must first run its process. When you run the correspondence process, the program uses the selected defaults and data fields to prepare the correspondence for the selected recipients. To start the process from the Manage Correspondence page, select the process to run in the **Correspondence processes** grid and click **Start process**.

Tip: If you inadvertently run a process with an incorrect selection of constituents, you can clear the results of the process instance. When you clear the results of a process instance, the program automatically removes the correspondence from the history of the constituents included during that instance. For information about how to clear the results of a correspondence process, see [Clear the Results of a Correspondence Process Instance](#) on page 120.

► Start a correspondence process

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. In the **Correspondence processes** grid, select a process and click **Start process**. The Start correspondence process screen appears. The items on this screen are the same as on the Add correspondence process screen. For a detailed explanation of the options, see [Add Correspondence Process Screen](#) on page 109.

Note: To run a correspondence process from its status page, click **Start process** under **Tasks**, or click **Start process** on the Recent status tab.

3. Make changes as necessary. For information about how to edit the exclusions or set the format options for the correspondence, see [Set Exclusions for a Correspondence Process](#) on page 110 or [Set Format Options for a Correspondence Process](#) on page 111.

Note: To view the document associated with the correspondence, click its file name in the **Letter template** or **Mailing label template** field.

4. Click **Start**. The status page of the process appears. From the record, you can verify the correspondence generated successfully and download the correspondence file or merge the selected data fields with the document file in *Microsoft Word*. For information about the status page, see [Correspondence Process Status Page](#) on page 117.

Note: If you select **Update constituent record with mailing**, the program automatically updates the Communications pages of the constituents included in the process to indicate you included them in the correspondence.

Mark a Correspondence Process Inactive or Active

If you no longer use a correspondence process, you can mark it inactive. The process remains in the database as archived information, such as for a historical audit trail. To view an inactive correspondence process, you must first select **Include inactive** in the filter on the Correspondence List tab of the Manage Correspondence page for it to appear in the **Correspondence processes** grid.

After you mark a process inactive, you can mark it active again to resume its use.

► Mark an active correspondence process inactive

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence List tab, select a correspondence process and click **Mark inactive**. A message confirmation appears.

Note: To mark a process inactive from its status page, click **Mark inactive** under **Tasks**.

3. Click **Yes**. You return to the Manage Correspondence page.

► Mark an inactive correspondence process active

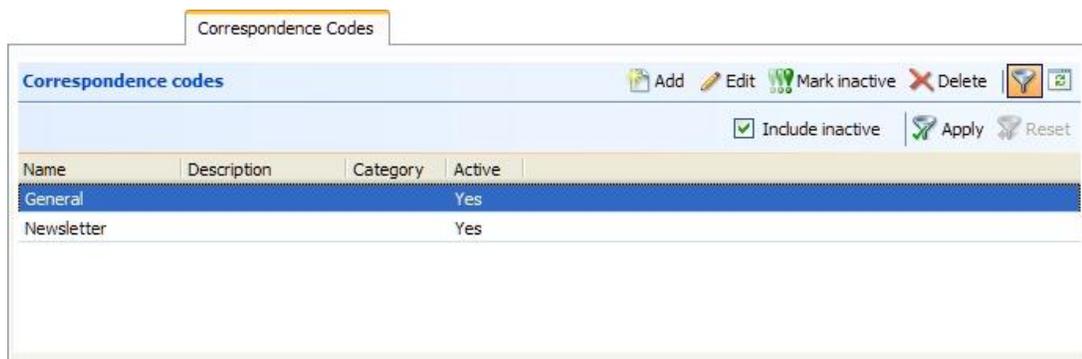
1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence List tab, click **Filter**, select **Include inactive**, and click **Apply**. The inactive correspondence processes appear.
3. Under **Correspondence processes**, select a process and click **Mark active**. A confirmation message appears.

Note: To mark an inactive process active from its status page, click **Mark active** under **Tasks**.

4. Click **Yes**. You return to the Manage Correspondence page.

Correspondence Codes

With correspondence codes, you can categorize general correspondence in a way that is meaningful for your organization. For example, you can create correspondence codes to indicate the purpose of correspondence. On the Correspondence Codes tab, the **Correspondence codes** grid displays the codes available in your database. For each correspondence code, you can view its name, description, and category. You can also view whether the code is active in your database.



To include codes marked inactive in the **Correspondence codes** grid, click **Filter**, select **Include inactive**, and click **Apply**. To update the information in the grid, click **Refresh List**.

From the grid, you can also perform multiple tasks to manage your correspondence codes.

Add Correspondence Codes

You can add correspondence codes to categorize your general correspondence in a way that is meaningful for your organization, such as to indicate the purpose of correspondence. Before you set up a correspondence process, you should add its code.

► Add a correspondence code

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence Codes tab, click **Add**. The Add correspondence code screen appears.



3. Enter a unique name and description to help identify the correspondence code. For example, explain when to assign this code to a correspondence.
4. To further categorize the correspondence code, select its category in the **Category** field.

Note: Your system administrator determines the correspondence code categories available in the **Category** field.

5. Click **Save**. You return to the Manage Correspondence page.

Edit a Correspondence Code

You can edit the properties of a correspondence code, such as to correct a typographical error.

► Edit a correspondence code

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence Codes tab, select a correspondence code and click **Edit**. The Edit correspondence code screen appears.
3. Make changes as necessary. The items on this screen are the same as on the Add correspondence code screen. For a detailed explanation of the options, see Add Correspondence Codes on page 115.
4. Click **Save**. You return to the Manage Correspondence page.

Mark a Correspondence Code Inactive or Active

If you no longer use a correspondence code, you can mark it inactive. The code remains in the database as archived information, such as for a historical audit trail. To view an inactive correspondence code, you must first select **Include inactive** in the filter on the Correspondence Codes tab of the Manage Correspondence page for it to appear in the **Correspondence codes** grid.

After you mark a correspondence code inactive, you can mark it active again to resume its use.

► Mark an active correspondence code inactive

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence Codes tab, select a correspondence code and click **Mark inactive**. A confirmation message appears.
3. Click **Yes**. You return to the Manage Correspondence page.

► Mark an inactive correspondence code active

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence Codes tab, click **Filter**, select **Include inactive**, and click **Apply**. The inactive correspondence codes appear.
3. Select a correspondence code and click **Mark active**. A confirmation message appears.
4. Click **Yes**. You return to the Manage Correspondence page.

Delete a Correspondence Code

If your organization no longer uses a correspondence code, you can delete it from your database.

Tip: To avoid the loss of data, we recommend you mark a correspondence code inactive rather than delete it. Inactive correspondence codes remain in the database as archived information, but you cannot assign them to correspondence processes. For information about how to mark a correspondence code inactive, see *Mark a Correspondence Code Inactive or Active* on page 116.

► Delete a correspondence code

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. Select the Correspondence Codes tab, select a correspondence code and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Manage Correspondence page. In the **Correspondence codes** grid, the selected type no longer appears.

Correspondence Process Status Page

When you add a correspondence process, the program automatically generates a status page of the process. On the status page, you can view the recipients and data fields selected for the correspondence and its description. If you associate a document with the correspondence, the **Letter template** or **Label template** field displays its file name. To access a correspondence process status page, select the process in the **Correspondence processes** grid on the Manage Correspondence page and click **Go to process**.

Mailing list
Welcome letter

Name: Welcome letter ✔ Active

Description: This mailing is sent to all new donors within 2 weeks of their first gift to the organization.

Correspondence code: General Create output selection: No

Include selection: Individual Constituents Overwrite existing selection: No

Output format: Formatted mail correspondence output Output selection name:

Letter template: Save our Streets_welcome.docx

Label template:

Recent status | History | Job schedules

Download file | Merge Letter | Merge Label

Status: ✔ Completed

Status message: Completed

Started by: BBNT\SteveSt Server name: INFINITYSERVER2

Started: 1/28/2009 8:56:27 AM Total records processed: 29

Ended: 1/28/2009 8:56:31 AM Number of exceptions: 0

Duration: 4 seconds Records successfully processed: 29

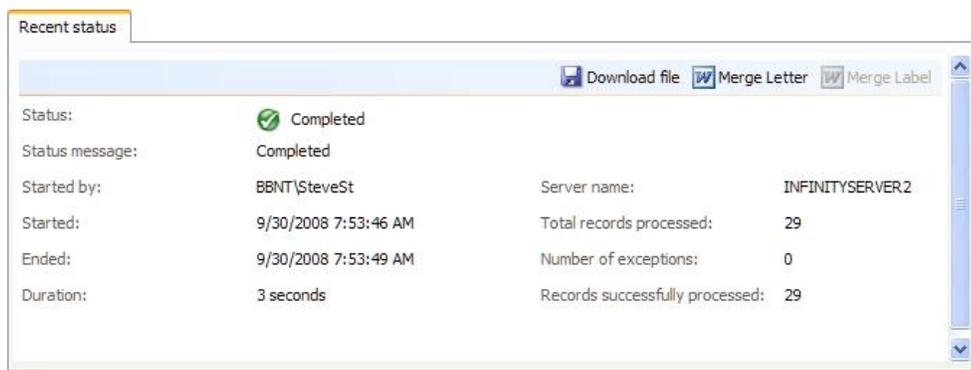
Note: You can also access the status page of a correspondence process from the Communications page of a constituent included in the process. On the Communications tab, select the process in the **Communications** grid and click **Go to correspondence**.

The status page also displays the current status and historical information about the process. To help you navigate through this information, each process status page contains multiple tabs.

Depending on your system role, you can perform tasks to manage a correspondence process from its status page. To perform a task, select it from the **Tasks** menu, or click it under **Tasks**.

Recent Status Tab

To view information about the most recent instance of the process, select the Recent status tab. On this tab, you can view the current status of the process to determine whether it completed successfully. You can also view the status message generated for the most recent run; the user who ran the process and the server; the dates and times the process started and ended and its duration; and the total number of records processed, how many of those records processed successfully, and how many exceptions it generated.



On the tab, you can download a comma-separated value (*.csv) file of the most recent correspondence output. If you associate a document with the correspondence, you can also select to merge the documents with the selected data fields to generate the most recent output in Microsoft *Word*.

Download a Correspondence Output File

You can generate a comma-separated value (*.csv) file of a correspondence output, such as to process the correspondence through a mailing house. The output file includes the recipients and data field information selected for the correspondence process. From the status page of the process, you can download an output file for the most recent instance or a previous instance of the process.

► Download the output file of a correspondence process

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. Select the Correspondence List tab, select the correspondence process and click **Go to process**. The status page of the process appears.
3. Select the instance of the process with the output file to download.
 - To download an output file of the most recent instance of the process, select the Recent Status tab.
 - To download an output file of a previous instance of the process, select the History tab. In the grid, select the instance to download.
4. Click **Download file**. The Save As screen appears.
5. In the **Save in** field, browse to the location on your workstation or network to save the output file.
6. In the **File name** field, enter a name for the output file.

Note: You can only save the output file as a comma-separated value (*.csv) file.

7. Click **Save**. You return to the process status page.

Generate Microsoft Word Documents for Correspondence

If you associate a Microsoft *Word* document file with a correspondence process, you can generate the correspondence output in *Word* from its status page. When you generate the output, the selected data fields automatically merge with the documents generated in *Word*. From the status page of the correspondence process, you can generate *Word* documents for the most recent instance or a previous instance of the process.

► Generate Microsoft Word documents for a correspondence process

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence List tab, select a correspondence process and click **Go to process**. The status page of the process appears.
3. Select the instance of the process with the documents to generate.
 - To generate documents of the most recent instance of the process, select the Recent Status tab.
 - To generate documents of a previous instance of the process, select the History tab. In the grid, select the instance to generate.
4. Click **Merge Letter**. The program merges the data fields and document file selected for the process and opens the merged documents in Microsoft *Word*.
5. In *Word*, save the merged documents on your workstation or network.

Generate Microsoft Word Labels for a Mailing

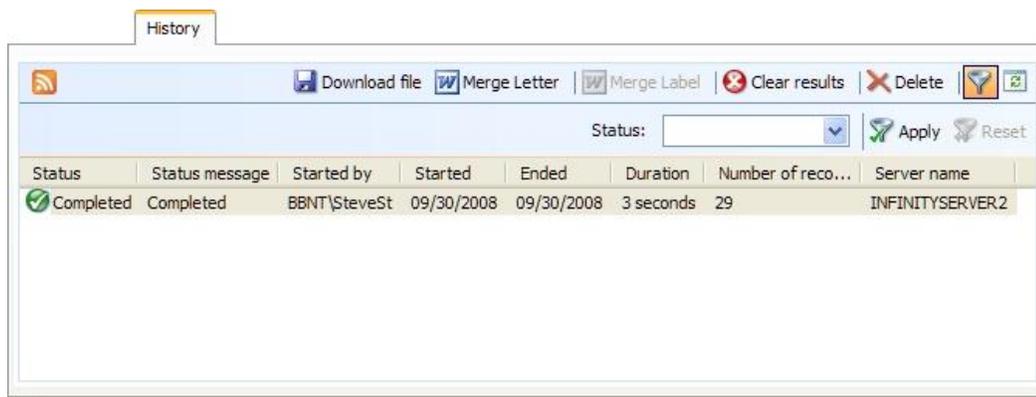
If you associate a Microsoft *Word* label document file with a correspondence process, you can generate the label output in *Word* from the status page of the process. When you generate the labels, the selected data fields automatically merge with the template generated in *Word*. From the status page of the correspondence process, you can generate labels for the most recent instance or a previous instance of the process.

► Generate Microsoft Word labels for a correspondence process

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence List tab, select a correspondence process and click **Go to process**. The status page of the process appears.
3. Select the instance of the process with the labels to generate.
 - To generate labels of the most recent instance of the process, select the Recent Status tab.
 - To generate labels of a previous instance of the process, select the History tab. In the grid, select the instance to generate.
4. Click **Merge Label**. The program merges the data fields and labels selected for the process and opens the merged labels in Microsoft *Word*.
5. In *Word*, save the merged labels on your workstation or network.

History Tab

To view information about the previous instances of the process, select the History tab. On this tab, you can view records of the previous instances the process was run. For each instance, you can view its status, the status message generated for it, the user who ran it, its start and end dates, its duration, the total number of records processed, and the server that handled the process.



To view all process instances of a specific status, click **Filter** to display the **Status** field and **Apply** and **Reset** buttons. In the **Status** field, select the status of the processes to display such as “Did not finish,” and click **Apply**. On the tab, you can download a comma-separated value (*.csv) file of a previous correspondence output. If you associate a document with the correspondence, you can also select to merge the documents with the selected data fields to generate a previous output in Microsoft *Word*. You can also clear the results or delete records of previous instances of the process.

Clear the Results of a Correspondence Process Instance

You can clear the results of an instance of a correspondence process, such as if you inadvertently run a process with an incorrect selection of constituents. When you clear the results of a process, the program removes the correspondence from the constituents’ Communications pages.

► Clear the results of a correspondence process

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.
2. On the Correspondence List tab, select a correspondence process and click **Go to process**. The status page of the process appears.
3. On the History tab, select the instance to clear.
4. Click **Clear results**. A message appears to confirm the removal of the correspondence from the constituents’ history.
5. Click **Yes**. The program removes the correspondence from the selected constituents’ Communications pages. On the status page of the process, the History tab displays “Results cleared” in the **Status** column for the instance.

Delete a Process Status Record

To clean up your database, you can remove previous instances of a process from the History tab of its status page.

► Delete a process status record from the History tab

1. From *Marketing and Communications*, click **Manage correspondence**. The Manage Correspondence page appears.

2. On the Correspondence List tab, select a correspondence process and click **Go to process**. The status page of the process appears.
3. On the History tab, select the status record to delete.
4. Click **Delete**. A confirmation message appears.
5. Click **Yes**. You return to the History tab. In the grid, the status record no longer appears.

Job Schedules Tab

To view the job schedules set for the business process, select the Job schedules tab. In the grid, you can view the job schedules set for the job. For each job schedule, you can view its job name, whether it is enabled, its frequency, its start date and time, its end date and time, and the dates the schedule was added and changed in the database.

Job name	Schedule enabled	Frequency	Start date	Start time	End date	End time	Date added	Date changed
Nightly process (PayCloud)	Yes	Daily	09/30/2008	1:00 AM	12/31/9999	11:59 PM	09/30/2008 ...	09/30/2008 ...

From the **Job schedules** grid, you can manage the job schedules set for the business process.

Add a Job Schedule

To automate a process, you can create a job schedule for the process. When you create a job schedule, you define when the job begins to run.

► Add a job schedule

1. On the status page for the business process, select the Job schedules tab and click **Add**. The Create job screen appears.

Create job

Job name:

Schedule type: Enabled

One-time occurrence

Date: Time:

Frequency

Occurs every: day(s)

Daily frequency

Occurs once at:

Occurs every: Minutes Starting at: Ending at:

Duration

Start date: End date: No end date

Note: To access the Create job screen from the process status page, you can click **Create job schedule** under **Tasks**.

2. In the **Job name** field, enter a name to help identify the scheduled job.
3. In the **Schedule type** field, select the frequency to run the job.
 - To run the job only once, select “One time.” The **One-time occurrence** frame is enabled.
 - To run the job every day, select “Daily.” The **Frequency**, **Daily frequency**, and **Duration** frames are enabled.
 - To run the job every week, select “Weekly.” The **Frequency**, **Daily frequency**, and **Duration** frames are enabled.
 - To run the job every month, select “Monthly.” The **Frequency**, **Daily frequency**, and **Duration** frames are enabled.
 - To run the job with the *SQL Server Agent* service, such as if you use the *SQL Server Agent* service with other tasks, select “Start when SQL Server Agent service starts.”
 - To run the job when enough resources are available on the server, as determined by the Idle condition defined in the *SQL Server Agent* properties on the server, select “Start when the computer becomes idle.”
4. To mark the schedule active, select **Enabled**.
5. If you select “One time,” under **One-time occurrence**, select the time and date to run the job.

6. If you select “Daily,” under **Frequency**, in the **Occurs every [] day(s)** field, select how often to run the job. For example, select “2” to run the job every other day.
7. If you select “Weekly,” under **Frequency**, in the **Occurs every [] week(s) on** field, select how often to run the job, and select the day of the week to run the job.
8. If you select “Monthly,” under **Frequency**, in the **Occurs every [] month(s) on** field, select how often to run the job, and then select a calendar date or a general date frequency to run the job.
 - To run the job the same date each month, select **Day** and, in the **[] of the month** field, enter the date. For example, to run the job on the 15th of the month, enter “15.”
 - To run the job at a general frequency each month, select **The** and, in the **[][] of the month** field, enter the frequency. For example, to run the job of the first Sunday of the month, select “First” and “Sunday.”
9. If you select “Daily,” “Weekly,” or “Monthly,” under **Daily frequency**, select whether to run the job one time or multiple times on the day selected under **Frequency**.
 - To run the job one time on the selected day, select **Occurs once at** and enter the time of the day to run the job.
 - To run the job multiple times on the selected day, select **Occurs every** and enter the frequency to run the job, such as “30 minutes.” In the **Starting at** and **Ending at** fields, select a time range to run the job at the selected frequency. For example, to run the job overnight during off-hours, enter select a start time of “12:01:00 AM” and an end time of “5:30:00 AM.”
10. If you select “Daily,” “Weekly,” or “Monthly,” under **Duration**, in the **Start date** field, enter the date to start the job schedule and select whether the schedule has an end date. If you select **End date**, enter the date to end the job schedule.
11. Click **Save**. You return to the Job schedules tab. In the grid, the new job schedule appears.

Edit a Job Schedule

You can edit the settings for a job schedule, such as to adjust its frequency. You can edit a job schedule from the status page of the process.

► Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, refer to [Create Job Screen](#) on page 169.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Delete a Job Schedule

You can delete a job schedule from a business process, such as if you no longer use it. You can delete a job schedule from the status page of the process.

► Delete a job schedule

1. On the Job schedules tab, click the double arrows beside the job to delete.
2. Click **Delete**. A confirmation screen appears.

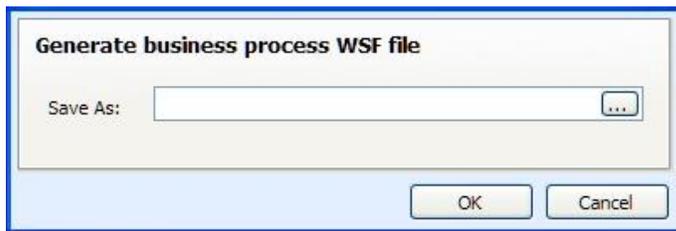
3. Click **Yes** to delete the job. You return to the Job schedules tab.

Generate a Windows Scripting File

You can generate a *Windows* scripting file (*.wsf) to use to run a process with an automated launch program such as *Task Scheduler*.

► Generate a Windows scripting file for a correspondence process

1. On the process status page, click **Generate WSF** under **Tasks**. The Generate Business Process WSF File screen appears.



2. In the **Save As** field, click the ellipsis. The Save As screen appears.
3. In the **Save in** field, browse to the location to save the scripting file.
4. In the **File name** field, enter the name to save the file as.

Note: You cannot change the selection in the **Save as type** field. You can only save a *.wsf file format.

5. Click **Save**. You return to the Generate business process WSF file screen. In the **Save As** field, the path entered for the saved scripting file appears.
6. Click **OK**. You return to the process status page. The application saves the *.wsf file at the location entered.

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To thank donors for gifts donated to your organization, use **Acknowledgements**. Using Acknowledgements, you can also send a tribute letter to acknowledgees to notify that a donation has been made for a tribute.

To thank donors for gifts donated to your organization, use **Acknowledgements**. Using Acknowledgements, you can also send a tribute letter to acknowledgees to notify that a donation has been made for a tribute. You can also send an advance notice letter to inform constituents that a payment will be debited from their bank account.

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*.

Generating acknowledgements consists of several main steps. First, we recommend you create an acknowledgement form template in Microsoft *Word*. The form template contains the text to repeat in each acknowledgement. You merge the template with acknowledgement data to create a personalized letter to send to donors. For example, the letter can read “Thank you for your gift of [gift amount merge field] to restore the Adamson Science Center.” Next, you upload the form template to your acknowledgement process. If you are generating revenue letters, the letter is assigned to the revenue group to acknowledge. For example, the Pledge Thank You letter goes to donors who have recently made a pledge. That revenue letter is assigned to the revenue gift type of Pledge. Lastly, you export the fields to merge with the acknowledgement letter by running the acknowledgement process. This creates the final acknowledgement letter in *Word* that is sent to constituents.

To begin learning how to use Acknowledgements, see Microsoft Word for Acknowledgements on page 126 and Acknowledgement Tasks on page 127.

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 204.
- 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 126.
- 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 146.
- 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 151 or [Run an Assign Letter Process](#) on page 154.
- 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 129.
- 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 132.
- 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 134.

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 204 and [Add a Letter Screen](#) on page 147.

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

Use **Acknowledgements** to manage the revenue and tribute acknowledgement processes in your database. To access **Acknowledgements**, select **Marketing and Communications, Acknowledgements** from the menu bar. The Acknowledgements page appears.

The screenshot displays the 'Review Acknowledgements' tab in the Acknowledgements application. It features two main sections: 'Revenue acknowledgement processes' and 'Tribute acknowledgement processes'. Each section includes a table of processes and a 'Date range' dropdown set to 'Last 7 days'.

Revenue acknowledgement processes:

Name	Status	Started	Duration	Records processed	Acknowledged date
Pledge Thank You	Completed	01/08/200...	2 seconds	13	
General Thank You	Completed	01/08/200...	5 seconds	761	
Annual Campaign	Completed	01/08/200...	1 second	135	
Annual Campaign	Completed	01/08/200...	5 seconds	0	

Tribute acknowledgement processes:

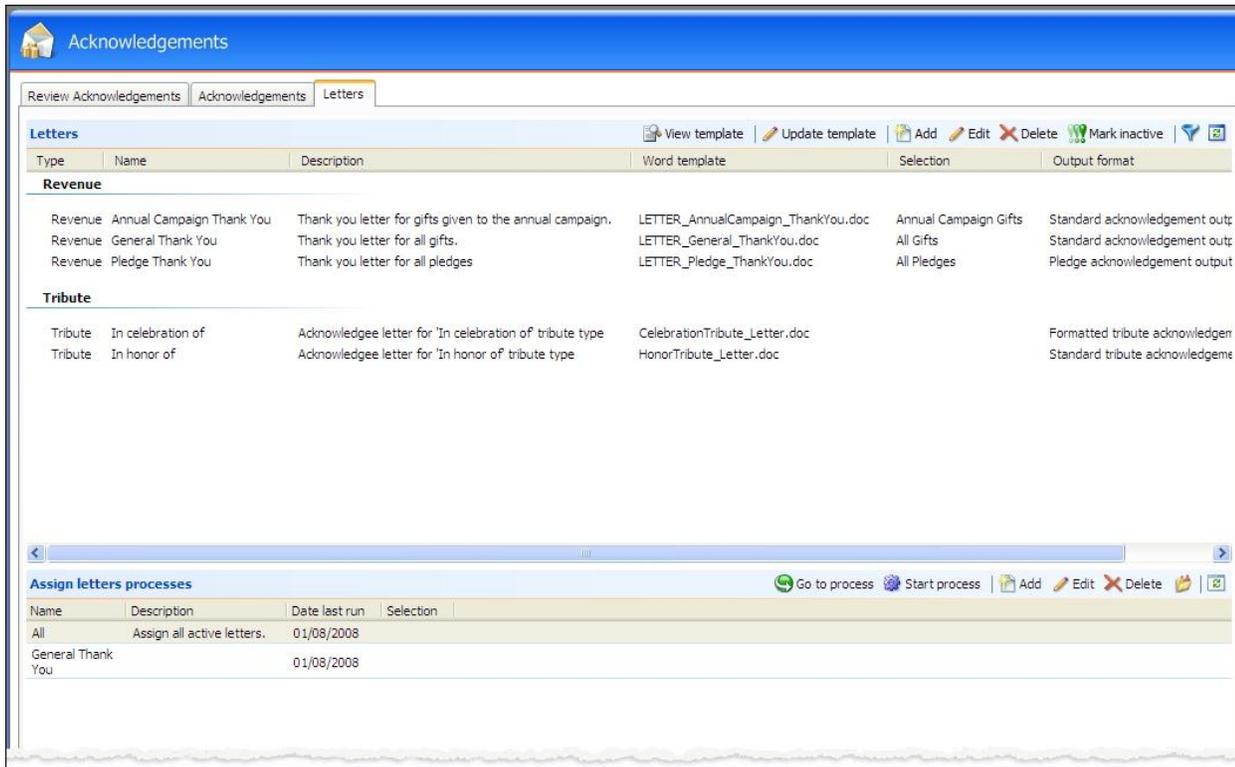
Name	Status	Started	Duration	Records processed	Acknowledged date
In honor of	Completed	01/08/2008 1:40:22 PM	1 second	0	
In celebration of	Did not finish	01/08/2008 1:40:06 PM	1 second	0	

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

You establish a process to generate acknowledgements. For example, you can create monthly acknowledgements for major gifts and save the settings you select as an acknowledgement process. Each month, you can call up the process to generate major donor acknowledgements again.

Note: The system administrator at your organization typically completes this process.

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*.

Two types of acknowledgements exist: revenue and tribute. When a constituent makes a payment, you send a revenue acknowledgement to thank the constituent for the revenue. You send a tribute acknowledgement to acknowledgees to notify that a donation has been made for a tribute.

► Add acknowledgement process

1. From *Marketing and Communications*, click **Acknowledgements**. The Acknowledgements page appears.
2. Select the Acknowledgements tab.
3. To add a revenue acknowledgement process, click **Add** and select **Revenue acknowledgement process**.
To add a tribute acknowledgement process, click **Add** and select **Tribute acknowledgement process**.
The Add 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 130. For a detailed list of the default export fields, see [Acknowledgement Output](#) on page 137.
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."
Site	Select the site that uses this process. If the process is available to users associated with any site, select "All sites."
Mailing label template	You must use a <i>Word</i> 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

Screen Item	Description
	name becomes a link. To change the file, edit the document in <i>Word</i> . 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 146.
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. For more information about the Exclusions screen, Set Exclusions for a Correspondence Process on page 110.
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.
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

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 **Acknowledgement processes**, select the process to edit.
3. 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 130.
4. Edit the information as necessary.
For a detailed list of the default export fields, see *Acknowledgement Output* on page 137.
5. Click **Save**. You return to the Acknowledgements page.

Run Acknowledgement Process

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.

Run revenue acknowledgement process

Process name: General Thank You

For gifts with letter: General Thank You

Exclusions

Results

Mark letters 'Acknowledged' when process completes

Acknowledge date: Today

Create selection from results

Selection type: Revenue

Selection name: General Thank You 2010

Overwrite existing selection

Start Cancel

For information about the items on this screen, see [Run Acknowledgement Process Screen](#) on page 133.

For a detailed list of the default export fields, see [Acknowledgement Output](#) on page 137.

- 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 134.

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. For more information about the Exclusions screen, see Set Exclusions for a Correspondence Process on page 110.
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.
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 134.

► 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.

The screenshot shows a web interface for managing acknowledgement processes. The title bar reads "Acknowledge revenue list" and "General Thank You". The main content area is divided into two sections: parameters and recent status.

Parameters:

- Description: Uses General Thank You letter for revenue
- Include selection: (blank)
- Mark letters 'Acknowledged': No
- Acknowledge date: 1/9/2010
- Letter: General Thank You
- Letter template: LETTER_General_ThankYou.doc
- Create output selection: No
- Overwrite existing selection: No
- Output selection name: General Thank You 2010
- Output selection type: Revenue Detail
- Label template: General_ThankYou_Ack.doc

Recent status tab:

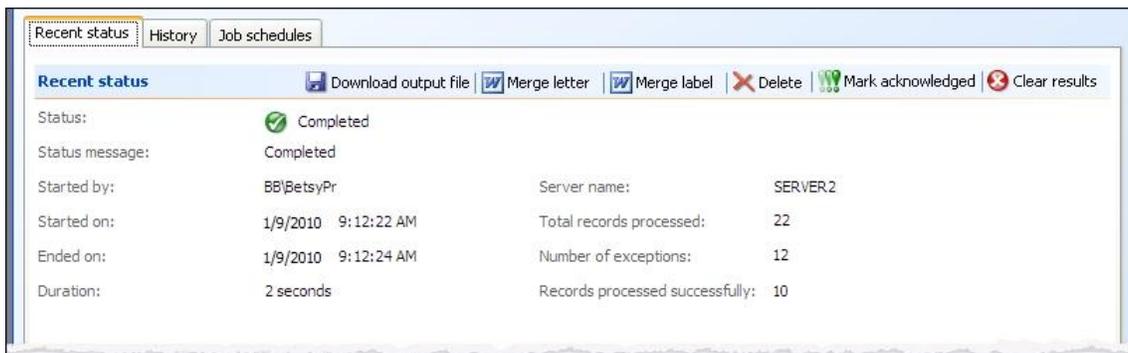
Buttons: Download output file, Merge letter, Merge label, Delete, Mark acknowledged, Clear results

Status:	Completed	Server name:	SERVER2
Status message:	Completed	Total records processed:	474
Started by:	BBNT\BetsyPr	Number of exceptions:	0
Started:	1/9/2010 10:42:49 AM	Records successfully processed:	474
Ended:	1/9/2010 10:42:51 AM		
Duration:	2 seconds		

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.

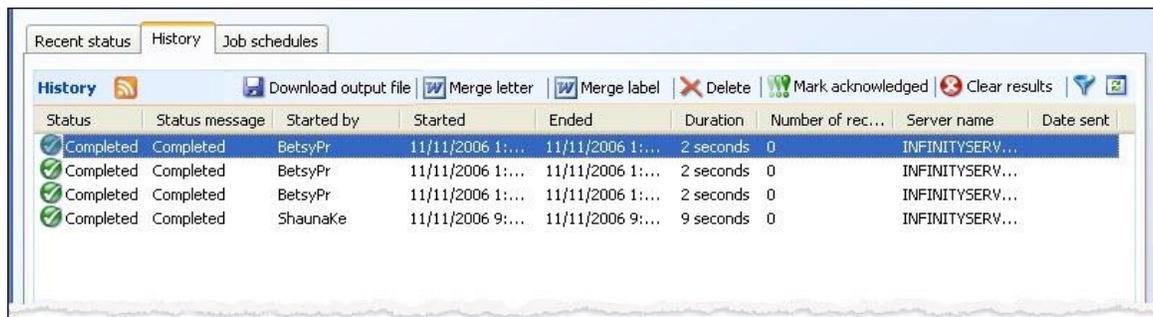
- **Download output file:** To save a copy of the output file to your hard drive or network, click **Download output file**. A Save as screen appears for you to name your file and browse to a location on your hard drive or network to save the output file.
- **Merge letter:** To merge the letters for 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**.

Generate WSF for Acknowledgements

A Windows Scripting File (.wsf) is an executable script file format for *Windows* that can incorporate JScript (.js) or VBScript (.vbs) routines and include XML elements. On the Acknowledgements page, you can select a export process and use either JScript or VBScript language to generate a *.wsf file of the process to use with another application. You can use Windows Task Scheduler to schedule tasks to run the exported Windows Scripting File through the other application at a time that is most convenient to your organization.

Note: The system administrator at your organization typically completes this process.

You can generate a Windows Scripting File for a process from its status page.

► Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**.
2. Your browser prompts you to open or save the file. To save the file, choose the file location.

Note: The download process varies according to the browser you use.

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 <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
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 150.

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 140.

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
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

Output	Example
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
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

Output	Example
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
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
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

Output	Example
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
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
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

Output	Example
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
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 150.

The following table explains the items contained in the tribute acknowledgement output formats.

Output	Example
Business process output PKID	1
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
Amount	\$100.00
Receipt amount	\$100.00
Appeal name	2008 Direct Mailing
Designation 1 name (exports from the Public)	President's Scholarship Fund

Output	Example
name field on the designation. If Public name is blank or does not exist, the designation Name exports)	
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

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 147.

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 <i>Word</i> 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 <i>Word</i> , click the link or click View template . To change the file, edit the document in <i>Word</i> . To update the file, click Clear file and select the document in this field again. To update the <i>Word</i> 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 acknowledgment 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.
Output format (this field also appears on	You must select an acknowledgement output. This determines the fields to export for acknowledgements with the <i>Word</i> form template.

Screen Item	Description
the Generate header file screen Generate header file under Tasks)	<p>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.</p> <p>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.</p> <p>For more information, see <i>Generate a Header File</i> on page 204, <i>Output Formats for Acknowledgements</i> on page 150, and <i>Acknowledgement Output</i> on page 137.</p> <p>To view the fields to export, view the header row in your *.csv file after you run the process.</p>
Export definition (this field also appears on the Generate header file screen Generate header file under Tasks)	<p>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 <i>Word</i> form template.</p> <p>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.</p> <p>For more information, see <i>Generate a Header File</i> on page 204.</p> <p>To view the fields to export, view the header row in your .csv file after you run the process.</p>
Sites	Revenue and tribute letters can be associated with one or more sites, in order to allow users from different sites to create and use them.

Edit a Letter

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 147.
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 149.

► Delete a letter

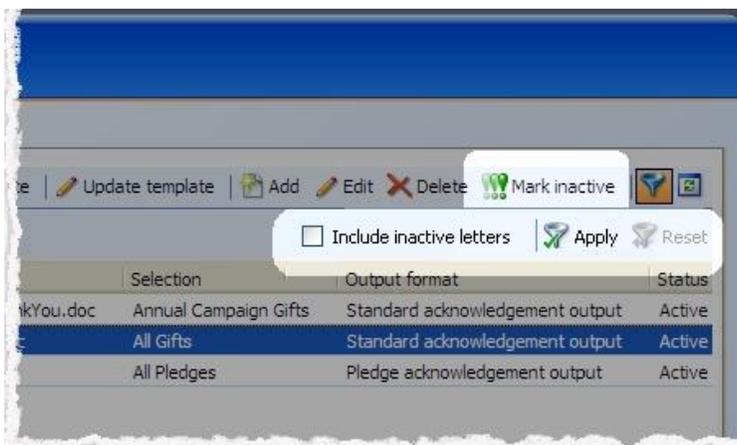
1. From the Letters tab, select a letter in the **Letters** grid and click **Delete**. A confirmation message appears.
2. Click **Yes**. The letter deletes. You return to the Letters tab.

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

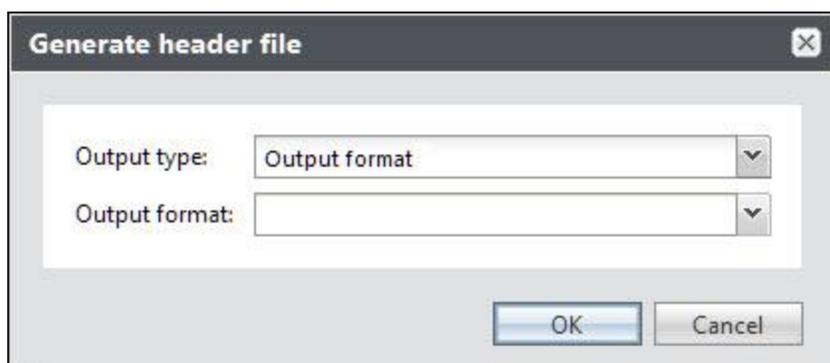
If a letter is no longer current and should not be assigned to revenue or used by a current acknowledgement process, you can mark it inactive. To do this, select the letter, and click **Mark inactive**. A confirmation message appears. Click **Yes**. The letter no longer appears in the **Letters** grid.



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 137.

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 140.

- 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 140.

- 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 140.

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.

Add an assign letters process

Name:

Description:

Site: All Sites

Include: Assign all letters
 Assign selected letters

Letter
<input type="text"/>

Acknowledges: Include donor
 Include recognition recipients

Criteria

Assign letters to: All revenue
 Selected revenue

Selection:

Only consider revenue or recognition credit added since last run

Results

These options may be modified at run time.

Create selection from results

Selection type:

Selection name:

Overwrite existing Selection

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 152.
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."
Site	Select the site that uses this process. If the process is available to users associated with any site, select "All sites."
Include: Assign all 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.

Screen Item	Description
	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, see Add a Letter Screen on page 147.
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.
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

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 152.
4. Click **Save**. You return to the Letters tab.

Run an Assign Letter Process

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 154.

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 155.

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 155.

► 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.

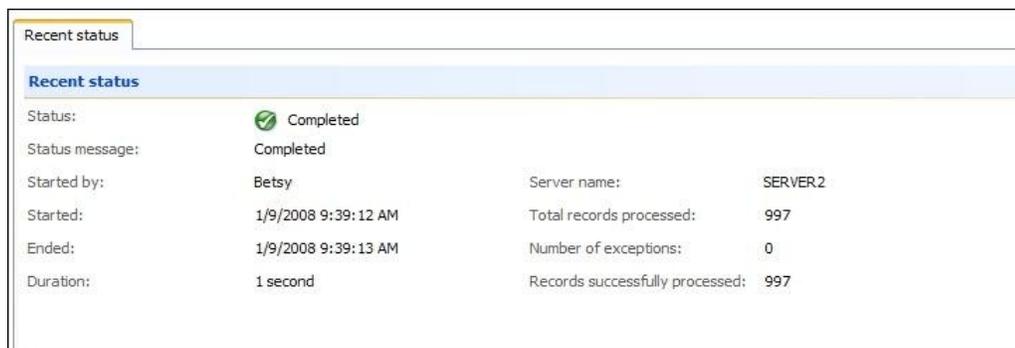
Go To Process Status Page for Assign Letters

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.



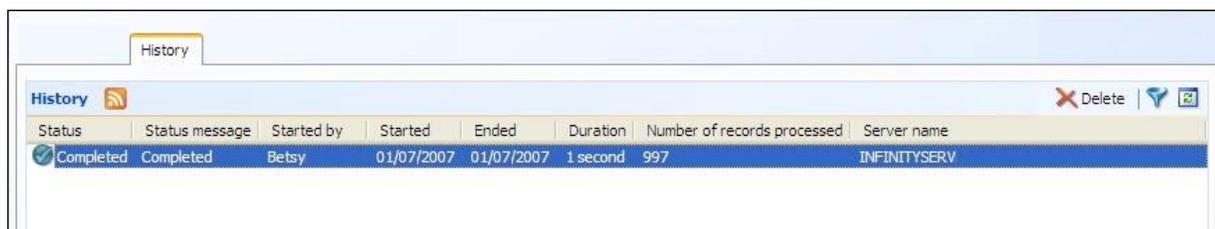
The screenshot shows the 'Recent status' tab with the following details:

Status:	Completed	Server name:	SERVER2
Status message:	Completed	Total records processed:	997
Started by:	Betsy	Number of exceptions:	0
Started:	1/9/2008 9:39:12 AM	Records successfully processed:	997
Ended:	1/9/2008 9:39:13 AM		
Duration:	1 second		

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.



The screenshot shows the 'History' tab with a table of process runs. The table has the following columns: Status, Status message, Started by, Started, Ended, Duration, Number of records processed, and Server name.

Status	Status message	Started by	Started	Ended	Duration	Number of records processed	Server name
Completed	Completed	Betsy	01/07/2007	01/07/2007	1 second	997	INFINITYSERV

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**.

Generate WSF for Assign Letter Process

A Windows Scripting File (.wsf) is an executable script file format for Windows that can incorporate JScript (.js) or VBScript (.vbs) routines and include XML elements. On the Acknowledgements page, you can select a export process and use either JScript or VBScript language to generate a *.wsf file of the process to use with another application. You can use Windows Task Scheduler to schedule tasks to run the exported Windows Scripting File through the other application at a time that is most convenient to your organization.

Note: The system administrator at your organization typically completes this process.

You can generate a Windows Scripting File for a process from its status page.

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.

Note: The **Re-acknowledge revenue** checkbox on the **Receipt and acknowledgement preferences** configuration task must be selected to process a new acknowledgement for a gift that was previously acknowledged. For more information, Receipt and Acknowledgement Preferences on page 43.

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 screenshot shows the Acknowledgements application interface. At the top, there are tabs for 'Review Acknowledgements', 'Acknowledgements', and 'Letters'. Below the tabs, there are two main sections, each with a table of processes.

Revenue acknowledgement processes

Name	Status	Started	Duration	Records processed	Acknowledged date
Pledge Thank You	Completed	01/08/200...	2 seconds	13	
General Thank You	Completed	01/08/200...	5 seconds	761	
Annual Campaign	Completed	01/08/200...	1 second	135	
Annual Campaign	Completed	01/08/200...	5 seconds	0	

Tribute acknowledgement processes

Name	Status	Started	Duration	Records processed	Acknowledged date
In honor of	Completed	01/08/2008 1:40:22 PM	1 second	0	
In celebration of	Did not finish	01/08/2008 1:40:06 PM	1 second	0	

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**.

Planned Gift Acknowledgements

Microsoft Word for Planned Gift Acknowledgements	159
Planned Gift Acknowledgement Tasks	160
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To thank donors for planned gifts donated to your organization, use **Planned Gift Acknowledgements**. Generating planned gift acknowledgements consists of four main steps. First, we recommend you create an planned gift acknowledgement form template in Microsoft *Word*. The form template contains the text to repeat in each planned gift acknowledgement. You merge the template with planned gift acknowledgement data to create a personalized letter to send to donors. For example, the letter can read “Thank you for your planned gift annuity of [gift amount merge field] to restore the Adamson Science Center.” Next, you upload the form template to your planned gift acknowledgement process. The letter is assigned to the revenue group to acknowledge. For example, the Planned Gift Thank You letter goes to donors who have recently made a planned gift. That letter is assigned to the revenue gift type of Planned Gift. Lastly, you export the fields to merge with the planned gift acknowledgement letter by running the planned gift acknowledgement process. This creates the final planned gift acknowledgement letter in *Word* that is sent to donors.

To begin learning how to use Receipts, see Microsoft Word for Planned Gift Acknowledgements on page 159 and Planned Gift Acknowledgement Tasks on page 160.

Microsoft Word for Planned Gift Acknowledgements

Before you run planned gift acknowledgements, we recommend you create a planned gift acknowledgement form template in *Word*. The *Word* document is the form you merge planned gift acknowledgement data with to create the planned gift acknowledgements you send to constituents. For example, the letter can read “Thank you for your planned gift annuity 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 about the fields on this screen, see Generate a Header File on page 204 and Add a Letter Screen on page 170.

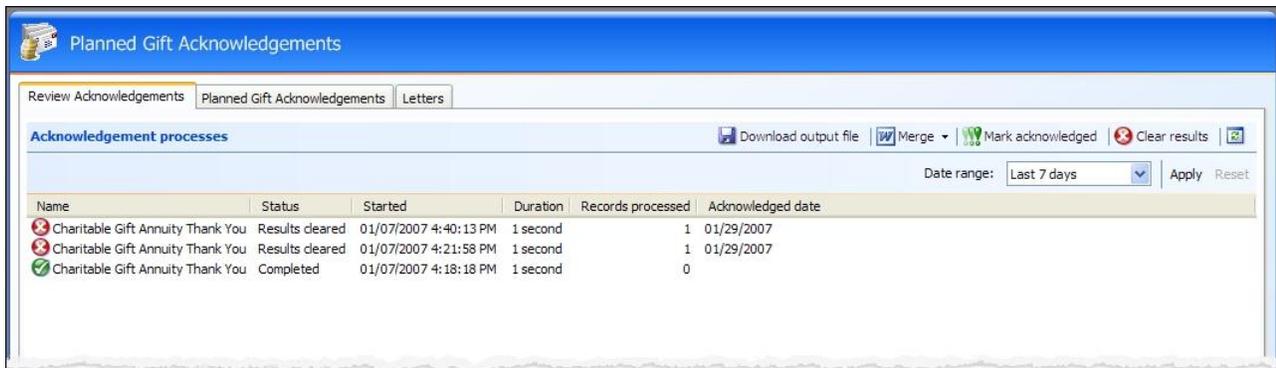
After you create the *Word* form template, you must add a letter to the program. The letter is assigned to the planned gift group to acknowledge. By creating the *Word* form template and adding letter information first, you can generate merged planned gift acknowledgements easily after you run the planned gift acknowledgement process.

Note: After you merge the planned gift acknowledgement *Word* form template with planned gift data, you can print the planned gift acknowledgements to mail to constituents. You can send planned gift 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.

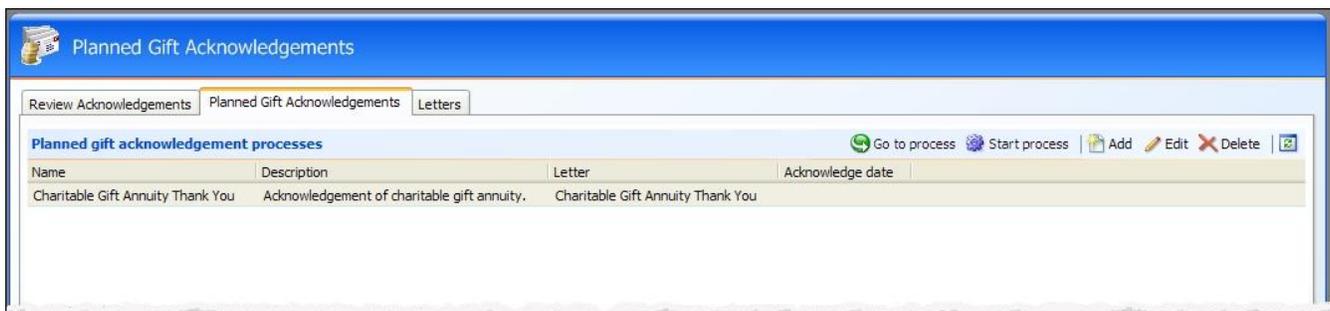
Planned Gift Acknowledgement Tasks

Use **Planned Gift Acknowledgements** to manage the planned gift acknowledgement processes in your database. To access **Planned Gift Acknowledgements**, select **Marketing and Communications, Planned gift acknowledgements** from the menu bar. The Planned Gift Acknowledgements page appears.

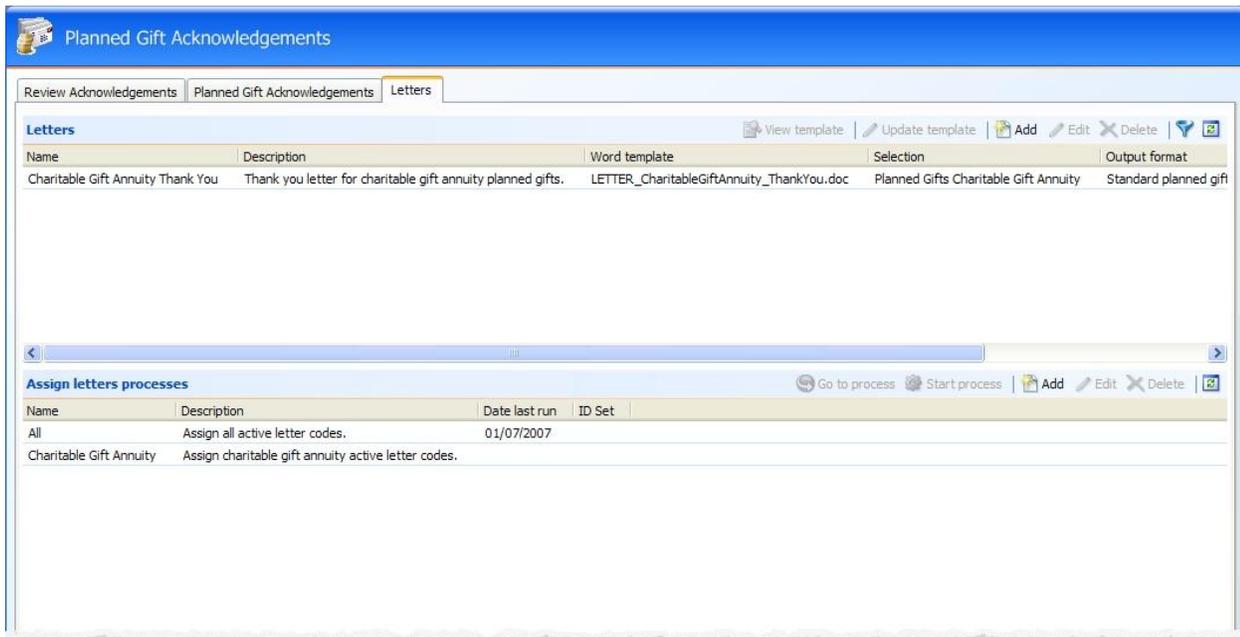


On the Review Acknowledgements tab, view details from multiple processes. The **Acknowledgement processes** displays recently run processes. The grid lists information such as the **Status** of the process, when it was **Started**, and the **Number of records processed**.

On the Planned Gift Acknowledgements tab, the **Planned gift acknowledgement processes** grid lists the planned gift acknowledgement processes in the database and displays the **Name**, **Description**, **Letter**, and **Acknowledgement date** of each process. You enter this information when you add the planned gift acknowledgement process to the database. Depending on your security rights and system role, you perform functions to manage planned gift acknowledgement processes in the database.



To add planned gift letters to the database and assign the letter to planned gifts, select the Letters tab. These planned gift letters and letter processes are used during the planned gift acknowledgement process.



The **Letters** grid displays the *Word* documents available for planned gift acknowledgement process. The grid lists the name of the **Letter** in the program and the **Word template** used for the letter. In addition, the grid lists the **Selection** of planned gifts that the letter applies to.

The **Assign letter processes** grid lists the letters assigned to planned gifts. A letter process assigns the letter name to the planned gift you specify. For example, you can send the Annuity Thank You letter to all planned gifts for annuities. The grid lists information such as **Date last run** and the **Selection** the process uses.

Warning: Before you create a planned gift acknowledgement process, you must add planned gift letters and assign the letters to planned gifts.

Depending on your security rights and system role, you perform functions to manage planned gift acknowledgement processes in the database.

Add Planned Gift Acknowledgement Process

You establish a process to generate different types of planned gift acknowledgements. For example, you can create monthly planned gift acknowledgements for bequests and save the settings you select as an planned gift acknowledgement process. Each month, you can call up the process to generate bequest planned gift acknowledgements again.

Note: The system administrator at your organization typically completes this process.

► Add planned gift acknowledgement process

1. On the Planned Gifts Acknowledgements page, click **Add**. The Add planned gift acknowledgement 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 Planned Gift Acknowledgement Process Screen* on page 162.
 For a detailed list of the default export fields, see *Planned Gift Acknowledgement Output* on page 174.
3. To close the screen and save the information you entered, click **Save**. You return to the *Planned Gift Acknowledgements* page. The data you entered appears in the **Planned gift acknowledgement processes** grid.

Add Planned Gift Acknowledgement 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 planned gifts.”
Site	Select the site that uses this process. If the process is available to users associated with any site, select “All sites.”
Mailing label template	You must use a <i>Word</i> 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 <i>Word</i> . To update the

Screen Item	Description
	file, click Clear file and select the document in this field again.
Acknowledge planned gift with letter	Click the drop down arrow to select a planned gift letter for the process. For more information about letters, see Planned Gift Letter Tasks on page 169.
Acknowledge: All 'Not acknowledged' planned gifts	To generate a planned gift acknowledgement letter for planned gifts with an Acknowledge status of Not acknowledged, select this option.
Acknowledge: Selected planned gifts	To specify a Planned Gift selection to acknowledge, select this option. Planned gifts in the selection that have not been assigned the letter in the Acknowledge planned gift with letter field will not be acknowledged. When you select this, the Selection field enables.
Selection	To specify a Planned Gift selection, click the binoculars. The Selection Search screen appears for you to add or select an existing query to use for planned gift acknowledgements. If the selection you need does not appear in search results, check to confirm that the Record type is Planned Gift. 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. For more information about the Exclusions screen, Set Exclusions for a Correspondence Process on page 110.
Mark letters 'Acknowledged' when process completes	To change the Acknowledge status from Not acknowledged to Acknowledged on the planned gift, select this checkbox. To preview the data for accuracy after you run the process, do not select the checkbox. You can mark planned gifts acknowledged at a later time on the Recent Status tab or History tab. You can also mark planned gifts acknowledged on the Review Acknowledgements tab.
Acknowledge date	When you select Mark letters sent when process completes , you enable this field. This date defaults in the planned gift 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 query for constituents contained in the planned gift acknowledgement process, select this checkbox. When you select this checkbox, you enable the remaining checkbox and fields.
Selection type	When you select Create selection from results , this field is required. Choose to create a Constituent or Planned Gift 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.

Edit Planned Gift Acknowledgement Process

After you create a planned gift acknowledgement process, you may need to update the information. For example, you may need to select another gift selection for the process or change the planned gift acknowledgement sent date. To do this, edit the planned gift acknowledgement process.

Note: The system administrator at your organization typically completes this process.

► Edit planned gift acknowledgement process

1. On the Planned Gift Acknowledgements page, select a planned gift acknowledgement process and click **Edit**. The Edit planned gift acknowledgement process screen appears.
2. Make changes as necessary. The items on this screen are the same as on the Add acknowledgement process screen. For a detailed explanation of the options, see Add Planned Gift Acknowledgement Process Screen on page 162.

For a detailed list of the default export fields, see Planned Gift Acknowledgement Output on page 174.

3. Click **Save**. You return to the Planned Gift Acknowledgements screen.

Run Planned Gift Acknowledgement Process

After you add or edit the planned gift acknowledgement process, you run the process to generate planned gift acknowledgements for donors.

Warning: If a planned gift is split more than two ways between designations, the planned gift acknowledgement output contains only two designations. For example, Mark Adamson splits a planned gift between the Annual Fund, the Campaign for Excellence, and the Library Fund. When you run the planned gift acknowledgement process, only two designations appear in the output.

► Run planned gift acknowledgement process

1. To run planned gift acknowledgements, select the planned gift acknowledgement process, and click **Start Process**. The Run planned gift acknowledgement process screen appears.

Run planned gift acknowledgement process

Process name: Charitable Gift Annuity Thank You

For planned gifts with letter: Charitable Gift Annuity Thank You

Exclusions

Results

Mark letters 'Acknowledged' when process completes

Acknowledge date: Today

Create output selection

Selection type: Constituent

Selection name: Charitable Annuity Gift Acknowledgements Q1

Overwrite existing selection

Start Cancel

For information about the items on this screen, see Run Acknowledgement Process Screen on page 165.

For a detailed list of the default export fields, see Planned Gift Acknowledgement Output on page 174.

2. To process planned gift 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 Planned Gift Acknowledgements on page 166.

When you run a planned gift acknowledgement process, the date automatically defaults on the planned gifts on the Letters tab in the **Process date** column. The **Acknowledge date** (also stored on the Letters tab) informs you when the assigned planned gift letters were marked acknowledged.

Run Acknowledgement 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) planned gift acknowledgement process screen. This field is disabled. To change the process name, access the Edit planned gift acknowledgement process screen.
For planned gifts with letter	The letter defaults from the Acknowledge planned gifts with letter field on the Add (or Edit) planned gift acknowledgement process screen. This field is disabled. To select another letter, access the Edit planned gift 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. For more information about the Exclusions screen, Set Exclusions for a Correspondence Process on page 110.
Mark letters 'Acknowledged' when process completes	To change the Acknowledge status from Not acknowledged to Acknowledged on the planned gift, select this checkbox. To preview the data for accuracy after you run the process, do not select the checkbox. You can mark planned gifts acknowledged at a later time on the Recent Status tab or History tab. You can also mark planned gifts sent on the Review Acknowledgements tab.
Acknowledge date	When you select Mark letters 'Acknowledged' when process completes , you enable this field. This date defaults in the planned gift 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 a planned gift acknowledgement process, the date automatically defaults on planned gifts 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 planned gift letters were marked acknowledged.
Create selection from results	To create a query for the individuals or gifts contained in the acknowledgement process, select this checkbox. When you select this checkbox, you enable the remaining checkbox and fields.
Selection type	When you select Create selection from results , this field is required. Choose to create a Constituent or Planned Gift 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 Planned Gift Acknowledgement Process

You can delete a planned gift acknowledgement process at any time. When you delete a planned gift 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 Planned Gift Acknowledgements](#) on page 166.

► Delete planned gift acknowledgement process

1. From the Planned Gift Acknowledgements page, select a planned gift acknowledgement process and click **Delete**. A confirmation message appears.
2. Click **Yes**. The process deletes. You return to the Planned Gift Acknowledgements page.

Go To Process Status Page for Planned Gift Acknowledgements

After you run a planned gift acknowledgement process, the process status page appears automatically.

The screenshot shows a web interface for managing planned gift acknowledgements. The main header is 'Acknowledge planned gift list' with a sub-header 'Charitable Gift Annuity Thank You'. Below this, there are several fields for process parameters:

- Name: Charitable Gift Annuity Thank You
- Description: Acknowledgement of charitable gift annuity.
- Include selection: (empty)
- Mark letters 'Acknowledged': No
- Acknowledge date: (empty)
- Letter: Charitable Gift Annuity Thank You
- Letter template: LETTER_CharitableGiftAnnuity_ThankYou.doc
- Create output selection: No
- Overwrite existing selection: No
- Output selection name: (empty)
- Output selection type: (empty)
- Label template: (empty)

Below the parameters are three tabs: 'Recent status' (selected), 'History', and 'Job schedules'. The 'Recent status' tab shows a table with the following data:

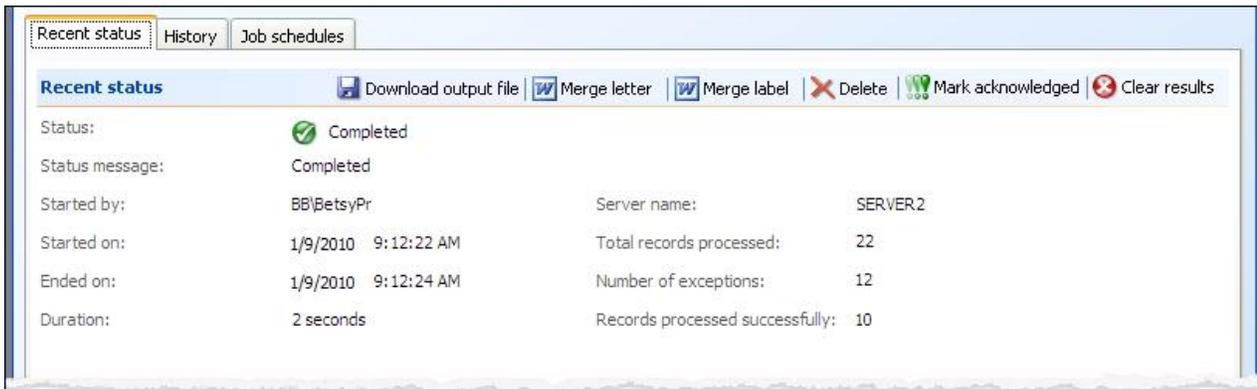
Recent status			
Status:	Completed		
Status message:	Completed		
Started by:	BB\BetsyPr	Server name:	SERVER2
Started on:	2/06/2007 9:12:22 AM	Total records processed:	22
Ended on:	2/06/2007 9:12:24 AM	Number of exceptions:	12
Duration:	2 seconds	Records processed successfully:	10

At the top of the 'Recent status' tab, there are several action buttons: 'Download output file', 'Merge letter', 'Merge label', 'Delete', 'Mark acknowledged', and 'Clear results'.

From the Planned Gift Acknowledgements tab, 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 planned gift acknowledgement process. To make a change to this information, edit the planned gift acknowledgement process.

Recent Status Tab

On the Recent Status tab, you view the details of the most recent instance of the planned gift 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 planned gift acknowledgements processed; and how many planned gift 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.

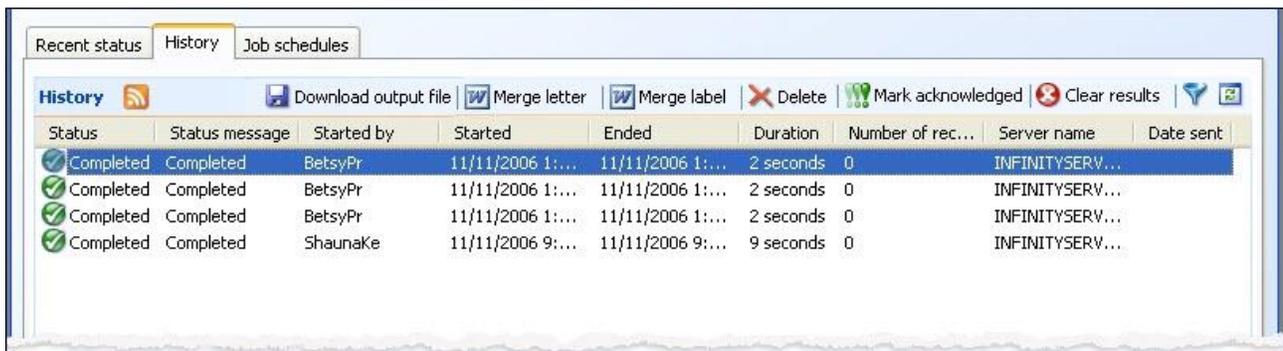
- **Download output file:** To save a copy of the output file to your hard drive or network, click **Download output file**. A Save as screen appears for you to name your file and browse to a location on your hard drive or network to save the output file.
- **Merge letter:** To merge the letters for your planned gift acknowledgements, click **Merge letter**. The planned gift acknowledgements merge automatically in Word. Save the merged planned gift 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 planned gift 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 planned gift 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 **Mark letters 'Acknowledged' when process completes** when you add or edit the process, this button is enabled. To mark assigned letters for planned gifts acknowledged, click **Mark acknowledged**. A confirmation message appears. Click **Yes**.
- **Clear results:** To run a planned gift acknowledgment process again, use **Clear results** to reverse the process. For example, you process planned gift acknowledgements with the wrong planned gift acknowledgement date. To undo the process, click **Clear results**. Then, run the process again with the correct planned gift acknowledgement date. When you clear results, the output and merged documents are deleted, the planned gift acknowledgement date is deleted on the planned gift, and the acknowledgement status becomes Not acknowledged on the planned gift.

History Tab

On the History tab, you view the history for each run of the planned gift 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 planned gift acknowledgements. This information generates each time you run a planned gift 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 planned gift acknowledgements, click **Merge letter**. The planned gift acknowledgements merge automatically in Word. Save the merged planned gift 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 planned gift 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 planned gift 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 **Mark letters 'Acknowledged' when process completes** when you add or edit the process, this button is enabled. To mark assigned letters for planned gifts acknowledged, click **Mark acknowledged**. A confirmation message appears. Click **Yes**.
- **Clear results:** To run a planned gift acknowledgment process again, use **Clear results** to reverse the process. For example, you process planned gift acknowledgements with the wrong planned gift acknowledgement date. To undo the process, click **Clear results**. Then, run the process again with the correct planned gift acknowledgement date. When you clear results, the output and merged documents are deleted, the planned gift acknowledgement date is deleted on the planned gift, and the acknowledgement status becomes Not acknowledged on the planned gift.
- **Filter:** As the history list grows over time, it may be difficult to find a particular planned gift 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**.

Generate WSF for Planned Gift Acknowledgements

A Windows Scripting File (.wsf) is an executable script file format for Windows that can incorporate JScript (.js) or VBScript (.vbs) routines and include XML elements. On the Planned Gift Acknowledgements page, you can select an export process and use either JScript or VBScript language to generate a .wsf file of the process to use with

another application. You can use Windows Task Scheduler to schedule tasks to run the exported Windows Scripting File through the other application at a time that is most convenient to your organization.

Note: The system administrator at your organization typically completes this process.

You can generate a Windows Scripting File for a process from its status page.

Job Schedules for Planned Gift 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 for Planned Gift Acknowledgements

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.

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 <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
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 .

Planned Gift Letter Tasks

Before you can generate letters from a planned gift acknowledgement process, planned gift letters must be created and assigned. After this is done, it is likely you will not change planned gift letter information.

Add a Planned Gift Letter

Before you can generate a planned gift acknowledgement process, you must add planned gift letters for planned gift acknowledgements. We recommend creating a planned gift acknowledgement form template in *Word*. The *Word* form template is the document you merge planned gift data with to create planned gift 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 planned gift letter

1. From the Letters tab, in the **Letters** grid, click **Add**. The Add a letter screen appears.

For information about the items on this screen, see Add a Letter Screen on page 170.

2. To close the Add a letter screen, 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.

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.

Screen Item	Description
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)	<p>To generate planned gift acknowledgements, select a <i>Word</i> form template. To navigate to your planned gift acknowledgement document on your hard drive or network, click Choose file.</p> <p>After you save a process, the document name becomes a link. To open the document in <i>Word</i>, click the link or click View template.</p> <p>To change the file, edit the document in <i>Word</i>. To update the file, click Clear file and select the document in this field again. To update the <i>Word</i> document for the planned gift letter, click Update template.</p>
Selection	<p>You must specify a selection for a planned gift acknowledgement letter. To specify a Revenue Detail 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 Planned Gift. If you choose an Ad-hoc or Smart query, you can click Edit Query to modify the query.</p> <p>Planned gifts in the selection are assigned to this planned gift letter during the assign letter process.</p>
Output type	<p>You must select whether to generate planned gift 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.</p>
Output format (this field also appears on the Generate header file screen Generate header file under Tasks)	<p>You must select a planned gift acknowledgement output. This determines the fields to export for planned gift acknowledgements with the <i>Word</i> form template.</p> <p>Select the standard output to export standard planned gift fields to merge with the <i>Word</i> form template. Examples include VEHICLE and EXPECTEDMATURITY. This output format always uses primary address.</p> <p>Select the seasonal address output format to export standard planned gift 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.</p> <p>Select the formatted mail output to include address process options for planned gift 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.</p> <p>Select the email output to use only mail preferences set for the primary email address.</p> <p>For more information, see Planned Gift Acknowledgement Output on page 174.</p> <p>To view the fields to export, view the header row in your .csv file after you run the process.</p>
Export definition (this field also appears on the Generate header file screen Generate header file under Tasks)	<p>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 planned gift acknowledgement data with the <i>Word</i> form template.</p> <p>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 planned gift acknowledgements. For more information, see Generate a Header File on page 204.</p> <p>To view the fields to export, view the header row in your .csv file after you run the process.</p>
Site	<p>System administrators can establish security access to letters based on site. When you select one or more sites in the Site field, only users associated with the selected sites can access the letter.</p>

Edit a Planned Gift Letter

After you create a planned gift 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 planned gift letter name, the name updates on existing planned gifts that contain the letter.

► Edit a planned gift letter

1. From the Letters tab, in the Letter grid, select a planned gift letter and click **Edit**. The Edit a letter screen appears.
2. 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 170.
3. Click **Save**. You return to the Letters tab.

Delete a Planned Gift Letter

You can delete a planned gift letter at any time. If you delete a planned gift 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 planned gift letter if one of the three conditions exist.

- The planned gift letter is not assigned to any planned gifts.
- The planned gift is not assigned to any letter process in the **Letters** table.
- It is not selected in the **Acknowledge revenue with letter** field for any planned gift acknowledgement process.

If the planned gift letter cannot be deleted, you can mark the letter inactive. For more information, see *Mark Inactive* on page 172.

► Delete a planned gift letter

1. From the Letters tab, in the Letters grid, select a planned gift letter and click **Delete**. A confirmation message appears.
2. Click **Yes**. The planned gift letter deletes. You return to the Letters tab.

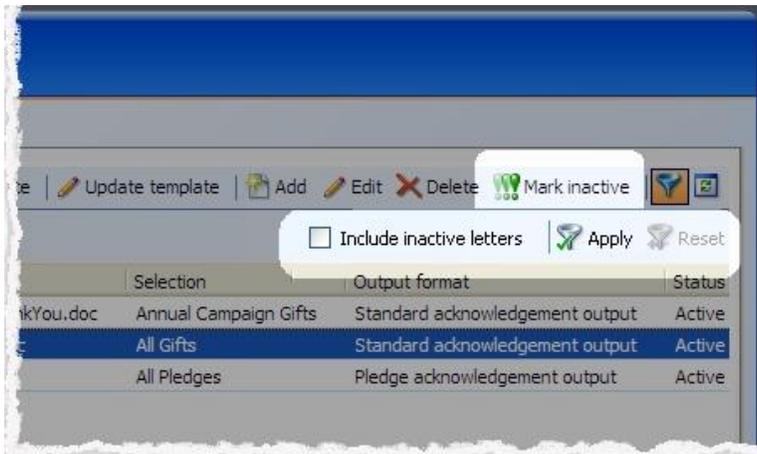
View Template

To open the planned gift 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 planned gift letter is no longer current and you do not want it to assign it to planned gifts or use it in a current planned gift acknowledgement process, mark the planned gift letter inactive. To do this, select the planned gift

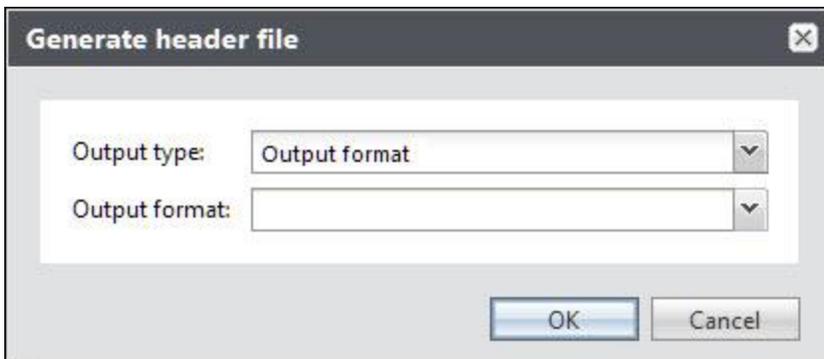
letter, and click **Mark Inactive**. A confirmation message appears. Click **Yes**. The planned gift letter no longer appears in the **Letters** grid.



To view inactive planned gift letters, click **Filter**. Mark **Include inactive letters**. Click **Apply**. Letters marked inactive appear in the **Letters** grid. To mark a planned gift letter active again, highlight the planned gift letter in the **Letters** grid. 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*.

Planned Gift Acknowledgement Output

When you export planned gift acknowledgements, a set of data exports based on the **Output format** selection on your planned gift letter. For information about the output formats for a planned gift letter, see *Add a Letter Screen* on page 170.

The following table explains the items contained in the planned gift 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
Planned gift 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
Vehicle code	LI
Vehicle	Life Insurance
Expected maturity	2025
Revocable	Yes
Anonymous	No
Net present value	\$10,000
Net present value date	09/15/2008
Remainder value	\$0.00
Remainder value date	09/15/2008
Recognition amount	\$40.00
Gift amount	\$40.00
Gift date	09/15/2008
Payout rate	25%
Payout amount	\$10,000
Payment frequency code	Quarterly
Payment period start	09/15/2008
Payment period end	09/15/2008
Discount rate	4.6%
Designation 1 name (exports from the Public)	MF Economics Scholarship Fund

Output	Example
name field on the designation. If Public name is blank or does not exist, the designation Name exports)	
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 amount	\$40.00
Beneficiary 1 name	John J. Smith
Beneficiary 1 relationship	Nephew
Beneficiary 1 age	55
Beneficiary 1 dependency	Primary beneficiary
Beneficiary 1 type	Donor + Non-Income
Constituent beneficiary 1	Yes
Beneficiary 2 name	John J. Smith
Beneficiary 2 relationship	Nephew
Beneficiary 2 age	55
Beneficiary 2 dependency	Primary beneficiary
Beneficiary 2 type	Donor + Non-Income
Constituent beneficiary 2	Yes
Pooled income fund code ID	CRG
Pooled income fund total units	200
Pooled income fund percent	25%
Asset type	Car
Asset description	Town Car
Asset value	\$45,000
Asset cost basis	\$0.00
Asset valuation method code	Market price
Asset valuation source	Car tables
Relationship 1 name	John J. Smith
Relationship 1 type	Attorney
Relationship 2 name	John J. Smith
Relationship 2 type	Attorney
Pooled income fund	Charitable Remainder Gift
Process date	09/15/2008
Process acknowledge date	09/15/2008
Planned gift letter code name	Charitable Gift Annuity Thank You

Add Assign Planned Gift Letter Process

After you create a planned gift letter, you must assign it to the planned gift you want the letter to acknowledge. For example, you create the Annuity Thank You letter to acknowledge all annuity planned gifts. After the planned gift letter is created, you must assign it to planned gifts for annuities.

Note: The system administrator at your organization typically completes this process.

► Add an assign planned gift letter process

1. From the Letters tab, in the **Assign letters processes** grid, click **Add**. The Add assign letters process appears.

Add an assign letters process

Name:

Description:

Site:

Criteria

Assign letters to: All planned gifts
 Selected planned gifts
 Selection:

Include: All letters
 Selected letters

Letter
<input type="text"/>

Only consider planned gifts added since last run

Results

These options may be modified at run time.

Create output selection

Selection type:

Selection name:

Overwrite existing selection

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 an Assign Letters Process Screen](#) on page 177.

- 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 is a required field with 100 character length field name. Enter a name for the letter process that is easily recognizable when you assign letters to revenue.
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 pledges."
Site	Select the site that uses this process. If the process is available to users associated with any site, select "All sites."
Assign letters to: All planned gifts	To generate acknowledgements for all planned gifts, select this option.
Assign letters to: Selected planned gifts	To choose a Revenue Detail query to assign a letter, select this option. When you select this, the Selection field enables.
Selection	To specify a Revenue Detail 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 Planned Gift. If you choose an Ad-hoc or Smart query, you can click Edit Query to modify the query.
Include: Assign all letters	To assign letters in this process to revenue without the assigned letter, select this option. The process does not assign the same letter twice to a planned gift. 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 a planned gift. 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, see Add a Letter Screen on page 170.
Only consider planned gifts added since last run	To assign letters to new planned gifts added to the database since the assign letters process last run, select this checkbox.
Create output selection	To create a query for the individuals or gifts contained in the acknowledgement process, select this checkbox. If you select this checkbox, you enable the remaining checkbox and fields.
Selection type	When you select Create output selection , this field is a required. Choose to create a Constituent or Planned Gift type of selection.
Selection name	When you select Create output selection , this field is a 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.

Edit an Assign Planned Gift Letter Process

After you assign a planned gift letter process, you may need to update the information. For example, you may need to assign selected planned gift types instead of all planned gifts.

Note: The system administrator at your organization typically completes this process.

► **Edit an assign planned gift letter process**

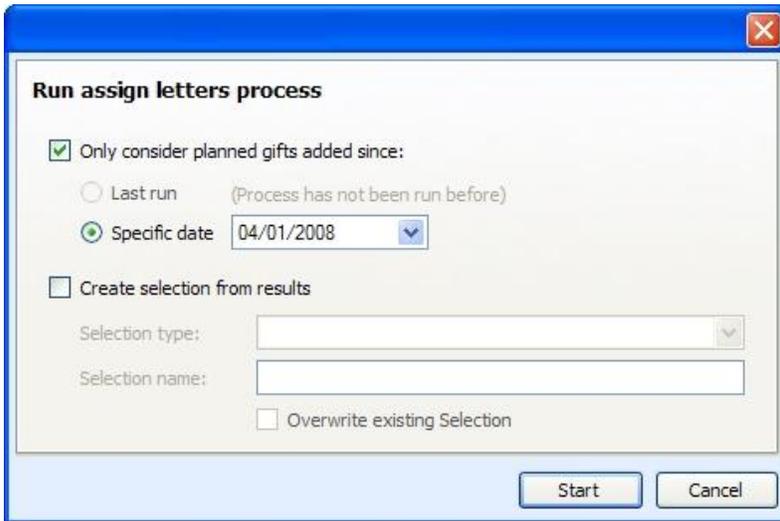
1. From the Letters tab, in the Assign letters processes grid, select a letter process and click **Edit**. The Edit assign letters process screen appears.
2. Make changes as necessary. The items on this screen are the same as on the Add assign letters process screen. For a detailed explanation of the options, see Add an Assign Letters Process Screen on page 177.
3. Click **Save**. You return to the Letters tab.

Run an Assign Planned Gift Letter Process

After you add or edit the letter process, you assign the letters to planned gifts by running the process.

► **Run an assign planned gift letter process**

1. To process your planned gift 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 178.

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 Planned Gift Letters on page 179.

Run Assign Letters Process Screen

The table below explains the items on this screen. For information about how to access this screen, see Run an Assign Planned Gift Letter Process on page 178.

Screen Item	Description
Only consider planned gifts added since	To assign letters to new planned gifts added to the database since the assign letters process last run, select this checkbox.
Last run	To assign letters to new planned gifts added to the database since planned gift acknowledgements were last processed, select this option.
Specific date	To assign letters to new planned gifts 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

Screen Item	Description
	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 query for the individuals or gifts contained in the acknowledgement process, select this checkbox. When you select this checkbox, you enable the remaining checkbox and fields.
Selection type	When you select Create selection from results , this field is required. Choose to create a Constituent or Planned Gift 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 an Assign Planned Gift Letter Process

You can delete an assign planned gift letter process at any time. When you delete a planned gift 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.

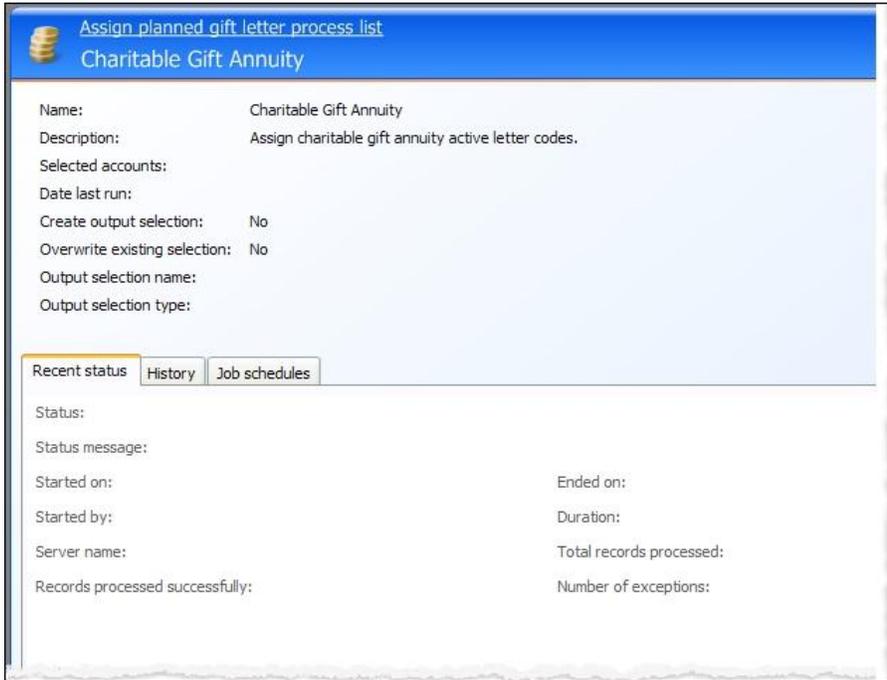
Warning: If you delete a process, you also delete the process status page and the history for the process. For more information, see [Go To Process Status Page for Planned Gift Letters](#) on page 179.

► Delete an assign planned gift letter process

1. From the Letters tab, in the Assign letters processes grid, select a planned gift letter process 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 Planned Gift Letters

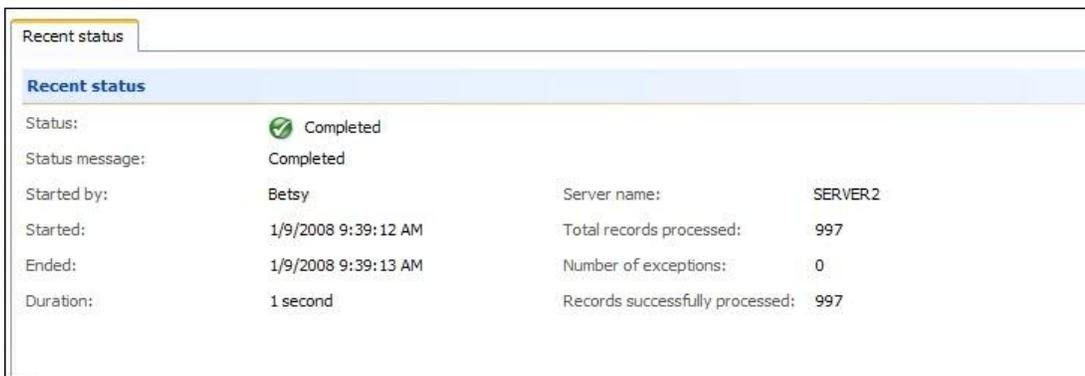
After you run a letter process, the process status page appears automatically.



From the **Assign letters processes** grid, 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 letter process. To make a change to this information, edit the assign planned gift letter process.

Recent Status Tab

On the Recent Status tab, you view the details of the most recent assign instance of the planned gift 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 planned gift letters processed; and how many planned gift 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 planned gift 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 planned gift letters.

This information generates each time you run a planned gift letter process. Therefore, it is likely you have multiple rows of information in this grid.

Status	Status message	Started by	Started	Ended	Duration	Number of records processed	Server name
Completed	Completed	Betsy	01/07/2007	01/07/2007	1 second	997	INFINITYSERV

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 planned gift 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**.

Generate WSF for Assign Planned Gift Letter Process

A Windows Scripting File (.wsf) is an executable script file format for Windows that can incorporate JScript (.js) or VBScript (.vbs) routines and include XML elements. On the Planned Gift Acknowledgements page, you can select a export process and use either JScript or VBScript language to generate a .wsf file of the process to use with another application. You can use Windows Task Scheduler to schedule tasks to run the exported Windows Scripting File through the other application at a time that is most convenient to your organization.

Note: The system administrator at your organization typically completes this process.

You can generate a Windows Scripting File for a process from its status page.

Job Schedule for Assign Planned Gift 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.

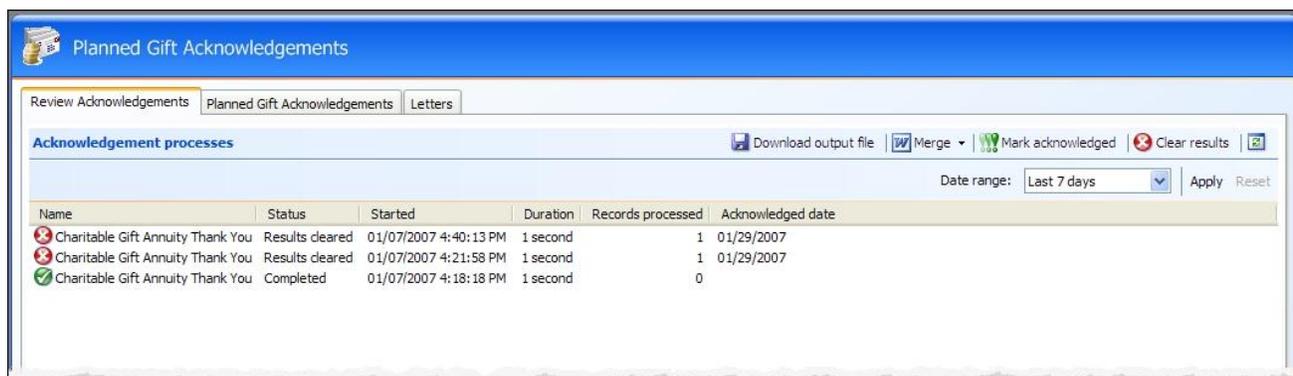
You can create a job schedule for a process from its status page.

Create Job Screen for Assign Planned Gift 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.

Review Planned Gift Acknowledgements

From the Review Acknowledgements tab, view details for each run of your planned gift acknowledgement processes. For example, you can view output information for the Annuity Thank You, Planned Gift Thank You, and Bequest Thank You at the same time in the **Acknowledgement processes** grid.



The **Acknowledgement 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 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 planned gift acknowledgements, click **Merge, letter**. The planned gift acknowledgements merge automatically in Word. Save the merged planned gift 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 **Mark letters 'Acknowledged' when process completes** when you add or edit the process, this button is enabled. To mark assigned letters for planned gifts acknowledged, click **Mark acknowledged**. A confirmation message appears. Click **Yes**.
- **Clear results:** To run a planned gift acknowledgment process again, use **Clear results** to reverse the process. For example, you process planned gift acknowledgements with the wrong planned gift acknowledgement date. To undo the process, click **Clear results**. Then, run the process again with the correct planned gift acknowledgement date. When you clear results, the output and merged documents are deleted, the planned gift acknowledgement date is deleted on the planned gift, and the planned gift acknowledgement status becomes Not acknowledged on the planned gift.
- **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

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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 1.

Send reminders to constituents who have an overdue or outstanding balance on a pledge. By reminding constituents to pay pledges, you improve the financial return of a pledge to your organization. In **Reminders**, you can create reminders that contain detailed information about a pledge and its current pledge installment.

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.

Note: You can also use the **Reminders** process to generate reminders for recurring gifts.

To begin learning how to use Reminders, see Microsoft Word for Reminders on page 183 and Reminder Tasks on page 184.

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.

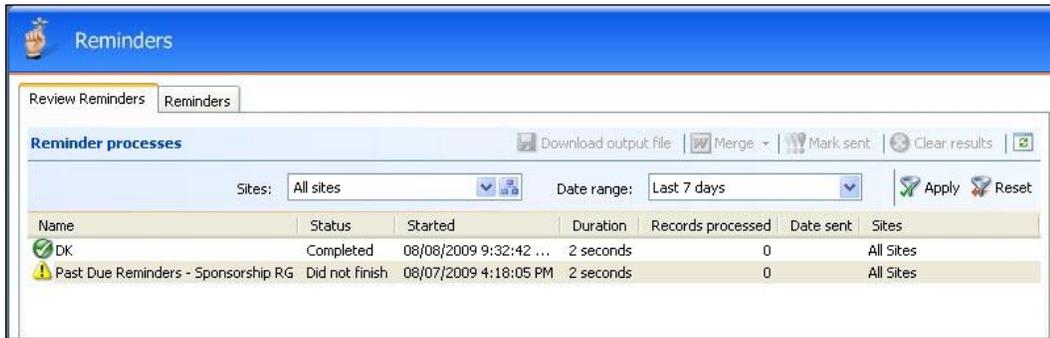
When you create the *Word* form template the first time, generate a header file from the program to use in the form template for merged fields. The header file exports in.csv format. For more information, see Generate a Header File on page 204 and Add Reminder Process Screen on page 185.

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

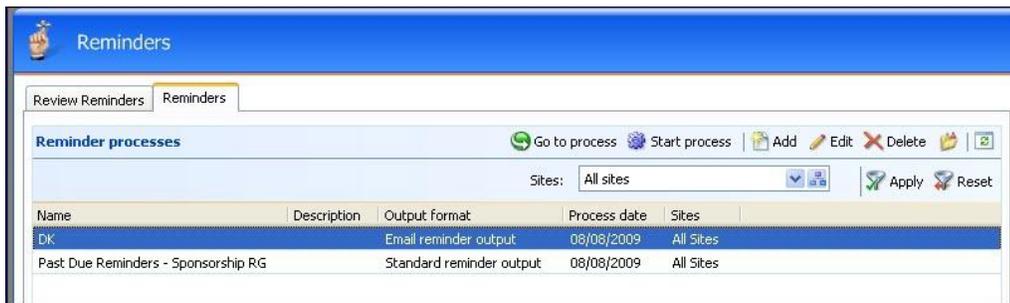
Use **Reminders** to manage reminder processes in your database. To access **Reminders**, select **Marketing and Communications, Reminders** from the menu bar. The Reminders page appears.



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 193.

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 185.

For a detailed list of the default export fields, see [Reminder Output](#) on page 193.

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.

Screen Item	Description
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."
Site	Select the site that uses this process. If the process is available to users associated with any site, select "All sites."
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 <i>Word</i> 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 <i>Word</i> . To update the file, click Clear file and select the document in this field again.
Label template	You must use a <i>Word</i> 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 <i>Word</i> . To update the file, click Clear file and select the document in this field again.
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 <i>Word</i> 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 <i>Word</i> form template. Examples include TOTALPLEDGEAMOUNT and PLEDGEBALANCE. This output format always uses primary address. For more information, see Generate a Header File on page 204 and Reminder Output on page 193. 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 <i>Word</i> 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 204. 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

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 185.

For a detailed list of the default export fields, see [Reminder Output](#) on page 193.

5. Click **Save**. You return to the Reminders page.

Run Reminder Process

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.

Run reminder process

Process name: DK test

Calculate amounts as of: Today

Exclusions

Mark reminders sent when process completes

Sent date: Today

Create selection from results

Selection type: Constituent

Selection name: Test

Overwrite existing selection

Start Cancel

For information about the items on this screen, see [Run Reminder Process Screen](#) on page 189.

For a detailed list of the default export fields, see [Reminder Output](#) on page 193.

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 191.

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.
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. For more information about the Exclusions screen, see Set Exclusions for a Correspondence Process on page 110.
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.

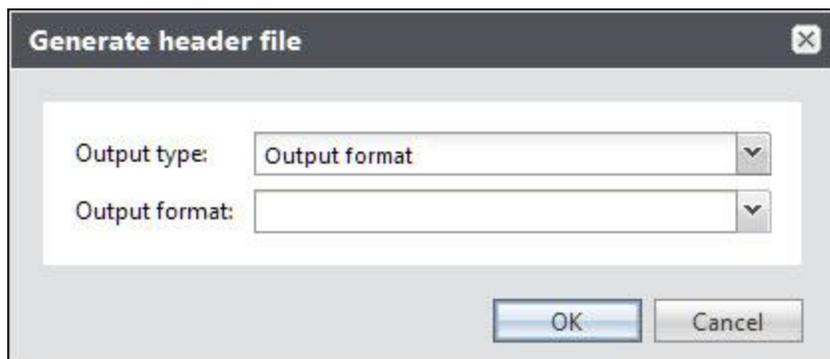
Warning: If you delete a process, you also delete the process status page and the history for the process. For more information, see Go To Process Status Page for Reminders on page 191.

► 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 193.

- 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**.

Generate WSF for Reminders

A Windows Scripting File (.wsf) is an executable script file format for Windows that can incorporate JScript (.js) or VBScript (.vbs) routines and include XML elements. On the Reminder revenue list page, you can select a export process and use either JScript or VBScript language to generate a .wsf file of the process to use with another application. You can use Windows Task Scheduler to schedule tasks to run the exported Windows Scripting File through the other application at a time that is most convenient to your organization.

Note: The system administrator at your organization typically completes this process.

You can generate a Windows Scripting File for a process from its status page.

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 190.

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 194.

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

Output	Example
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
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:

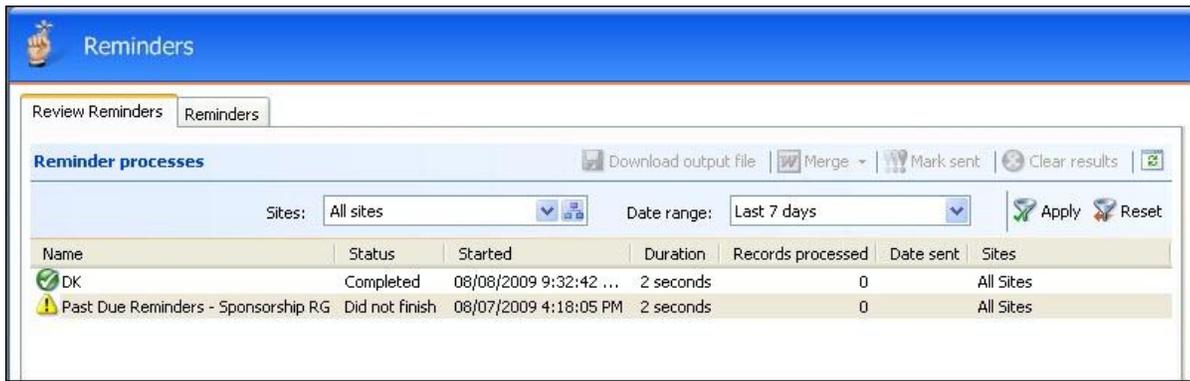
- 5 applications per transaction
- 10 recognition credits per application

Output	Example
Business process output PKID	1
Revenue ID	24ffdc3a-31fc-47a8-a2ce-00ca801248eb
Constituent name	John J. Smith (individual) or ABC, Inc. (organization)

Output	Example
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
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**.

Receipts

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Use **Receipts** to generate receipts for payments from constituents. Receipts confirm that you received the gift and help constituents track donations for tax purposes. When you process receipts, the program can update revenue with the receipt number, date, and status.

Receipt Preferences and Scenarios

To correctly generate the receipts your constituents want to receive, the program considers constituent receipt preferences and your organization establishes best practice scenarios to send receipts. Read the information in this section to learn about receipt preferences and the main scenarios for receipt tasks.

Receipt Preferences

Receipt preferences include two types: Per payment and Consolidated. Your system administrator can establish a system setting to use to receipt payments for recurring gift and pledge. For more information, see Receipt and Acknowledgement Preferences on page 43. Other gifts, such as a one time cash gift, default to a per payment receipt type automatically.

If a constituent has a receipt preference, the preference is stored in the constituent record. To do this, click **Communications** in the **More information** frame. A constituent's preference overrides the system default preference. For more information, see the *Constituents Guide*.

A constituent's receipt preference for an individual gift overrides the constituent record receipt preference. For example, Marilyn Mahoney's receipt preference is consolidated. However, Marilyn donates a \$5000 check and wants a receipt for the gift immediately. To do this, click **Change receipt preference** in the **Tasks** frame on the gift record. Marilyn receives the receipt for the \$5000 gift. Her other gifts are not receipted until you generate consolidated receipts. For more information about changing the gift receipt preference, see the *Revenue Guide*.

Receipt Scenarios

Three main scenarios exist to receipt constituents. Your organization may consistently use one of these scenarios, a combination of these scenarios, or you may discover your own scenario for processing receipts. The scenarios are driven by the receipt type you select for the receipt process. For example, to receipt individual gifts immediately, the receipt type is per payment. To send one receipt for all gifts, the receipt type is consolidated.

For more information about receipt types, see [Add Receipt Process](#) on page 199.

Receipt One-Off Gifts Immediately and Regular Gifts Annually

In one year, Audrey Andrews donated 12 recurring payments of \$10 each to the Endowment Campaign. In June, she donated \$20 to the Library Fund. Using this scenario, you send an individual receipt to Audrey in June for the \$20 donation to the Library Fund. At the end of the year, you send her a consolidated receipt for the total amount of her recurring gift payments. Using this example, the receipt is for \$120. The receipt includes a list for each recurring payments. The list includes date and amount for each payment.

Donors Select to Receive One Receipt for All Gifts

Phillip Thomas is a regular gift donor. In addition to his regular gifts, he often makes additional donations to support current causes and urgent needs. Phillip requests to receive one consolidated receipt for all donations at the end of the year. You track his preference on his constituent record. Using this scenario, you send Phillip one consolidated receipt for all payments. The receipt lists the date and amount for each payment.

Tip: You select a receipt preference for a donor on the constituent record. To do this, click **Communications** in the **More information** frame. For more information, see the *Constituents Guide*. You can override a constituent's receipt preference on a gift record. To do this, click **Change receipt preference** in the **Tasks** frame. For more information, see the *Revenue Guide*.

Donors Select to Receive a Receipt Immediately

Your organization adopts the policy to receipt all individual gifts immediately and to receipt all recurring and pledge payments annually. However, Susan McDonald prefers to receive a receipt for her recurring payments immediately. You track her preference for a per payment receipt in her constituent record. Using this scenario, Susan receives a receipt for each payment immediately. Recurring and pledge payments for other donors are held until the end of year for the consolidated receipt process.

Microsoft Word for Receipts

Before you run receipts, we recommend creating a receipt form template in Microsoft *Word* first. This form template contains the text to repeat in each receipt. You merge the template with receipt data to create the receipts you send to constituents. By creating the *Word* form template first, you can generate merged receipts easily after you run the receipt process task in this program.

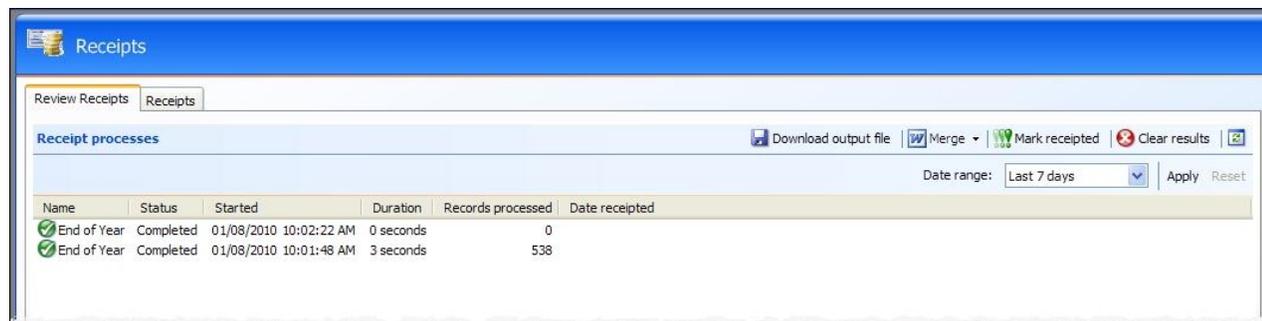
When you create the *Word* form template the first time, generate a header file from the program to use in the form template for merged fields. The header file exports in .csv format. For more information, see [Generate a Header File](#) on page 204 and [Add a Receipt Process Screen](#) on page 200.

Note: After you merge the receipt *Word* document with receipt data, you can print the receipts to mail 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.

Receipt Tasks

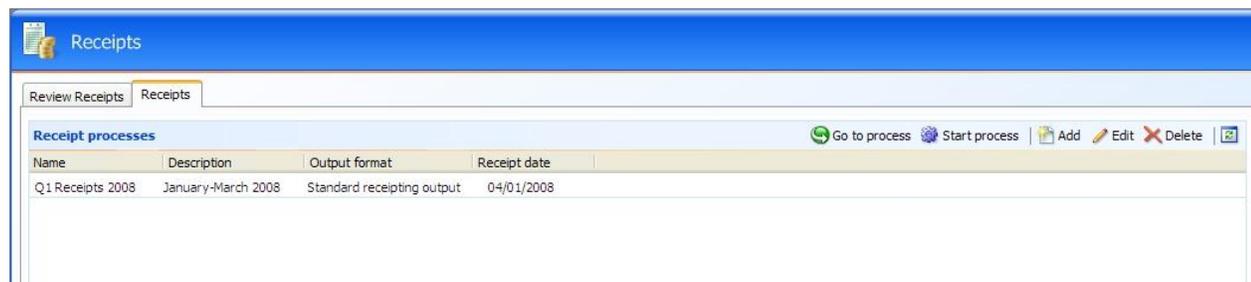
Use **Receipts** to manage the receipt processes in your database. To access **Receipts**, select **Marketing and Communications, Receipts** from the menu bar. The Receipts page appears.



On the Review Receipts tab, view details for multiple recently run processes. The **Receipt processes** grid displays these 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 Receipts on page 209.

Select the Receipts tab to view the **Receipt processes** grid that lists the receipt processes in the database. Information such as **Name**, **Description**, **Output format**, and **Receipt date** appear for each process. You enter this information when you add the receipt process to the database.



Depending on your security rights and system role, you perform functions to manage receipt processes in the database.

Add Receipt Process

You establish a process to generate different types of receipts. For example, you can create monthly receipts for major gifts and save the settings you select as a receipt process. Each month you can call up the process when you need to generate major donor receipts again.

Note: The system administrator at your organization typically completes this process.

► Add receipt process

1. On the Receipts page, click **Add**. The Add a receipt process screen appears.

For information about the items on this screen, see [Add a Receipt Process Screen](#) on page 200.

For a detailed list of the default export fields, see [Receipt Output](#) on page 209.

- To close the Add receipt process screen, click **Save**. You return to the Receipts page. The data you entered appears in the **Receipt processes** grid.

Add a Receipt 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."
Site	Select the site that uses this process. If the process is available to users associated with any site, select "All sites."
Receipt type	You must select Per payment or Consolidated. To process a receipt for each gift, select Per payment. To process one receipt for multiple gifts, select Consolidated. The receipt type system default is Per payment. This can be changed for recurring gift payments and pledge payments on the Configure system receipt and acknowledgement preferences configuration task. System defaults are used when the donor's communication preference is No preference.
Receipt stack	If you use receipt stacks, select the receipt stack to associate with the receipt process. For information, see Receipt Stacks on page 45.
Output type	You must select whether to generate receipts 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. If the selected receipt type is "Consolidated," you must use the "Output format"

Screen Item	Description
	output type.
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 receipts to merge with the <i>Word</i> form template. The output format options vary depending on your selection in the Receipt type field. For more information, see Generate a Header File on page 204, Output Formats for Receipts on page 205, and Receipt Output on page 209. 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 receipt data with the <i>Word</i> 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 receipts. For more information, see Generate a Header File on page 204. To view the fields to export, view the header row in your .csv file after you run the process.
Letter template	You must use a <i>Word</i> form template to generate a receipt. To navigate to your receipt form on your hard drive or network, click Choose file . After you save a process, the document name becomes a link. To make change the file, edit the document in <i>Word</i> . To update the file, click Clear file and select the document in this field again.
Label template	You must use a <i>Word</i> 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 <i>Word</i> . To update the file, click Clear file and select the document in this field again.
Receipt: All 'Not receipted' payments	To generate receipts for all revenue with a Receipt status of "Not receipted," select this option. If the receipt type is "Consolidated," you must use the "Output format" output type.
Include payments marked for re-receipt that will receive a new receipt number	Select this option to include re-receipt payments that receive a new receipt number.
Include payments for re-receipt that will use the same receipt number.	Select this option to include re-receipt payments that keep the same receipt number.
Receipt: Selected payments	To choose a Revenue query of records to receipt, select this option. When you select this, the Selection field enables. Recurring gifts and pledges cannot be receipted. If the receipt type is "Consolidated," you cannot select payments.
Selection	To specify a Revenue Transaction selection, click the binoculars. The Selection Search screen appears for you to add or select an existing query to use for receipts. If the selection you need does not appear in search results, confirm that the Record type is Revenue Transaction. 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. For more information about the Exclusions screen, see Set Exclusions for a

Screen Item	Description
	Correspondence Process on page 110.
Mark revenue 'Received' when process completes	To change the Receipt status on revenue from Not received to Received when the process completes, select this checkbox. If you do not select this checkbox, Pending appears in Receipt status when the process completes. The status remains Pending until you select the revenue received or you clear the results. To preview the data for accuracy after you run the process, do not select the checkbox. After you run a receipt process, you cannot run the process again for the same revenue. You can mark revenue received at a later time on the Recent Status tab or History tab. You can also mark revenue received on the Review Receipts tab.
Receipt date	When you select the Mark revenue 'Received' when process completes checkbox, this field enables. This date defaults on the payment in the Receipt date field. 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 payments contained in the receipt process, select this checkbox. If you select this checkbox, the remaining fields and checkbox enables.
Selection type	When you select Create selection from results , this is a required field. Choose to create a Constituent or Revenue Transaction 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 Receipt Process

After you create a receipt process, you may need to update the information. For example, you may need to select another selection for the process or change the receipt date. To do this, edit the receipt process.

Note: The system administrator at your organization typically completes this process.

► Edit receipt process

1. From the Receipts page, select a receipt process and click **Edit**. The Edit receipt process screen appears.
2. Make changes as necessary. The items on this screen are the same as on the Add receipt process screen. For a detailed explanation of the options, see [Add a Receipt Process Screen](#) on page 200.
For a detailed list of the default export fields, see [Receipt Output](#) on page 209.
3. Click **Save**. You return to the Receipts page

Run Receipt Process

After you add or edit the receipt process, you run the process to generate the receipts for donors. Receipts generate at the payment level. For example, Paul Frantz donates \$100 check to your organization. You apply \$50 of the donation to his pledge for the last pledge installment and create a gift for the remaining \$50. When you generate receipts, Paul receives one receipt for both revenue types.

Warning: When you generate a single receipt for two revenue types, the output for the receipt includes only payment level information. Using the above example, the output only includes that Paul's receipt has a

payment type of Check and a gift amount of \$100.

► Run receipt process

1. To run receipts, select the process, and click **Start process**. The Run receipt process screen appears.

For information about the items on this screen, see [Run Receipt Process Screen](#) on page 203.

For a detailed list of the default export fields, see [Receipt Output](#) on page 209.

2. To generate receipts, click **Start**. The process begins. After the process completes, the process status page appears. For more information, see [Go To Process Status Page for Receipts](#) on page 206.

Warning: After you run a receipt process, you cannot run the process again for the same revenue. If you make a mistake, you must clear the results to run the process again. For more information, see [Go To Process Status Page for Receipts](#) on page 206.

Run Receipt Process Screen

The table below explains the items on this screen.

Screen Item	Description
Process name	Process name displays the name entered in the Name field on the Add (or Edit) receipt process screen.
Receipt stack and Stack type	These fields display the receipt stack and stack type selected on the Add (or Edit) receipt process screen.
Use starting receipt number	The number that appears is the next available receipt number for the selected receipt stack. To change the starting receipt number, enter a new number. To reset it to the next available number for this stack, click Next Available . If you are processing consolidated receipts, the same receipt number defaults for all gifts for a constituent.
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

Screen Item	Description
	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. For more information about the Exclusions screen, see <i>Set Exclusions for a Correspondence Process</i> on page 110.
Mark revenue ‘Received’ when process completes	To change the Receipt status on revenue from Not receipted to Receipted when the process completes, select this checkbox. If you do not select this checkbox, Pending appears in Receipt status when the process completes. The status remains Pending until you mark the revenue receipted or you clear the results. To preview the data for accuracy after you run the process, do not select the checkbox. After you run a receipt process, you cannot run the process again for the same revenue. You can mark revenue receipted at a later time on the Recent Status tab or History tab. You can also mark revenue receipted on the Review Receipts tab.
Receipt date	When you select the Mark revenue ‘Received’ when process completes checkbox, this field enables. This date defaults on the payment in the Receipt date field. 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 payments contained in the receipt process, select this checkbox. If you select this checkbox, the remaining fields and checkbox enables.
Selection type	When you select Create selection from results , this is a required field. Choose to create a Constituent or Revenue Transaction 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 Receipt Process

You can delete a receipt process at any time. When you delete a receipt 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 Receipts* on page 206.

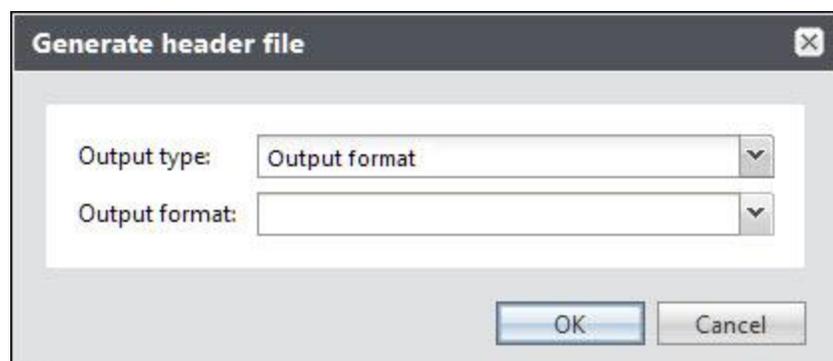
► Delete receipt process

1. From the Receipts page, select a receipt process and click **Delete**. A confirmation message appears.
2. Click **Yes**. The process deletes. You return to the Receipts 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 Receipts

Output formats determine the fields to export for receipts. Output formats are dependant upon the receipt type you select for a receipt process. If the receipt type is per payment, the applicable output formats are standard, seasonal address, formatted mail, and email. An extended output format exists for formatted mail. If the receipt type is consolidated, the applicable output formats are gift summary, gift detail, formatted mail gift detail, formatted mail gift summary, email gift detail, and email gift summary.

For more information about output formats, see Receipt Output on page 209.

Per Payment Receipt Type:

- Standard receipt output - exports standard receipt fields to merge with the *Word* form template. Examples include PAYMENTMETHOD and RECEIPTAMOUNT. This output format always uses primary address.
- Seasonal address receipt output - exports standard receipt 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.
- Email receipt output - uses only mail preferences set for the primary email address.
- Formatted mail receipt 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.
- Formatted mail receipt 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 benefits and tributes per transaction. For more information, see *Extended Output Formats* on page 211.

Consolidated Receipt Type:

- Gift detail - exports revenue details for each payment. The list includes **Total constituent payment amount**, **Total constituent receipt amount**, **Total constituent benefit amount**, and **Total number of transactions** for the constituent on the consolidated receipt.
- Email gift detail - uses only mail preferences set for the primary email address for consolidated, gift detail receipts.
- Email gift summary - uses only mail preferences set for the primary email address for consolidated, gift summary receipts.
- Formatted mail gift detail - uses address process options for consolidated, gift detail receipts. 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 gift summary - uses address process options for consolidated, gift summary receipts. 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.
- Gift summary - exports one row of summary data for each constituent. The row contains **Total constituent payment amount**, **Total constituent receipt amount**, **Total constituent benefit amount**, and **Total number of transactions** information for a constituent.

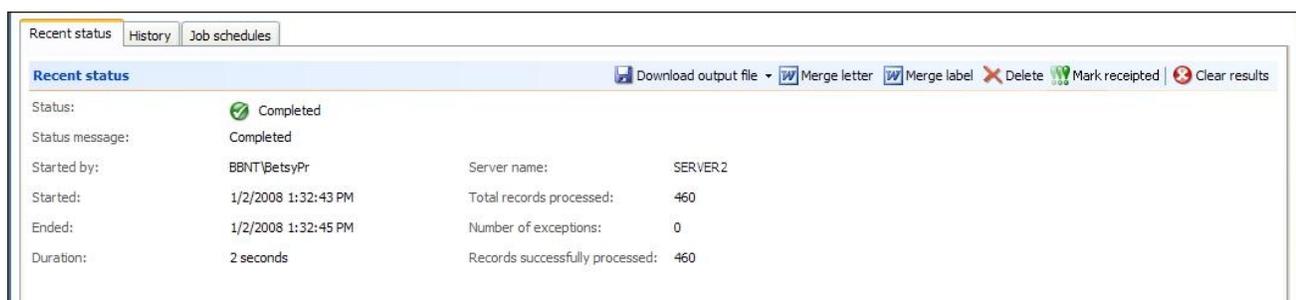
Go To Process Status Page for Receipts

After you run a receipt process, the process status page appears automatically.

From the Receipts 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 receipt process. To make a change to this information, edit the receipt process.

Recent Status Tab

On the Recent Status tab, you view the details of the most recent instance of the receipt 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 receipts processed; and how many receipts 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.

Receipts generate at the payment level. For example, Paul Frantz donates \$100 to your organization. You apply \$50 of the donation to his pledge for the last pledge installment and create a gift for the remaining \$50. When you generate receipts, Paul receives one receipt.

Warning: If the **Merge letter** and **Merge label** buttons are disabled, check your receipt process to confirm you selected the *Word* templates in the **Letter template** and **Label template** fields.

- **Merge letter:** To merge the letters for your receipts, click **Merge letter**. The receipts merge automatically in Word. Save the merged receipt 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.
- **Delete:** To delete the most recent instance of the process, click **Delete**.
- **Mark receipted:** If you do not select the **Mark revenue 'Receipted' when process completes** checkbox when you add or edit the process, this button is enabled. To mark the revenue in the process receipted, select the process and click **Mark receipted**. A confirmation message appears. To change the **Receipt status** to Receipted, click **Yes**.
- **Mark for re-receipt:** If you want to mark all payments within a process for re-receipt, select it and click **Mark for re-receipt**. The Re-receipt payments screen appears. Enter a reason, details about the reason, and select if you want the process to generate new numbers. If you clear the checkbox, the process uses the same numbers. All information entered on the Re-receipt payments screen is added to each payment.
- **Unmark for re-receipt:** If you want to unmark all payments within a process for re-receipt, select it and click **Unmark for re-receipt**. A confirmation message appears. Click Yes. All payments originally marked for re-receipt are now unmarked.
- **Clear results:** To run a receipt process again, use **Clear results** to reverse the process. For example, you process receipts with the wrong receipt date. To undo the process, click **Clear results**. Then, run the process again with the correct receipt date. When you clear results, the output and merged documents are deleted, the receipt date and number (if applicable) is deleted on the payment, the receipt status becomes "Not receipted" on the payment and the next available receipt number returns to the number prior to running the process.

History Tab

On the History tab, you view the history for each run of the receipt 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 receipts. This information generates each time you run a receipt process. Therefore, it is likely you have multiple rows of information in this grid.

Status	Status message	Started by	Started	Ended	Duration	Number of records processed	Server name	Date received
Results cleared	Results cleared	Betsy	4/1/2010 1:32:43 PM	4/1/2010 1:32:45 PM	2 seconds	460	SERVER.2	4/1/2010

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.

Receipts generate at the payment level. For example, Paul Frantz donates \$100 to your organization. You apply \$50 of the donation to his pledge for the last pledge installment and create a gift for the remaining \$50. When you generate receipts, Paul receives one receipt.

- **Merge letter:** To merge the letters for your receipts, click **Merge letter**. The receipts merge automatically in Word. Save the merged receipt 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 receipt 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 receipted:** If you do not select the **Mark revenue 'Receipted' when process completes** checkbox when you add or edit the process, this button is enabled. To mark the revenue in the process receipted, select the process and click **Mark receipted**. A confirmation message appears. To change the **Receipt status** to Receipted, click **Yes**.
- **Clear results:** To run a receipt process again, use **Clear results** to reverse the process. For example, you process receipts with the wrong receipt date. To undo the process, click Clear results. Then, run the process again with the correct receipt date. When you clear results, the output and merged documents are deleted, the receipt date and number (if applicable) is deleted on the payment, and the receipt status becomes Not receipted on the payment.
- **Filter:** As the history list grows over time, it may be difficult to find a particular receipt 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**.

Generate WSF for Receipts

A Windows Scripting File (.wsf) is an executable script file format for Windows that can incorporate JScript (.js) or VBScript (.vbs) routines and include XML elements. On the Receipt revenue list page, you can select a export process and use either JScript or VBScript language to generate a .wsf file of the process to use with another application. You can use Windows Task Scheduler to schedule tasks to run the exported Windows Scripting File through the other application at a time that is most convenient to your organization.

Note: The system administrator at your organization typically completes this process.

You can generate a Windows Scripting File for a process from its status page.

Job Schedules for Receipts

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 Receipts

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-Receipts

You can process a new receipt for a payment that was previously receipted. Payments with a receipt status that includes “eligible for re-receipt” can be receipted again.

A payment becomes eligible for a new receipt when you adjust the payment amount, payment date, receipt amount, or designation, or select a different constituent for the payment. On the payment record, you can also use the **Re-receipt payment** task to change the receipt status manually to “eligible for re-receipt.”

Note: Additionally, the **Re-receipt payments** checkbox on the **Receipt and acknowledgement preferences** configuration task must be selected to process new receipts for payments previously receipted. For more information, Receipt and Acknowledgement Preferences on page 43.

When a payment is eligible for a new receipt, the re-receipt is processed the same way the original or previous receipt was generated. The process remains the same for all receipts. For more information, see Add Receipt Process on page 199 or Edit Receipt Process on page 202.

When you generate re-receipts, it is important to remember the following.

- When you generate a new receipt for a previously receipted payment, the payment receives a new receipt date and number. Until you process the new receipt and mark it “Receipted,” the previous receipt date and number appear on the payment record.
- If the payment was previously included in a consolidated receipt, a new consolidated receipt generates when you re-receipt the payment. Each transaction in the original consolidated receipt is included in the re-receipt.
- When more than one receipt is associated with a payment, a **Receipt history** link appears on the payment record. View this history for individual receipt details. For more information, see the *Revenue Guide*.
- When more than one receipt is associated with a payment, a **Receipt history** link appears on the payment record. View this history for individual receipt details. For more information, see the Payment Records section of the help file.

Receipt Output

When you process receipts, a set of data exports based on the **Output format** selection on your receipt process. Review the tables in this section for field information contained in an export.

Receipt Type: Per Payment

If the receipt type for the process is Per payment, the available output formats are Standard receipt output, Seasonal address receipt output, Formatted mail receipt output, and Email receipt output. For more information about these output formats, see [Output Formats for Receipts](#) on page 205.

A Formatted mail receipt 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 benefits and tributes per transaction.

Warning: For a constituent's information to appear in fields of the Email receipt 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 per payment receipt 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
Transaction 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
Job title	Sales Manager
Address block*	100 Main Street, Apartment D
City*	Charleston
State*	SC
Zip code*	29492
Country*	USA
Email address	jjsmith@somewhere.com
Email address	jjsmith@somewhere.co.uk
Date	05/10/2009
Payment amount	\$150.00
Receipt amount	\$150.00
Total benefit amount	\$15.00
Payment method	Cash
Stock issuer	Blackbaud
Stock symbol	BLKB
Stock number of units	100
Stock median price	\$15.00
Property/GIK subtype	Acreage, Computers
Anonymous	No

Output	Example
Process date	05/10/2009
Process receipt number	12387
Previous receipt number	12387
Original receipt number	12387
Process receipt number (with receipt stacks)	aa12387
Previous receipt number (with receipt stacks)	aa12387
Original receipt number (with receipt stacks)	aa12387
Unique receipt number (with receipt stacks)	aa12387
Re-receipt reason code	Lost
Re-receipt reason details	Original receipt lost
Earliest receipt gift date	05/10/2009
Last receipt gift date	05/10/2009
Process receipt date	05/10/2009

Extended Output Formats

The following table explains the items contained in the formatted mail receipt 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 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
Transaction 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
Primary addressee	Mr John J. Smith, Jr.
Primary salutation	Mr Smith
Job title	Sales Manager
Address block	100 Main Street, Apartment D
State	SC

Output	Example
Zip code	29492
Country	USA
Date	05/10/2009
Payment amount	\$150.00
Receipt amount	\$150.00
Total benefit amount	\$15.00
Payment method	Cash
Stock issuer	Blackbaud
Stock symbol	BLKB
Stock number of units	100
Stock median price	\$15.00
Property/GIK subtype	Acreage, Computers
Anonymous	No
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
Benefit name**	Free Admission
Benefit quantity**	1
Benefit unit value**	\$15
Benefit total value**	\$15
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
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
Membership program	Adopt a Sea Turtle (if applicable)
Membership level	Individual (if applicable)
Membership expiration date	08/08/2011 (if applicable)

Output	Example
Constituent on pledge	Adam Johnson (if applicable)
Pledge amount	\$2,000 (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
Process receipt number	12387
Previous receipt number	12387
Original receipt number	12387
Process receipt number	12387
Previous receipt number	12387
Original receipt number	12387
Unique receipt number	12387
Process receipt number (with receipt stacks)	aa12387
Previous receipt number (with receipt stacks)	aa12387
Original receipt number (with receipt stacks)	aa12387
Unique receipt number (with receipt stacks)	aa12387
Re-receipt reason code	Lost
Re-receipt reason details	Original receipt lost
Earliest receipt gift date	05/10/2009
Last receipt gift date	05/10/2009
Process receipt date	05/10/2009
Gift in kind fair market value	Blue book value
Gift in kind item name	Vehicle

Receipt Type: Consolidated

If the receipt type for the process is Consolidated, the available output formats are Gift summary, Gift detail, Formatted mail gift detail, Formatted mail gift summary, Email gift detail, and Email gift summary. For more information about these output formats, see [Output Formats for Receipts](#) on page 205.

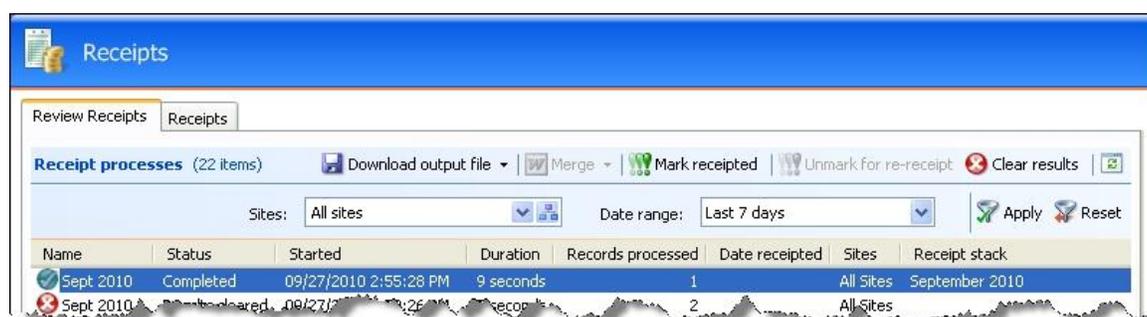
The following table explains the items contained in the consolidated receipt output formats. The asterisk (*) fields in the **Output** column indicate the additional fields that appear for the gift detail output formats.

Output	Example
Business process output PKID	1
Transaction ID	24ffdc3a-31fc-47a8-a2ce-00ca801248eb

Output	Example
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
Job title	Sales Manager
Address block	100 Main Street, Apartment D
City	Charleston
State	SC
Country	USA
Email address	jjsmith@somewhere.com
Total constituent payment amount	\$150.00
Total constituent receipt amount	\$135.00
Total constituent benefit amount	\$15.00
Total number of transactions	10
Date*	05/10/2009
Payment amount*	\$150.00
Receipt Amount	\$150.00
Total benefit amount*	\$15.00
Payment method*	Cash
Stock issuer*	Blackbaud
Stock symbol*	BLKB
Stock number of units*	100
Stock median price*	\$15.00
Property/GIK Subtype*	Acreage, Computers
Anonymous*	No
Process date	05/10/2009
Process receipt number	12387
Previous receipt number	12387
Original receipt number	12387
Process receipt number (with receipt stacks)	aa12387
Previous receipt number (with receipt stacks)	aa12387
Original receipt number (with receipt stacks)	aa12387
Unique receipt number (with receipt stacks)	aa12387
Re-receipt reason code	Lost
Re-receipt reason details	Original receipt lost
Earliest receipt gift date	05/10/2009
Last receipt gift date	05/10/2009
Process receipt date	05/10/2009

Review Receipts

From the Review Receipts tab, view details for each run of your receipt processes. For example, you can view output information for the End of Year Receipts, Major Gifts Receipts, and Monthly Receipts processes at the same time in the **Receipt processes** grid.



The **Receipt processes** grid lists information such as the **Status** of the process, when it was **Started**, and the **Records processed**. Depending on your security rights and system role, you perform functions to manage receipt 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 receipts, click **Merge, letter**. The receipts merge automatically in Word. Save the merged receipt document on your hard drive or network. To merge the data for your labels, click **Merge, label**. The your labels merge automatically in Word. Save the merged label document on your hard drive or network.

Warning: If the **Merge** buttons are disabled, check your receipt process to confirm you selected the *Word* templates in the **Letter template** and **Label template** fields.

- **Mark received:** If you do not select the **Mark revenue 'Received' when process completes** checkbox when you add or edit the process, this button is enabled. To mark the revenue in the process received, select the process and click **Mark received**. A confirmation message appears. To change the **Receipt status** to Received, click **Yes**.
- **Mark for re-receipt:** If you want to mark all payments within a process for re-receipt, select it and click **Mark for re-receipt**. The Re-receipt payments screen appears. Enter a reason, details about the reason, and select if you want the process to generate new numbers. If you clear the checkbox, the process uses the same numbers. All information entered on the Re-receipt payments screen is added to each payment.
- **Unmark for re-receipt:** If you want to unmark all payments within a process for re-receipt, select it and click **Unmark for re-receipt**. A confirmation message appears. Click Yes. All payments originally marked for re-receipt are now unmarked.
- **Clear results:** To run a receipt process again, use **Clear results** to reverse the process. For example, you process receipts with the wrong receipt date. To undo the process, click **Clear results**. Then, run the process again with the correct receipt date. When you clear results, the output and merged documents are deleted, the receipt date and number (if applicable) is deleted on the payment, the receipt status becomes "Not received" on the payment and the next available receipt number returns to the number prior to running the process.

Mark Payments for Re-Receipt Screen

The table below explains the items on this screen.

Screen Item	Description
Reason	Enter the reason payments in the selected process are to be marked for re-receipt. The reason applies to all payments included in the receipt process.
Details	Enter information about the reason. The details you enter apply to all payments included in the receipt process.
Generate new receipt numbers	If you want the receipt process to generate new numbers, select the Generate new receipt numbers. If not, clear the checkbox and the process uses the same receipt numbers. The selection you make applies to all payments in the receipt process.