



PLANNED GIVING
(MAJOR DONORS)

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Objectives

The purpose of this manual is to instruct users on understanding:

- **How Planned Giving is set up**
- **How Major Gift Officers are Assigned**
- **How Accounts are Tracked**
- **How Progress is Tracked**

Planned Giving Overview

This manual is for the understanding of how Planned Giving performs in the Aegis CRM. The Planned Giving module provides Aegis clients with a location from which to track their Major Gift Officers (MGOs), the Accounts (Donors) that those MGOs have been assigned, and reports on their interactions.

Users can set up the criteria from which those MGOs are tracked as well as goals that can be defined for those officers.

There are two sub-modules located under Planned Giving – RDD Assignments and Manage Major Donors.

- **RDD Assignments** – enables users to view the Goals, Assignments, Follow-Ups, and Response Rules for the MGO. It is helpful in evaluating progress and tracking responsibilities for that officer.
- Manage Major Donors has two distinct tabs for users to utilize: **Major Donor Pool** and **Major Donor Status**.
 - The **Major Donor Pool** tab enables users to Query and Find Donors or prospects to assign Major Donor status.
 - The **Major Donor Status** tab is the location by which users create the desired Major Donor Status Codes that are leveraged in Appeals, Queries, Reports, and in the assignment as Accounts to MGOs.

In the following pages users will understand how to interact with the RDD Assignments, assign MGO's Donor Accounts, how search for potential and actual Major Donors, and how to edit and interact with the Major Donor Status settings.

RDD Assignments

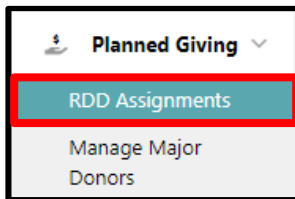
RDD Assignments is an area that enables users to see the Major Gift Officer accounts and the progress the MGOs have made in recruiting gifts from those accounts. Users can be limited to viewing their own account.

In this section the RDD Assignments sub-module and its functions will be reviewed using a fictional data set.

RDD Assignments OVERVIEW

ACCESS/LANDING PAGE

1. Click on the **Planned Giving** module.
2. Select the **RDD Assignments** sub-module.



3. Initially, users are presented with a list of **Major Gift Officers** and a summary of their **Progress, Assignments, Follow-Ups, and Rules**.

A screenshot of the 'RDD Assignments' landing page. The page title is 'Assignments'. Below the title is a link for 'Import MGO Assignments'. A header reads 'Select A User To View More Detailed Information'. Below this is a table listing Major Gift Officers (MGOs) with their progress percentages and counts for Assignments, Follow-Ups, and Rules.

ID	Name	Progress	Assignments	Follow-Ups	Rules
CG	Carlos Guerrero cguerrero@demo-data.com	Progress: 94%	6	0	1
DO	Dave O'Connell doconnell@wearemoore.com	Progress: 80%	6	1	1
DL	Debby Lee dlee@demo-data.com	Progress: 49%	4	0	1
GK	Gary Kirk gkirk@demo-data.com	Progress: 52%	5	0	1
JM	Jennifer Mitchell jmitchell@demo-data.com	Progress: 16%	3	0	1
KH	Kevin Hartland khartland@demo-data.com	Progress: 9%	7	0	1
NW	Nikki Wiederaenders nwieder@demo-data.com	Progress: 24%	2	0	1
TU	Test User redsox1809@yahoo.com	no goals defined	0	0	0

4. Clicking on an **MGO** – Carlos Guerrero – displays that officers **Summary Screen**.

GOALS Tab

The **Goals** tab is the default tab first viewed when clicking on an officer. From this location users can:

- View an **MGO’s Monthly Goals** for the **Year-to-Date**.
 - Users can toggle to the **Total Year** as well.
- Edit an **MGO’s Monthly Goals** by clicking the Edit Goals button.
 - Users will need permissions to edit.

NOTE: Goals are calculated against the Donations/Gifts made by a MGO’s Assigned Accounts within the time listed.

1. Users can click the **All-Years** link to see **All Monthly Goals** for all years tracked.

- The left-hand pencil icon enables users to edit the goal amount.

All Monthly Goals													
+ Add Fiscal Year Refresh													
	Fiscal Year	Month1	Month2	Month3	Month4	Month5	Month6	Month7	Month8	Month9	Month10	Month11	Month12
	2016	\$100.00	\$150.00	\$200.00	\$100.00	\$2,000.00	\$3,000.00	\$4,000.00	\$500.00	\$600.00	\$1,000.00	\$1,000.00	\$800.00
	2017	\$500.00	\$1,500.00	\$500.00	\$500.00	\$2,000.00	\$500.00	\$1,500.00	\$2,000.00	\$500.00	\$500.00	\$2,500.00	\$2,500.00
	2018	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00
	2019	\$600.00	\$500.00	\$300.00	\$600.00	\$1,000.00	\$50.00	\$1,200.00	\$1,000.00	\$500.00	\$600.00	\$900.00	\$2,000.00
	2020	\$20,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$1,000,011.00	\$10,000.00	\$10,000.00	\$100,000.00	\$10,000.00
	2021	\$100,000.00	\$100,000.00	\$100,000.00	\$100,000.00	\$100,000.00	\$100,000.00	\$120,000.00	\$130,000.00				
	2023	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00
	2024	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00	\$250.00

ASSIGNMENTS Tab

1. When selected, the **Assignments** tab displays three sections to help display existing Assignments for the selected MGO.

The screenshot shows the 'Assignments' tab interface. At the top, there are tabs for 'Goals', 'Assignments', 'Follow-Ups', and 'Response Rules'. The 'Assignments' tab is active. Below the tabs, there are three main sections:

- Section 1: General Search** - Contains a form with fields for Donor ID, First Name, Last Name, Address, City, State / Province, Postal Code, Country, Company, Title, Phone, Email Address, Status, Last Gift Date, Major Gift Field, Major Gift Value, and Flags. It includes 'Locate' and 'Clear' buttons.
- Section 2: Search by Miles from Address** - Contains a form with fields for Radius in Miles, Address, City, State / Province, and Postal Code. It includes 'Geocode', 'Locate', and 'Clear' buttons.
- Section 3: Assignments Table** - A table with columns: ID, Major Donor, Status, MGO(s), Follow-Up Dates, Flag(s), Lifetime Giving, and Last Gift. The table contains four rows of data. A red box highlights the ID column, and a callout points to it as the Partner Summary Page link.

ID	Major Donor	Status	MGO(s)	Follow-Up Dates	Flag(s)	Lifetime Giving	Last Gift
40000138	Kayden & Catherine Tamya 4775 Puritan Rd Buzzards Bay, MA 02032-5624		Carlos Guerrero	Next: 05-30-2024 Last: 05-30-2024		\$80.00 as Revenue \$60.00 in Total	\$20.00 Date: 06-28-2007 Appeal: OC31C
40001719	Abril Zechariah 18152 S Central Ave Flagler Beach, FL 32136-4039	★ Major Donor LTR: Silver	Carlos Guerrero			\$701.40 as Revenue \$701.40 in Total	\$150.00 Date: 06-04-2021 Appeal: CMG16
40678735	Martin Brody Amity PD 194 E Chop Dr Vineyard Haven, MA 02568-2156	★★★ Major Donor LTR: Gold	Carlos Guerrero Dave O'Connell	Next: 01-01-2024 Last: 12-31-2024	NoPhoneSolicitation, PreventMerge, VIP, BOARD, COMM, COMM_ASST, NO SHARE, SPON	\$17,655.00 as Revenue \$17,655.00 in Total	\$100.00 Date: 12-31-2022 Appeal: BMP 2016
40678726	James & Martha Dolan Aegle's Premier 2nd Address 2 Woodhaven Ct Belleville, IL 62223-4545	Major Donation: \$5000+	Carlos Guerrero	Next: 01-31-2023 Last: 01-31-2023	NoPhoneSolicitation, NoResponseEmails, NoTaxStatements, PreventMerge, VIP, BOARD, COMM	\$2,526,692.99 as Revenue \$2,526,692.99 in Total	\$500.00 Date: 11-26-2022 Appeal: 10Gen

1

General Search

2

Search by Miles from Address

3

Assignments

4

Partner Summary Page (Via ID link)

General Search

2. The **General Search** section enables users to search existing MGO Assignments via one or more of the listed fields and the **Locate** button clicked.

- EXAMPLE: **Last Name** of Brody and **Locate** button clicked yields result:

The screenshot shows the 'Assignments' search interface. The search criteria include: Donor ID, First Name, City, Country, Company, Status, Major Gift Field, Last Name (highlighted with a red box and containing 'Brody'), Address, State / Province, Postal Code, County / FIPS, Title, Phone, Email Address, Last Gift Date, Major Gift Value, and Flags. The 'Locate' button is highlighted with a red box. Below the search form, there is a 'Search by Miles from Address' section with fields for Radius in Miles, City, State / Province, and Postal Code, and buttons for 'Geocode', 'Locate', and 'Clear'. At the bottom, a table displays the search results, with the first row highlighted by a red box:

ID	Major Donor	Status	MGO(s)	Follow-Up Dates	Flag(s)	Lifetime Giving	Last Gift
40878735	Martin Brody Amity PD 194 E Chap Dr Vineyard Haven, MA 02568-2198	★ ★ ★ Major Donor LTR: Gold	Carlos Guerrero Dave O'Connell	Next: 01-01-2024 Last: 12-31-2024	NoPhoneSolicitation, PreventMerge, VIP, BOARD, COMM, COMM_ASST, NO SHARE, SPON	\$17,855.00 as Revenue \$17,655.00 in Total	\$100.00 Date: 12-31-2022 Appeal: BMP 2016

3. Users can use the delete button on the far-left column to terminate the Assignment if desired.

Search by Miles from Address

4. The **Search by Miles from Address** section enables users to search existing MGO assignments via address specific information leveraging **Geocodes** (Latitude and Longitude).
 - This is especially helpful in determining how many assignees live in close proximity, possible to group for personal visits.
 - EXAMPLE: City of Boston

5. TO **Search by Miles from Address**:
 - a. Enter the **Radius by Miles** (EXAMPLE: 100)
 - b. Enter EITHER:
 - i. **Address AND City AND State/Province**
OR
 - ii. **Postal Code** (EXAMPLE: 02367)
 - c. Click the **Geocode** button.
 - i. The **Latitude & Longitude** display in lower right corner of section.
 - d. Click the **Locate** button.
 - i. The results display in the bottom section.

Search by Miles from Address

Radius in Miles
100

Address
85 Ring Rd

City
Plympton

State / Province
MA

Postal Code
02367-1406

Lat: 41.97438 Long: -70.79042 S: S25

Geocode

Locate

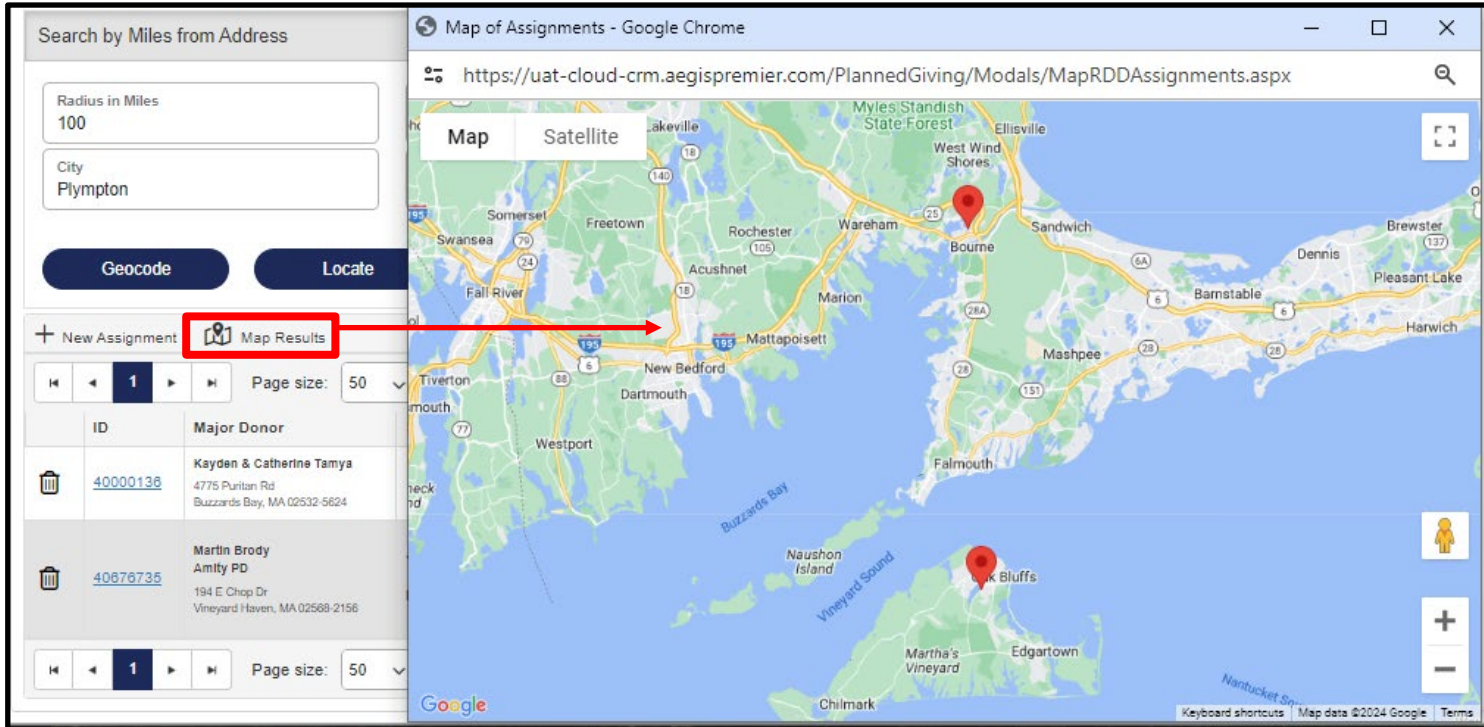
Clear

+ New Assignment Map Results

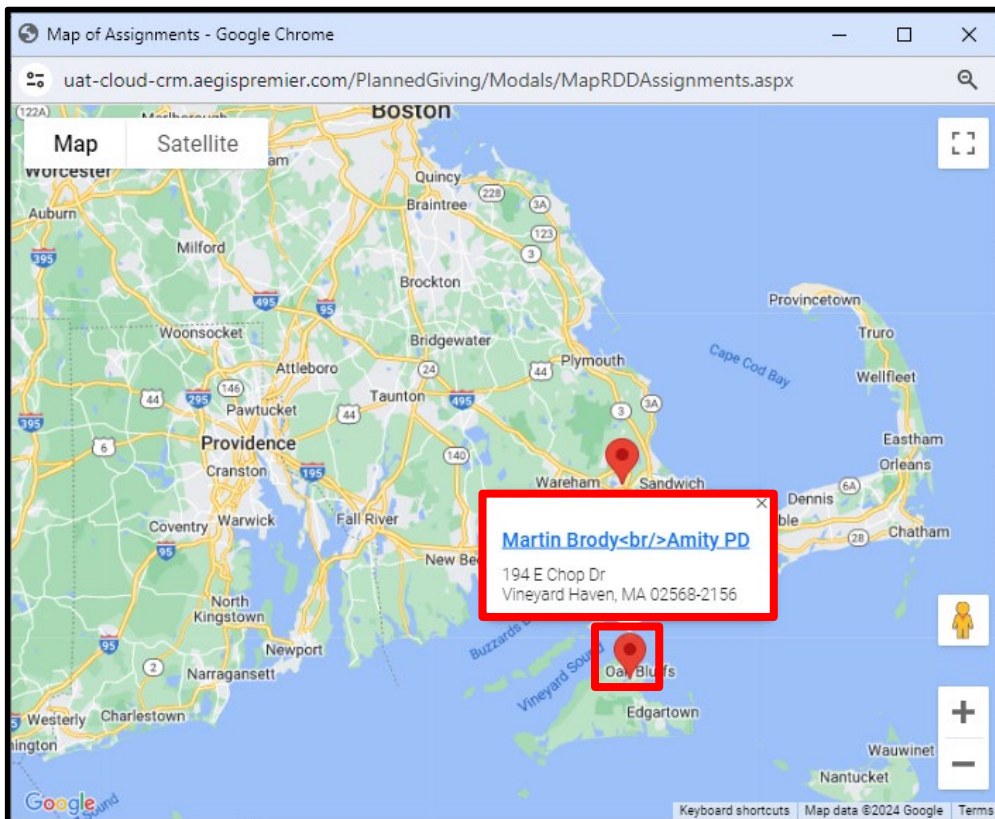
Page size: 50 2 items in 1 pages

ID	Major Donor	Status	MGO(s)	Follow-Up Dates	Flag(s)	Lifetime Giving	Last Gift
40000138	Kayden & Catherine Tanya 4775 Puritan Rd Buzzards Bay, MA 02532-5624		Carlos Guerrero	Next: 05-30-2024 Last: 05-30-2024		\$80.00 as Revenue \$60.00 in Total	\$20.00 Date: 06-28-2007 Appeal: OC3IC
40676735	Martin Brody Amity PD 194 E Chop Dr Vineyard Haven, MA 02568-2158	★ ★ ★ Major Donor LTR: Gold	Carlos Guerrero Dave O'Connell	Next: 01-01-2024 Last: 12-31-2024	NoPhoneSolicitation, PreventMerge, VIP, BOARD, COMM, COMM_ASST, NO SHARE, SPON	\$17,655.00 as Revenue \$17,655.00 in Total	\$100.00 Date: 12-31-2022 Appeal: BMP 2016

6. Users can also view the results on a map by clicking the **Map Results** button.








7. Clicking on a location displays summary information and if the blue link is clicked, displays the **Partner Summary** (covered shortly).



Assignments

8. The **Assignments** section enables users to view all existing assignments for the selected MGO (EXAMPLE: Carlos Guerrero).
- If more than 50 assignments exist, users scroll additional pages.

ID	Major Donor	Status	MGO(s)	Follow-Up Dates	Flag(s)	Lifetime Giving	Last Gift
 40000138	Kayden & Catherine Tanya 4775 Puritan Rd Buzzards Bay, MA 02532-5624		Carlos Guerrero	Next: 05-30-2024 Last: 05-30-2024		\$80.00 as Revenue \$80.00 in Total	\$20.00 Date: 06-28-2007 Appeal: OC3IC
 40001719	Abriil Zechariah 18152 S Central Ave Flagler Beach, FL 32136-4039	★ ★ Major Donor LTR: Silver	Carlos Guerrero			\$701.40 as Revenue \$701.40 in Total	\$150.00 Date: 05-04-2021 Appeal: CMG16
 40678735	Martin Brody Amity PD 194 E Chop Dr Vineyard Haven, MA 02568-2156	★ ★ ★ Major Donor LTR: Gold	Carlos Guerrero Dave O'Connell	Next: 01-01-2024 Last: 12-31-2024	NoPhoneSolicitation, PreventMerge, VIP, BOARD, COMM, COMM_ASST, NO SHARE, SPON	\$17,655.00 as Revenue \$17,655.00 in Total	\$100.00 Date: 12-31-2022 Appeal: BMP 2016
 40678728	James & Martha Dolan Aegle Premier 2nd Address 2 Woodhaven Ct Belleville, IL 62223-4545	Major Donation: \$5000+	Carlos Guerrero	Next: 01-31-2023 Last: 01-31-2023	NoPhoneSolicitation, NoResponseEmails, NoTaxStatements, PreventMerge, VIP, BOARD, COMM	\$2,526,692.99 as Revenue \$2,526,692.99 in Total	\$500.00 Date: 11-29-2022 Appeal: 10Gen
 40679913	Barbara & Stephen Veto 105 Sir Lawrence Dr Belleville, IL 62221-4480	★ ★ ★ Major Donor LTR: Gold	Carlos Guerrero		VIP, BOARD, NO PREM	\$100,650.00 as Revenue \$100,650.00 in Total	\$15.00 Date: 11-05-2022 Appeal: 17100

9. Users can sort by the **ID, Major Donor, Status, Follow-Up Dates, Lifetime Giving, & Last Gift** columns.

10. Users can also sever the connection between the MGO and the Assignment by clicking on the **Delete** (trashcan) icon in the left-most column next to desired record.

Parter (Donor) Summary Page

11. Clicking the **ID link** for an Assignment displays the **Partner Summary** page.

- This page opens in a separate window, enabling users to engage additional areas of the CRM, including opening multiple assignments.
- This page provides a focused look at the revenue generating actions and outcomes of the **Donor** record in a format that aids the MGO in evaluating the value of the Assignment.

12. The following section provides a **Donor** Page breakdown of the available information available to the user on this page.

Major Donor LTR: Gold ★★

Martin Brody
Amity PD
 Donor ID: 40676735
 Salutation: Chief
 Birth Date: 01/01/1935

RDDs Assigned
 Carlos Guerrero
 Dave O'Connell

Primary Address
 194 E Chop Dr
 Vineyard Haven, MA 02568-2156

Primary Contact Info
 Phone: (970) 412-3823
 Email: mbrody@demo-data.com

Actions: Create Note, Additional Addresses, Generic Response

Donor Giving Summary

Origin 05/07/2016 Member Date DI2020 Source Code	First Gift 4 years ago Date \$100 Value	Largest Gift this month Date \$150 Value	Last Gift this month Date \$150 Value
Lifetime Value \$4,227 -\$288 \$3,939	Last 12 Months \$592 Total Gift Value 11 Gifts	Soft Credits \$0 Total Value 0 Count	Product Orders \$410 Total Value 5 Count

Donor Performance Year-To-Date

Year-to-Date Progress: \$537.00 / Performance Goal \$0.00

Revenue by Fiscal Year

Fiscal Year	Revenue
2020	\$2,795
2021	\$210
2022	\$220
2023	\$785
2024	\$3,037

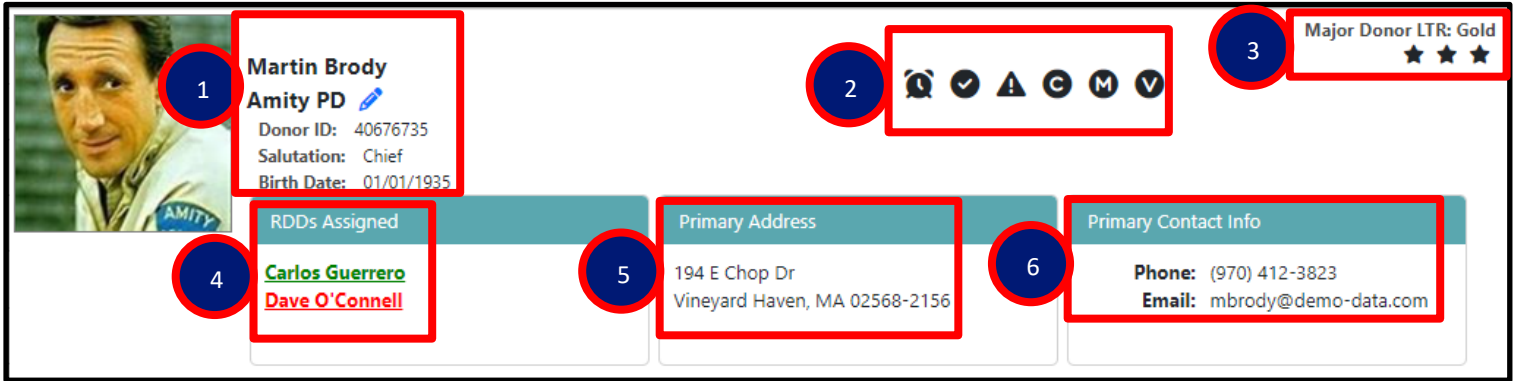
A Summary

B Actions

C Activity







Summary

The Donor Summary/Quick Actions section presents 5 Basic areas of information:



1 **Name/Donor ID/Salutation/Birth Date** - Users can click on the Pencil icon & go directly to Edit mode in the Full **Donor** record.

2 **Quick Info Bar** – Floating over the icon displays latest data for the following:

-  Next Follow Up
-  Standard Flags
-  Custom Data
-  Volunteer Profile
-  Major Gift Data
-  Volunteer Data

3 **Major Donor Designation** – Displays the Major Donor level.

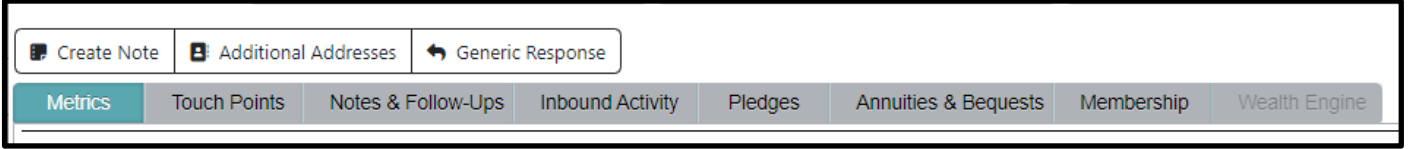
4 **RDDs Assigned** – Regional Donor Directors responsible for this account.

5 **Primary Address**

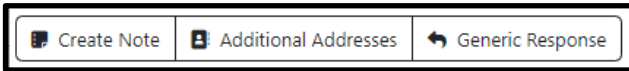
6 **Primary Contact Info**

Actions

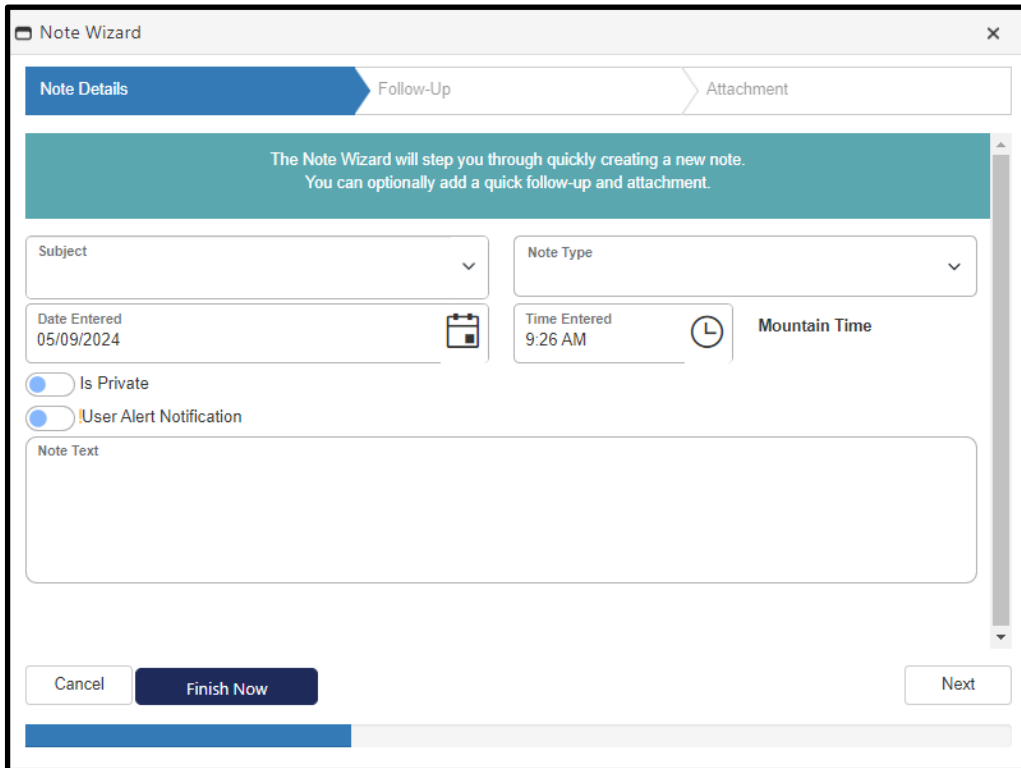
The **Donor Menu/Tabs** area enables users to interact quickly with Account data and functions.



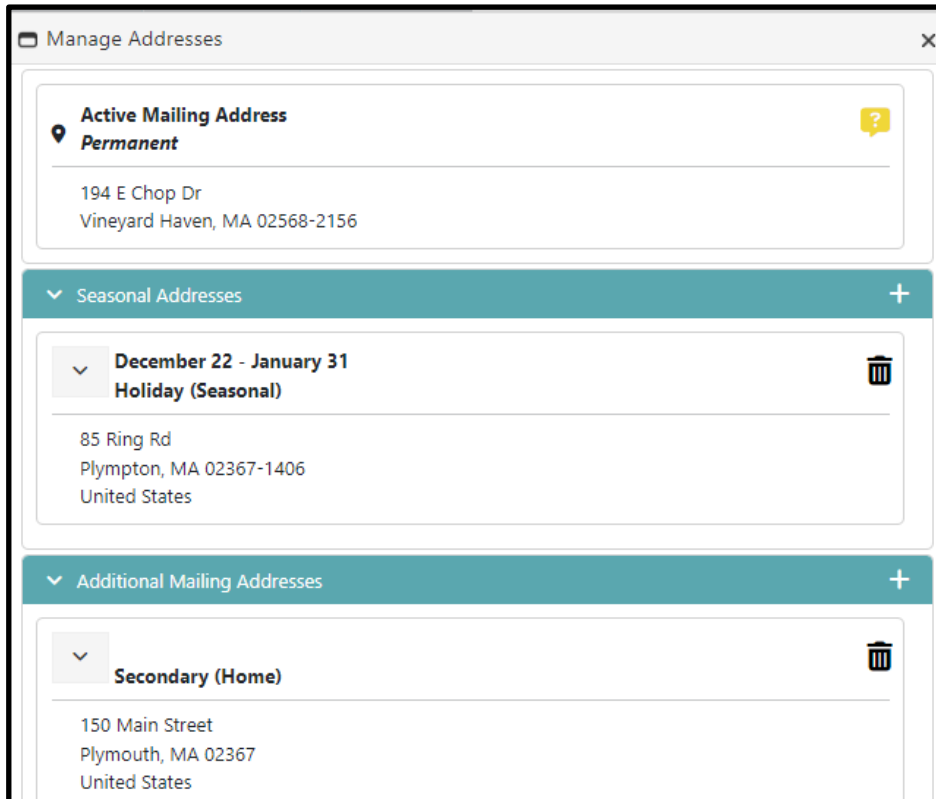
The **Donor Menu** has three distinct functions that users can engage – each is described below:



Create Note - When selected displays the Note Wizard for quick creation of a Note tied to the Accounts Donor record. For directions on how to create a full Donor Note record, please see the relevant section in the Donors manual.



Additional Addresses - When selected displays the Manage Address interface tied to the Accounts, Donor record. Users can Add/Delete and/or modify Permanent, Seasonal, or Additional Addresses. For complete directions on how to manage all Donor Addresses, please see the relevant section in the Donors manual.



Generic Response - When selected enables users to create a Generic Response tied to the Donor record of this Account. For complete directions on how to create Generic Responses, please see the relevant section in the Donors manual.

☰ Create Generic Response ✕

Create Generic Response

Response Type

Response Date
05/09/2024

Channel
Direct Mail ▼

Fund 🔍

Appeal 🔍

[Select Response Appeal\(s\)](#)

Note

Products

+ Add Product(s)

SKU	Description	Quantity	Price	Discount
No items have been selected.				

Shipping Information

Ship To
Martin Brody

Address 1
194 E Chop Dr

Address 2

City
Vineyard Haven

State/Province
MA

Postal Code
02568-2156

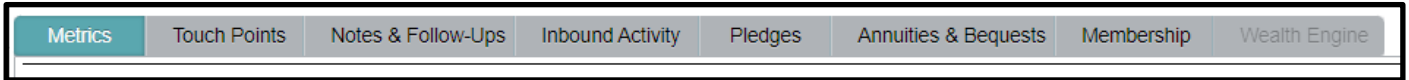
Shipping Method

Save

Cancel

Activity

The **Activity Tabs** is composed of 7 distinct tabs with Account centered functions/reports (Wealth Engine is NOT being utilized). Each is described below:



Metrics Tab – Displays **Donor Giving Summary** info: **Origin, First Gift, Largest Gift, Lifetime Value, Last 12 Months, Soft Credits, and Product Orders**. On far right a Donut Chart of the **Donor Performance Year-To-Date** is displayed.

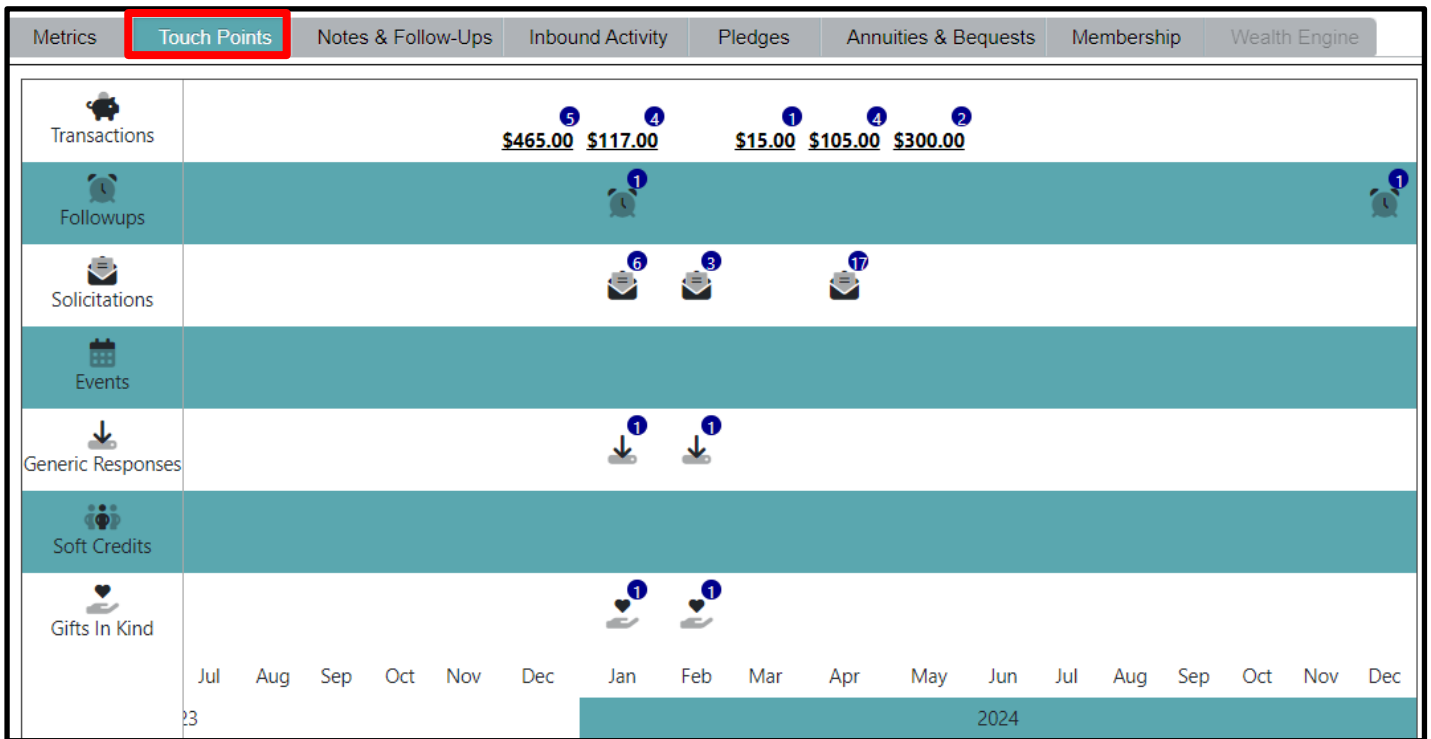


Touch Points Tab – Enables users to interact with Donor related records via a scrolling and linked calendar.

Users can click on the item to drill down into the actual records as well as scroll the calendar backwards/forwards to see records from other time frames.

The calendar displays the following types of records:

- Transactions
- Follow Ups
- Solicitations
- Events
- Generic Responses
- Soft Credits
- Gifts in Kind



Notes & Follow-Ups Tab – Enables users to:

- **Search** - Locate Notes for the Donor
- **View Search Results** – Current & Past of Donor Notes assigned to the Donor
- **For Each Individual Note:**
 - View Note Details
 - Add Follow-Ups
 - Add Attachments
 - Delete

For more information on how to create and manage Notes, see the relevant section of the **Donors** manual.

Metrics

Touch Points

Notes & Follow-Ups

Inbound Activity

Pledges

Annuities & Bequests

Membership

Wealth Engine

Start Date

End Date

Note Type ▼

Subject

Body

Follow-up Method ▼

Follow-up Result ▼

Include

My Notes All Notes

Apply

Clear

	Date	Type	Note	Operator	Follow-up Date	Follow-up Method	Follow-up Assigned to	Follow-up Result
▼	04/11/2024 11:21 AM	Follow Up	Thank You Thanks for your contribution.	Dave O'Connell				
▼	02/29/2024 9:08 AM	Billing-Payment Issue	Care Call Past due on current Pledge payment.	Dave O'Connell				
▼	02/01/2024 9:00 AM	General Contact	Thank You Thank you for your major contribution on _____, we really appreciate your continued support of our Organization!	Dave O'Connell				

Inbound Activity Tab – Displays a complete list of all Inbound Activity: **Contributions, Pledges, Orders, Gift in Kind**. Also displays both **General** and **Personal Thank You’s** sent to Donor and Major Donor Contacts made because of an initial inbound action.

Users can access the full Transaction record for each listed item by clicking on the **Eye** icon under the **View** column on the far left.

The **Type** column displays the inbound activity type for the individual row.

The screenshot shows the 'Inbound Activity' tab selected in a navigation menu. Below the menu are search filters for Activity Type, Appeal ID, Date Range Start/End, Appeal Name, \$ Value Min, and \$ Value Max. There are 'Locate' and 'Clear' buttons. Below the filters is a pagination bar showing page 1 of 5, with a page size of 10. The main table displays 10 rows of activity data with columns for View, Type, Date, Appeal ID, Appeal Name, Operator, Batch, and Value.

View	Type	Date	Appeal ID	Appeal Name	Operator	Batch	Value
	Order	05/07/2024 12:00 AM	24_3SM	2024 Summer (SOL)	Dave O'Connell	11730	\$150.00
	Contribution	05/01/2024 12:00 AM	24_3SM	2024 Summer (SOL)	Dave O'Connell	11732	\$150.00
	Contribution	04/16/2024 12:00 AM	24_3SM	2024 Summer (SOL)	Dave O'Connell	11716	\$50.00
	Contribution	04/11/2024 12:00 AM	24_3SM	2024 Summer (SOL)	Dave O'Connell	11711	\$30.00
	Order	04/11/2024 12:00 AM	24_3SM	2024 Summer (SOL)	Dave O'Connell	11712	\$15.00
	Pledge	04/11/2024 12:00 AM	24_3SM	2024 Summer (SOL)	Dave O'Connell	11714	\$0.00
	Contribution	04/11/2024 12:00 AM	24_3SM	2024 Summer (SOL)	Dave O'Connell	11714	\$10.00
	Order	03/01/2024 12:00 AM	24_1WT	2024 Winter (SOL)	Dave O'Connell	11698	\$15.00
	General Thank You	02/27/2024 12:00 AM	24_1WT	2024 Winter (SOL)	Dave O'Connell		\$0.00
	Gift In Kind	02/27/2024 12:00 AM	24_3SM	2024 Summer (SOL)	Dave O'Connell		\$0.00

Pledges Tab – Displays a complete list of all Pledges per this Donor.

Users can access the full Pledge record for each listed item by clicking on the **Eye** icon under the **View** column on the far left.

Metrics	Touch Points	Notes & Follow-Ups	Inbound Activity	Pledges	Annuities & Bequests	Membership	Wealth Engine	
<div style="display: flex; align-items: center;"> « ◀ 1 ▶ » </div>		Page size: 5	7 items in 2 pages					
View	Date	Appeal	Appeal Name	Pledge Program	Period	Value	Total Paid	Active
	12/11/2023	24_8ST	2024 Sustainer Continuous (SOL)	Sustained Continuous Giving	OpenEnded	\$10.00		True
	08/01/2021	24_8ST	2024 Sustainer Continuous (SOL)	Sustained Continuous Giving	OpenEnded	\$100.00	\$300.00	True
	07/28/2021	24_8ST	2024 Sustainer Continuous (SOL)	Sustained Continuous Giving	OpenEnded	\$10.00	\$675.00	True
	04/11/2024	24_3SM	2024 Summer (SOL)	Sustained Continuous Giving	OpenEnded	\$10.00		True
	03/01/2024	24_1WT	2024 Winter (SOL)	Sustained Continuous Giving	OpenEnded	\$0.00		False

Annuities & Bequests Tab – Displays lists of Bequests and Annuities tied to this Donor’s record.

Metrics	Touch Points	Notes & Follow-Ups	Inbound Activity	Pledges	Annuities & Bequests	Membership	Wealth Engine	
Bequests								
	ID	Originator	Type	Source	Status	Total Bequests Amount	Total Paid	Paid in Full
	72456	John Anthony	Trust	Stock	Final	\$1,500.00	\$3,500.00	False
Annuities								
	Contract Number	Type	Status	Gift Amount	Frequency			
	54889	Single	Open	\$1,500.00	Quarterly			

Membership Tab – Displays current Memberships levels held by the Donor.

BMP Level 4			
Member Dates 07/28/2016 <small>Very First</small>	Expiration 12/31/2016 <small>Date</small>	Renewal Period 09/30/2016 <small>Start Date</small>	Years 2 <small>Distinct</small>
07/28/2016 <small>Most Recent</small>	<i>expired</i> <small>Time Left</small>	01/31/2017 <small>End Date</small>	1 <small>Consecutive</small>

FOLLOW-UPS Tab

The **Follow-Ups** tab enables user to see all Pending and/or Completed Follow Ups with their assigned Accounts (Donors).

Goals
Assignments
Follow-Ups
Response Rules


Status
 Pending & Completed ▼

Time Period
 All Time ▼

Follow-ups
 Assigned To Dave O'Connell ▼

Apply
Clear

7 Follow-Ups



Refresh

	Follow-up Date ▼	Follow-up Method	ID	Full Name	Note Type	Subject	Follow-up Assigned to	Follow-up Result
👁	12/31/2024	Phone Call	40676735	Martin Brody Amity PD	Follow Up	Major Donor Recruitment	Dave O'Connell	Engaged and Donation made
👁	06/10/2024	Email	40673054	Adrien Chance	General Contact	Major Donor Recruitment	Dave O'Connell	
👁	05/31/2024	In Person	40115722	Connor Sheila	Follow Up	Thank You	Dave O'Connell	Completed
👁	05/30/2024	Phone Call	40000136	Kayden & Catherine Tanya	Follow Up	Thank You	Dave O'Connell	Engaged and Donation made
👁	05/30/2024	Phone Call	40000136	Kayden & Catherine Tanya	Follow Up	Thank You	Dave O'Connell	
👁	02/29/2024	Email	40676075	Michael Brody	General Contact	Care Call	Dave O'Connell	Engaged with NO Donation made
👁	01/01/2024	Proposal	40676735	Martin Brody Amity PD	Follow Up	Major Donor Recruitment	Dave O'Connell	Completed

⏪
◀
1
▶
⏩

Page size: 20

7 items in 1 pages

1. Users can **Search** for MGO **Follow-Ups** via the three dropdowns at the top left of the screen by:

- **Status** – All Pending, All Completed, & All Pending & Completed.
- **Time Period** – All Time, Up Coming Only, & Overdue Only.
- **Follow-ups** – Assigned To _____, All Follow-Ups, & Requested by _____.

2. Users can click on the **Eye** icon on the far left to open/edit the **Follow Up**.

The screenshot displays the 'Follow-Ups' section of the MOORE system. On the left, a table lists follow-up entries with columns for 'Follow-up Date', 'Follow-up Method', and 'ID'. A red box highlights the 'Eye' icon in the first row, and a red arrow points from it to the 'Add/Edit Follow-up' modal window. Another red box highlights the ID '40000136' in the same row. The modal window contains the following fields:

- Follow-up Date:** 12/31/2024
- Follow-up Time:** 11:00 AM (Mountain Time)
- Method:** Phone Call
- Result:** Engaged and Donation
- Assign To:** Dave O'Connell
- Reminders:** Set Email Reminder, Set Calendar Reminder, None
- Note:** (Empty text area)
- Start Date:** 12/30/2024
- Time of Day:** 9:00 AM (Mountain Time)
- Frequency:** Once, Every "n" Hours, Every "n" Days, Weekly, Monthly
- Buttons:** Save, Cancel

3. Users can also click on the **ID** link in the results to display the **Donor** record.

RESPONSE RULES Tab

The **Response Rules** tab displays the logic behind the rules that govern how an MGO responds to one of their Accounts when a donation is made.

With permissions, users can configure these rules to their own needs and will apply to any account under their responsibility.

User	Progress	Assignments	Follow-Ups	Rules
CG Carlos Guerrero	94%	6	0	1
DO Dave O'Connell	80%	6	2	1
DL Debby Lee	49%	4	0	1
GK Gary Kirk	52%	5	0	1
JM Jennifer Mitchell	16%	3	0	1
KH Kevin Hartland	9%	7	0	1
NW Nikki Wiederaenders	24%	2	0	1
TU Test User	no goals defined	0	0	0

In this existing example, Dave O’Connell has one **Rule** governing his responses:

- A donating Account would have to donate greater than or equal to \$250.00 for it to qualify for a response from the MGO.

The system would then enforce four additional **Details**:

- Send MGO an email notification regarding receipt of donation
- Prevent any manual Acknowledgements from delivery to the Account
- Prevent any conditional Acknowledgements from delivery to the Account
- Stop any additional processing.

Setting up Response Rules STEPS

To set up Response Rules for a MGO, users should follow these steps.

1. Click on the desired **MGO** record.
 - EXAMPLE: **Test User**
2. Click on the **+Add Rule** button.

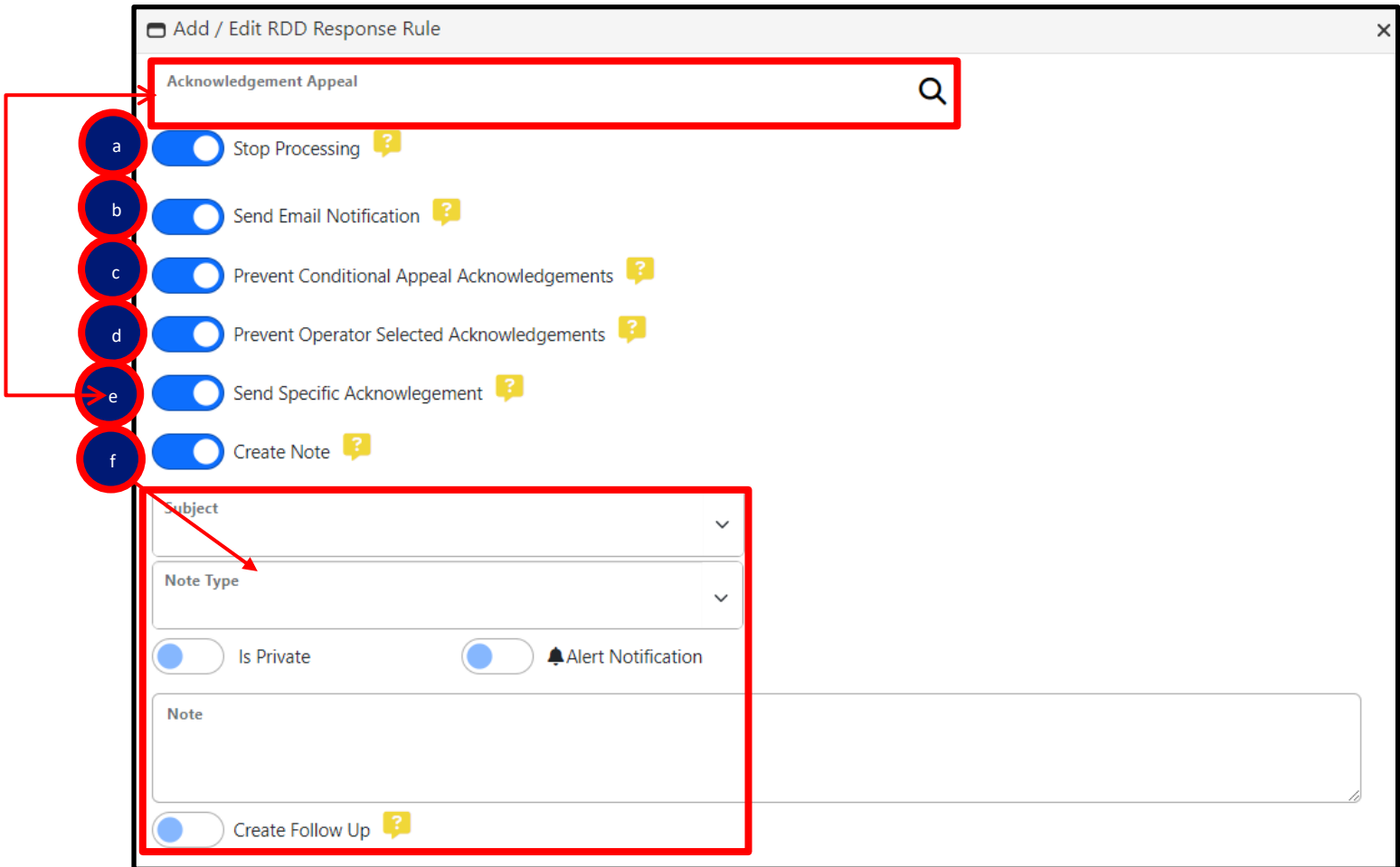
The screenshot displays the 'Assignments' section of a software interface. On the left, a table lists users with their progress and counts for Assignments, Follow-Ups, and Rules. The 'Test User' (TU) is highlighted with a red box. On the right, a detailed view for 'Test User' is shown, with a '+ Add Rule' button also highlighted by a red box.

Select A User To View More Detailed Information		Progress	Assignments	Follow-Ups	Rules
CG	Carlos Guerrero cguerrero@demo-data.com	94%	6	0	1
DO	Dave O'Connell doconnell@wearemoore.com	80%	6	2	1
DL	Debbly Lee dlee@demo-data.com	49%	4	0	1
GK	Gary Kirk gkirk@demo-data.com	52%	5	0	1
JM	Jennifer Mitchell jmitchell@demo-data.com	16%	3	0	1
KH	Kevin Hartland khartland@demo-data.com	9%	7	0	1
NW	Nikki Wiederaenders nwieder@demo-data.com	24%	2	0	1
TU	Test User redsox1809@yahoo.com	no goals defined	0	0	0

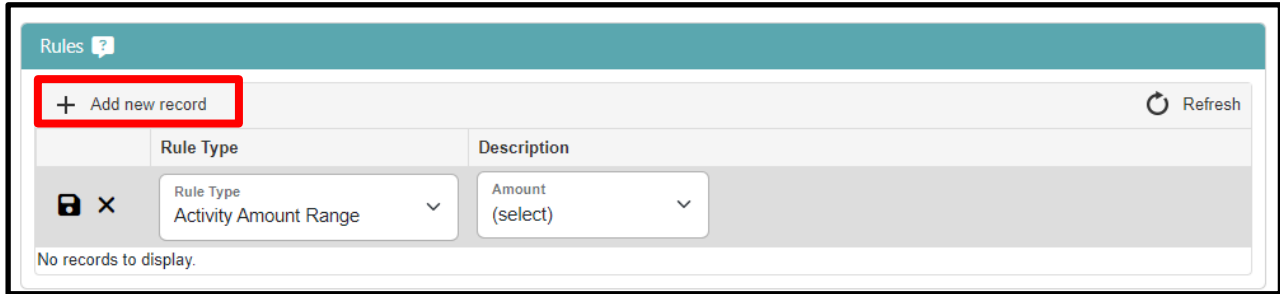
Goals	Assignments	Follow-Ups	Response Rules
Test User TU			
+ Add Rule Refresh			
Rules Details			
There are no response rules set up for this .			

Rules set up the criteria that is employed to pull certain Donors in as account to which this MGO should respond.

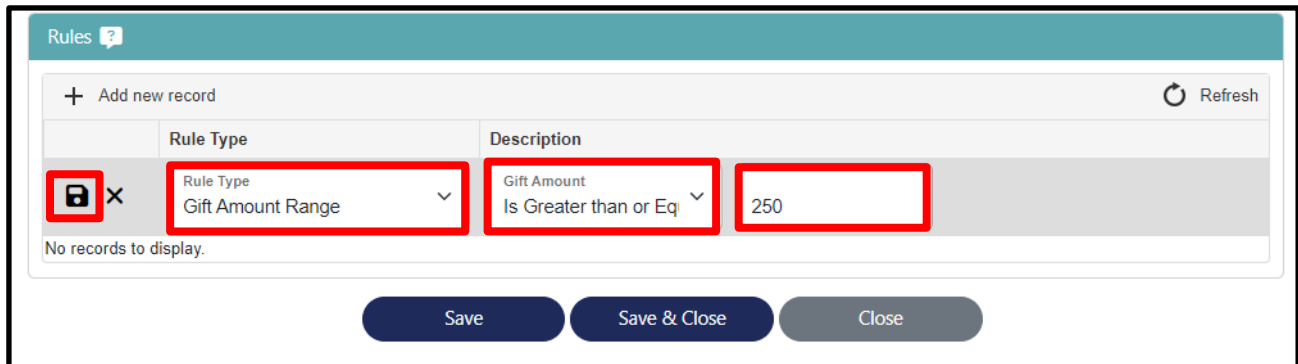
3. Two sections display: the **Details** and the **Rules**. Either can be filled out first, but the purpose of the Details is to apply to the Rule.
4. Toggle on the desired **Details**. The following **Options** display that will affect how the **Rule** defined below is handled:
 - **Stop Processing** – Will cease processing any responses from Appeal.
 - **Send Email Notification** - Send MGO email notification upon receipt of donation.
 - **Prevent Conditional Appeal Acknowledgements** - Prevent any conditional (automatic) Appeal Acknowledgements from delivery to the Donor.
 - **Prevent Operator Appeal Acknowledgements** - Prevent any manually selected Acknowledgements (in Rapid Entry) from delivery to the Donor.
 - **Send Specific Acknowledgement** – Will send the Acknowledgment letter selected (or searched for and selected) at the top of the screen in the Acknowledgement Appeal field to the qualified Donor(s).
 - **Create Note** – Displays Note Subject, Note Type, Is Private & Alert Notification, Note (Description) and Create Follow Up fields/toggles whose desired content can then be automatically applied to qualified Donor records.



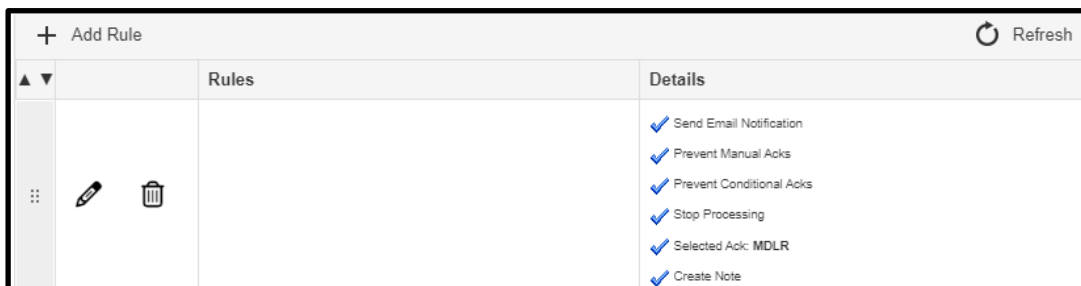
5. In the **Rules** section, click on the **Add new record** button.
 - Users can repeat the Rule creation steps (5-9) as often as desired; every row can apply a different filter to the results.



6. From the **Rule Type** dropdown, select **Criteria**.
 - EXAMPLE - **Gift Amount Range**.
7. From the **Description** field dropdown, select the desired **Range**.
 - EXAMPLE - **Is Greater than or Equal to**.
8. In the **Value** field, enter the desired amount.
 - EXAMPLE - **250**.
9. Click the **Save icon** on the Row.



10. Click the **Save & Close** button once all rules have been saved and added.
 - EXAMPLE – Only **ONE** rule is added.
11. The saved **Rule** displays:



Reassigning Donors to a New MGO STEPS

Users will sometimes have to reassign donors from one Major Gift Officer (MGO) to a different one. These steps can be done from the **Planned Giving>RDD Assignments** module.

1. Expand the **Planned Giving** module.
2. Click on the **RDD Assignments** Tab.
3. Click on the desired **Major Gift Officer (MGO)** record from which you need to REMOVE the assigned donors.
 - In this example: **Carlos Guerrero**
4. Click on the **Assignments** tab.

The screenshot displays the software interface for reassigning donors. On the left, the 'Planned Giving' menu is expanded, and 'RDD Assignments' is selected. The main area shows a table of Major Gift Officers (MGOs) with their assignment counts. The 'Assignments' tab for Carlos Guerrero is active, showing a form for donor search and location.

MGO	Name	Goals	Assignments	Follow-Ups	Rules
CG	Carlos Guerrero	no goals defined	6	0	1
CT	Cody Thompson	no goals defined	1	0	0
DO	Dave O'Connell	no goals defined	2	0	0
DL	Debby Lee	no goals defined	4	0	1
GK	Gary Kirk	no goals defined	5	0	1
JM	Jennifer Mitchell	no goals defined	3	0	1
KS	Karen Sullivan	no goals defined	1	0	0
KH	Kevin Hartland	no goals defined	7	0	1
LW	Leah Wright	no goals defined	2	0	1
LR	Lori Read	no goals defined	1	0	0
MS	Melody Smith	no goals defined	1	0	1
NW	Nikki Wiederanders	no goals defined	2	0	1

The 'Assignments' tab for Carlos Guerrero is active, showing a form for donor search and location. The form includes fields for Partner ID, First Name, Last Name, Address, City, State / Province, Postal Code, County / FIPS, Country, Company, Title, Phone, Email Address, Status, Last Gift Date, Major Gift Field, and Major Gift Value. There are 'Locate' and 'Clear' buttons for both the main search and the 'Search by Miles from Address' section.

5. Scroll to the bottom of the screen (below the **Search by Miles from Address** section) to the listed MGO assignments.
6. Click the **Delete** button in far-left column next to the donor record to which you wish to sever the connection.
 - In this example: **Kayden & Catherine Tamya**
 - This will have to be done individually for each desired record.
 - It is recommended that if there are multiple donors to sever, that users take a screen shot of the list for reference for when they choose to re-assign the severed users to a new Major Gift Officer.

ID	Major Donor	Status	MGO(s)	Follow-Up Dates	Flag(s)	Lifetime Giving	Last Gift
40000136	Kayden & Catherine Tamya 4775 Puritan Rd Buzzards Bay, MA 02532-5824		Carlos Guerrero			\$12.50 as Revenue \$12.50 in Total	\$12.50 Date: 03-18-2024 Appeal: 24_ES
40001719	Abni Zechariah 18152 S Central Ave Flagler Beach, FL 32138-4039		Carlos Guerrero			\$125.00 as Revenue \$125.00 in Total	\$25.00 Date: 04-05-2024 Appeal: 24_ES
40676735	Martin Brody Amity PD 194 E Chop Dr Vineyard Haven, MA 02568-2158	★ ★ ★ Major Donor LTR: Gold	Carlos Guerrero		NoPhoneSolicitation, PreventMerge, VIP, COMM, NO SHARE, SPON	\$4,655.00 as Revenue \$4,655.00 in Total	\$300.00 Date: 09-17-2024 Appeal: 24_NSR

7. Click on the desired **Major Gift Officer** to which you need to ADD the assigned donors.
 - In this example: **Dave O’Connell**

Assignments

Import MGO Assignments

Select A User To View More Detailed Information

	no goals defined	Assignments	Follow-Ups	Rules
CG Carlos Guerrero cguerrero@bernardsolutions.com	no goals defined	6	0	1
CT Cody Thompson cthompson@aegispremier.com	no goals defined	1	0	0
DO Dave O'Connell doconnell@wearemoore.com	no goals defined	2	0	0

Goals Assignments Follow-Ups Response Rules

Assignments

Partner ID: Exact Match

8. Click on the **Assignments** tab.

9. Scroll to the bottom of the screen (below the **Search by Miles from Address** section) to the listed MGO assignments.
10. Click on the **+New Assignment** button in the upper left of the existing MGO assignments list section.

ID	Major Donor	Status	MGO(s)	Follow-Up Dates	Flag(s)	Lifetime Giving	Last Gift
40008657	Maribel Cameron 56430 McClean Ave Staten Island, NY 10305-4802		Dave O'Connell				
40069981	Ella Claudia 84269 Langford Ct Woodbridge, VA 22193-4502		Dave O'Connell		NoDirectMail	\$100.00 as Revenue \$100.00 in Total	\$50.00 Date: 08-04-2024 Appeal: 24_6WM

11. The **RDD New Assignment** screen displays.
12. Enter the desired criteria for locating Donor and click the **Locate** button.

Partner ID: <select a partner>

Existing RDD(s):

Partner ID: Exact Match Head of Household

Company: First Name: Last Name:

Address: City: Title: Phone:

County / FIPS: Country: State / Province: Postal Code:

Email Address:

ID	Name	Address	Company	Start Date
✓ 40036962	Jessica Brody	39657 Rockledge Dr Brewster, NY 10509-5537		2007-09-20
✓ 40670163	Johnathon Brody	27308 Hayden Way Salt Lake City, UT 84118-2227		2009-09-15
✓ 40676085	Michael Brody	194 E Chop Dr Vineyard Haven, MA 02568-2156		2024-02-02
✓ 40676086	Sean Brody	194 E Chop Dr Vineyard Haven, MA 02568-2156		2024-02-02
✓ 40676093	Ellen Brody	194 E Chop Dr Vineyard Haven, MA 02568-2156		2024-02-24

Modals/RDDNewAssignment.aspx?uid=9024e890-2a75-4a57-b010-85dabd3c0f2c

13. Click the **check mark** to the left of the desired donor - this will have to be done individually for each desired record.

- The **Donor/Partner** information will display at the top left
- Users have the option to **Mark MGO as Primary** – if toggle off, the officer will be designated as a Secondary.

14. Click on the **Create Assignment** button.

RDD New Assignment
✕

Create Assignment
Cancel

Partner ID: 40000136
 Kayden & Catherine Tamyia
 4775 Puritan Rd
 Buzzards Bay, MA 02532-5624

Mark MGO as Primary:

Partner ID

Company

Address

County / FIPS

Exact Match

Head of Household

City

Country *Select a Country*

First Name

Title

State / Province

Email Address

Last Name

Phone

Postal Code

Locate
Clear

Refresh

	ID	Name	Address	Company	Start Date
<input checked="" type="checkbox"/>	40000136	Kayden & Catherine Tamyia	4775 Puritan Rd Buzzards Bay, MA 02532-5624		2005-01-05

Page size: 20
1 items in 1 pages

15. The Donor is now assigned to the new **Major Gift Officer**.

+ New Assignment
Map Results
↻

Page size: 50
3 items in 1 pages

	ID	Major Donor	Status	MGO(s)	Follow-Up Dates	Flag(s)	Lifetime Giving	Last Gift
<input type="checkbox"/>	40000136	Kayden & Catherine Tamyia 4775 Puritan Rd Buzzards Bay, MA 02532-5624		Dave O'Connell			\$12.50 as Revenue \$12.50 in Total	\$12.50 Date: 03-18-2024 Appeal: 24_2ES
<input type="checkbox"/>	40008657	Maribel Cameron 56430 McClean Ave Staten Island, NY 10305-4802		Dave O'Connell				
<input type="checkbox"/>	40069981	Ella Claudia 84250 Langford Ct Woodbridge, VA 22193-4602		Dave O'Connell		NoDirectMail	\$100.00 as Revenue \$100.00 in Total	\$50.00 Date: 08-04-2024 Appeal: 24_6WM

Manage Major Donors

Manage Major Donors has two distinct tabs for users to utilize: **Major Donor Pool** and **Major Donor Status**.

The **Major Donor Pool** tab enables users to Query and Find Donors or prospects to assign Major Donor status. User can run an existing Query or create a brand new Query to pull specific results from the entire Donors table. Users can then narrow the results of that donor pool even further by completing Current Pool search fields. Finally, from the displayed results, users can select and assign the resulting records to a specific MGO.

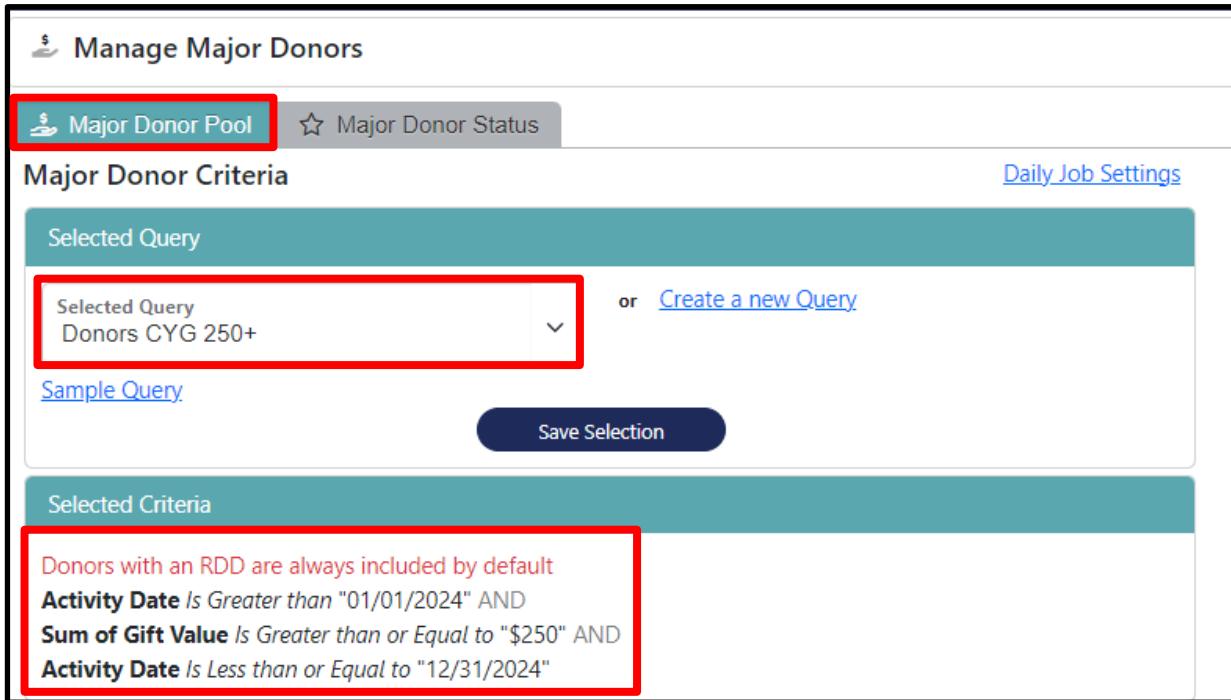
The **Major Donor Status** tab is the location by which users create the desired Major Donor Status Codes. These codes are constructed using Criteria (same set up as in Appeals and Queries) and define the desired levels of Major Donors that the user's organization desires to be distinct. These codes are then auto assigned to Donors as a result of their donation levels and can be leveraged in Appeals, Queries, Reports, and in the assignment as Accounts to MGOs.

Selected Query Creation and Results Management STEPS

Users can leverage an existing query or Create a new Query for use in narrowing down the Donor pool to a desired level. Users will learn how to select an existing query and create a new query in these steps. Users will also learn how to read and manage the query results.

1. Click on the **Planned Giving** module, **Manage Major Donors** sub-module.
2. Ensure that the **Major Donor Pool** tab is selected.
3. From under the **Selected Query** section, click on the **Selected Query** dropdown.

4. From the **Selected Query** dropdown, select the desired query to run against the Donors table.
 - **Queries** populate this dropdown from a list of Queries created via the **Create a new Query** link which is covered below.
 - EXAMPLE – **Donors CYG 250+** (Donors who have given \$250 or more during Current Year)



5. **OBSERVE** – Under the **Selected Criteria** section, the criteria used in the Query (Donors CYG 250+) is displayed.
 - a. Note red text – **Donors with an RDD are always included by default.**
 - b. Users can click on the blue **Sample Query** to see a non-editable display of all the values that are returned for the Query.
6. Users can also choose to narrow the results displayed at the bottom of the page further by clicking in the top area of the **Current Pool** section and completing one or more of the desired fields.
7. Users can also utilize the **Current Pool** section, **Search by Miles from Address** area to narrow geographically within the results.
 - To use effectively, users must set the **Radius in Miles** FIRST, then enter accompanying information from one or more of the additional fields.

8. Scrolling to the bottom of screen enables users to view the functionality of the **Full Results** of the query.

Map Results MGO Assign Run Major Donor Segmentation

Page size: 50 32 items in 1 pages

ID	Major Donor	Status	MGO(s)	Follow-Up Dates	Flag(s)	Lifetime Giving	Last Gift
40000001	Elvis Clayton 88830 Box 1396 Camp Verde, AZ 86322-1396	★ ★ ★ Major Donor LTR: Gold	Gary Kirk			\$1,510.00 as Revenue \$1,510.00 in Total	\$100.00 Date: 11-30-2009 Appeal: OC3WW1109
40000024	Saige Alan 44808 S Carolet Ln Orange, CA 92809-4736	★ ★ ★ Major Donor LTR: Gold	Carlos Guerrero Nikki Wiederaenders Gary Kirk			\$27,600.00 as Revenue \$27,600.00 in Total	\$2,000.00 Date: 03-05-2010 Appeal: OC3LA0210
40000136	Kayden & Catherine Tamy 4775 Puritan Rd Buzzards Bay, MA 02532-5624		Carlos Guerrero	Next: 05-30-2024 Last: 05-30-2024		\$60.00 as Revenue \$60.00 in Total	\$20.00 Date: 06-28-2007 Appeal: OC3IC
40000156	Camila Madison 67472 Hillcrest Rd Windsor, CT 06095-3301		Jennifer Mitchell			\$50.00 as Revenue \$50.00 in Total	\$50.00 Date: 08-18-2005 Appeal: DEFAULT
<input checked="" type="checkbox"/> 40000182	Anita Alexia 92039 Gatewood Cir Athens, GA 30607-2010	★ ★ Major Donor LTR: Silver				\$543.00 as Revenue \$543.00 in Total	\$75.00 Date: 08-03-2021 Appeal: 12THGV

9. From the **Results** display, users have a number of options:

- Clicking on the **ID** column link displays the **Donor information** record.

Elvis Clayton

Donor ID: 40000001
Salutation: Hon. Anderson
Birth Date:

Major Donor LTR: Gold ★ ★ ★

RDDs Assigned

Gary Kirk

Primary Address

86630 Box 1396
Camp Verde, AZ 86322-1396

Primary Contact Info

Phone: 33-772-3315
Email:

Create Note Additional Addresses Generic Response

Metrics

Touch Points

Notes & Follow-Ups

Inbound Activity

Pledges

Annuities & Bequests

Membership

Wealth Engine

Donor Giving Summary

Origin 07/01/2004 Member Date DI2020 Source Code	First Gift this month Date \$150 Value	Largest Gift this month Date \$150 Value	Last Gift this month Date \$150 Value
Lifetime Value \$150 -\$3,072 (\$2,922)	Last 12 Months Total Gift Value \$150 1 Gifts	Soft Credits Total Value \$0 0 Count	Product Orders Total Value \$0 0 Count

Revenue by Fiscal Year

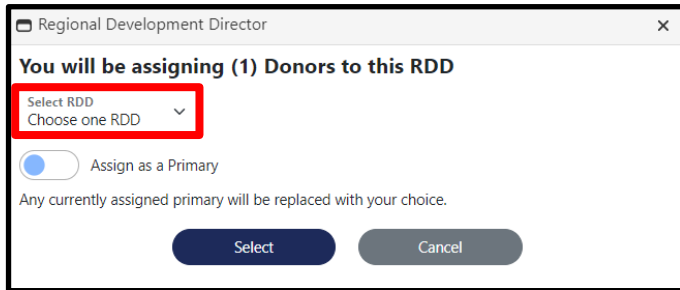
2024

Donor Performance Year-To-Date

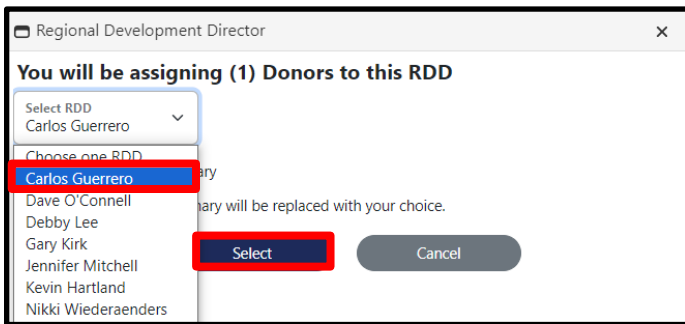
Year-to-Date Performance Goal: \$0.00

- Selecting a record by **Toggling** the switch in far-left column to On.

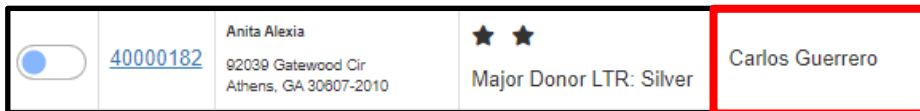
- c. Assigning a record to an MGO - with Toggle on for desired record(s) – by clicking **MGO Assign** button in the upper right-hand corner.
 - i. Clicking the **Select RDD** dropdown (RDD =’s MGO)



- ii. Selecting an **RDD** from the dropdown



- iii. Clicking the **Select** button.



- d. Update all Donor assignments by clicking on the **Run Major Donor Segmentation** button in the upper right-hand corner.
 - o This updates all the **Major Donor Status rules** which will be discussed in the next section.

Major Donor Status Management STEPS

Users can create new or modify existing **Major Donor Status Codes**. In this section, users will learn how to create a new code and how they can be managed.

1. Click on the **Planned Giving** module, **Manage Major Donors** sub-module.
2. Ensure that the **Major Donor Status** tab is selected.
3. Click on the **Add new Status Code** button.

Manage Major Donors

Major Donor Pool Major Donor Status

Donor Status Codes * Expand a status to see the members assigned.

+ Add new Status Code

				Count	Date		
▶	⋮	✎	🗑️	★ ★ ★ ★ ★	Major Donation: \$5000+ Single Largest Donation of \$5,000+	1	05/14/2024
▶	⋮	✎	🗑️	★ ★ ★ ★ ★	Major Pledge: \$5000+ Pledge amount of \$5000 or Greater	0	05/14/2024
▶	⋮	✎	🗑️	★ ★ ★	Major Donor LTR: Gold Lifetime Total Revenue from Donor of \$1000 or Greater	11	05/14/2024
▶	⋮	✎	🗑️	★ ★	Major Donor LTR: Silver Lifetime Total Revenue from Donor of \$500-\$999.99	9	05/14/2024
▶	⋮	✎	🗑️	★	Major Donor LTR: Bronze Lifetime Total Revenue from Donor of \$250-\$499.99	3	05/14/2024

4. Users enter a **Segment Code** – this forms the displayed **Status Code Name** – and a **Description** – this forms the **Text** below the Status Code Name.
 - In this EXAMPLE – a Code of **Major Donation: \$7500** added with 5 Stars.
 - The system automatically cuts stars in halves to fit ratings w/in 5.

Segment

Segment Code
Major Donation: \$7500+

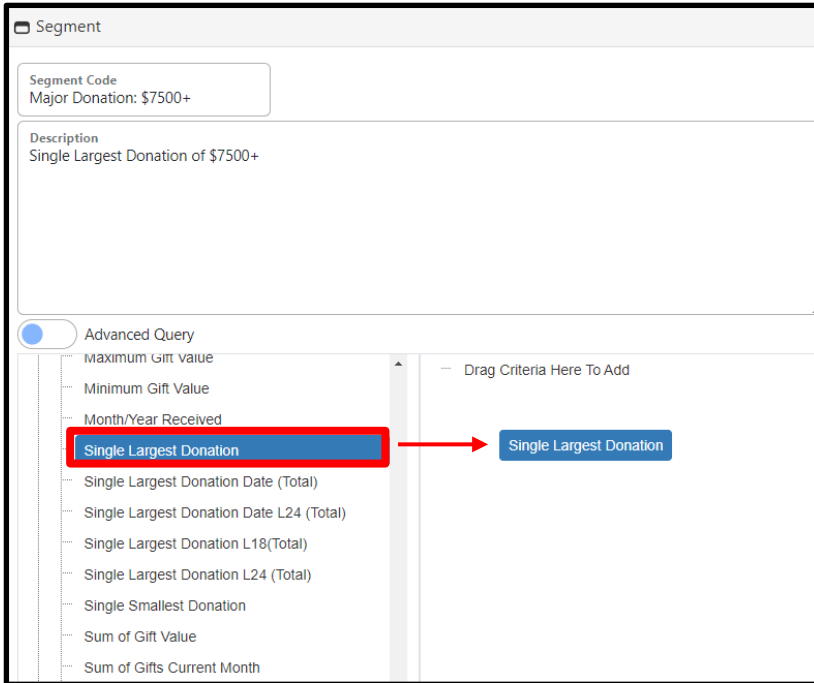
Description
Single Largest Donation of \$7500+

Advanced Query

- Maximum Gift Value
- Minimum Gift Value
- Month/Year Received
- Single Largest Donation
- Single Largest Donation Date (Total)
- Single Largest Donation Date L24 (Total)

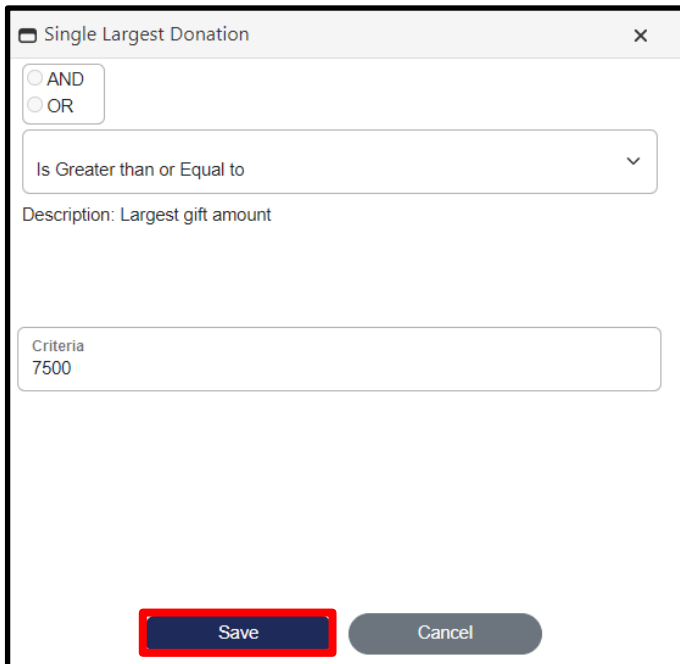
Drag Criteria Here To Add

5. Users scroll to the desired **Criteria** in the lower section and select by dragging and dropping to the right-hand column.



6. Once dropped, the filter criteria screen displays, users need to select from the **Filter** dropdown and fill out the desired **Criteria**.

- EXAMPLE – Is Greater than or Equal to – 7500
- Users can add as many **Criteria** rows as desired to the **Status Code**.



7. Click the **Save** button.

8. Click on the **Save and Close button** at the bottom of the **Segment** screen.
 - Users can also run **Sample** results from this location as well.

9. The new **Status Code Segment** is added to the list.

The screenshot shows the 'Manage Major Donors' interface. At the top, there are tabs for 'Major Donor Pool' and 'Major Donor Status'. Below this, a section titled 'Donor Status Codes' includes a note: '* Expand a status to see the members assigned.' There is a '+ Add new Status Code' button and a refresh icon. A table lists the status codes with columns for 'Count' and 'Date'. A red box highlights the first row:

	Count	Date
Major Donation: \$7500+ Single Largest Donation of \$7500+		
Major Donation: \$5000+ Single Largest Donation of \$5,000+	1	05/14/2024
Major Pledge: \$5000+ Pledge amount of \$5000 or Greater	0	05/14/2024
Major Donor LTR: Gold Lifetime Total Revenue from Donor of \$1000 or Greater	11	05/14/2024
Major Donor LTR: Silver Lifetime Total Revenue from Donor of \$500-\$999.99	9	05/14/2024
Major Donor LTR: Bronze Lifetime Total Revenue from Donor of of \$250-\$499.99	3	05/14/2024

At the bottom, there is a pagination control showing 'Page size: 10' and '6 items in 1 pages'.

10. Users can also **expand** a status to view accounts that qualify.

The screenshot shows the 'Manage Major Donors' interface with the 'Major Donor LTR: Gold' status code expanded. A red box highlights the expanded list of donor accounts. The table below shows the details for these accounts:

ID	First Name	Last Name	Company	Address	City	State / Province	Postal Code
40000001	Elvis	Clayton		86630 Box 1396	Camp Verde	AZ	86322-1396
40000024	Saige	Alan		44808 S Carolet Ln	Orange	CA	92869-4736
40000714	Iris	Ryker		96446 Meadow Burn Rd	Vernon	NJ	07462-3316
40001782	Itzel	Arlene		3475 S Race St	Englewood	CO	80113-3137
40002625	Marcos	Tyrone		97005 S Oxbow Ave Apt 305	Sioux Falls	SD	57106-4128
40002839	Broderick	Tianna		71391 Barksdale Ln	Manlius	NY	13104-9432

11. Users can also view **Counts** and **Date** last refreshed in the far left-hand columns.

12. Users can also change the **Ranking** display as desired and **Refresh** on the fly from the upper left-hand buttons.

Manage Major Donors

Major Donor Pool Major Donor Status

Donor Status Codes * Expand a status to see the members assigned.

+ Add new Status Code

						Count	Date
▶	⋮			★ ★ ★ ★ ★	Major Donation: \$7500+ Single Largest Donation of \$7500+		
▶	⋮			★ ★ ★ ★	Major Donation: \$5000+ Single Largest Donation of \$5,000+	1	05/14/2024
▶	⋮			★ ★	Major Pledge: \$5000+ Pledge amount of \$5000 or Greater	0	05/14/2024
▶	⋮			★ ★	Major Donor LTR: Gold Lifetime Total Revenue from Donor of \$1000 or Greater	11	05/14/2024
▶	⋮			★	Major Donor LTR: Silver Lifetime Total Revenue from Donor of \$500-\$999.99	9	05/14/2024
▶	⋮			★	Major Donor LTR: Bronze Lifetime Total Revenue from Donor of of \$250-\$499.99	3	05/14/2024