AEGIS
PREMIER SOLUTIONS

Get Started with Aegis CRM

AEGIS crm

Aegis Premier Solutions is committed to maintaining thehighest standards and providing exceptional service to our nonprofit clients.We are a leading provider of nonprofit services such as caging,donor management,merchant services,and acquisition funding.

Our suite of products offers an end-to-end solution from acquisition funding to donation processing and the management of donor and campaign data. We help you work smarter and make it simple. Let Aegis Premier Solutions help you focus your time on fulfilling your non-profit's mission!

The Aegis brand includes three unique companies – Aegis Premier Solutions, Aegis Processing Solutions and Aegis Premier Technologies – that have joined forces to provide our clients with an A to Z suite of services to help navigate through the various aspects of fundraising.

Security is at the forefront of our business mission. Your organization and your donors can rest easily knowing information is secure in state-of-the art data centers, monitored 24/7/365. Our experts ensure your system is always up-to-date, correctly configured, and is PCI DSS compliant.

Table of Contents

AEGIS crm

Overview

Aegis CRM is a cloud-based portal you can access anytime from anywhere when you have an electronic device such as a computer, mobile phone, or tablet connected to the internet. When you are logged in to your **Aegis CRM** database, you are using a tool designed to move your mission forward. The integrity and security of your data, as well as the stability of the software, guarantees you a high performing solution customized to meet the needs of your organization.

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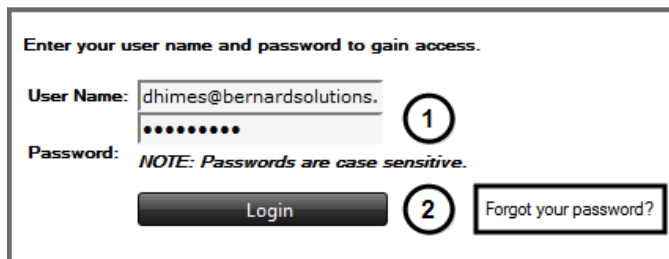
Support:support@aegispremier.com

Log in and Log Out

Before you can access any of the modules available in **Aegis CRM**, you must log in to the database.

Log In

Open your web browser and enter www.mybernard.com in the address line. Follow these steps to log in to **Aegis CRM**:

1. Enter your user name and password in the appropriate fields.

   a. If you do not know this information, contact your Administrator.

2. Click **Login**.

NOTE: Passwords are case sensitive.

If you have forgotten your password, click the **Forgot your password?** link and follow the prompts to reset it.

Once you have successfully logged in, the Home page displays all of the modules available to you based on the rights and permissions assigned to you by your Administrator.

Log Out

After you are done working, you should log out of the database. Follow these steps to log out of **Aegis CRM**:

A E G I S *crm*

Welcome Diana Himes ▪ Training
Switch Database ▪ **Help** ▪ **Support** ▪ ▪ **Logout**
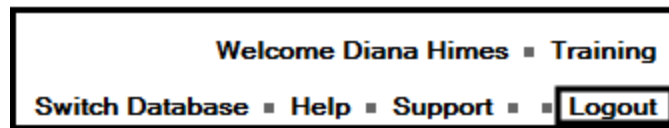
1. Navigate to upper right corner of the page.

2. Click **Logout**.

Home Page

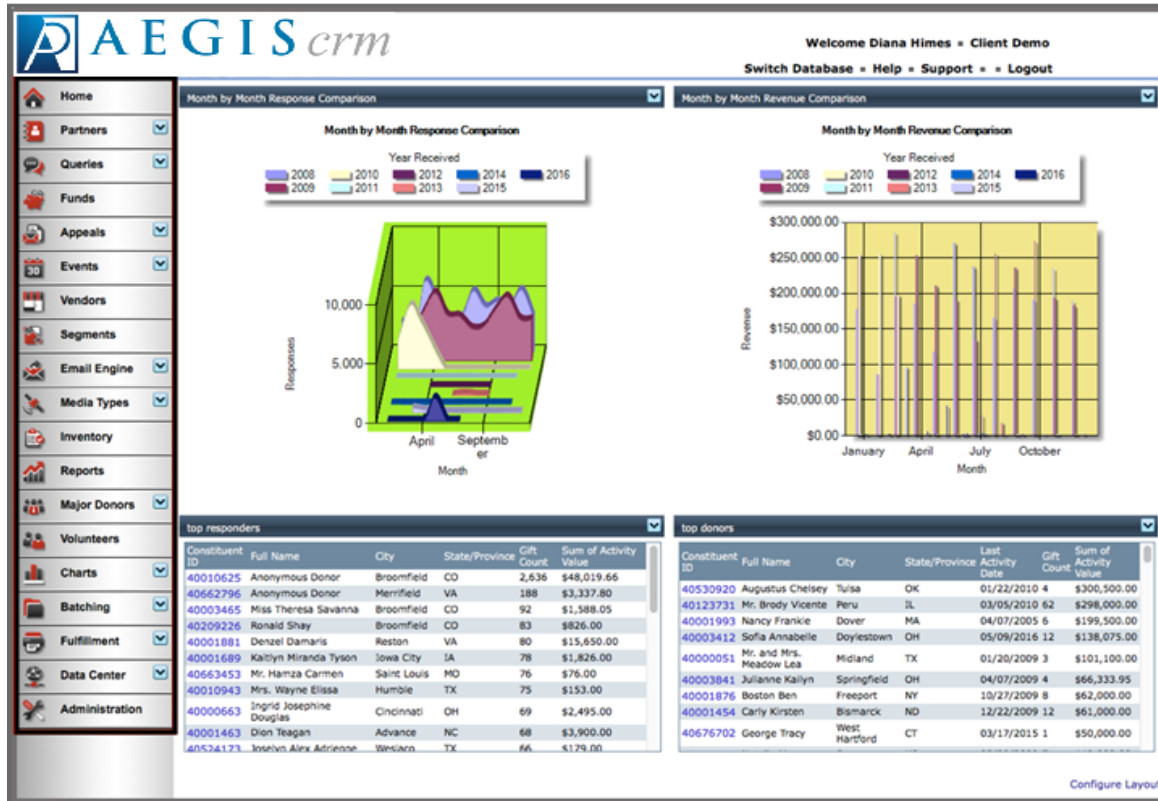Once you successfully log in to **Aegis CRM**, the Home page displays items including the Navigation menu. Because the Home page is customizable, the layout of your page may be different than the one shown below.

Navigation Menu

The Navigation menu is where you access all modules available in **Aegis CRM**. The following table identifies key modules listed on the Navigation menu and includes a description of each module.

Note: The modules that display on the Navigation menu depend upon the rights and permissions given to you by your Administrator.

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Functional Area	Description
Home	Customize to display dashboards when you log in to the database.
Partners	Access donor information including giving activity.
Membership	Create and manage all aspects of your membership programs.
Queries	Build to quickly and accurately identify information in the database.
Funds	Establish designations when donations are made for specific purposes.
Appeals	Create and design new fundraising campaigns.
Events	Manage all tasks and other details for your events.
Segments	Build to categorize donors based on specific criteria.
Email Engine	Use MailChimp® to design email blasts for your campaigns.
Media Types	Track details about your media outlets and programs.
Inventory	Maintain the goods and materials used to further your mission.
Reports	Determine the effectiveness of your organization.
Major Donors	Maintain all aspects of building relationships with major donors.
Volunteers	Manage all information related to the individuals who donate their time.
Charts	Design graphical images of data available in the database.

Functional Area	Description
Batching	Enter multiple transactions in to the database at one time.
Fulfillment	Manage acknowledgements and orders.
Data Center	Import data from other applications.
Administration	Set user rights and system options.

To access a specific module in the database, click the button on the Navigation menu.

Navigation Sub-Menus

Some modules on the Navigation menu have a sub-menu with tasks you can complete such as locating and adding records.
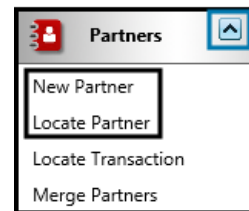
Portal Menu

The Portal menu displays links so you can view Help documentation, chat with Support, and log out of the database. If you have access to multiple databases, the name of the current database displays and the **Switch Database** link is available to you.
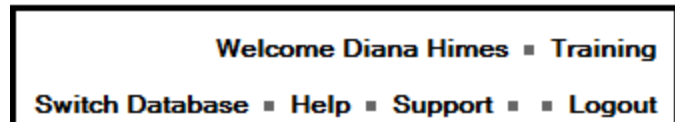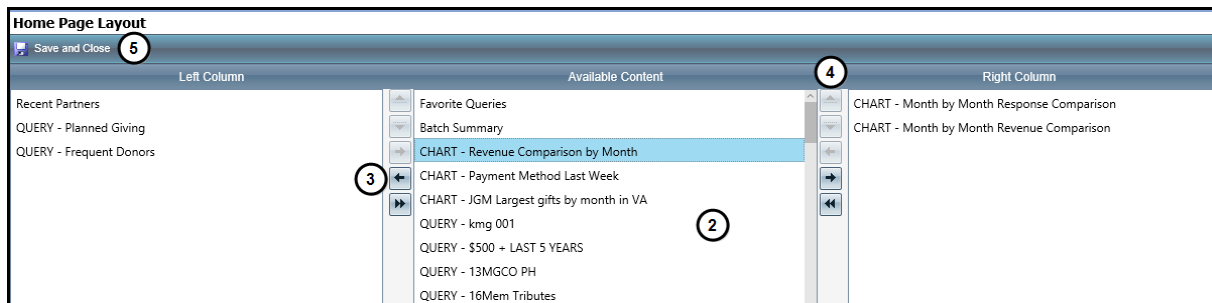
Customize The Home Page

Aegis CRM allows each user to add and remove items on the Home page to display the information you want to monitor on a regular basis.

Log in to **Aegis CRM** and follow these steps to customize your Home page:

1. Click **Configure Layout** on the bottom right of the Home page.

2. Select the items to display from the **Available Content** pane.

3. Click the left arrow to display the content in the **Left Column** pane or click the right arrow to display the content in the **Right Column** pane.

4. Use the other arrow keys to move your content to a different column or change the order they display on the page.

5. Repeat steps 2 through 4 to add more content to the page.

6. Click **Save and Close**.

Locate Records

Records in **Aegis CRM** store information about donors and how they interact with your organization. Being able to locate and open records is critical for managing the data available in **Aegis CRM**. In addition to tracking donors you can also maintain information about vendors and volunteers as well as the funds, appeals, and events you use to further your mission.

Record Types

There are multiple record types that display specific information and the following table identifies some of the record types available in **Aegis CRM**.

Record Type	Description
Partner	Track the personal and demographic information about donors.
Transaction	Manage the donations and appeal responses made by donors.
Query	Use to identify information in the database quickly and accurately.
Fund	Track designations when donations are made for specific purposes.
Appeal	Monitor all forms of communication with donors.
Event	Manage all aspects of events hosted by your organization.
Vendor	Track information about the vendors that provide goods and services.
Inventory	Maintain the goods and materials used to further your mission.
Major Donors	Use for establishing and cultivating relationships with major donors.

Record Type	Description
Volunteer	Identify individuals who give their time to your organization.
Batch	Review and approve data that has been entered in to **Aegis CRM** using **Rapid Entry**.
Fulfillment	View the pending and prepared acknowledgements or orders.

Begin Your Search

To control duplication of records in your database, you should always search for a current record before adding a new one in **Aegis CRM**. Depending on the record type you want to locate, finding records is done in one of two ways.

Navigation Sub-Menus

Some modules on the Navigation menu have a sub-menu with tasks you can complete such as locating records. The table below identifies the record types and the Navigation menu options to choose for your search.

Record Type	Navigation Menu Button Sequence
Partner	Click **Partners** and then select **Locate Partner**.
Transaction	Click **Partners** and then select **Locate Transaction**.
Query	Click **Queries** and then select **Locate Query**.
Appeal	Click **Appeals** and then select **Locate Appeal**.
Event	Click **Events** and then select **Locate Event**.
Batch	Click **Batching** and then select **Locate Batch**.
Fulfillment	Click **Fulfillment** and then select **Prepared Acks** or **Prepared Orders**.

Once you complete the steps above for the record type, a locate page displays fields where you can enter information about the record you want to find.

Navigation Menu

When searching for fund, vendor, inventory, or volunteer records click the corresponding button on the Navigation menu to display fields where you enter criteria to locate the record.

Wildcard Search

You can use the % character to locate records when you only know part of the name or ID used as your search criteria. The following table identifies different ways to use the % character and includes a description of the results you will receive from your search.

% Character	Results
Search%	Displays records that begin with Search.
%Search	Displays records that end with Search.
%Search%	Displays records that contain Search in the name.
Sea%rch	Displays records that begin with Sea and ends in rch.

The wildcard search is useful if you are unsure of how to spell a donor's name. Use Sm% in the Last Name field to include "Smith" and "Smyth" records in your results.

Partners in Aegis CRM

In **Aegis CRM** you can track information about your donors and supporters on partner records. Depending on how your database has been set up, you may see partners referred to as donors or constituents. In this online Help system we talk about partner records, but you can substitute donor records or constituent records as appropriate.

Partner records contain information about your partners. You can create partner records one at a time in **Aegis CRM** or all at once using Rapid Entry.

Once the records are created in **Aegis CRM**, you can use the information to perform functions including:

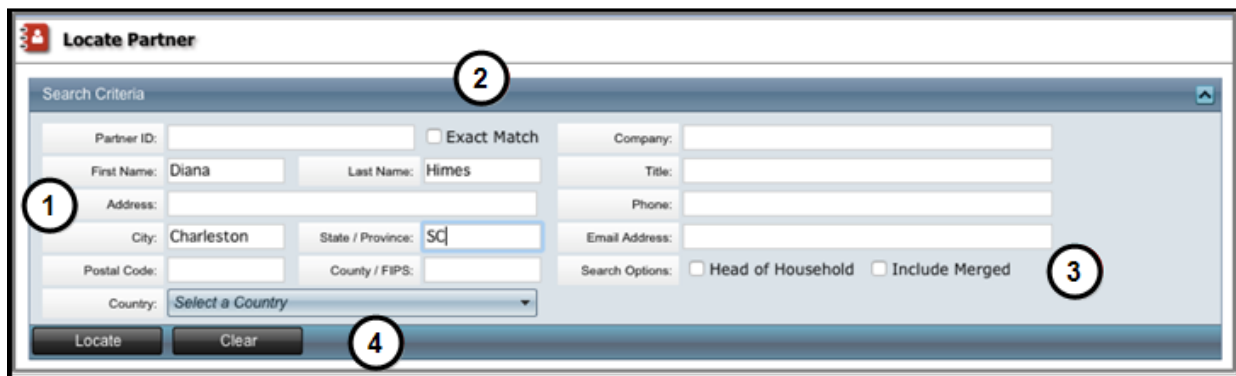- Identifying if the partner will likely to respond to a particular appeal
- Viewing historical donations, notes from conversations, and any inbound and outbound activity associated with the partner.
- Reminding you that you need to follow up with the partner as well as the topic of the follow up.
- Managing multiple addresses for a specific partner.
- Managing pledges, bequests, and annuities.

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Locate a Partner Record

To view information about the donors who give to your organization, you can locate and open their partner record in **Aegis CRM**.

Note: It is important that you search for a partner record before adding a new partner.

To locate a partner record, click **Partners** on the Navigation menu and then select **Locate Partner**. On the Locate Partner page, follow these steps:

1. Enter as much information about the partner in the Search Criteria fields as you can. The more accurate the criteria, the better chances of locating the correct record.

2. Mark the **Exact Match** checkbox to locate only records that specifically match the criteria you enter in the fields.

3. Mark the **Head of Household** or **Include Merged** checkboxes to use these options in your search.

4. Click **Locate**.

   a. To locate another partner record, click **Clear** to remove the criteria you entered in the fields.

Note: If more than one person is living at an address, marking the **Head of Household** checkbox can be used to select only one person at that address.

If the record you are searching for is located in the database, it will open in a new page. When multiple records are found, you can sort the results by clicking on a column heading or click the link in the **Partner ID** column to open the partner record.

Merge	Partner ID ▲	First Name	Spouse	Middle	Last Name	Address	City	State	Country	Home Phone	Start Date	Company
☐	110442	Hilda		A.	Zamacona	1505 Jenys St	Charleston	SC	US		2003-02-26	
☐	116933	Emerita			Banas	723 King St Apt 205A	Charleston	SC	US		2003-02-26	
☐	119108	Carroll		P.	Tauzin	1621 Balsam St Apt C	Charleston	SC	US		2003-02-26	
☐	121548	Sean			Phillips	1854 Stonehedge Rd	Charleston	SC	US		2003-02-26	
☐	124375	Marcia			Woodroffe	8750 Fairwind Dr Apt 8A	Charleston	SC	US		2003-02-26	
☐	125213	Ernest			Liberati	2931 Foxhall Rd	Charleston	SC	US		2003-02-26	
☐	135999	Josephine			Tuminello	2070 Saint James Dr	Charleston	SC	US		2003-02-26	

Merge Selected   Refresh

K < 1 2 3 4 5 > >| Page size: 50 ▼   228 items in 5 pages

Navigate a Partner Record

The Partner record stores information about the individuals who interact with your organization. On this record you can view details about the partner and manage the data associated with that partner.

A. View personal information including name, address, phone number, and email address. If the partner record includes an email address, you can click the address link to open a new email in your default email program.

B. More details about the partner display and the table below identifies each pane with a description of the information available for the partner.

Information Pane	Description
Notes	View and add notes to the partner record

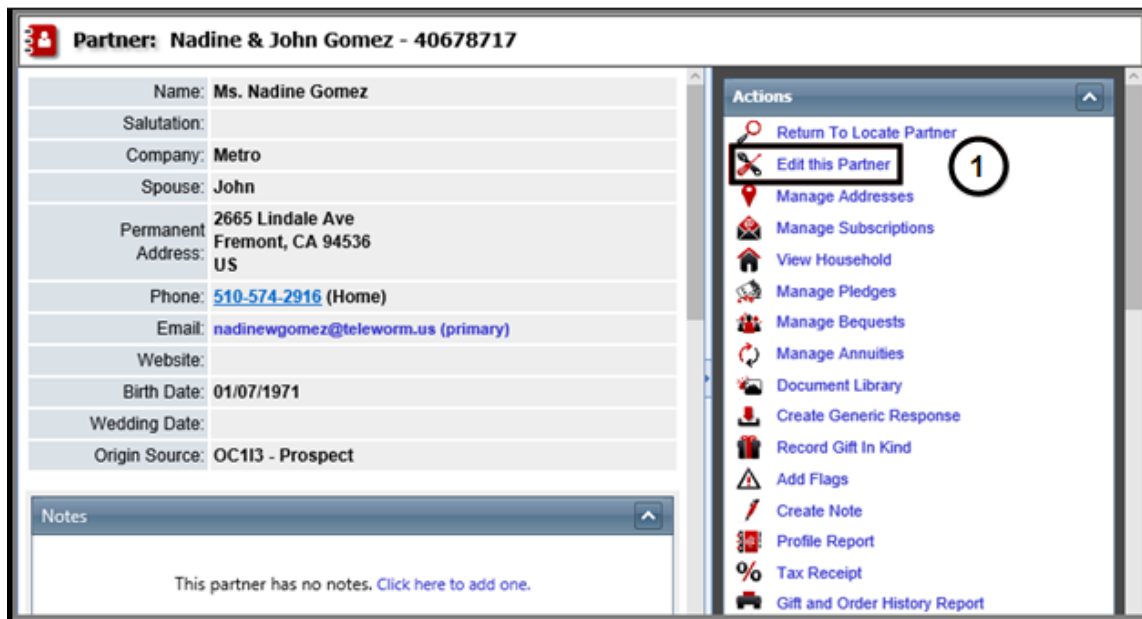| Information Pane	Description
	such as information about family members.
Personal Details	View gender, email preferences, and web accounts.
Query Fields	
Custom Fields	View data for specific information you want to track.
Major Gifts Custom Fields	
Change History	View when a change was made, date it was modified, who made the change, and what changed on the record.
Geographic/Postal/Demographic	View the latitude, longitude, carrier route, and address match code for the partner's address.
Individual Links	
Details	View when the record was added, current segment, and any standard or custom flags assigned to the partner.
Activity	View all activity, product, and note summaries as well as all inbound and outbound activity for the partner.
Partner Image	View an uploaded image of the partner.

C. Click a link in the Actions pane to search for records, make changes to a record, generate reports, and manage the donations made by the partner.

Note: You can move these panes around the page to display them the way you want to see the data when you open a partner record.

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Edit a Partner Record

After a partner record has been added to **Aegis CRM**, you can modify and update the record to add more information about the partner. To update a partner record, click **Partners** on the Navigation menu, select **Locate Partner**, and then enter information to search for and open the record.

Once you open the partner record, follow these steps to add the new information to the record:

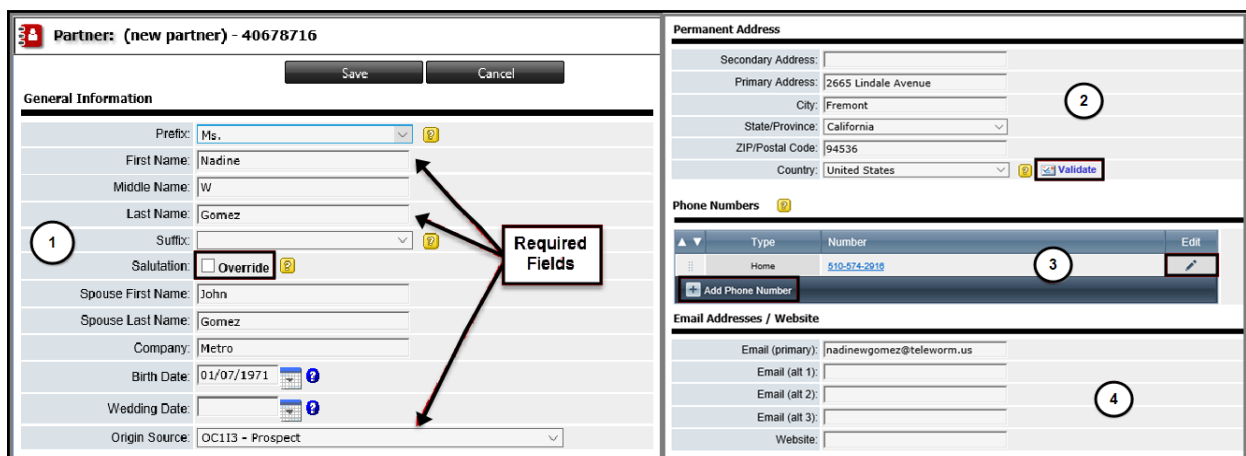1. Click **Edit this Partner.**

2. Enter the information to update the record. If you change the address inform-ation, click **Validate** to update the **Geographic / Postal / Demographic** details.

3. Click **Save**.

Add a New Partner

Information about donors and other individuals who support your mission is stored in partner records (also known as donor and constituent records). You can add individual partner records to **Aegis CRM** or add multiple records using **Rapid Entry**.
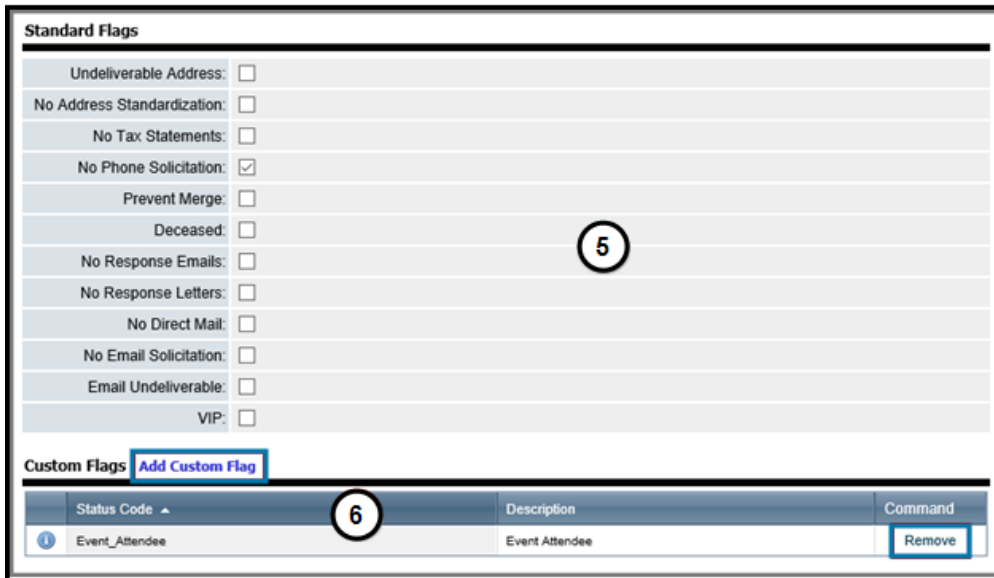
Note: It is a best practice to search **Aegis CRM** for current records before adding a new record to the database.

To add a new partner record in **Aegis CRM**, click **Partners** on the Navigation menu, select **New Partner** and then follow these steps:

1. Enter the **First Name** and **Last Name** of the partner and then select the **Origin Source** for the information you have about the partner. Enter additional information about the partner and the more details you enter, the better results you receive when you create queries and generate reports.

   a. Mark the **Override** checkbox and then enter a salutation for communications sent to the partner.

2. Enter address information for the partner in the **Primary Address, City, State/Province, ZIP/Postal Code,** and **Country** fields. Enter any care of or attention details in the **Secondary Address** field.

   a. Click **Validate** to ensure proper delivery and populate the Geographic / Postal / Demographic details for the primary address.

3. Click **Add Phone Number**, select the **Type**, and then enter the number including area code. Click the check mark to add the number.

   a. To modify an added phone number, click the **Edit** icon.

4. Enter a primary email address and any alternate addresses. If the partner has a website, enter the URL address in the **Website** field.

5. Mark the checkboxes in the **Standard Flags** section to help segment records by specific criteria.

   EXAMPLE: Mark the **No Phone Solicitation** checkbox to include this partner in a query created to identify partner records who do not want to be contacted by phone.

   - Mark the **Undeliverable Address** checkbox if the mailing address on file has been returned as undeliverable.

   - Mark the **No Address Standardization** checkbox if you do not want the entered address to be standardized. Address standardization is the process of making an address uniform. This includes fully spelling out words or using the US Postal Service's standard abbreviations.

   - Mark the **No Tax Statements** checkbox if the partner requests that he or she not be sent tax statements.

- Mark the **No Phone Solicitation** checkbox if the partner requests that he or she should not be contacted via telephone.

- Mark the **Prevent Merge** checkbox if there is a reason why this partner's record should not be [merged with another record](#) having the same name and contact information.

- Mark the **Deceased** checkbox if notification is received that this partner is deceased.

- Mark the **No Response Emails** checkbox if the partner requests that he or she does not want to receive response emails.

- Mark the **No Response Letters** checkbox if the partner does not want to receive response letters.

- Mark the **No Direct Mail** checkbox if the partner does not want to receive direct mail.

- Mark the **No Email Solicitation** checkbox if the partner does not want to receive solicitations via email.

- Mark the **Email Undeliverable** checkbox if the email sent to this partner with the provided email address could not be delivered.

- Mark the **VIP** checkbox if this partner is a VIP partner.

6. Click **Add Custom Flag** to select the flags to add to the partner record.

- Enter criteria in the **Flag** and **Description** fields to filter the list of available flags that display on the page.

- Mark the checkboxes for the custom flags to add to the partner record and then click **Select**.

  - Mark the **Undeliverable Address** checkbox if the mailing address on file has been returned as undeliverable.

  - Mark the **No Address Standardization** checkbox if you do not want the entered address to be standardized for some reason. Address standardization is the process of making an address uniform. This includes fully spelling out words or using the US Postal Service's standard abbreviations.

  - Mark the **No Tax Statements** checkbox if the partner requests that he or she not be sent tax statements.

- Mark the **No Phone Solicitation** checkbox if the partner requests that he or she should not be contacted via telephone.

- Mark the **Prevent Merge** checkbox if there is a reason why this partner's record should not be [merged with another record](#) having the same name and contact information.

- Mark the **Deceased** checkbox if notification is received that this partner is deceased.

- Mark the **No Response Emails** checkbox if the partner requests that he or she does not want to receive response emails.

- Mark the **No Response Letters** checkbox if the partner requests that he or she does not want to receive response letters.

- Mark the **No Direct Mail** checkbox if the partner does not want to receive direct mail.

- Mark the **No Email Solicitation** checkbox if the partner has indicated that he or she does not want to receive solicitations via email.

- Mark the **Email Undeliverable** checkbox if the email sent to this partner with the provided email address could not be delivered.

- Mark the **VIP** checkbox if this partner is a VIP partner.

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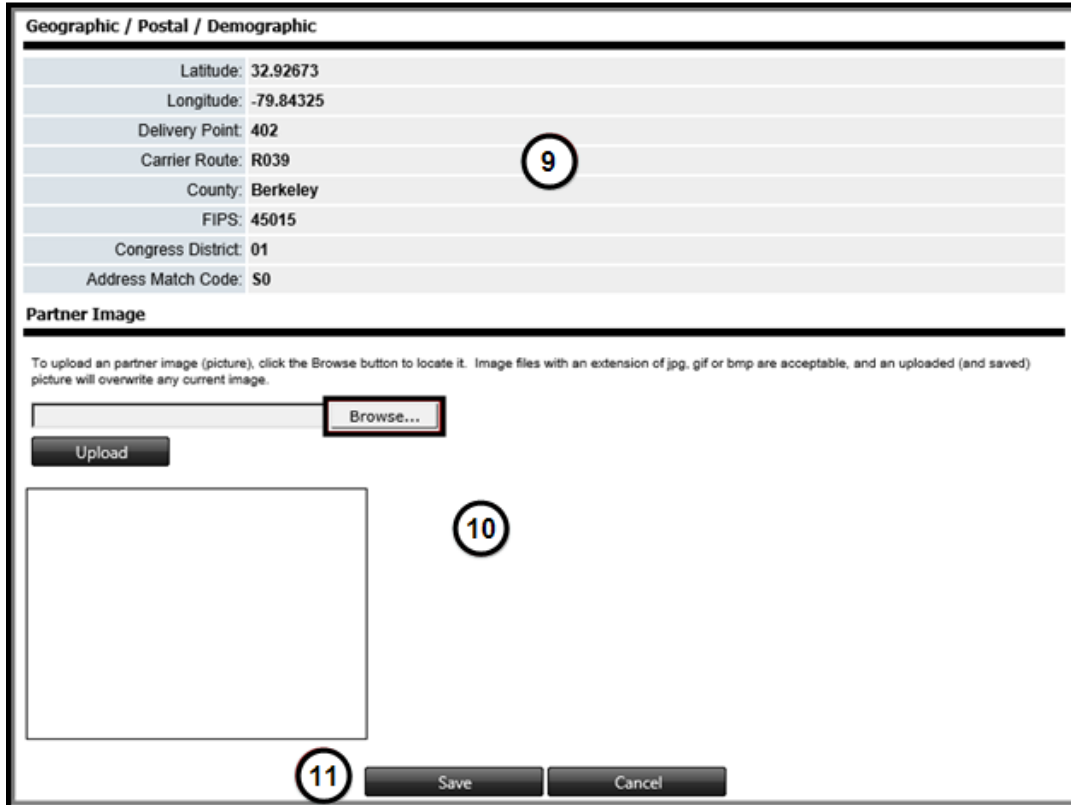
7. Enter details or mark checkboxes to add custom fields to the partner record.

   NOTE: The fields that display are specific to your organization and may be different than the options shown in the above graphic.

8. Select the **Gender** of the partner and the **Email Preference** (HTML or TEXT)

![AEGIS crm logo]

for the format for receiving emails from your organization.

9. The **Geographic / Postal / Demographic** information based on the validated primary address details you entered display in this section. Any changes to the primary address must be validated to update this information.

10. Click **Browse** to search for an image and then click **Upload** to add the image to the partner record.

11. Click **Save**.

Transactions in Aegis CRM
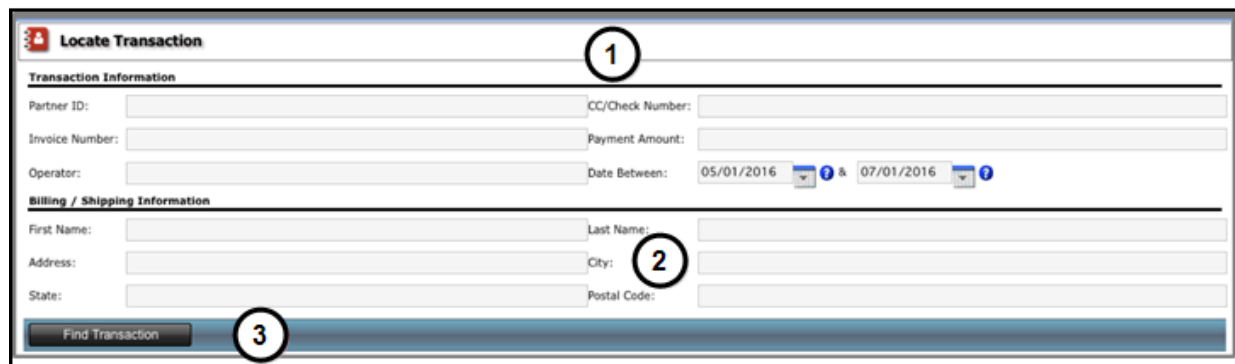
In **Aegis CRM** you can track information about the payments and donations made to your organization from your partners. Transaction records contain information including payment amount and method used to make the payment. You enter all payments and donations using Rapid Entry so you can query and report on them in **Aegis CRM.**

Transactions can include:

- Donations to your organization.
- Payments made by ordering products your organization sells.
- Registration fees for event attendance.
- Donations to your organization.

Locate a Transaction Record

Click **Partners** on the Navigation menu and then select **Locate Transaction**. On the Locate Transaction page, follow these steps:
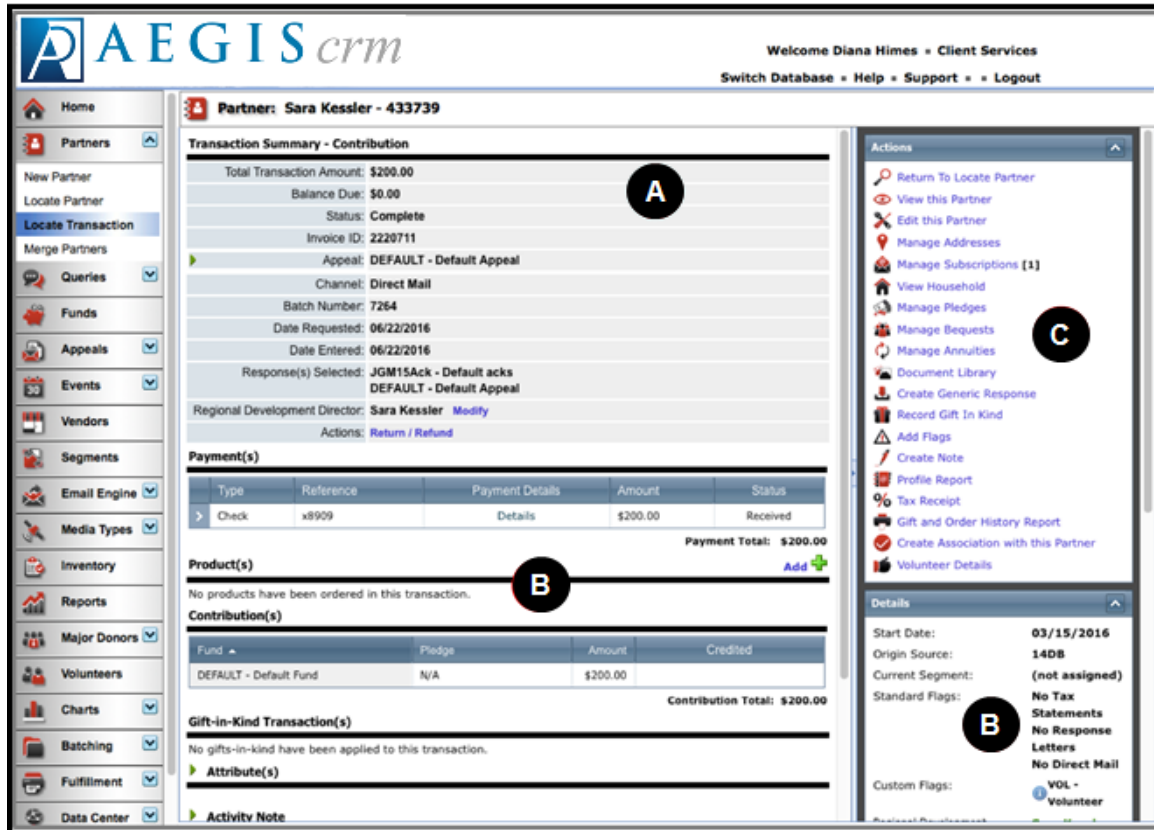
1. Enter as much information about the transaction in the **Transaction Inform-ation** fields as you can. The more accurate the details, the better chances of locating the correct record.

2. Enter additional information in **the Billing / Shipping Information** fields to fur-ther define the criteria for your search.

3. Click **Find Transaction.**

If the record you are searching for is located in the database, it will open in a new page. When multiple records are found, you can sort the results by clicking on the column headings or click the **View** link to open the transaction record.

	Activity Type	Partner ID	Name	Invoice #	Batch	Activity Date	Appeal Name	Operator
View		433781	Susan & Mr. Glen B. Kauffman Kauffman			06/24/2016	Easter Appeal	Susan Kauffman
View		433779	Robert Miller	2220713	7264	06/22/2016	Default Appeal	Sara Kessler
View		433778	William Kessler	2220712	7264	06/22/2016	Default Appeal	Sara Kessler
View		433780	Penny Bobar	2220715	7264	06/22/2016	Default Appeal	Sara Kessler
View		433739	Sara Kessler	2220711	7264	06/22/2016	Default Appeal	Sara Kessler
View		100283	Robert & Mrs. Nancy Smith Smith	2220714	7264	06/22/2016	Default Appeal	Sara Kessler
View		433722	Paul & Karen Shaw	2220710	7262	06/08/2016	2015 Vigil Lights	Karen Sullivan
View		433694	Karen Sullivan	2220709	7262	06/08/2016	Father's Day Appeal	Karen Sullivan
View		433732	Karen Kerr	2220707	7261	05/09/2016	Default Appeal	Debby Lee
View		433692	Jennifer Winchell	2220706	7261	05/09/2016	Default Appeal	Debby Lee
View		433692	Jennifer Winchell	2220708	7261	05/09/2016	Default Appeal	Debby Lee
View		433710	Jeni Green Mitchell	2220704		05/05/2016	2015 Web Donations	Jennifer Mitchell
View		433710	Jeni Green Mitchell	2220705		05/05/2016	Appeal Acknowledgements- Gifts $100-$249.99	Jennifer Mitchell

Page size: 50 — 13 items in 1 pages

Navigate a Transaction Record

The transaction record stores information about the gifts your organization receives from donors. On this record you can view details about the transaction and manage the data associated with that transaction.

A. View information including total amount, balance due, appeal, batch number, date entered, and regional development director.

B. More details about the transaction display and the table below identifies each pane with a description of the information available on the record.

Information Pane	Description
Payment(s)	View the payment total along with the amount of each payment included in the total.

Information Pane	Description
Product(s)	View and add product information ordered for the transaction.
Contribution(s)	View the total contribution along with the funds and amounts applied to each fund.
Gift-in-Kind Transaction(s)	View details about a gift (vehicle, land, stock, etc.) given to your organization.
Attribute(s)	
Activity Note	View any additional information specific to the transaction.
Shipping	View shipping information for any orders added to the transaction.
Change History	View when a change was made, date it was modified, who made the change, and what changed on the record.
Details	View when the record was added, current segment, and any standard or custom flags assigned to the partner.
Activity	View all activity, product, and note summaries as well as all inbound and outbound activity for the partner.
Partner Image	View an uploaded image of the partner.

C. Click a link in the Actions pane to view the partner record, search for other partner records, make changes to the current partner record, generate reports, and manage donations made by the partner.

Note: You can move these panes around the page to display them the way you want to see the data when you open a transaction record.

Rapid Entry

Rapid Entry is used to quickly enter data in a batch that is then processed in **Aegis CRM**. A batch is a way to divide up the data entry of information into smaller more manageable pieces and then distribute them to a team of data entry personnel.

With **Aegis CRM**, your organization can scale to any size or number of batches necessary to accommodate all sized organizations. You enter the data in batches using Rapid Entry so you can query and report on that information in **Aegis CRM**.

Install Rapid Entry

To install **Rapid Entry**, follow these steps:

1. Click https://app.mybernard.com/rapidentry/publish.htm to access the installation page for **Rapid Entry**:

   Bernard Data Solutions
   Bernard - Rapid Entry

   Name: Bernard - Rapid Entry

   Publisher: Bernard Data Solutions

   The following prerequisites are required:
   - Windows Installer 4.5
   - Microsoft .NET Framework 4 (x86 and x64)

   If these components are already installed, you can launch the application now. Otherwise, click the button below to install the prerequisites and run the application.

   Install

2. Click **Install** to begin the installation. If the .NET Framework version 4 is not installed on your computer, you will be prompted to do so before continuing the installation of **Rapid Entry**. Follow the prompts to continue the installation.

3. After installing the .NET framework (and rebooting if prompted to do so), return to https://app.mybernard.com/rapidentry/publish.htm and click the install button again. Follow the instructions to complete the install of Rapid Entry.

Once the installation is complete, the Rapid Entry icon is available on your desktop. When you double click the Rapid Entry icon and a new version is available, it is automatically downloaded and installed on your computer.

Get Started with Rapid Entry

Rapid Entry is used to enter multiple items in to a batch that is then processed and uploaded to **Aegis CRM**.

Step 1
Create Batch

Step 2
Enter Data

Step 3
Review and Approve

Step 4
Close
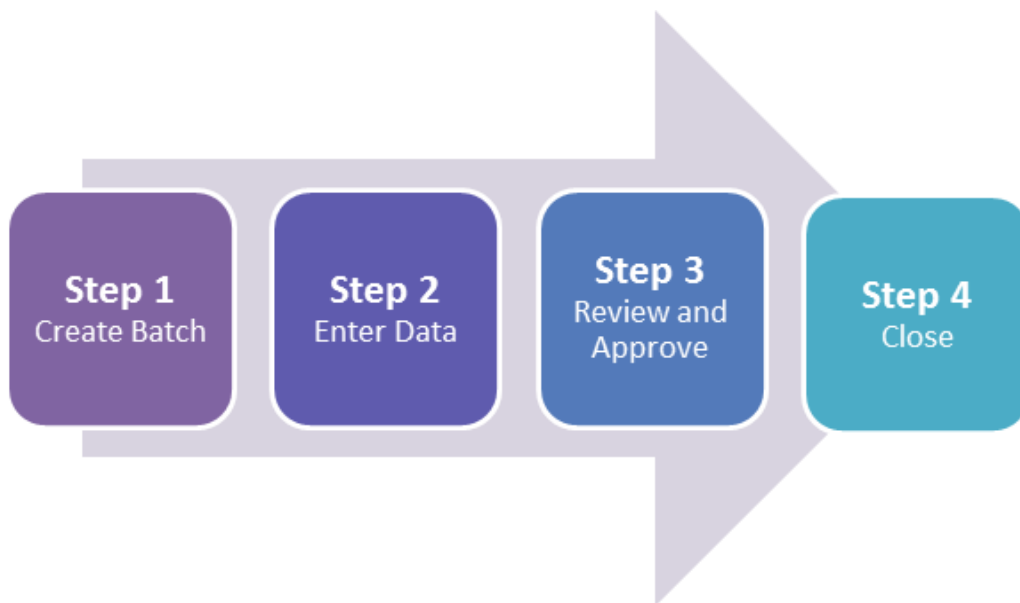
Before you can use Rapid Entry, you must install it on your computer.

Log in to Rapid Entry

Double click the Rapid Entry icon on your desktop and then follow these steps:

1. Enter your **User Name** and **Password**.

2. Click **Login**.
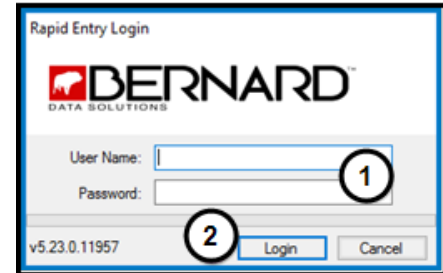
Navigate the Rapid Entry Home Screen

There are four main sections on the home screen.
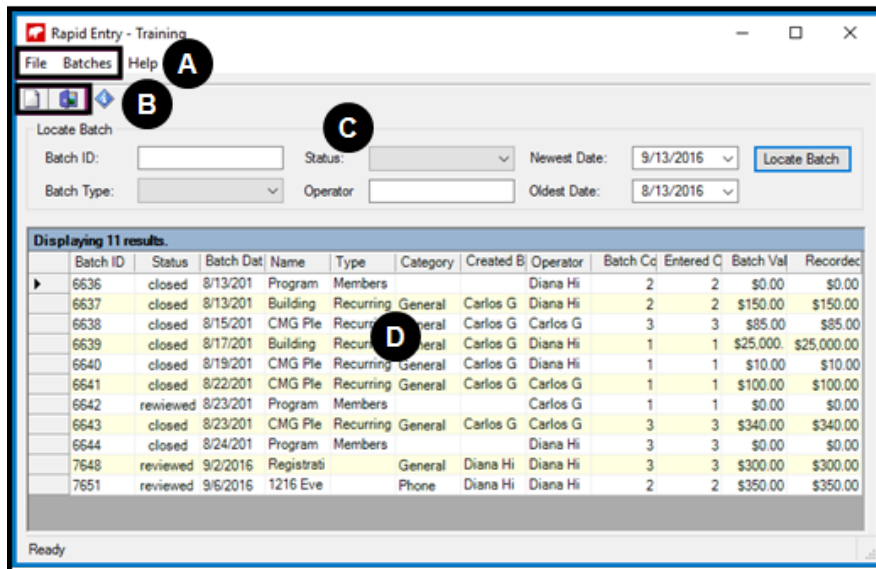
A. The **Menu** section includes these options:

1. On the **File** menu, click **Exit** to close Rapid Entry.

    a. You can also click the X in the top right corner to exit Rapid Entry.

B. On the **Batches** menu, you can create a new batch or edit the selected batch.

1. Navigate your mouse to the **Quick Links** section for quick access to::

    a. Create a New Batch.

    b. Exit Rapid Entry.

C. In the **Locate Batch** section, you can enter criteria to search for a specific batch.

D. All of the batches that meet the criteria you entered in the **Locate Batch** section display in the list.

   1. Double-click on a row to open the Batch Entry screen.
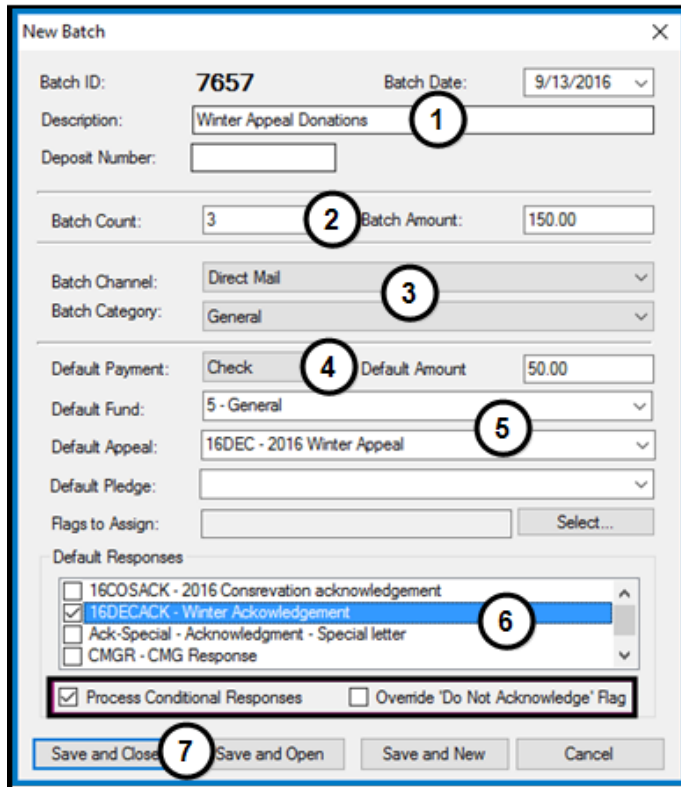
Batch Status

In the batch results list, the status of the batch displays in the **Status** column. The following table identifies the different batch states and includes a description of each.

Batch Status	Description
Open	Data is being entered in the batch or it is being reviewed.
Pending	Data has been entered but does not reconcile or needs to be reviewed.
Reviewed	The batch is ready to be reconciled against the daily deposit.
Closed	The batch is reconciled and transactions do not require review.
Processing	Data is being imported to **Aegis CRM**. If the batch remains in the processing state for more than an hour, send an email to support@aegispremier.com.
Locked	The batch has been reconciled with the daily deposit and the day has been closed.

Create a New Batch

To create a new batch, click the **New Batch** icon and then follow these steps:

Rapid Entryautomatically assigns the **Batch ID** using the next unused sequential number.

1. Enter the current date and a description for the batch.

2. Enter the number of unique items to be added and the total amount of the transactions included in the batch.

   EXAMPLE: If you have 36 checks to enter and two are from the same donor, the batch count would be 35.

   EXAMPLE: If there have 36 checks to enter and the combined dollar total is $2,700, the total amount is 2700.

 Note: You do not need to use a dollar sign, comma, or decimal point when entering an amount. Twenty-seven dollars is **27**, while two thousand seven hundred dollars is **2700**.

Note: You can change the batch count and amount after you start entering batch information, provided you have the user rights to edit the Batch Header.

3. Select the **Batch Channel**; such as Mail, Internet or Phone and **Batch Category** such as checks or cash.

   Note: The selected channel and category applies to every item entered in the batch.

4. Select the **Default Payment** and enter the **Default Amount** for each payment. These are automatically added to all entries unless you manually override them on a line-by-line basis.

5. Select the **Default Fund** and **Default Appeal**.

   TIP: Because an appeal is required when creating a batch in **Rapid Entry**, if you receive donations that were not motivated by an appeal we suggest you create a White Mail appeal for these donations.

6. Mark the checkbox for the default acknowledgement to be sent to the donor.

   a. Mark the **Process Conditional Responses** checkbox to apply the response rules on the record.

   b. Mark the **Override "Do Not Acknowledge"** Flag to send the acknowledgement even if this flag is set on the partner record.

7. Click **Save and Open**. You can click **Save and New** to create another batch.

Options in Rapid Entry

Batch options allow you to set up the different data entry panels available in Rapid Entry.

Transaction Collection

The **Transaction Collection** tab allows you to select the panels and data entry areas for those panels that should display on the Batch Entry window.
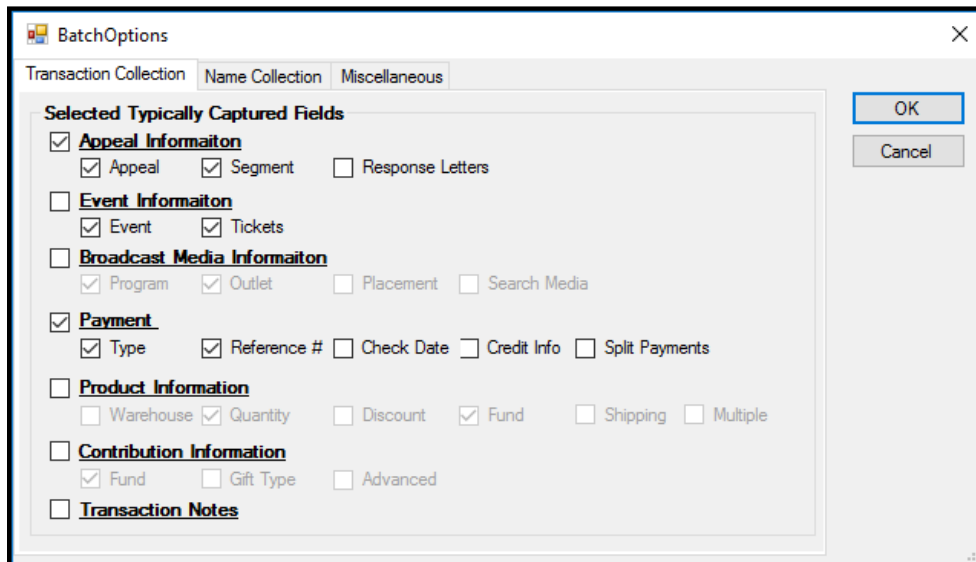
Name Collection

The **Name Collection** tab sets the preferred method for identifying duplicate partner records and what to do if duplicate records are found.
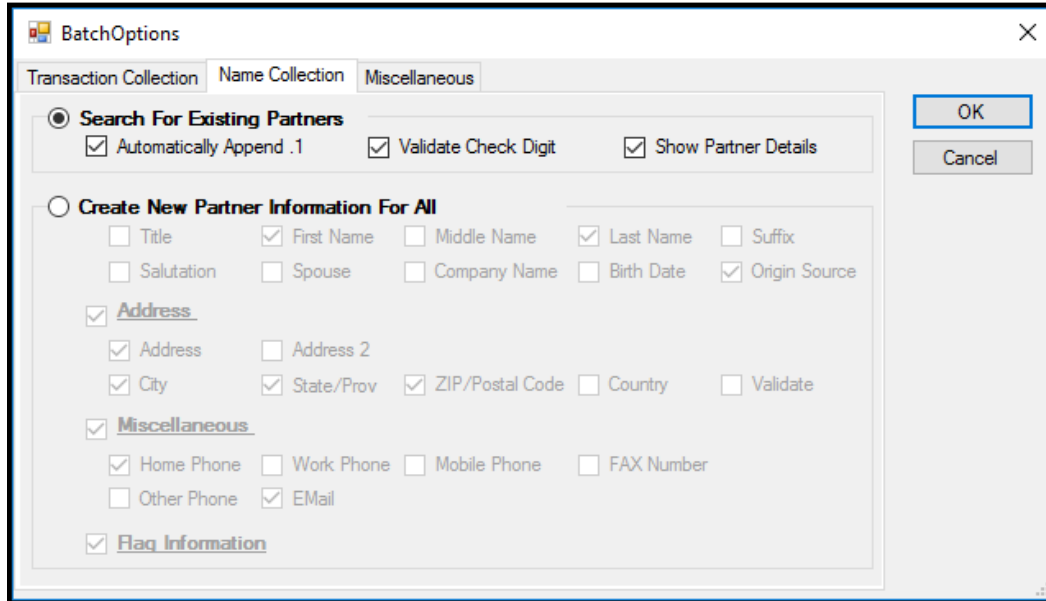
Select **Search for Existing Partners** to add a **Partner** panel where you enter a partner ID and search for existing partner records. If a partner record is not found, click **New** to enter data for the new partner.

Select **Create New Partner Information for all Transactions** to add a new Partner panel where you can enter information about the partner so it can be added to **Aegis CRM**.

Miscellaneous

On the Miscellaneous tab, you define the options for qcing transactions, how to display the selected data entry row, and display payment details.
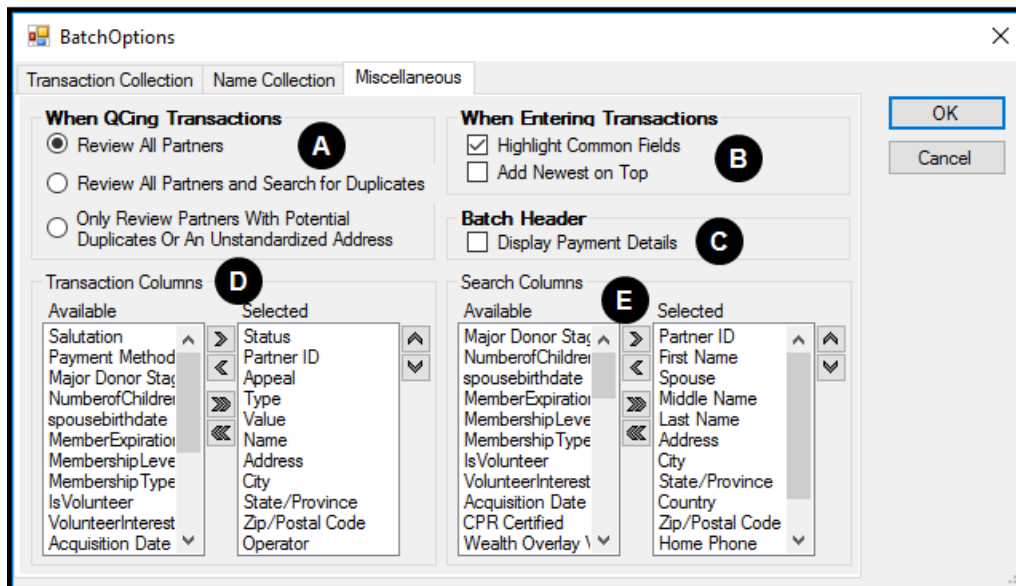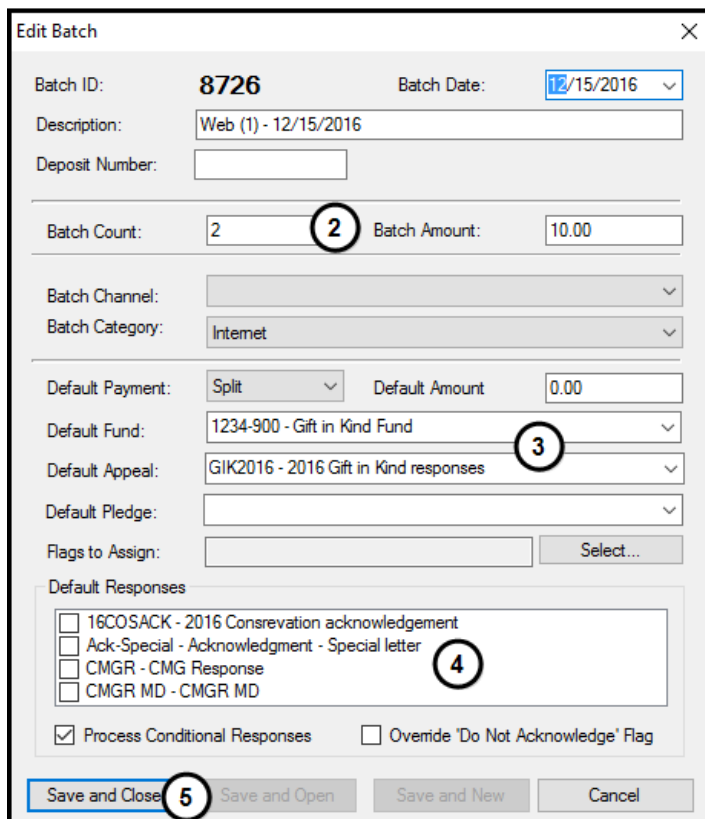
A. In the **When QCing Transactions** frame, there are quality control options that determine which transactions should be reviewed after they have been entered. You can choose **Review All Partners**, **Review All Partners and Search for Duplicates**, or **Only Review Partners with Potential Duplicates Or An Unstandardized Address**.

B. Mark the checkboxes in the **When Entering Transactions** frame to**Highlight Common Fields** and add a colored background to the selected data entry areas or **Add Newest on Top** so that the newest transaction displays first.

C. Mark the **Display Payment Details** checkbox to list the details in the **Batch Header**.

D. Select columns in the **Available** pane and then click the right arrow to add it to the **Selected** pane so the column displays in the batch results.

E. Select columns in the **Available** pane and then cllick the right arrow to add it to the **Selected** pane so it displays in the search results.

Edit a Batch Header

Note: You can change the batch count and amount after you start entering batch information, provided you have the user rights to edit the Batch Header.

To edit a batch header log in to Rapid Entry, select the row for the batch header you want to edit, and then follow these steps:

1. On the Menu bar, select **Batches** and then select **Edit Batch**.

2. Modify the **Batch Count** or **Batch Amount**.
3. Change the default options.
4. Edit the default responses.
5. Click **Save and Close**.
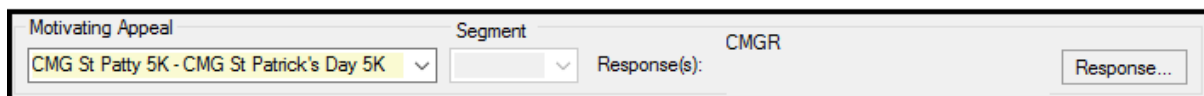
Appeal Panel

The Appeal panel displays options for identifying the motivating appeal for the transactions you enter in a batch.

Note: Press F2 to toggle between displaying and hiding the Appeal panel.

Terms You Should Know

- An **Appeal** is any form of communication that solicits a donation.
- A **Motivating Appeal** is the appeal that solicited the contribution, such as "Monthly Newsletter."
- A **Segment** is a specific group within the appeal, such as, "All constituents who contributed within the last 12 months."
- A **Response** is an acknowledgement sent to a contributor for a specific contribution.
- A **Document Template** is used to create an automatic response (acknowledgement) for an appeal, typically set up with merge fields for address information.

The name of the appeal and the segment (category) within the appeal display in the panel. If multiple appeals and segments are available, you will be able to select one from the options in the drop-down box. The information displayed in the **Motivating Appeal** and the **Segment** fields is determined by the choices made when the batch was created.

Choose Another Response

To choose a response document other than that shown on the Appeal panel, click **Response** and then follow these steps:

A E G I S *crm*

```
Response Selection                                        ×
Selected Appeal:    CMG St Patty 5K - CMG St Patrick's Day 5K
   Select the response(s) for this transaction: |
   ☑ CMGR - CMG Response
   ☐ 16COSACK - 2016 Consrevation acknowledgement
   ☐ Ack-Special - Acknowledgment - Special letter
   ☐ CMGR MD - CMGR MD
     ①


Additional Options:
   ☑ Process Conditional Responses
   ☐ Override 'Do Not Acknowledge' Flag   ②

        ③   [    OK    ]   [  Cancel  ]
```
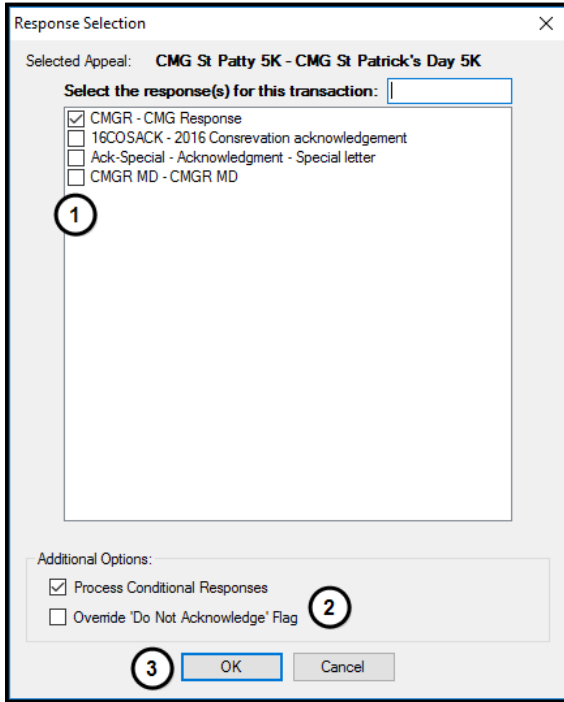
1. Mark the checkboxes for the reponses to use in the batch.

2. Mark the checkboxes to process conditional responses or override the "Do Not Acknowledge Flag" for the partner records included in the batch.

   Note: Marking or unmarking a checkbox allows the user to decide whether or not the appeal's business rules will be considered along with any that are manually selected by the operator.

   Note: If a response is selected when a new batch is created and it is different than that set by the business rule(s) in the appeal, both the business rule response AND the checked response will be sent for all transactions that meet the criteria set for the responses.

   Note: If, during or after a transaction is entered, the response is manually unchecked, NO RESPONSE WILL BE SENT, even if the transaction meets criteria in the motivating appeal. Any change at this level supersedes response templates previously set whether in the business rules of the motivating appeal or in the batch set-up.

Payment Panel

Note: Press F3 to toggle between displaying and hiding the Payment panel.

Terms you Should Know:

- The **Payment Amount** is the total sum of dollars received from a single appeal contribution.
- A **Payment Method** is the way in which the contribution was received (cash, check, etc.).
- A **Split Payment** is a single transaction split between different payment methods.
- A **Tax Deductible Contribution** is the amount donors can deduct on their taxes.

Note: Please be sure you understand the differences between a payment, a split payment, or a **Tax Deductible Contribution** to ensure accurate and efficient transaction data entry.

The **Payment Panel** provides options for choosing the payment method for the transaction.

Payment Methods

The Payment Method can be set as the default during new batch setup or on each transaction. The following tables identifies the different payment methods and includes a description of each method.

Payment Method	Description
Cash	Enter the entire dollar amount and select **Cash** as the payment method.
Check	Enter the entire dollar amount, select **Check** as the payment method, and then enter the check number.
Credit Card	Enter the entire dollar amount, select **Credit Card**as the payment method, and then enter

Payment Method	Description
	the card number. Click **CC Details** to add more information about the card including CVV number and expiration date
Electronic Funds Transfer (EFT)	Enter the entire dollar amount, select **EFT** as the payment method, and enter the card number. Click **CC Details** to add more information about the card including CVV number and expiration date.

Payment Amounts
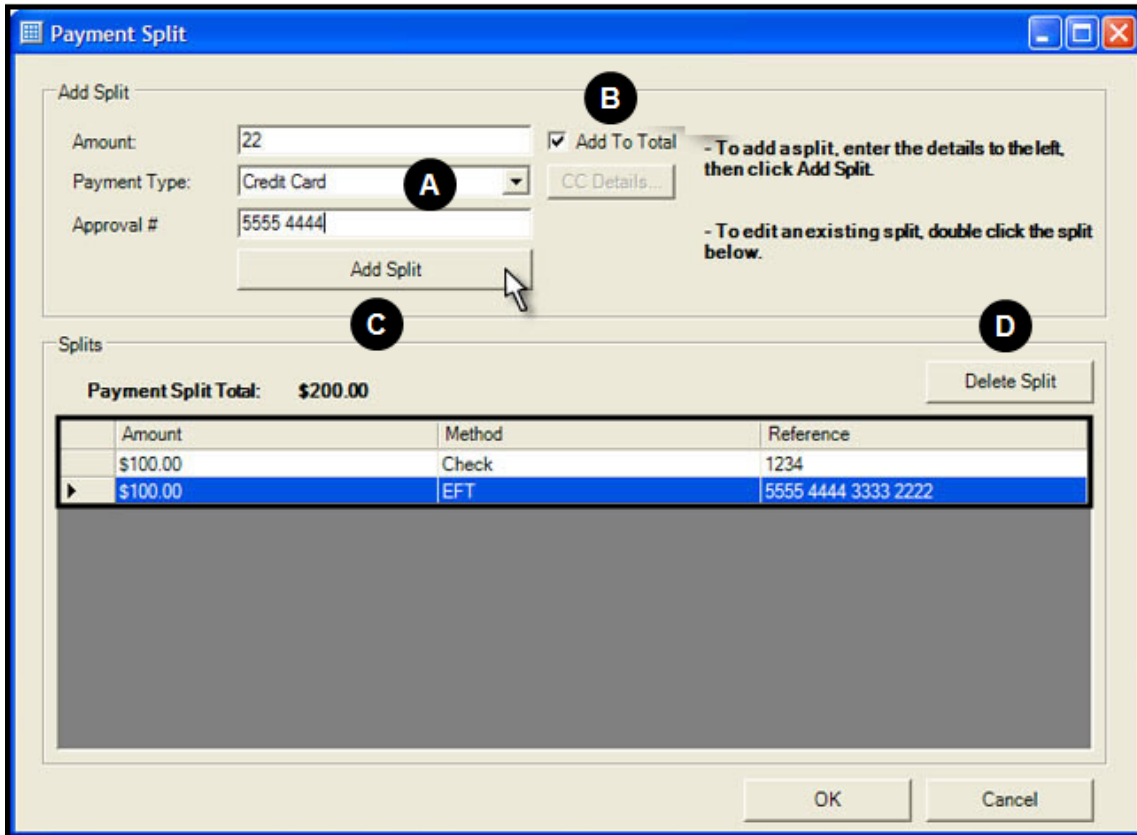
Enter the payment amount as a whole dollar amount (five dollars is "5") or as a decimal amount (five dollars and thirty-two cents is "5.32").

Note: The payment amount does not require the dollar sign or the comma.

Split Payments

The **Split** button gives you the ability to split a single payment using different payment methods.

Example: if a single payment is received using a check and credit card, you can split them and enter both payment methods for the payment. When the Split button is clicked, the "Payment Split" box is displayed. The box provides guidelines for adding and editing a split.

A. Enter the payment amount, type, and other information for the split. The fields that display in the Add Split panel will change depending on the payment type you select.

B. Mark the **Add to Total** checkbox to include the split amount in the total for the payment.

C. Click **Add Split** to add the payment to the Splits panel and automatically update the **Payment Split Total** field.

D. Click **Delete Split** to remove the selected payment from the total.

In the example above, two splits for $100.00 each have been added, and a third for $22.00 is about to be completed, for a total of $222.00 dollars.

Review Entries in Rapid Entry

As you enter information in Rapid Entry, it is searched for potential duplicate records and non-standardized addresses. If there is a problem with an entry, the status flag changes in the Status column. All entries that do not display the green check mark must be reviewed before a batch can be properly closed in **Aegis CRM**.

Status Flags

Status flags are applied to each transaction entered in Rapid Entry and are displayed in the Status column of the Batch Entry screen. The table below identifies the stats flags and includes a description of each flag.

Status Flag	Description
Green Check Mark	No issues with the Partner record have been found.
Yellow Check Mark	There is an issue with the Partner record and it needs to be reviewed..
Green Check Mark with People Icon	A similar record has been found with a potential for duplicate records. If they the records are duplicates, you can merge the records in Rapid Entry.
Letter with a Red Circle and Bar	The Partner record does not have a standardized address.

Review an Entry

To review an entry select the record with an issue, click **Review** in the Batch Header panel.

After duplicate records have been merged or other issues have corrected, click Review Next to display the next record for review.

Note: Depending on the choices made on the Miscellaneous tab of the batch Options screen, either the next entry in the list or one with a potential issue displays for you to review.

Introduction To Queries

Aegis CRM's Query module is designed to help you get the answers you need from your database quickly and accurately. It is a very powerful tool that can be used to find the answers to simple questions like:

"How many of our donors have given a gift of $100 or more in the past twelve months and live in California?"

You can also use the Query module to create complex queries that answer questions such as:

"We need to know how many of our donors who received our March Announcement Letter have given at least three gifts in the past six months that totaled more than $1000, or were added to the system in the last three months and have given at least $100."

For either example you use the same process to build your query. With an understanding of the basic principles of queries and how they interact with your database, you can provide answers to any database question.

For any query, you need to answer two questions:

1. What is the criteria for identifying common records?
2. What type of records and information do you want in your results?

Criteria

The criteria you use filters the database to separate the records you want from other records in the database. There are many different ways to apply these filters, depending on the type of query you create. When you select a query type, you are applying the first filter to your query.

Query Types

Aegis CRM includes multiple query types you can use to identify the information you want included in your results.

Example: You have a partner named Joe Smith who has given three gifts in the current year. If you create a contact query for current year donors, Joe Smith is included once in the results. If you create a gift query for gifts received during the current year, Joe Smith will be included in your results for each gift he made.

The most commonly used query types in **Aegis CRM** are Contacts, Activity, and Gifts. The following table includes a description and sample criteria for each query type.

Query Type	Description	Sample
Contact Query	Group partners that have something in common.	Partners who live in Maine with an average gift of $25 or higher
Activity Query	Group records based on inbound activities including any that did not include a donation.	Partners who responded to a specific appeal, during a specific time frame, and made a pledge
Gift Query	Group transaction records based on something they have in common.	Gifts given by specific appeal, during a specific time frame, and entered in a specific batch.

Operators

You can operators in your query to help identify the records you want in your results. The **And** operator looks for records that meet all criteria you add to the query.

Example: How many of our partners have given a gift of $100 or more in the past twelve months **and** live in California?

The results include records for all partners who gave $100 or more living in California.

The **Or** operator looks for records that meet at least one of the criteria you added to your query.

Example: How many of our partners have given a gift of $100 or more in the past twelve months **or** live in California?

You will receive more results because they include all records for partners who have given $100 or more regardless of where they live and records for all partners living in California regardless of the amount they have given to your organization.

Value operators specify what to include in the query results. In the example query above, the phrase "have given a gift of $100 or more" uses the value operator "equal to or greater than" to determine which records meet that criteria and should be included in the results.

Note: Make sure that when you create queires using multiple criteria, you identify the value operators for each criteria you use.

Query Types

The table below identifies the different query types available in **Aegis CRM** and includes a description, example, and the type of results available for the query.

Query Type	Description	Example	Result Type
Activity	Find information about **inbound** correspondence with your partners. Donations, orders, and non-zero-dollar responses are all included in the Activity Query Type.	Activity Value is greater than or equal to $5 AND Activity Date is greater than or equal to 6/1/2015	Gifts
Appeals	Find detailed information on appeals, such as acknowledgements, packages, grouping options, and general appeal status.	Appeal Date is greater than or equal to 6/1/2015 AND Active is equal to True AND Appeal Type is equal to Solicitation	Appeals
Appeal Segments	Find information on specific appeal segments such as Description, Mail Count, Segment Cost	Appeal ID is equal to OC3DV0408	Appeal Segments
Available Contact Flags	Contact Flags are custom fields added for your specific organization.	Flag Description is equal to Quarterly	Contact Flags
Batches	Find information on specific batches, such as Amount, Date, Type, Status, etc.	Batch Date is equal to 6/1/2015 AND Batch Status is equal to Reviewed	Batch Details

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Query Type	Description	Example	Result Type
Campaign	Find gift information on a specific campaign, such as Date Gift Received, Gift Value	Campaign Name is equal to BG31C	Gifts
Change History	Find information on changes made to contact records, such as an address and custom data field changes.	Date Changed is greater than or equal to 6/1/2015 AND Modified Property is equal to Address1	Contacts
Contacts	Find information on partner records in the database. This is also the query type used for Appeal Pulls.	Date Joined Is Greater than or Equal to 6/1/2015 AND Sum of Gifts in Last 12 Months is Greater than or Equal to $5	Contacts
Day Deposits	Used in conjunction with the Day Closing function, this query type provides summary information on batch deposits.	Deposit Date is equal to 6/1/2007	Deposit Details
Funds	Find gift information for a specific fund, or group of funds.	Fund ID is equal to 2005 Fund	Gifts
Gifts	Find information on non-zero dollar, non-pledge transactions, such as Date Received, Batch Number, Appeal ID	Date Received is greater than or equal to 6/1/2007 AND Gift Value is greater than or equal to $100	Gifts

Query Type	Description	Example	Result Type
Inventory	Find information on inventory items, such as Location, Price, Fair Market Value, Reorder Levels	Active is equal to True	Inventory Items
Invoice Gifts	Find information based on donations only. No order or other non-donation transactions are included	Appeal ID is equal to 0C3TC AND Gift Date is greater than or equal to 6/1/2007	Gifts
Invoice Items	Find information about order transactions, such as SKU's , purchases, fair market value, etc	SKU is equal to CBA1112	Invoice Items
Invoices	Find information about order transactions, such as transaction totals, appeal trends, etc	Appeal ID is equal to OC3TC	Invoice Items
Letters	Find information based on solicitations, whether direct mail, telephone or email, with the exception of response or acknowledgement letters. This will return all constituents that receive the solicitation, whether they reply or not.	Appeal ID is equal to OC3HC0908	Contacts
Outbound Activity	Find information based on response or acknowledgement appeals.	Appeal ID is equal to OCSC2010	Contacts
Packages	Find information on appeal	Appeal ID is	Gifts

Query Type	Description	Example	Result Type
	packages, such as which packages are assigned to an appeal, costs and counts, etc.	equal to OC1FD	
Payments	Find information on what types of payment methods were used by constituents, such as Checks, Cash, Credit Cards, etc.	Payment Type is equal to Credit Card and Payment Date is greater than or equal to 6/1/2007	Gifts
Pledges	Find information on pledges made by your partners, such as original appeal, income generated from pledge payments.	Date Pledged is greater than or equal to 6/1/2007 AND Active Pledge is equal to True	Pledges
RDD Assignments	Find giving information on Regional Development Director (RDD) assignments	RDD Name is equal to Planned Giving Officer AND Activity Date is greater than or equal to 6/1/2007	Gifts
User Activity	Find information on specific user activities	Operation is equal to Create AND Time Stamp is greater than or equal to 6/1/2007 AND Category is equal to Activity	User Activity

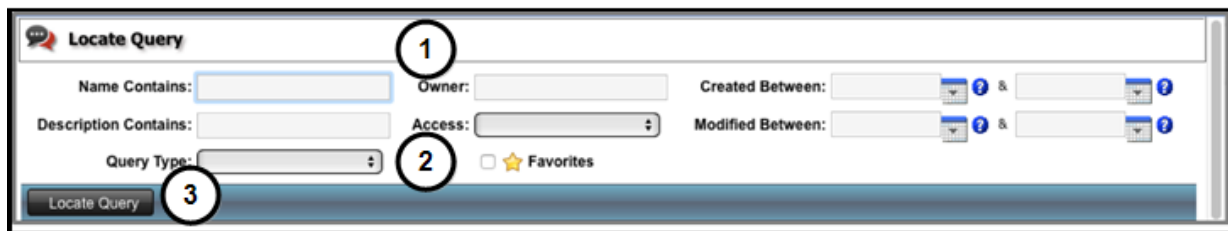**Note:** Saved queries can be used as a template for creating new queries.

Locate a Query

Queries allow you to group records based on specific criteria such as the number of donors who have given $100 or more in the last year and live in California. To view these records, you can locate and open a query record in **Aegis CRM**.

Saved queries can be used as a template for creating new queries that you can easily track and monitor on the Home page.

Note: Only the queries available to everyone in your organization display in your search results. If a user marks a query as private, it only displays in the results for the user who created the query.

To locate a query, click **Queries** on the Navigation menu and then select **Locate Query**. On the Locate Query page, follow these steps:
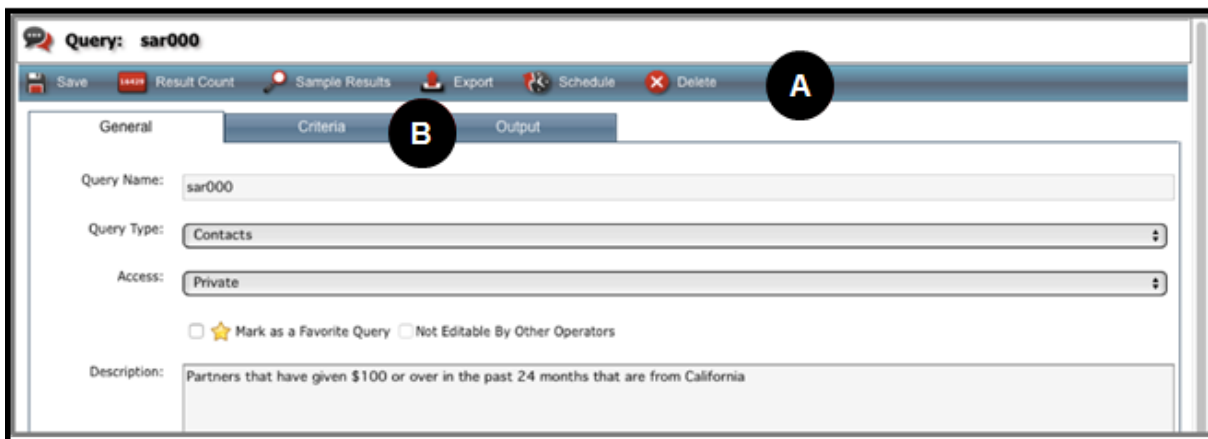
1. Enter as much information about the query in the available fields as you can. The more accurate the criteria, the better the chances of locating the correct query.

2. Select the **Query Type** such as activity, event, or payment to further define the criteria for your search.

3. Click **Locate Query.**

When multiple records are found, you can sort the results by clicking on the column headings or click the link in the **Query Name** column to open the query record.

Navigate a Query Record

The query record allows you to view general information, criteria filters, and output fields of the records included in the query results.

A. Click a button to:

- **Save** - Allows you to save the query for future use
- **Result Count** - Returns the total number of records included in the query.
- **Sample Results** - Returns the first 200 records included in the query.

- **Schedule** - Create a job schedule to run the query at a later time.
- **Export** - Allows the user to export the query results
- **Delete** - Deletes the entire query

B. Access general information about the query as well as the criteria used to fil-ter the results and the information you want to view in those results.

The General Tab

On the General tab you can view basic information about the query.
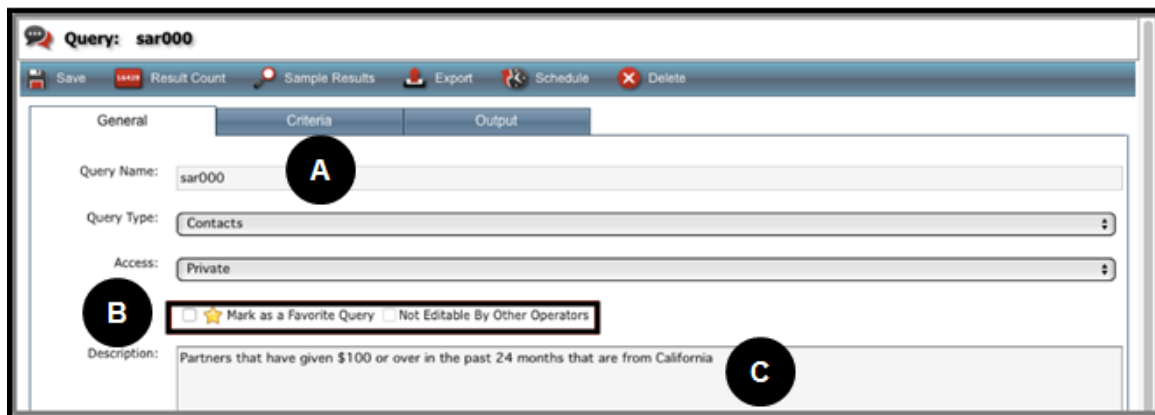
A. View the name, query type, and access level for the query.

B. Determine whether the query has been marked as a favorite or whether oth-ers are able to make changes to the query.

C. View a description of the query that identifies the information you want included in the results.

The Criteria Tab

On the Criteria tab, you can view the fields that have been selected to filter the records selected for the query.
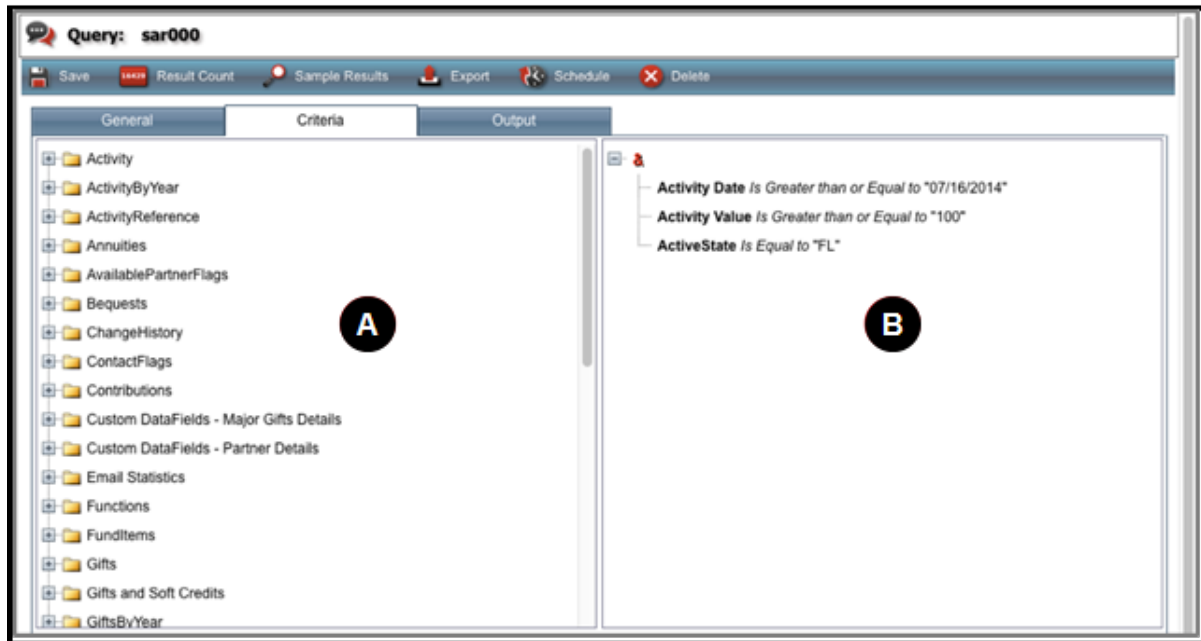
A. View the fields available to select as filters based on the query type you selected on the General tab.

B. View the fields selected as filters for the query.

The Output Tab

On the Output tab, you can select the fields you want displayed in your results.
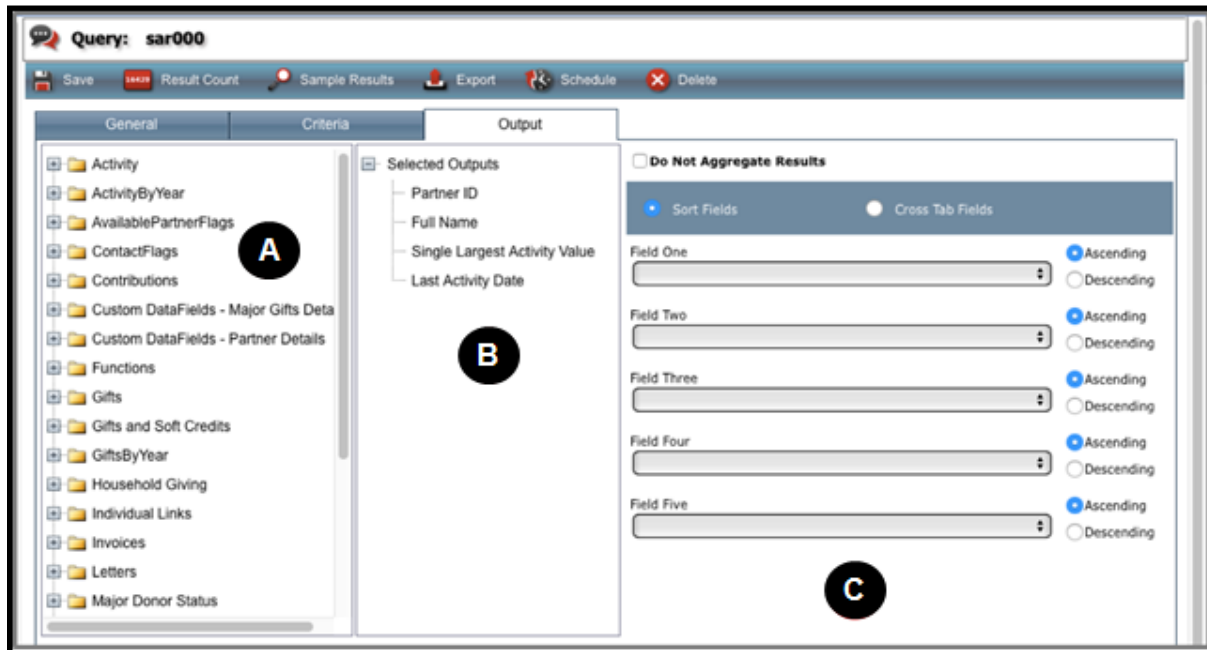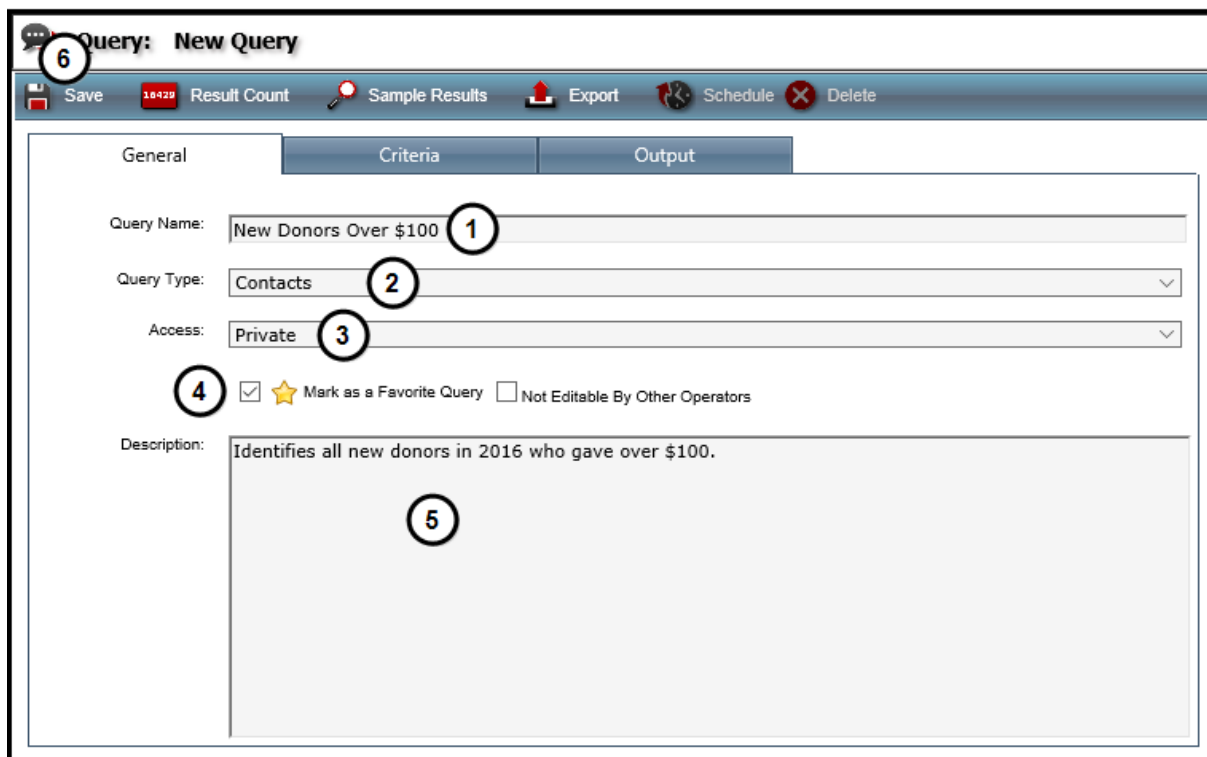
A. View the fields you can select for your output based on the query type you selected on the General tab.

B. View the fields selected as the output for the query.

C. View the fields used for sorting the output results and determine whether they display in ascending or descending order.

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Create a Contact Query

A contact query groups partner records that have something in common based on the criteria you identify when you build the query. For this query, you want to identify all new donors who gave more than $100 in 2016.

General Information

To create a contact query click **Queries** on the Navigation menu, click **New Query**, and then follow these steps:

1. Enter a name for the query.

    Tip: If there are several users who create queries, it is helpful to prefix your queries with your initials to make them easier to find later.

2. Select **Contacts** for the **Query Type** field.

3. Select who has access, besides you, to the query.

    1. Choose **Private** to restrict access for other users.

    2. Choose **Everyone** to allow all users access to the query.

    3. Choose **Admin** to give only users with administrative rights to the database access to the query.

4. Mark the **Mark as a Favorite Query** checkbox so you can add it to your Home page.

5. Enter a description that identifies the purpose of the query.

6. Click **Save**.

Criteria

On the Criteria tab you add the filters to your query. To add the filters, select the Criteria tab and then follow these steps:
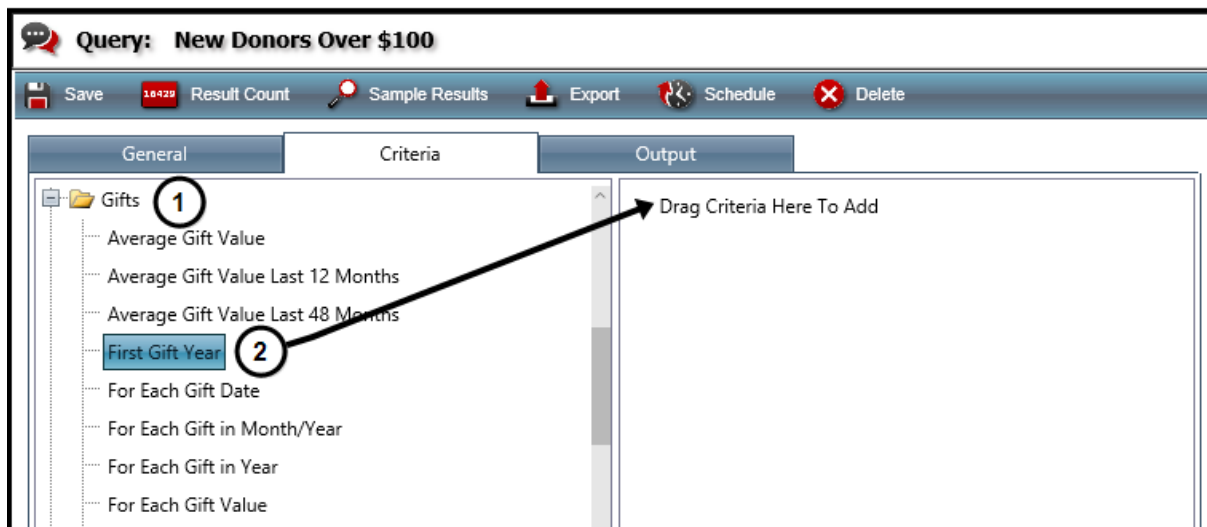
1. Click **Gifts** in the Available Fields pane to expand the folder and display the fields available to use as your query filters.

    a. For this query we want all records for new donors who gave a gift of a of $100 or more in 2016.

2. Click and drag the **First Gift Year** field and drop it in the Criteria panel.
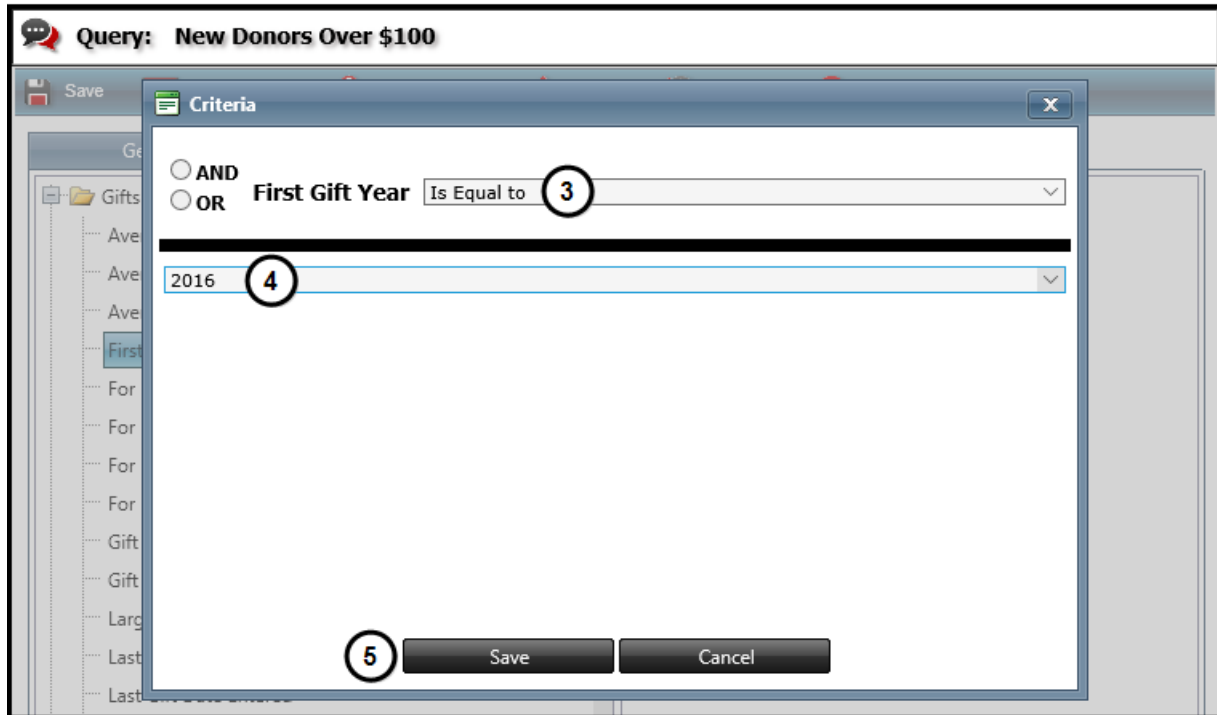
3. Select **Is Equal To** for the **First Gift Year** value operator.

4. Select **2016** as the value.

5. Click **Save**.

    a. Repeat steps 1 through 5 to:

        i. Select **And** as the operator.

        ii. Select **Is Greater than or Equal to** as the value operator.

        iii. Enter **$100** as the value.

The query filters are identified in this graphic.
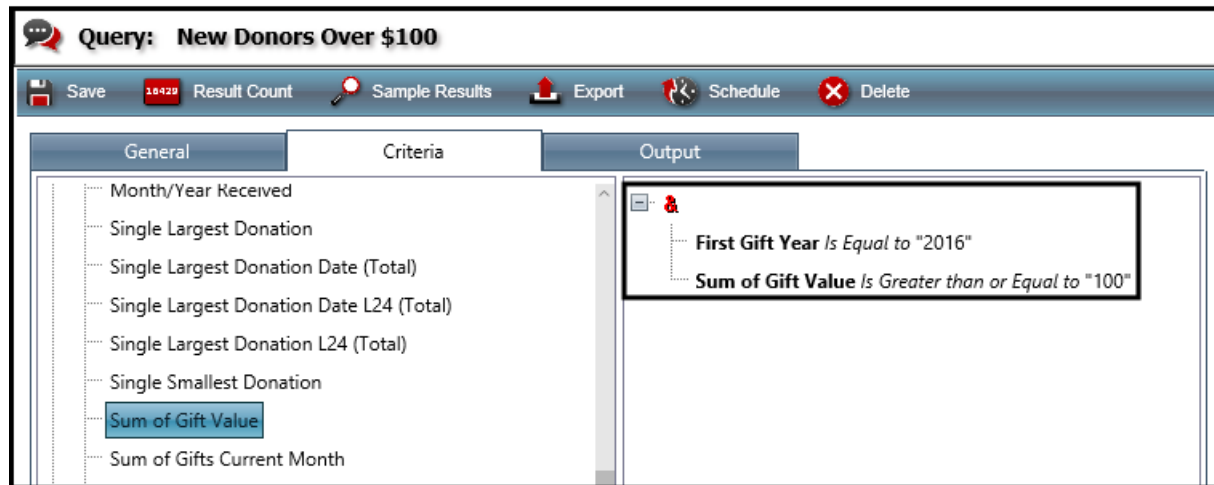
If you need to edit the criteria for your filter, right click the filter and select **Edit Criteria**. Click **Remove Criteria** to delete the filter.

Output

On the Output tab of the query, you select the fields to display in your results. Common fields include first name and last name or full name, address details, contact information, amount given, and when it was given.

For this query we want to the new donor's full name, address, contact information, the amount they gave, and the date it was donated to your organization.

To add output fields select the Output tab, expand the Partner folder in the Available Fields pane, and then follow these steps:
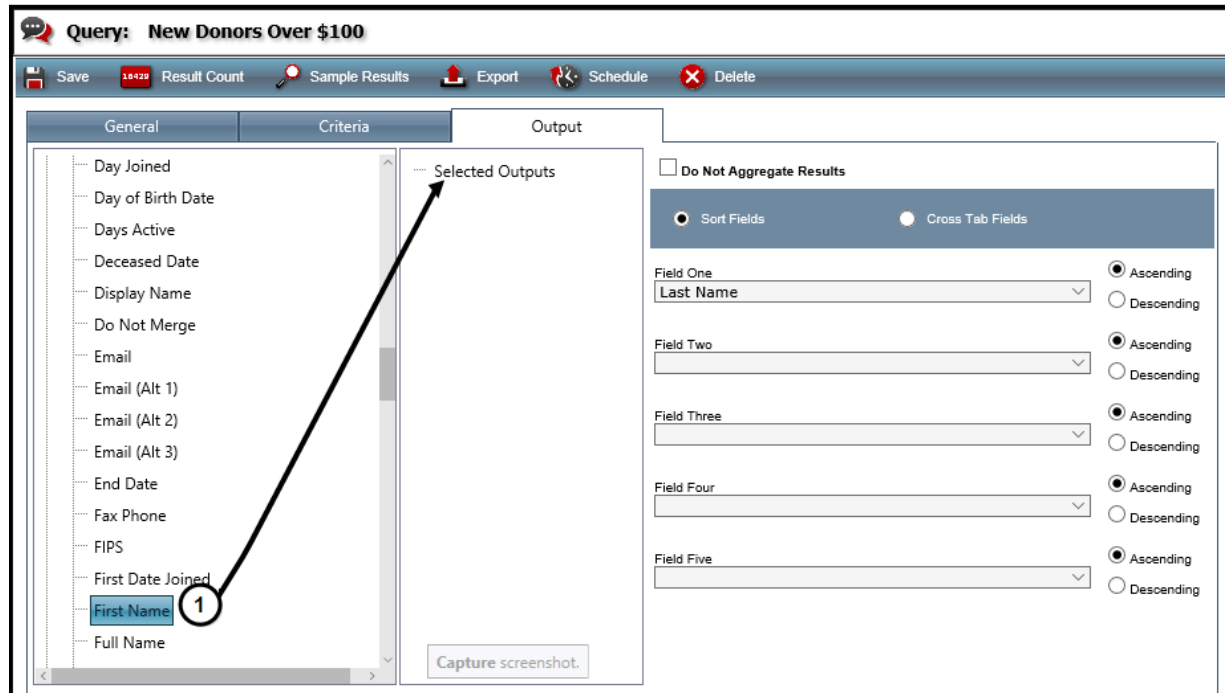
1. Select and drag the **First Name** field from the Available Fields pane and drop in the Outputs pane.

    a. Repeat this step to add these fields:

        i. Partner > Last Name

        ii. Partners > Active Address

        iii. Partners > Active City, State, and Zip

        iv. Partners > Email

        v. Partners > Phone 1

        vi. Gifts > Last Gift Date

        vii. Gifts > Sum of Gift Value
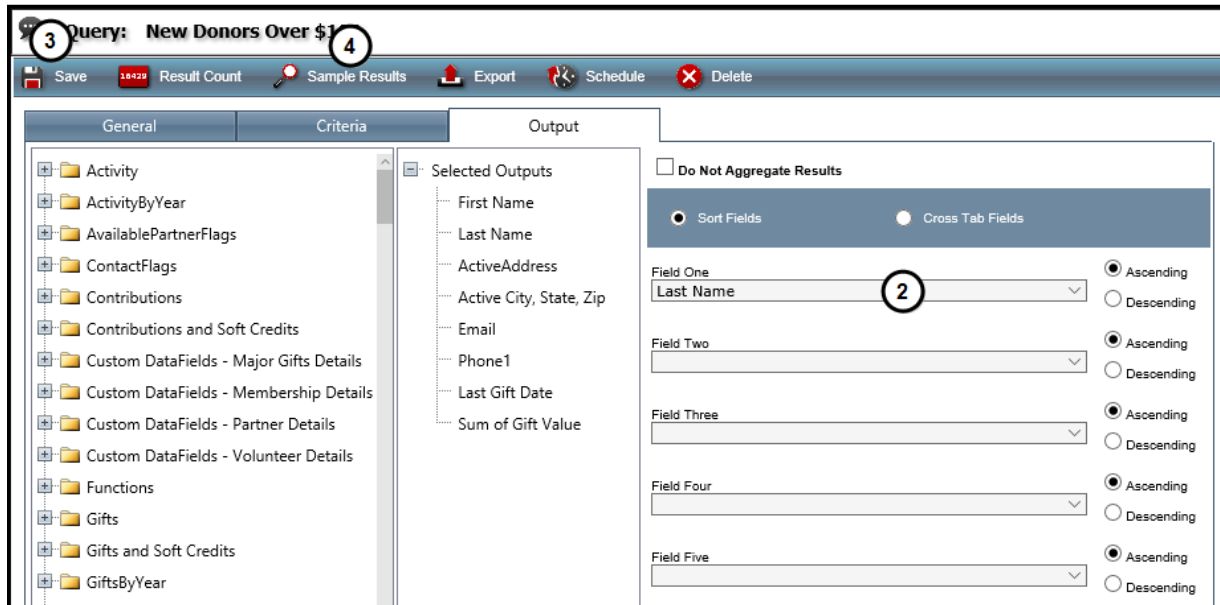
2. Select a field to sort the results included in the query.

   a. Last name in ascending order is a common way to sort the results.

3. Click **Save** and then click **OK** in the message that says your query has been saved.

4. Click **Sample Results**.

Sample Results

You can use the sample results to verify the information you want is included in the query results.

Query Name:	New Donors Over $100
Query Owner:	dhimes@bernardsolutions.com
Result Count:	33
Query Criteria:	First Gift Year *Is Equal to* "2016" AND Sum of Gift Value *Is Greater than or Equal to* "100"

First Name	Last Name	ActiveAddress	Active City, State, Zip	Email	Phone1	Last Gift Date	Sum of Gift Value
John	Anthony	5397 Brookside Dr	Broomfield, CO, 80020-6158	janthony@bernardsolutions.com	(303) 627-4331	02/16/2016	$250.00
Linda	Arnold	4930 E State St	Rockford, IL, 61108-2289			05/18/2016	$500.00
Crystal	Brown	2022 Oak Ridge Rd	Oak Ridge, NC, 27310-9782	mrdavidallenbrown@gmail.com	336-403-4339	11/15/2016	$200.00
Jon	Cargill	7707 SW 44th St	Oklahoma City, OK, 73179-4899			05/18/2016	$300.00
Patrick	Cole	123 Main St.	Revere, MA, 02151			01/23/2017	$720.00
John	Doe	123 Main	Culpeper, VA, 22701			10/14/2016	$275.00
Kojo	Duncan	16900 Science Dr Ste 210	Bowie, MD, 20715-4412	kduncan@cdrfg.com	3018581500	12/15/2016	$1,514.00
Inger	Green	1136 S Blue Ridge Ave	Culpeper, VA, 22701-3302			08/03/2016	$305.00

A. View the **Query Name, Query Owner, Result Count,** and **Query Criteria** for the query.

B. The Output fields you identify display as column headers in the results.

C. Each partner who meets the criteria you used displays on a row in the results.

If the results do not include the details you expect, modify the criteria or output fields until you get the information you need.

Analytics

Aegis CRM includes reports you can generate that use graphics and data so you can analyze the performance, effectiveness, and efficiency of your organization.

Note: Your permission settings determine the reports you can generate in **Aegis CRM**. Output is available in .PDF format and some reports can be opened in Excel.

The following tables identifies the report groups and includes a description of the information available in the reports.

Report Group	Description
Accounting	A collection of reports that include information about credit cards, outstanding invoices, and pending transactions.
Advanced Management	These reports focus on the core statistics of your database, lifetime values, recency/frequency, and RFM.
Appeal	A collection of reports, divided in to five groups for analyzing appeal data. **Administrative** reports focus on information about acknowledgements, templates, and unassigned appeals. **Appeal Performance** reports give you insight into how your appeals are performing by county, segments, and date range. **Lifetime Value** reports provide information about the lifetime values of your donors focusing on lapsed partners and segments. **Response** reports focus on details including response data by partners, state, and country. **Revenue** reports provide information such as monthly

Report Group	Description
	revenue for an appeal grouping, monthly comparison, top 10 or 20 appeals, and product sold by appeal.
Batch	A collection of reports that focus on information about the batches used at your organization including payments, performance, daily deposits, and transaction reconciliation.
Campaign Analysis	Designed to provide you with insights into your campaigns including performance analysis, by package and segment groupings, and giving analysis.
Documents	Gives you information about the documents stored in **Aegis CRM** and include a summary or detailed report.
Email	Includes details about the email appeals used to communicate with partners.
Event	Gives you a cost detail and summary report for your events.
Fulfillment	Review information about daily printing tasks and product fulfillment by item or order.
Fund	Information in these reports include giving analysis by quarter and revenue including by description or batch category.
Geography	View geography information including 3 or 5 digit by state, postal code by Canadian province, and revenue by country.
Income/Expense	Details information related to monthly income, revenue by month, 3-year comparison, and item revenue by order or payment date.
Inventory	Provides details including instock vs. reorder levels, orders by partner, status by appeal, and pending shipments.
Major Donors	Identify information about the net worth analysis of partners, major gifts by year, and major giving officer goals or follow up tasks.

Report Group	Description
Management	View statistics related to the state of your database.
Media Management	Information available includes top media markets and monthly transaction summary.
Memberships	Generate revenue details by membership level.
Partner	A collection of reports, divided in to three groups for analyzing partner data. **Administrative** reports include change history, partner merge, origin code list, managed addresses, and flag counts. **New Name** reports identify details about new partners to your organization by appeal, mail date, origin code, and new partners to donors summary. **Revenue** reports focus on the giving details of your partners such as receipts, matching gift details, RFM analysis, and top 50 or 100 donors.
Pledge	View details about the pledges made to your organization including partner details, monthly analysis, adjustments, and appeal.
Segmentation	Identify information you can analyze about your segments such as appeal revenue and partner counts.
Volunteers	Generate volunteer role information in summary or detailed format.

Any custom reports that your organization requested are available in a folder with your organization's name. If you need a custom report, please contact your **Aegis CRM** Account Manager or Support, support@aegispremier.com.

Monitor High Impact Reports

Aegis CRM includes many different reports you can generate to analyze information in your database. The table below identifies the high impact reports

you should monitor on a regular basis and includes a description of each report in order of importance.

Report Name	Description
Giving Lifecycle (P1014)	Categorizes donors in groups of donors/non-donors and runs a detailed analysis of gifts as well as revenue for each group. Generate this report no less than Quarterly to determine if programs are on target to Budget expectations. **Reports module > Partner folder > Administrative folder**
State of the Database (MG1001)	Summarizes giving metrics for three previous years to date. You should generate this report on a monthly basis to verify that programs are functioning as expected. **Reports module > Management folder**
Fund Revenue By Description (V1007)	Displays month to date and year to date responses and income for the past three fiscal years. Month to date displays at the top and year to date displays below that at the bottom of the report. **Reports module > Income/Expense folder**
Revenue By Appeal (A1006)	Details the performance of active appeals during a specific date range. This report should be run monthly as part of your end-of-month procedures. **Reports module > Appeal folder > Revenue folder**
Core Stats (MA1010)	Analyzes five years of data including donations, retention, and upgrade/downgrade metrics for each lifecycle group. **Reports module > Advanced Management folder**
Appeal Recap (A1013)	Displays summary details for a specific appeal and includes information such as the Overall Summary, Package Summary, Monthly Giving Summary, and Package Cost Detail.

Report Name	Description
	Reports module > Appeal folder > Revenue folder
Revenue by Appeal Group (A1040)	Displays details in a table and graphical format based on the revenue, number mailed, and gift counts for the selected appeal grouping. **Reports module > Appeal folder > Revenue folder**
Appeal Performance Analysis (A1015)	Provides a summary total of all appeals mailed within the date range you choose. Previous and current fiscal year (or calendar year) are the most common date ranges. **Reports module > Appeal folder > Appeal Performance folder**
Appeal Performance Analysis by Segment (A1014)	Provides metrics associated with the performance of a set of defined appeals. Sub-Totals are provided for each appeal presented and Grand Totals are printed for all appeals printed. **Reports module > Appeal folder > Appeal Performance folder**
Campaign Performance Analysis (C1006)	Provides appeal performance information for appeals mailed during the date range you define with the appeal grouping you select. **Reports module > Campaign Analysis folder**
Appeal Performance Analysis by Package (A1061)	Provides an appeal performance analysis by package for the appeals you select. **Reports module > Appeal folder > Appeal Performance folder**
Appeal Performance Analysis by	Provides appeal performance statistics by segment using the appeal segment groupings for the appeals you select.

Report Name	Description
Segment with Segment Groups (A1030)	Reports module > Appeal folder > Appeal Performance folder