APPEALS

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Objectives

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

- **Function of Solicitation and Acknowledgement Appeals**
- **Linking of Solicitation and Acknowledgement Appeals**
- **Creation of Acknowledgement Appeals**
- **Creation of Global Acknowledgements**
- **Creation of Solicitation Appeals**
- **Copying of Appeals**
- **Grouping for Appeals**
- **Creation of Subscription Appeals**

Aegis Appeals Overview

Solicitation Appeals

Appeals are campaigns launched to raise money for a user's organization. They are date, season, or event-based occurrences in which donations are actively solicitated from a target audience and usually acknowledged if a contribution is made.

In Aegis, **Solicitation Appeal records** are the main mode by which the CRM stores and tracks the creation, management, and monitoring of Appeal campaigns. They are called Solicitation Appeals because a solicitation is the communication – mail, email, phone call, etc. that "appeals" or "solicits" for donations from the targeted audience.

In Aegis **Solicitation** Appeal records, multiple aspects of donor solicitations are tracked and executed. They store the costs, audience segments, pulls, track donations, and trigger acknowledgements (thank you letters), as well as report on the overall success of the campaign.

But Solicitations are not designed to track the complicated nature of **Acknowledgment** letters or control how they interact with donor segments. For the tracking of those thank you letters (or email/phone campaigns) users must create and link separate **Acknowledgement Appeal records** to Solicitations.

Acknowledgement Appeals

In Aegis, **Acknowledgement** Appeal records are linked records to Solicitation Appeal records. Their purpose is to define and act as the physical repository for the "acknowledgement" or "thank you" communications donors receive for contributing.

But there can be MANY Acknowledgement Appeal records, and often multiples are linked to a single Solicitation Appeal. This is because organizations usually track multiple contributor segments which receive differing "Ack" (thank you) letters.

As such, Aegis **Acknowledgement** Appeal records are designed to enable a **One-to-Many** relationship tracked between Solicitation and Acknowledgement records. The **One** represents the Solicitation Appeal, the **Many** represents the linked Acknowledgement Appeals.

The same Acknowledgement record (letter) can also be linked to multiple campaigns/appeals over different time frames. This allows users to apply standard replies across multiple campaigns without having to repeatedly re-create.

The specific conditions and rules for which segment of contributors receives which Acknowledgement letter, are covered next in the **Linking of Solicitation and Acknowledgement Appeals.**

Linking Solicitation & Acknowledgement Appeals

When a user links an Acknowledgement Appeal to a Solicitation Appeal, they will then have to define how the system will recognize which contributing donor will receive which acknowledgement. Users will most often use **Global Acknowledgements** to do so.

Global Acks enable users to set up repeatable **Rules** and **Conditions** for distributing specific Acknowledgements. Rules define the general purpose of the Global Ack – and describe its overall purpose. Conditions are then tied to the Rule. Conditions are then built with distinct, conditional rules of their own. These Conditional rules set two major criteria for how the rule behaves: one, which Acknowledgement should be delivered to which audience – this is done by a link. And two, the specific filters built to route the acknowledgement to that audience – gift amount ranges, geographic considerations, donor characteristics, etc.

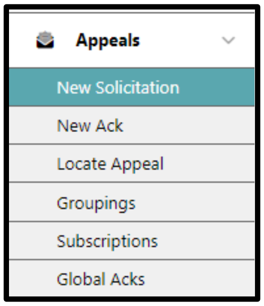
Once **Global Acks** are built, they can then be leveraged as templates on all future campaigns and save valuable setup time. A single Global Ack – users can set up as many as they like – can even be labeled as the **Default**- or most frequently used - to distribute Acknowledgements. A radio button on a Solicitation Appeal is simply clicked to link the complex Global Acknowledgement Default rule or General Rule to that Solicitation.

Users CAN also set up links between Solicitation and Global Acknowledgement by **two additional methods** where Global Acks cannot be used, they can:

- Create a "deliver to all" scenario on a Solicitation Appeal in which no conditions or rules are defined and ALL contributors receive the same Acknowledgement letter(s).
- Create a "unique" scenario on a Solicitation Appeal in which one-off conditions and rules are defined and whose criteria (rules and conditions) will NEVER be repeated in a future Appeal.

Appeals Module

Solicitation and **Acknowledgement** Appeal records are the main records found under the **Appeals Module**. Various other Submodules under Appeals serve to find, set up, and manage those Solicitations and Acknowledgements. See the list below for basic descriptions of the purpose of each of those sub-modules.



New Solicitation – Users can create a new solicitation appeal or copy an existing appeal from this sub-module. Solicitations are complex records that act as the linchpin for the entire Aegis system. They are responsible for generating Pulls, initial Solicitations, Export files, and assigning Acknowledgements. They are also the record to which active Donors and Transactions are linked via Rapid Entry.

New Ack - Users can create a new Acknowledgement or copy an existing Acknowledgement from this sub-module. Acknowledgements are the communication (Thank You) that a Donor receives as a result of contributing to a specific Appeal. They are linked to a specific Appeal and usually multiple Acknowledgements are added for specific segments of Donors who contribute.

Locate Appeal – Users can search for and access existing Solicitations and Acknowledgements from this function. A list of the latest accesses, existing Appeals display by default under the search fields.

Groupings – Users can add client defined labels (groupings) and options by which they wish to categorize and or organize appeals for reporting purposes.

Subscriptions – Users can create non-transactional Subscriptions appeals and track donors that subscribed to those Appeals via their Door record. These are simple records designed to associate Donors to a specific association such as a committee, non-solicitation letter, or newsletter for tracking purposes.

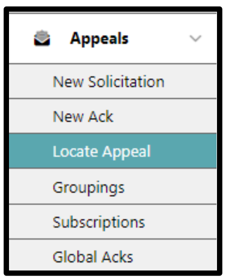
Global Acks – Enables users to set up Rules and Conditions for distributing specific Acknowledgements. Global Acks can be repeatedly leveraged on individual campaigns as templates and save valuable setup time.

Locate Appeals

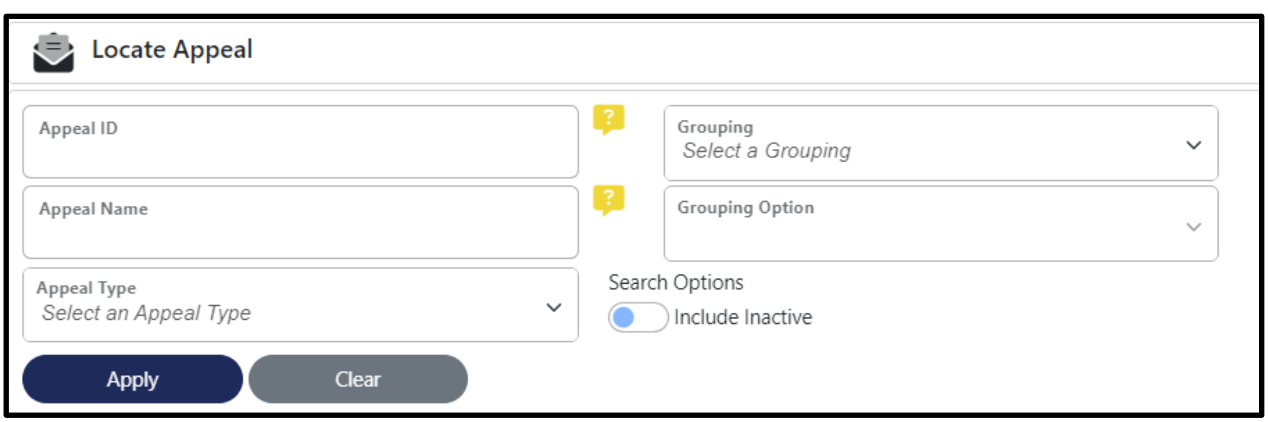
Locate Appeals is the main method from which to both find and access appeal records. If an appeal is recent by date or by use, users can quickly locate the record by simply scanning the existing Appeals display in the bottom two thirds of the screen. The display area doubles as both the listing of current, accessed appeals and as the container in which results from the top locate section are placed. Users can **Sort** on multiple fields as well as quickly interact with the records by either opening them via the left-most **Appeal ID** column, or by viewing consolidated information from the right-most **Reports** column.

Locating Appeals STEPS

1. Click on the **Appeals** module**>Locate Appeal** sub-module.



2. Users can enter as many of the Locate fields as desired to find an Appeal:
   a. **Appeal ID** – Designation of the Appeal created manually at generation.
   b. **Appeal Name** – Descriptive title IDing the Appeals focus.
   c. **Appeal Type** – Users can narrow the results from Global Available Acknowledgement, Acknowledgement, or Solicitation.
   d. **Grouping** – Additional client defined/created category which can be configured from under the Appeals>Grouping sub-module.
   e. **Grouping Option** – Sub-grouping conditionally required based on value chosen from Grouping field above. Set up under Appeals>Grouping.
   f. **Search Options**: Include Inactive – Users can switch on to see historical or future Appeals.



3. Once fields are completed, users can click on **Apply** to generate results.

4. The **Results** display below and default to an order of the latest Appeal accessed.

◂◂ ◂ 1 2 ▸ ▸▸ Page size: 20													26 items in 2 pages
Appeal ID ▲	Appeal Name	Mail Date	Date First Return	Date Last Return	Qty Mailed	# Responses	Revenue	Cost	Net	Appeal Type	Active	Reports	
24_1WT	2024 Winter (SOL)	01/01/2024	01/05/2024	03/01/2024	2,678	271	$34,126.25	$10,821.32	$23,304.93	BULK	☑	P	E
24_2ES	2024 Easter (SOL)	01/01/2024	02/29/2024	02/29/2024	2,678	2	$100.00	$1,418.28	($1,318.28)	BULK	☑	P	E
24_3SM	2024 Summer (SOL)	01/01/2024	02/27/2024	02/27/2024	2,678	1	$0.00	$482.04	($482.04)	BULK	☑	P	E
24_4CH	2024 Christmas (SOL)	01/01/2024	01/09/2024	01/09/2024	2,678	1	$0.00	$1,599.80	($1,599.80)	BULK	☑	P	E
24_5GT	2024 Giving Tuesday (SOL)	01/01/2024			2,678	0	$0.00	$482.04	($482.04)	BULK	☑	P	E
24_6WM	2024 White Mail (SOL)	01/01/2024	01/05/2024	02/18/2024	0	183	$9,456.10	$0.00	$9,456.10	BULK	☑	P	E
24_7WB	2024 Web (SOL)	01/01/2024			0	0	$0.00	$0.00	$0.00	BULK	☑	P	E
24_8ST	2024 Sustainer Continuous (SOL)	01/01/2024	01/05/2024	02/05/2024	0	24	$15,083.00	$0.00	$15,083.00	BULK	☑	P	E
24_9MT	2024 Matching (SOL)	01/01/2024	01/16/2024	02/28/2024	2,678	32	$1,365.29	$0.00	$1,365.29	BULK	☑	P	E
25_1WT	2025 Winter (SOL)	-			0			$0.00	$0.00	BULK	☑	P	E
ALL	All Donors Generic Letter (ACK)	-			0			$0.00	$0.00	RESPONSE	☑		
BSDN	Donation of $250 or Less (ACK)	-			0			$0.00	$0.00	RESPONSE	☑		
BSPL	Pledge of $250 or Less (ACK)	-			858			$0.00	$0.00	RESPONSE	☑		
CHR1	Christmas Letter 1: $99.99 or Less (ACK)	-			9			$0.00	$0.00	RESPONSE	☑		
CHR2	Christmas Letter 2: $100 or More (ACK)	-			0			$0.00	$0.00	RESPONSE	☑		
CHR3	Christmas Letter 3: Gala Tix (ACK)	-			0			$0.00	$0.00	RESPONSE	☑		
EAS1	Easter Letter 1: $99.99 or Less (ACK)	-			0			$0.00	$0.00	RESPONSE	☑		
EAS2	Easter Letter 2: $100 or More (ACK)	-			0			$0.00	$0.00	RESPONSE	☑		

5. If Desired, users can Sort by the clicking on the Column header of the following:
   a. **Appeal ID** (which is already sorted as indicated by up arrow)
   b. **Mail Date**
   c. **Revenue**
   d. **Appeal Type**
   e. **Active**

6. The **Reports** column on the far right enables users to generate either a **P (PDF)** or **E (Excel)**, **Appeal Performance Analysis by Package** report.

AEGIS crm

Appeals: 24_1WT

APPEAL PERFORMANCE ANALYSIS BY PACKAGE

Appeals by Mail Date: StartDate Not Selected - 3/26/2024

Training – Sales - Dave O'Connell

03/26/2024 2:15:29 PM

Page 1 of 1

Package: 1 - Standard Mail																
Appeal	Segment	Description	Mail Date	Qty Mailed	$ Resp	Non $ Resp	Donated	Cost	Profit/(Loss)	%Resp $	%Resp Non $	Avg. Gift	Cost/ Piece	Gross/ Piece	Net Per Piece	ROI
24_1WT	100	Gift Value .01-24.99	12/22/2222	0	1	0	$55.00	$0.00	$55.00	0.00%	0.00%	$55.00	$3.62	$0.00	$0.00	0.00
24_1WT	1200	White Mail	12/22/2222	0	72	5	$5,477.60	$0.00	$5,477.60	0.00%	0.00%	$76.08	$3.62	$0.00	$0.00	0.00
24_1WT	200	Gift Value 25-49.99	01/01/2024	1,102	110	4	$17,629.20	$3,984.17	$13,645.03	9.98%	0.36%	$160.27	$3.62	$16.00	$12.38	4.42
24_1WT	300	Gift Value 50-99.99	01/01/2024	983	59	0	$10,074.75	$3,553.94	$6,520.81	6.00%	0.00%	$170.76	$3.62	$10.25	$6.63	2.83
24_1WT	400	Gift Value 100-249.99	01/01/2024	379	2	1	$50.75	$1,370.24	($1,319.49)	0.53%	0.26%	$25.38	$3.62	$0.13	($3.48)	0.04
24_1WT	500	Bronze Major Donors: LTR 250-499	01/01/2024	56			$0.00	$202.46	($202.46)	0.00%	0.00%	$0.00	$3.62	$0.00	($3.62)	0.00
24_1WT	600	Silver Major Donors: LTR 500-999	01/01/2024	60	4	0	$386.25	$216.92	$169.33	6.67%	0.00%	$96.56	$3.62	$6.44	$2.82	1.78
24_1WT	700	Gold Major Donors: LTR 1000- 4999.99	01/01/2024	98	10	3	$452.70	$354.31	$98.39	10.20%	3.06%	$45.27	$3.62	$4.62	$1.00	1.28
		1 Total:		*2,678*	*258*	*13*	*$34,126.25*	*$9,682.04*	*$24,444.21*	*9.63%*	*0.49%*	*$132.27*	*$3.62*	*$12.74*	*$9.13*	*3.52*
		Grand Totals:		*2,678*	*258*	*13*	*$34,126.25*	*$9,682.04*	*$24,444.21*	*9.63%*	*0.49%*	*$132.27*	*$3.62*	*$12.74*	*$9.13*	*3.52*

New Acknowledgements

This section will focus on creating a new Acknowledgement Appeal record from the **Appeal** module**>New Ack** sub-module.

Acknowledgement Appeals are not as created as often as Solicitation Appeal records because they are often reused ON Solicitation Appeals. BUT in order for Solicitation Appeals to be effective, Acknowledgement Appeals must be created **BEFORE** Solicitation Appeals are formed. Once an Acknowledgement Appeal record is created, it can be reused on as many appeals and in conjunction with as many Global Acknowledgement Rules as desired.

By default, when a user creates a new Acknowledgement record, they receive FIVE tabs, with multiple sections, to complete/evaluate:

General – Basic Identification info: Appeal ID, Name, Status, etc.

Acknowledgements – Are where follow up Ack letters can be linked to the initial Acknowledgement Appeal. Organizations will often encourage "follow up" donations on an initial Acknowledgement letter. This section is used to set up those links to a SECOND Acknowledgement letter which would in turn thank the donor for their follow up donation. Information on HOW to set these up is the same as it would be for a Solicitation Appeal.

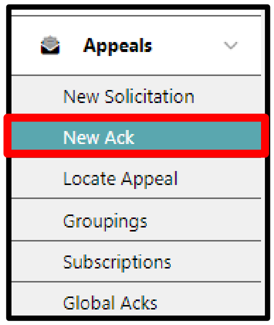
Packages – Mailing or Communication options are defined – Regular mail, 1st Class, special packaging, email, etc.

Documents – Storage location for any accompanying documents: vendor contracts, donor lists, letters, etc.

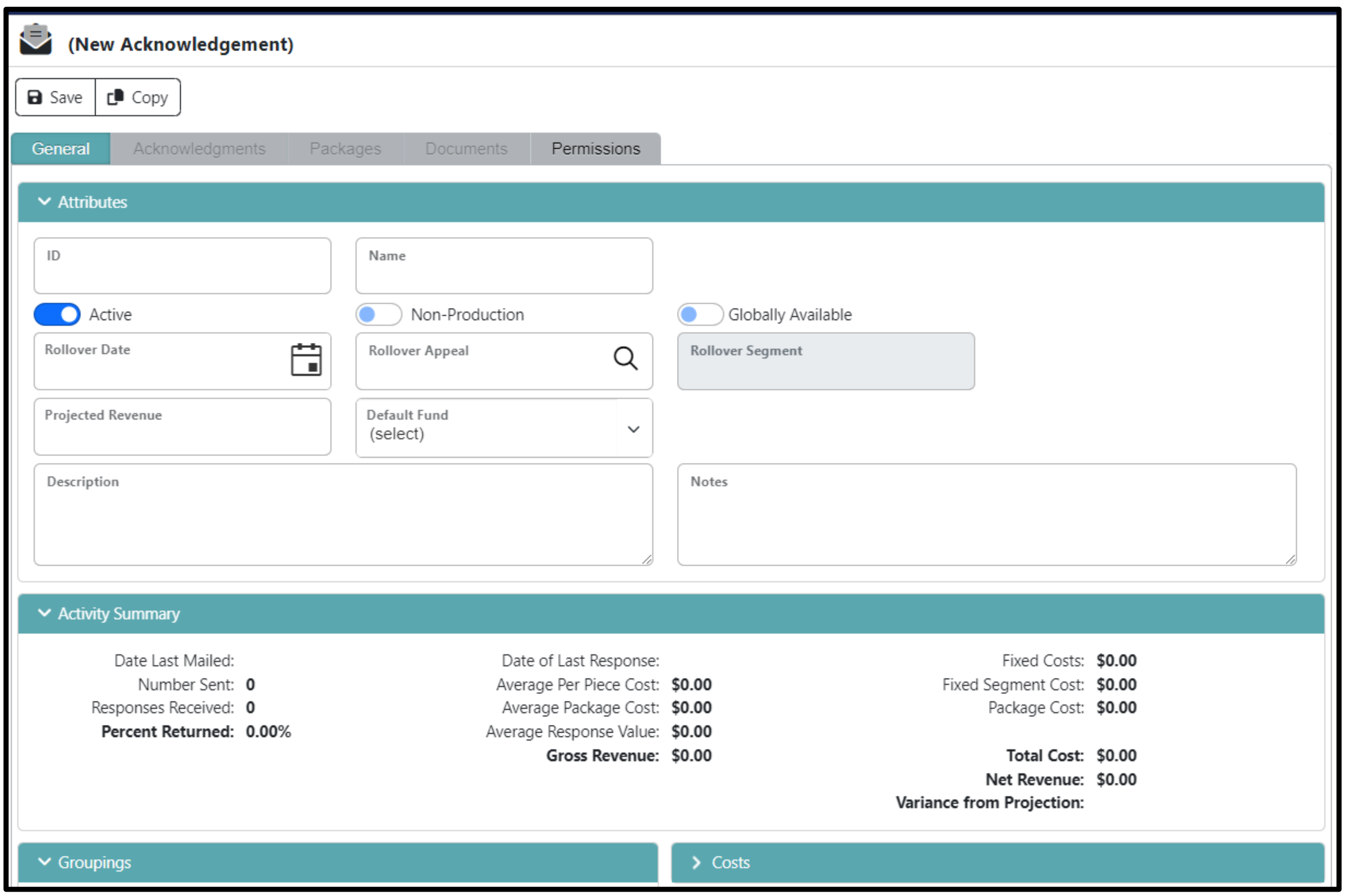
Permissions – Enables users to set security by Roles on which users can view or not view the Appeal in Rapid Entry.

Creating New Acknowledgement STEPS

1. Click on the **Appeals Module>New Ack** sub-module.



2. The **New Acknowledgement** record displays.

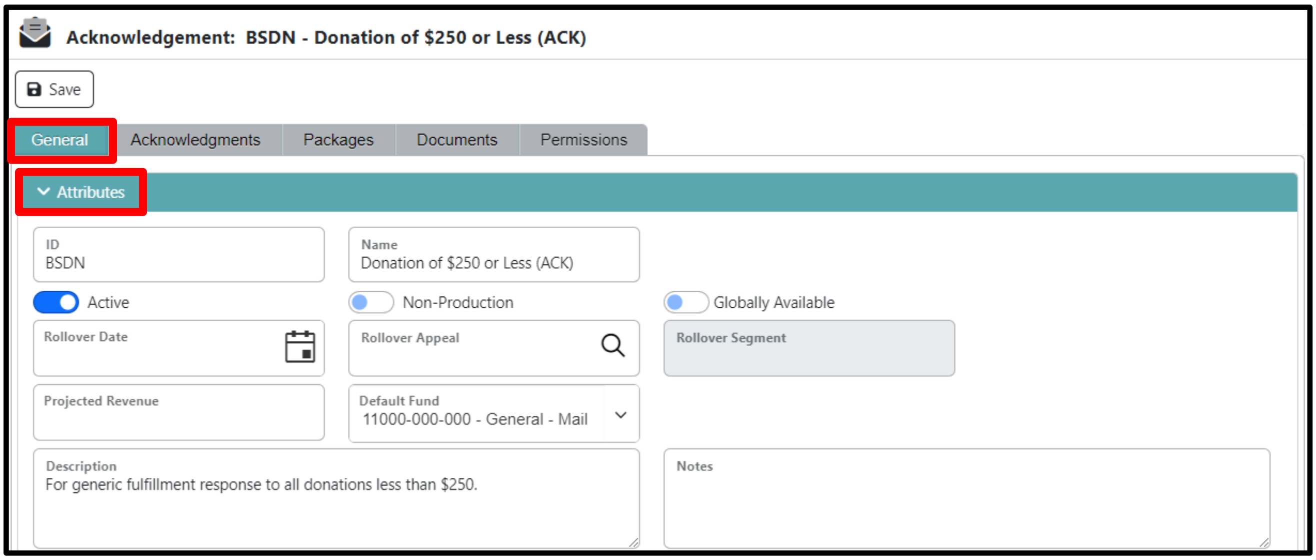


GENERAL TAB

The **General** tab Tracks the basic information about the Appeal including ID, Name, Activity, Grouping & Costs.

Attributes

The **General** - **Attributes** section enables users to define the basic required fields to saving an Appeal: **ID** and **Name**.



1. In the **ID** field, enter the desired **ID**.
   - Enter a value that abbreviates the intent of the Acknowledgement letter.
   - For this example, we will be entering an ID of **BSDN** to represent a **Base Donation of $250 or Less (ACK)**.

2. In the **Name** field, enter **Base Donation $250 or Less (ACK)**.

3. Leave the **Active** toggle selected.
   - Users might toggle this off to plan this appeal and only activate during the actual release time period of that appeal.
   - Toggled off, appeal is NOT selectable from Rapid Entry and would prevent donations from mistakenly being attributed to this Appeal.

4. Leave the **Non-Production** toggle unselected.
   - User would un-toggle if interested in just creating a test appeal.

5. Rollover fields: **Rollover Date**, **Rollover Appeal**, and **Rollover Segment** are optional and MUST be enabled by Support to be visible.
   - These fields would not be used on an Ack Appeal but will be covered when reviewing a Solicitation Appeal.

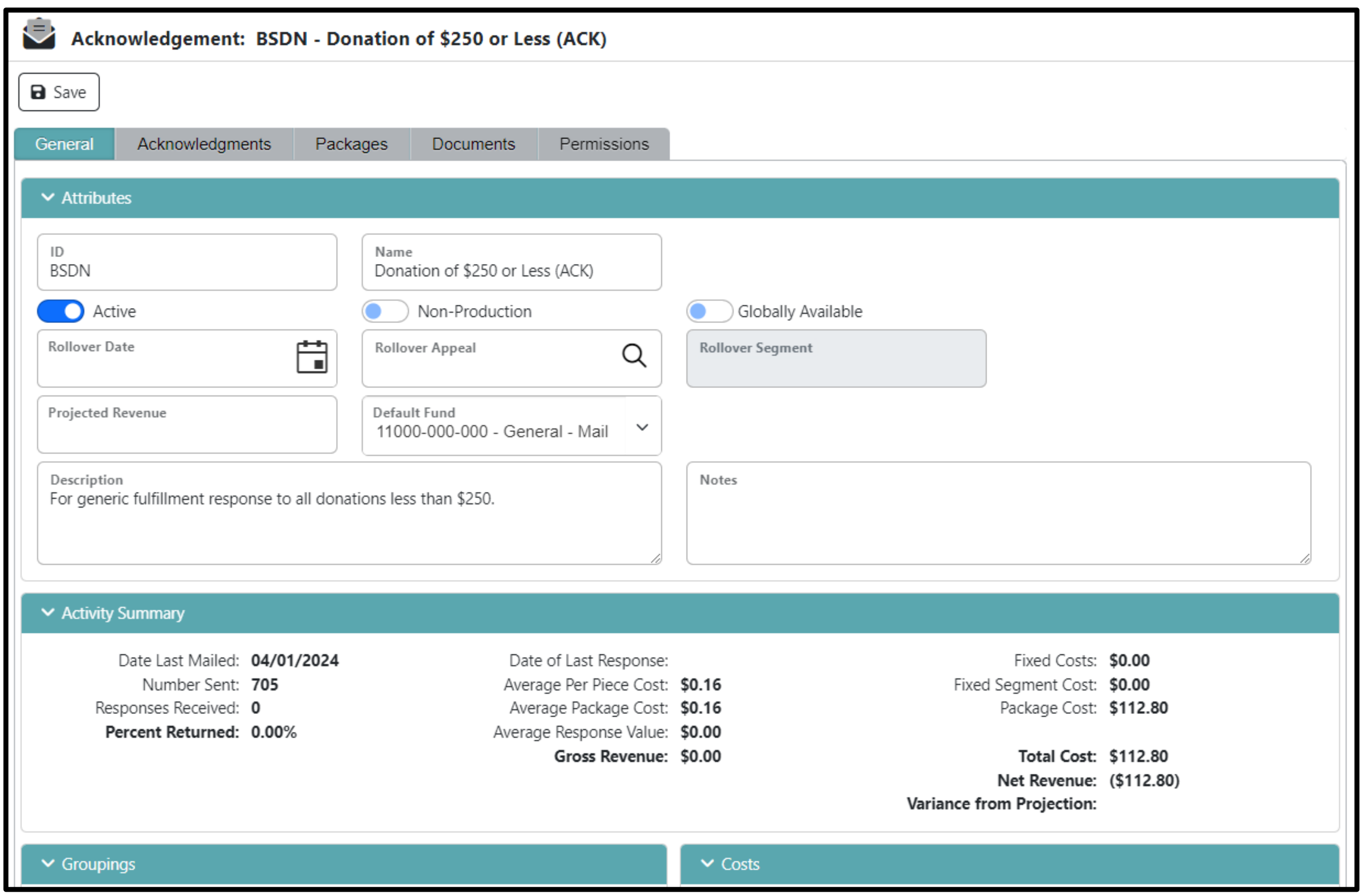
6. For an Acknowledgement Appeal, the **Projected Revenue** field would be left blank. Projected Revenue would only be tracked on a Solicitation Appeal.

7. In the **Default Fund** field, users can select from the dropdown list.
    - Users should receive direction from their Finance/Accounting department as to which fund to select.

8. In the **Description** field, enter a short accounting of the purpose of the acknowledgement.
    - Be as specific as possible, this field will inform future users as to the target of this solicitation and whether it is viable for their use.

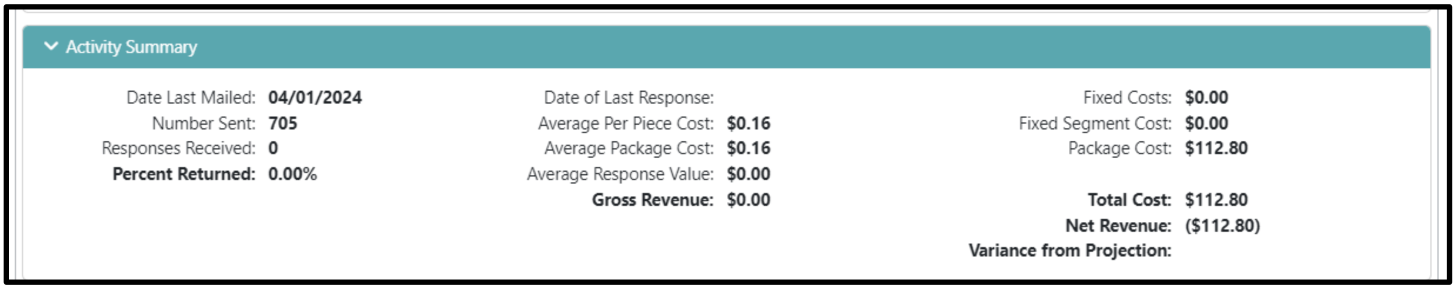
9. Leave the **Notes** field blank.
    - Notes are generally added to define something unique about the appeal that a user should know. Limited to specific audience, one-time use, etc.

10. Click **Save** to save the required **ID** and **Name** fields and other completed fields.



Activity Summary

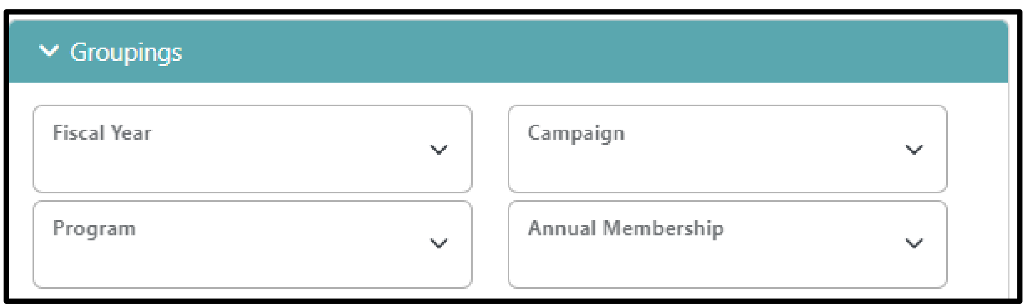
The **General – Activity Summary** section generates summarized, non-editable information that captures the current status of the Acknowledgement. It would most likely just communicate the overall Costs of mailing/marketing the Ack and would NOT be used to track any type of Revenue – that would be done on the same area on the linked Solicitation Appeal.



Groupings

The **General – Groupings** section is an optional section that enables users to leverage Administrator created Groupings **Categories** and Grouping **Values** to further label an Appeal and create more refined reporting.

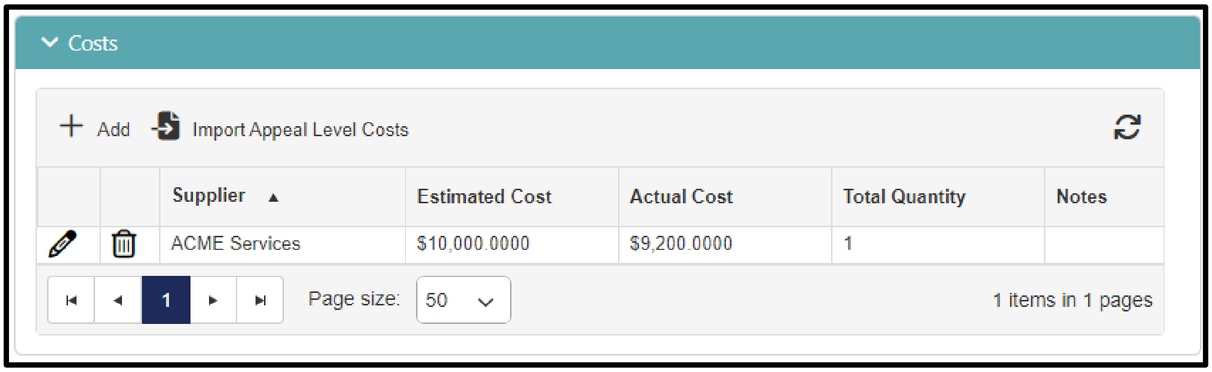
This area would NOT be used in an Acknowledgement Appeal.



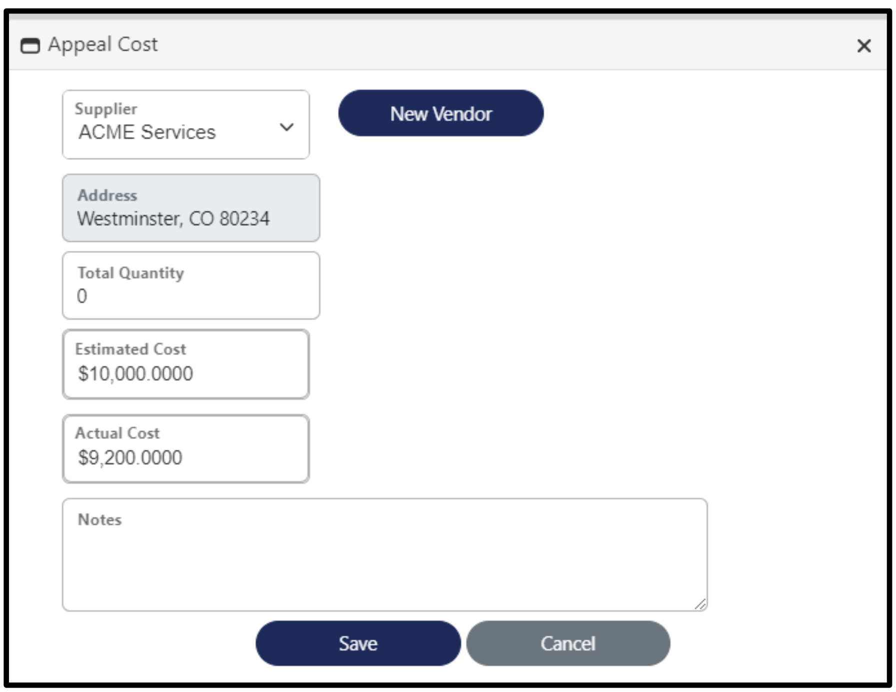
Costs

General – **Costs** section is where users can track extraneous costs for the creation, marketing, and delivery of specific items related to this particular Acknowledgement letter. Users could track items such as the cost to hire a Marketing firm to create a specific letter or the cost to produce a Calendar as a giveaway.

These costs are factored into the overall cost and reflect in the Activity Summary.



1. Click on the **+ Add** button.



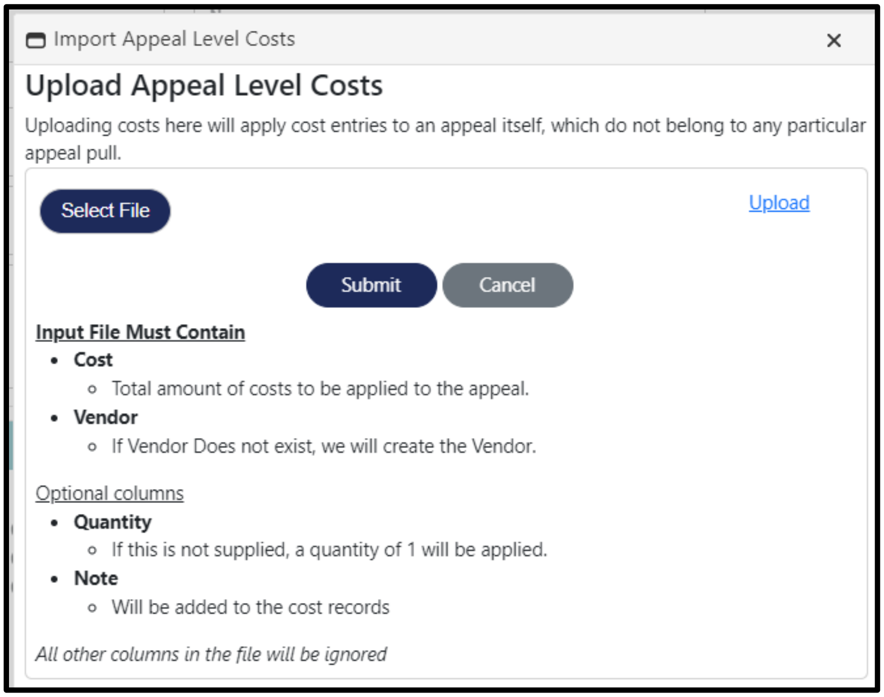
2. Select the desired **Supplier** from the dropdown menu.
    - New Vendors can be added via the New Vendor button and will be stored under the Vendors module.

3. **Address** will populate from Vendor record.

4. Enter the **Total Quantity**, **Estimated Cost**, and **Actual Cost** (when determined), and any desired **Notes**.

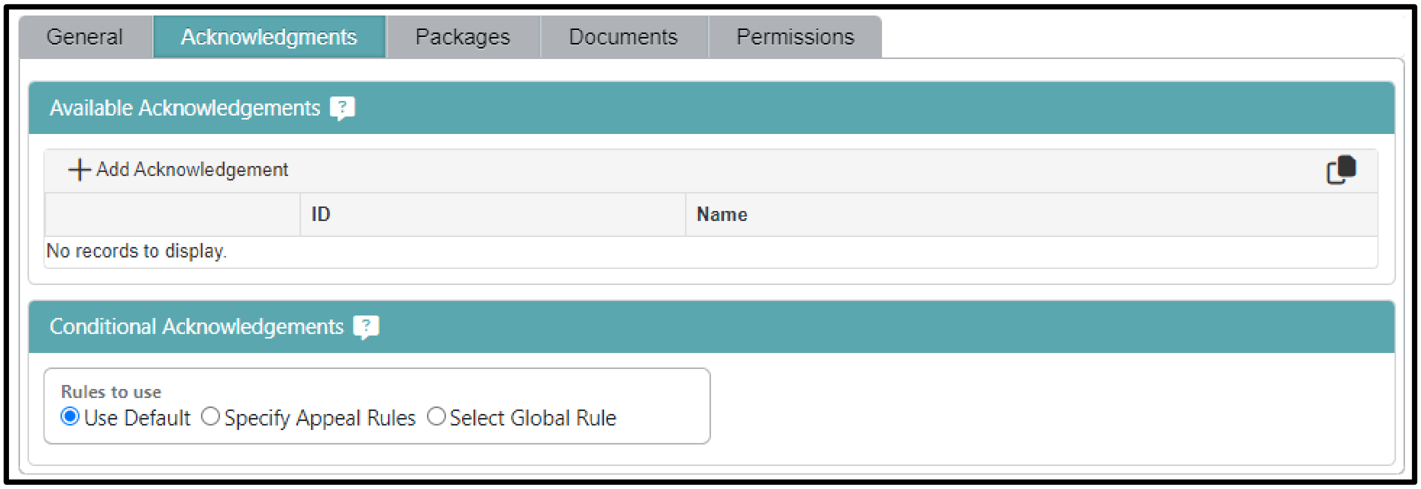
5. Click **Save**.

Costs can also be imported into the system via the **Import Appeal Level Costs** link and by following the directions listed.



ACKNOWLEDGEMENTS TAB

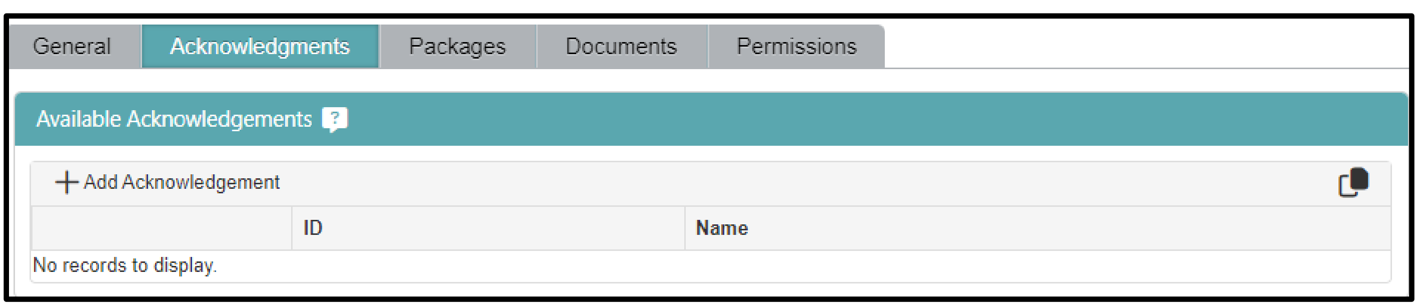
The **Acknowledgements** tab enables users to link specific follow up **Acknowledgement** appeal (letters) to the current **Acknowledgement** appeal record. This section also defines how follow up Acknowledgement appeals can be used by the original Acknowledgement.



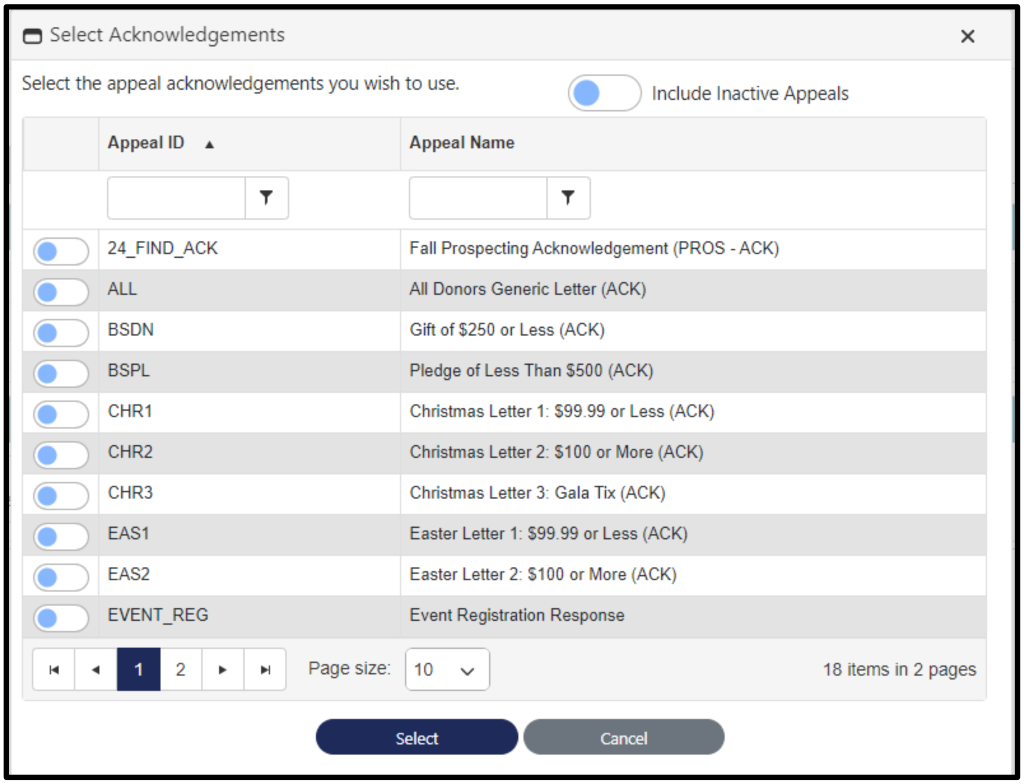
Available Acknowledgements

The **Acknowledgements – Available Acknowledgements** section enables the Acknowledgement Appeal letters added under this section will be displayed to Rapid Entry Operator and require **MANUAL** selection. Rapid Entry operators will see a display of the available Acknowledgements, click on the desired ACK, and that letter will be sent to that Donor.

This option is rarely used as the ONLY option, since it puts the burden on the Operator to manually remember to designate a particular ACK for each donating user to this Appeal, but when it is combined with the Conditional Acknowledgements section below, it can be effective. For instance, if an especially high amount donation of $100,000.00 occurs, an organization might want a differently worded Available Acknowledgement to be available to send.



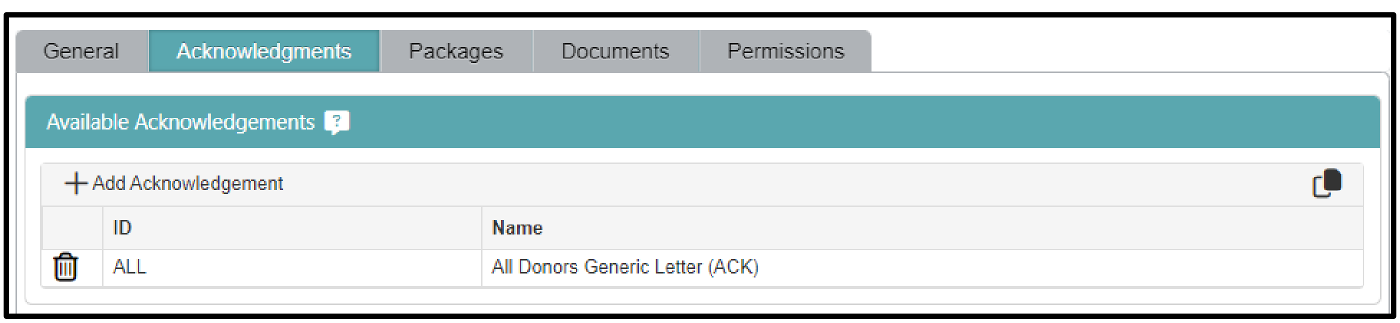
1. Click on the **+Add Acknowledgement** button.



2. Click on the desired follow up **Acknowledgement** toggle.

3. Click **Select**.

4. Once **Added**, users can observe the added line.
    - Users CAN add multiple Acknowledgments, but ANY letters listed in this section would be delivered to ALL donors contributing to this Appeal.
    - For example, users might want to have the system deliver a secondary thank you acknowledgement AND a complimentary calendar to ALL donors who give a second time.



Conditional Acknowledgements

The **Acknowledgements** – **Conditional Acknowledgements** section is where users can choose to target specific, pre-existing **Acknowledgement Appeal** records to be processed by one of three different settings. These ACKS will be **AUTOMATICALLY** selected FOR the Rapid Entry Operator when processing donations.

- **Default** - Leverages an existing **Global Acknowledgment Rule** found under the **Appeals** module>**Global Acks** sub-module, which has been marked as the **Default**.
- **Specify Appeal Rules** – Enables users to create unique **Conditions** and **Rules** tie them to an existing **Acknowledgement Appeal** record. Used specifically for Appeals whose Condition & Rules are NOT replicable.
- **Select Global Rule** - Leverages an existing **Global Acknowledgment Rule** found under the **Appeals** module>**Global Acks** sub-module, which has **NOT** been marked as the **Default**.

NOTE: To use this section effectively, user must have:

- **ONE** – Existing **Acknowledgment Appeal** records to tie to any of the three **Conditional Acknowledgement** radio buttons.
- **TWO –** Existing **Global Acks** in order to use either the **Default** or **Select Global Rule Acknowledgement** radio buttons under **Conditional Acknowledgements**.

USE DEFAULT RADIO BUTTON

1. Click the **Use Default** radio button.

2. The system will automatically leverage the **Global Ack** set as Default in processing Acknowledgements for this Appeal.

3. See screen shot above.

SELECT GLOBAL RULE RADIO BUTTON

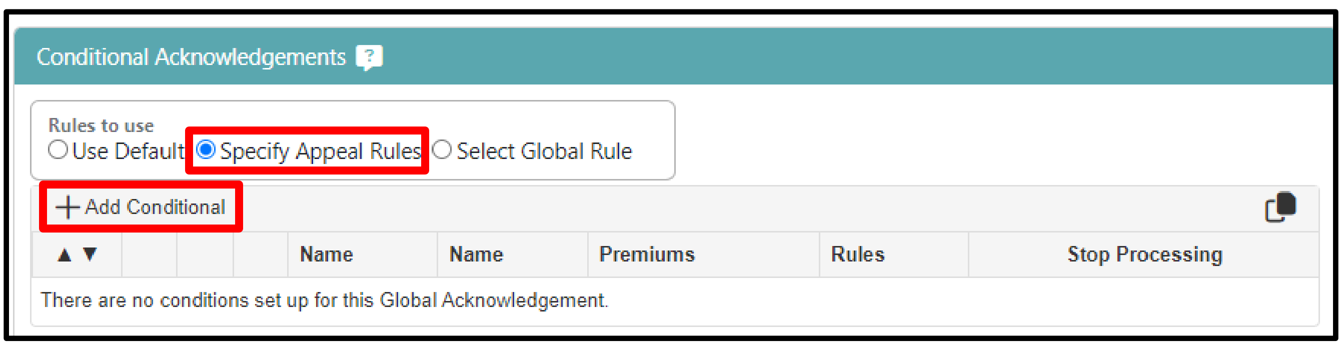
1. Click the **Select Global Rule** radio button.

2. From the **Global Rule** dropdown, select the desired Global Rule to apply.

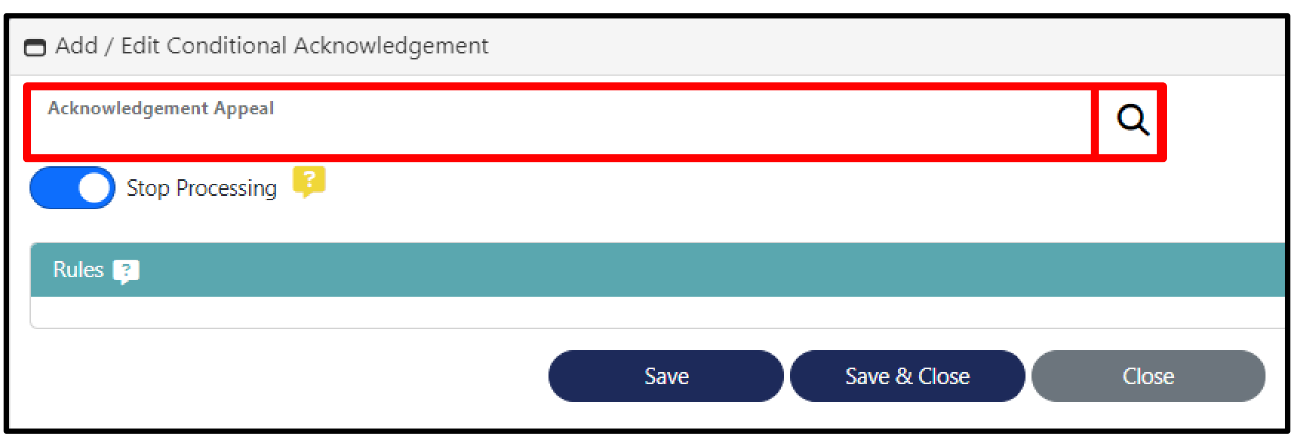
SPECIFY APPEAL RULES RADIO BUTTON

1. Click the **Specify Appeal Rules** radio button.

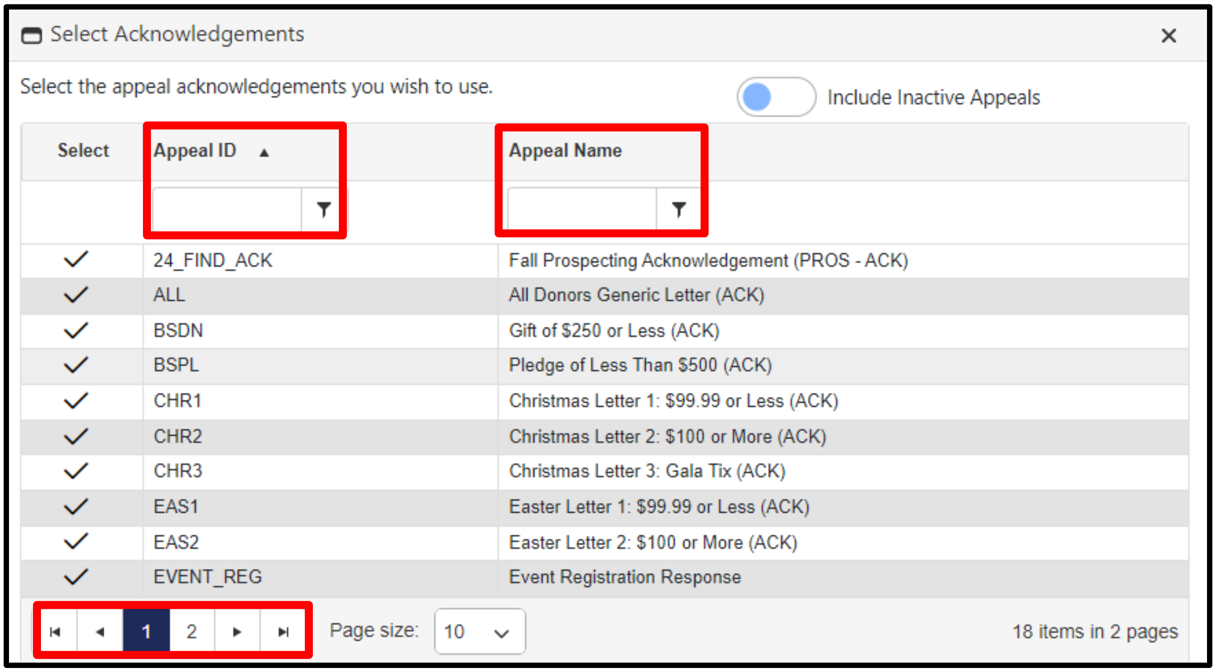
2. Click the **+Add Conditional button**.



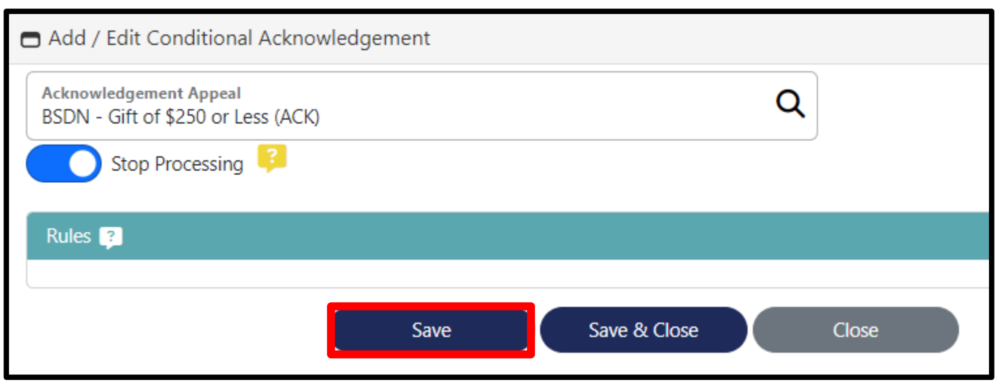
3. In the **Acknowledgement Appeal** lookup field enter the name of the desired **Acknowledgement Appeal** record.



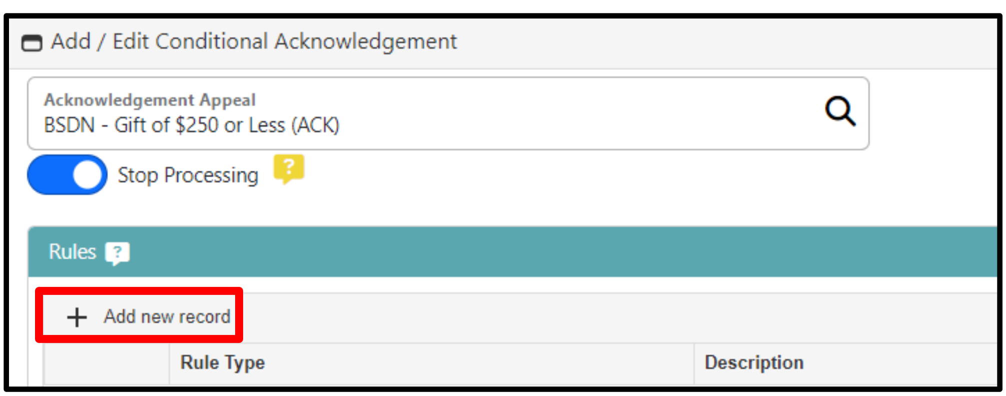
4. Alternately, click the **Lookup icon** and select the desired **Acknowledgement Appeal** from dropdown by clicking the **checkbox** from under the **Select** column.
    - User can also scroll pages or filter results by **Appeal ID** or **Appeal Name**.



5. Once the desired **Acknowledgement Appeal** is selected, click the **Save** button.



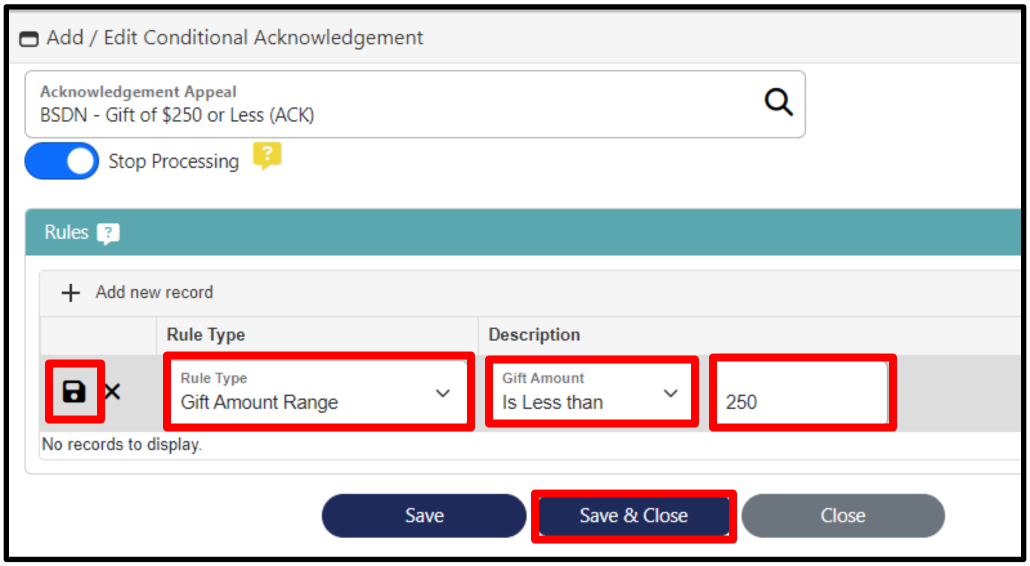
6. Click on the **+Add new record** button that displays under the **Rules** section.



7. Add a **Rule Type** of **Activity Amount Range**.

8. Add an **Amount** of **Is Less Than**.

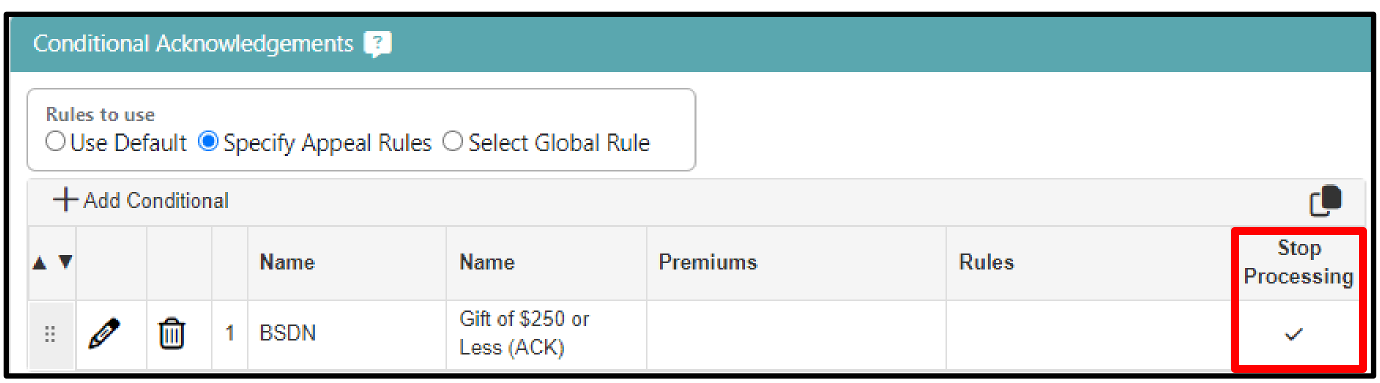
9. Add a **Value** of **250**.



10. Click the **Save** **<u>ICON</u>** to the left of the row.
    - There is no auto-save or reminder if NOT saved; users must remember to click here for initial save of row.

11. Click the **Save & Close** button on the bottom of record.

12. The Rule is added under the **Specify Appeal Rules** selection.

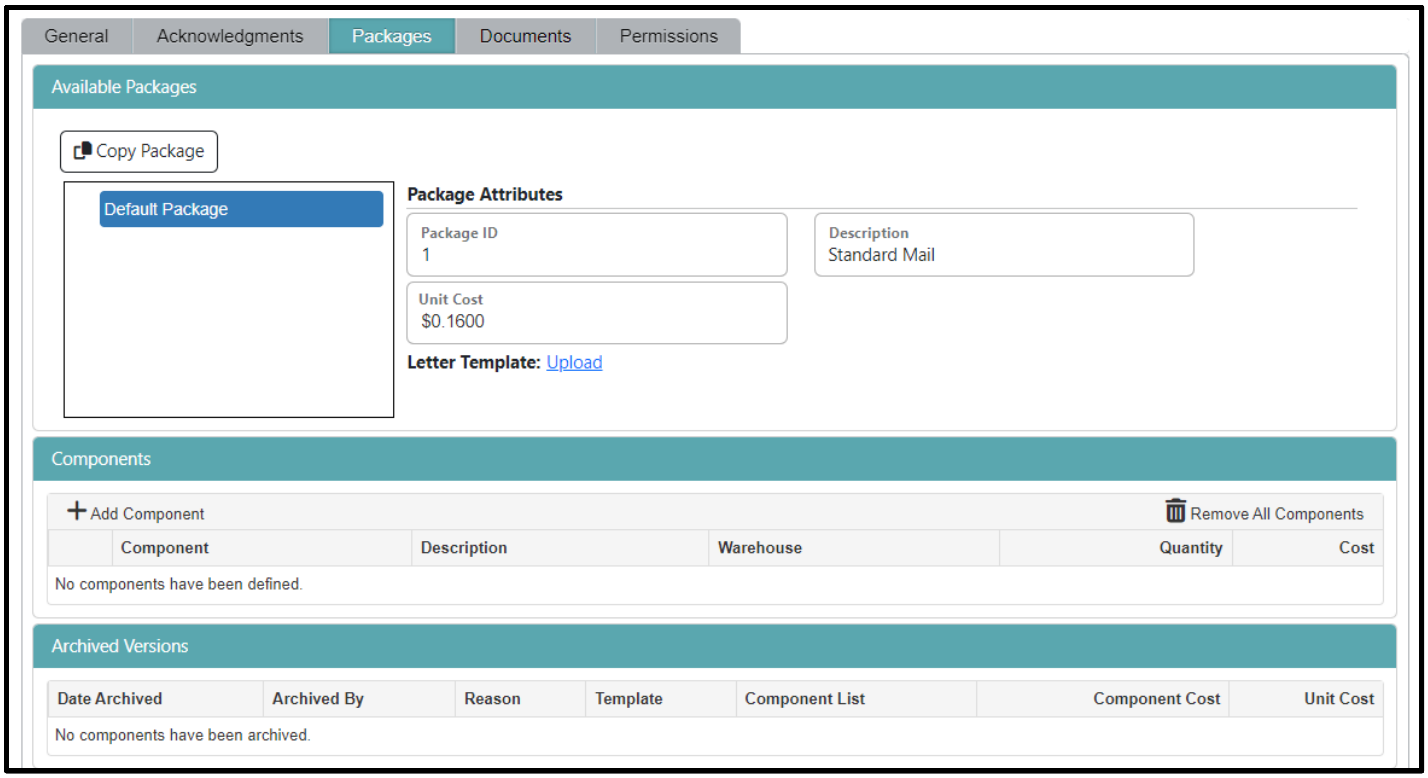


Stop Processing feature will sometimes be <u>UNCHECKED</u> for both Available and Global Acks: this enables clients to send multiple acknowledgement responses to a particular gift type. For example, a client might send an Email response AND a Paper response.

PACKAGES TAB

The **Packages** tab enables users to define Acknowledgement mailing methods, costs, letterhead, and envelopes in the distribution of the Acknowledgement letters. Packages help create an accurate picture of the overall cost and effort of sending follow-up acknowledgements.

User also have the opportunity to Upload a **Letter Template** that will function as a “hand-crafted” response that is then appended to, or signed by, a staff member or account manager. **Major Donor Account Managers** often use this function to store the response that they will use to reply directly to their assigned donors.

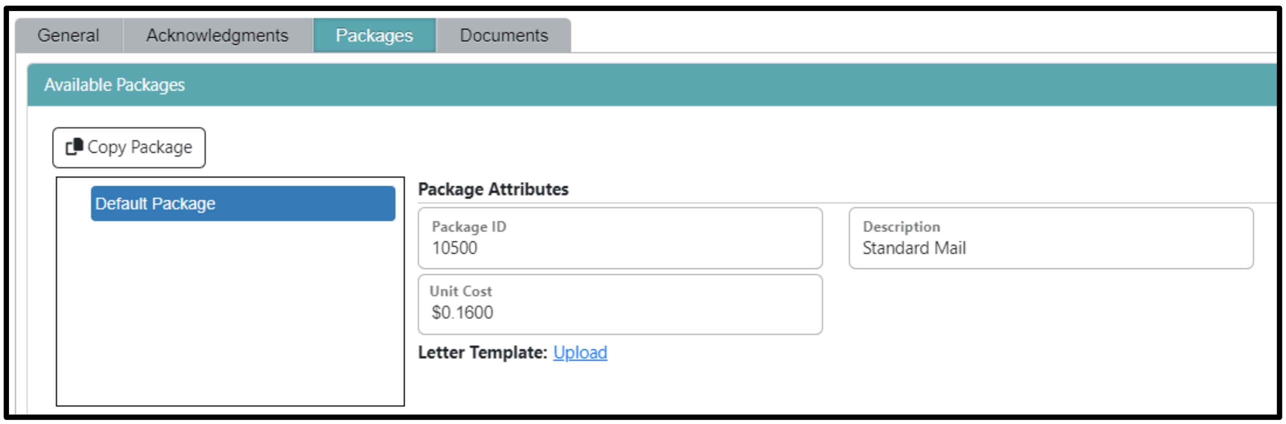


Available Packages

1. In the **Package ID** field, enter a desired ID– type over the (default) value.

2. In the **Description** field, enter a short description of the Package.
    - Usually the type of mail being used to respond: Standard, First Class, etc.

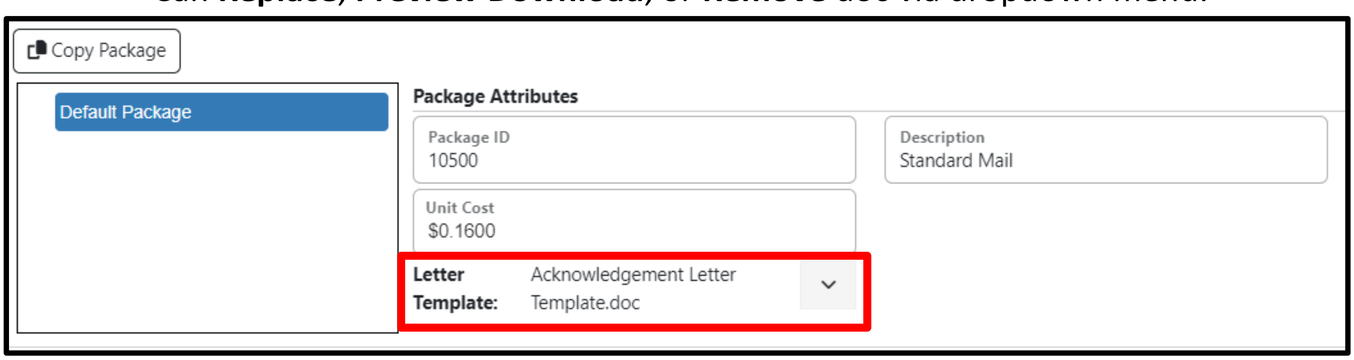
3. In the **Unit Cost** field, enter the estimated or exact unit cost for a piece of the mail type being delivered.
    - Estimates the cost of the Acknowledgements being delivered.



4. Click on the **Upload** link next to the **Letter Template** field.

5. A **File Uploader** pop-up screen displays.
    - Users can browse to a file and Upload.
    - This file can then be leveraged to be printed for the Donors determined to receive this follow up letter.
    - Account Managers can print out and sign to send individually as well.

6. Click **Save** - **Letter Template Name** displays next to the **Letter Template** field.
    - Can **Replace**, **Preview Download**, or **Remove** doc via dropdown menu.



Packages Components

Users can choose to add Components to be delivered with Acknowledgement follow-ups. For instance, an organization might choose to send a free T-Shirt or Calendar as a result of a secondary contribution. Setting a component also ensures it is tied into Inventory and will depreciate amounts.

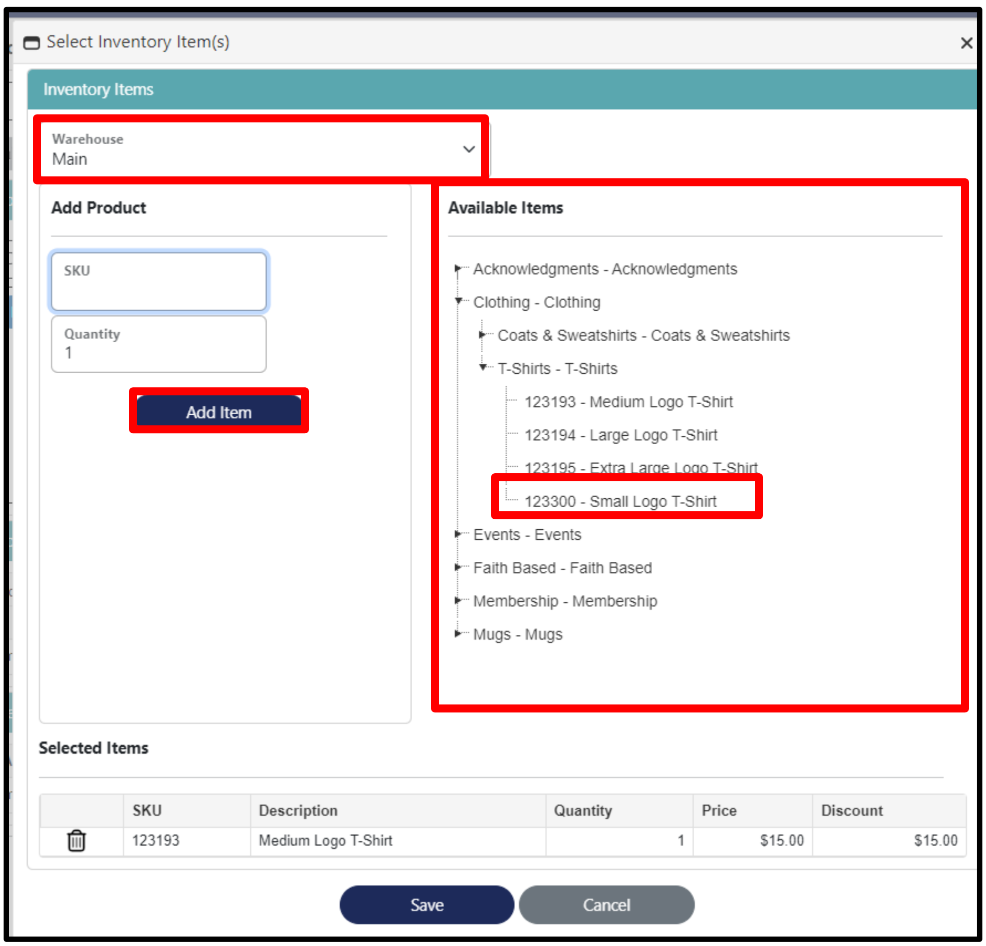
1. Click on the **+Add Component** button.

2. From the **Warehouse** dropdown, user select the desired Warehouse to select an Item to add as a Component.

3. **Available Items** – on right – display according to Warehouse selected.

4. From **Available Items**, users expand selections until reaching desired item, then double click the item to select as the Component.

5. Users must then click **Add Item** - on left - to Add item as the Component.



6. Click **Save** to add the Component to the Acknowledgement.

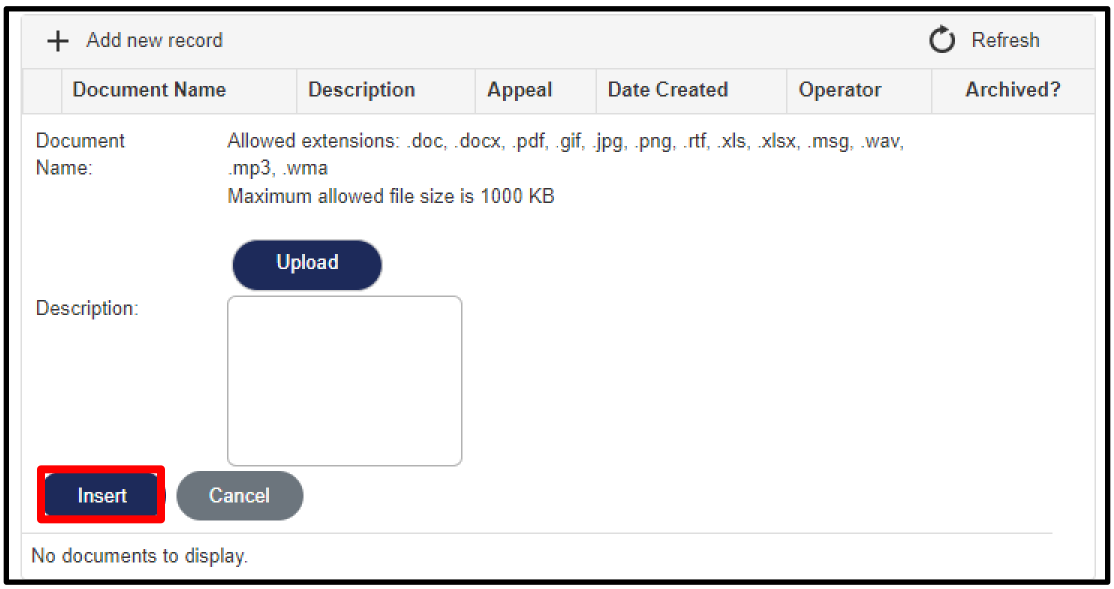
DOCUMENTS TAB

Documents

The **Documents** tab enables users to Add any documents to the Acknowledgements record. Users may have a need to add images or larger descriptions as part of the permanent record.

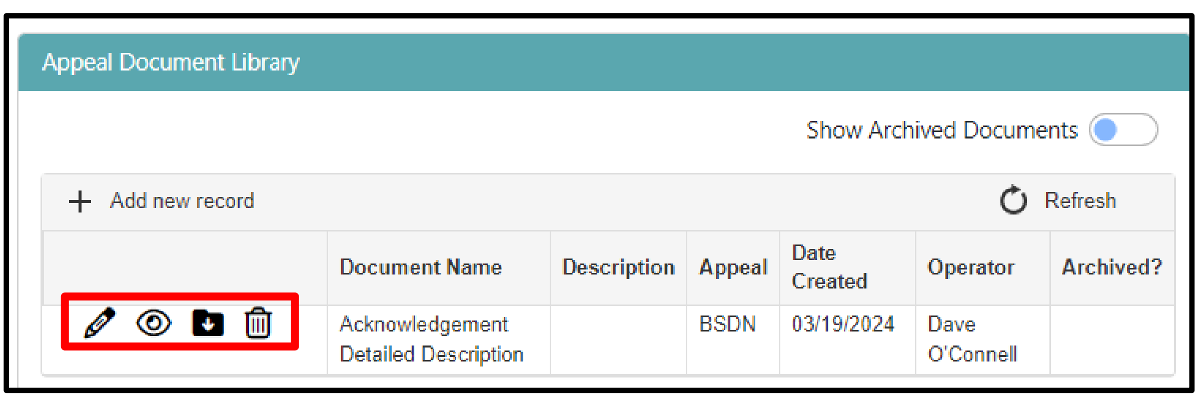
1. Click on the **+Add new record** button.

2. A **File Uploader** pop-up screen displays.
   - Users can browse to a file and **Upload**.
   - Users can also add a short **Description** as desired.



3. Click on **Insert**.

4. The file displays as an entry under the **Documents** listing.



5. Users can **Edit**, **Read**, **Download**, and **Delete** with appropriate permissions.

PERMISSIONS TAB

Permissions

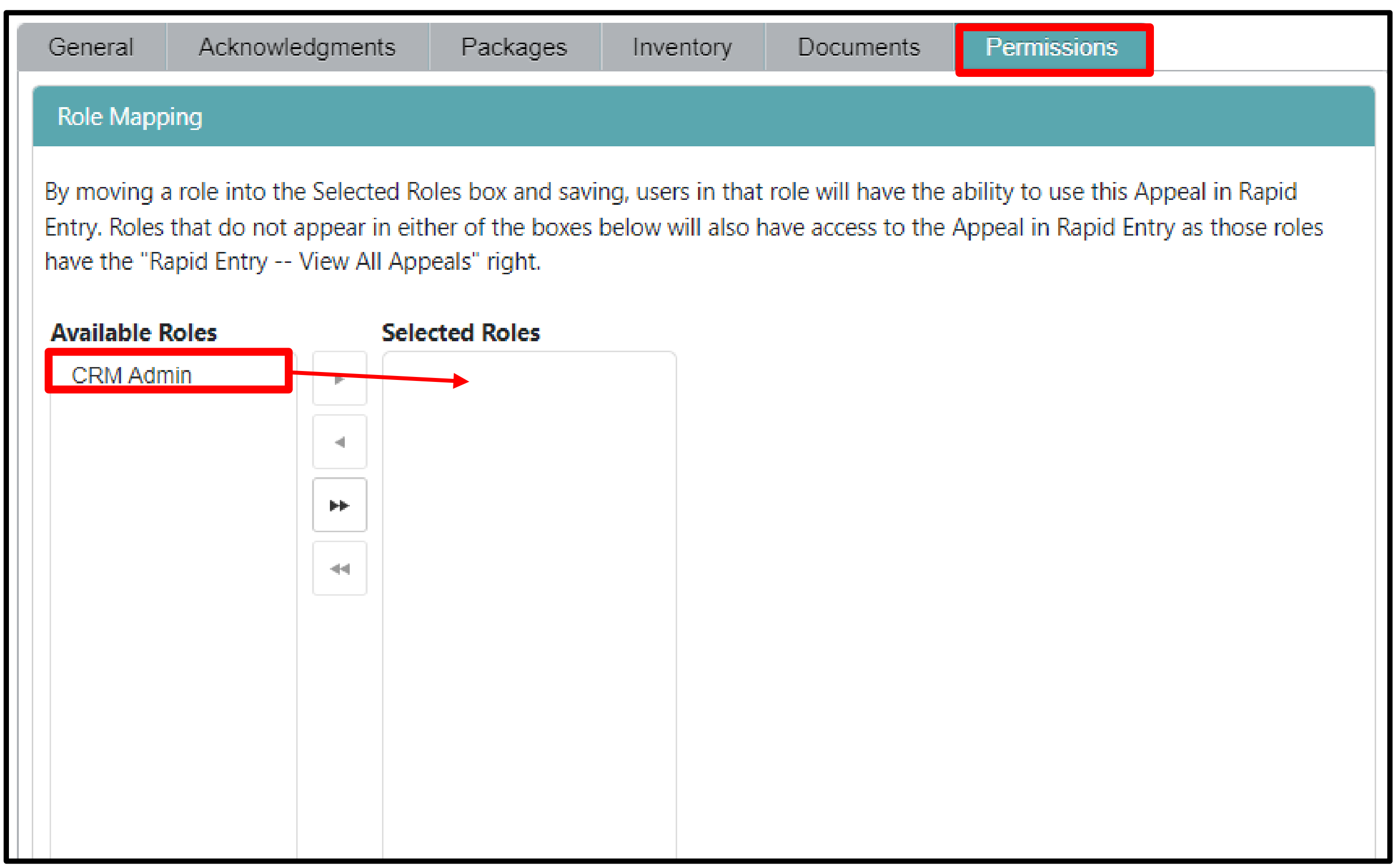
The **Permissions** tab enables users to set security by **Roles** on which users can view or not view the Appeal in **Rapid Entry**.

This can be extremely helpful for clients with a high volume of Appeals in which certain Roles – groups of users – are only required to view a sub-set of Appeal records. Those Roles can then be "assigned" to those Appeals and not need to wade through the bulk of Appeals in order to find those they must focus on.

IMPORTANT NOTE: In order for this tab to function, an **Administrator** must set up the targeted user role under the **Administration>Security Roles** sub-module and ensure role has **Rapid Entry – View All Appeals** right moved from Selected Rights under Available Rights. **By DEFAULT, this right resides under Selected Rights.**

To set up Permissions:

1. Select on the **Role** under the **Available Roles** column.
2. **Drag and Drop the Role** to the **Selected Roles** column.
3. That role will now be able to view the **Appeal** in **Rapid Entry**.



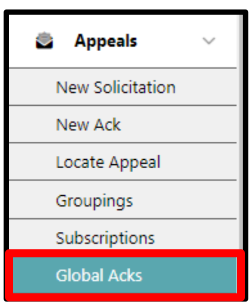
Global Acknowledgement Rules

This section will focus on managing and creating new Global Acknowledgement Rules from the **Appeal module>Global Acks**. Global Acks enable users to set up both simple and complex Conditions and Rules around the distribution of Acknowledgements. ANY Global Acks can then be leveraged from any Solicitation Appeal without having to constantly set up repeatable Rules and Conditions.

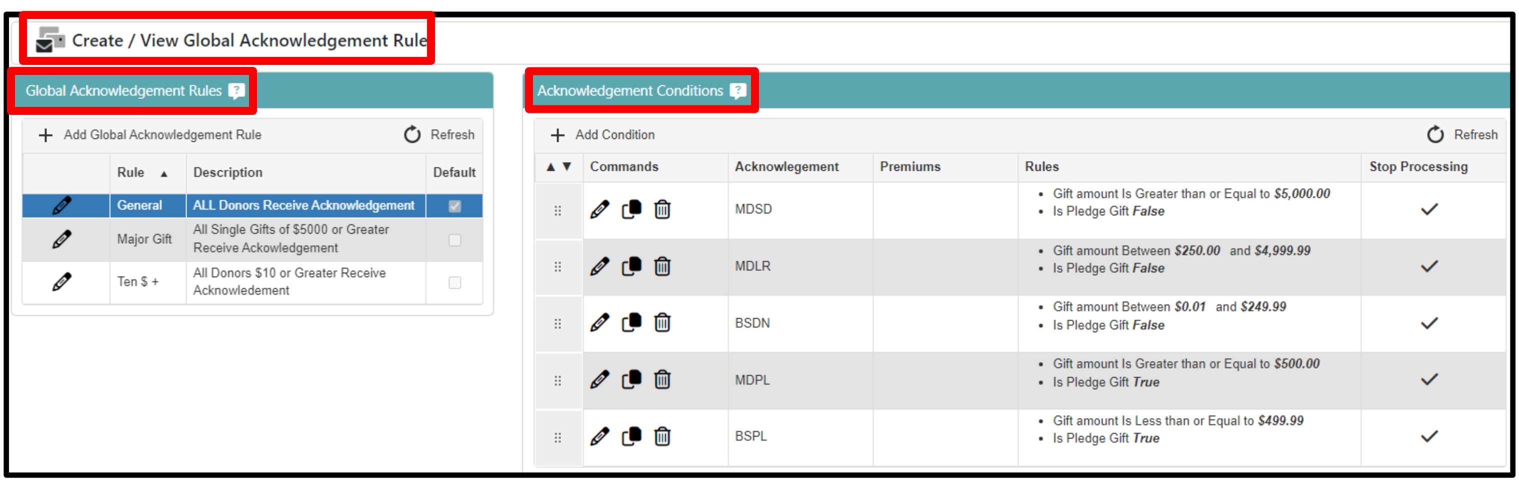
To help users understand how **Global Acknowledgements** work, we will examine an example of a previously created Global Rules in the steps below.

Understanding Global Acknowledgement Rules

1. **Global Acknowledgement Rules** are found under the **Appeals** module>**Global Acks** sub-module.



2. Opening the **Global Acks** takes users to the **Create/View Global Acknowledgement Rules** screen.



3. From this screen, users can view two distinct sections: **Global Acknowledgement Rules** and **Global Acknowledgement Conditions**.
   - **Rule** selected (on left) – **General Rule** – displays its **Conditions** (on right)

4. A New Rule can be created by clicking on the **+Add Global Acknowledgement Rule button**.

5. Once the Rule is created the User would then add the accompanying **Conditions**, by clicking on the **+Add Condition** button under the Acknowledgement Conditions section.

6. In this scenario we will examine the **General - Global Acknowledgement Rule**:

Global Acknowledgement Rules

+ Add Global Acknowledgement Rule   Refresh

	Rule ▲	Description	Default
	General	ALL Donors Receive Acknowledgement	✓

7. And its five distinct and defined **Acknowledgement Conditions** and **Rules**:

Acknowledgement Conditions

+ Add Condition   Refresh

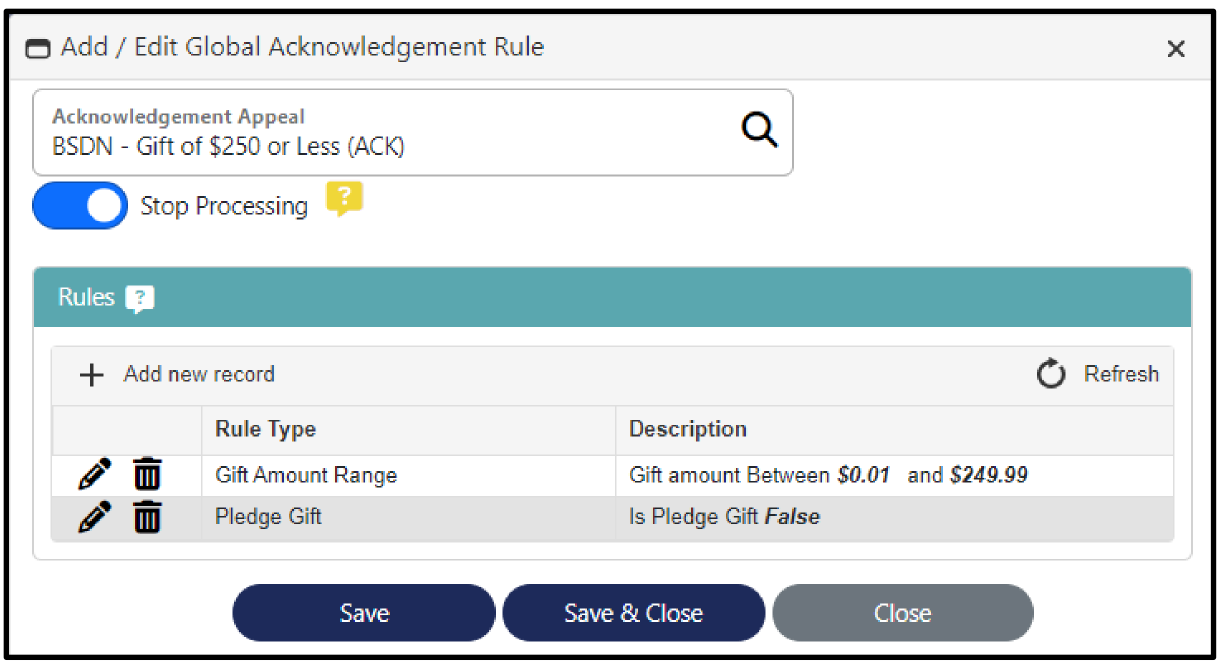
▲ ▼	Commands	Acknowlegement	Premiums	Rules	Stop Processing
		MDSD		• Gift amount Is Greater than or Equal to ***$5,000.00*** • Is Pledge Gift ***False***	✓
		MDLR		• Gift amount Between ***$250.00*** and ***$4,999.99*** • Is Pledge Gift ***False***	✓
		BSDN		• Gift amount Between ***$0.01*** and ***$249.99*** • Is Pledge Gift ***False***	✓
		MDPL		• Gift amount Is Greater than or Equal to ***$500.00*** • Is Pledge Gift ***True***	✓
		BSPL		• Gift amount Is Less than or Equal to ***$499.99*** • Is Pledge Gift ***True***	✓

8. Each of the five **Conditions**, and their accompanying **Rules** are:
   a. Built separately.
   b. Linked to an **Acknowledgement Appeal** (letter).
   c. Contain **Rules** that use **Criteria** to determine which Donors receive which Acknowledgment Letter.
   d. Flow from the **lowest** dollar range to the **highest** dollar range of contribution.
   e. Can be **reorganized** via the **left-most** column.

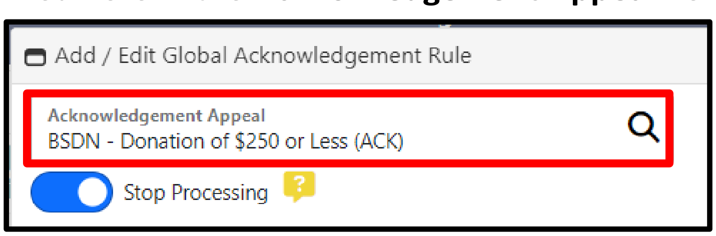
9. We will examine the first Condition – **BSDN** – and its construction.

10. First, we will click on the **Edit** button.

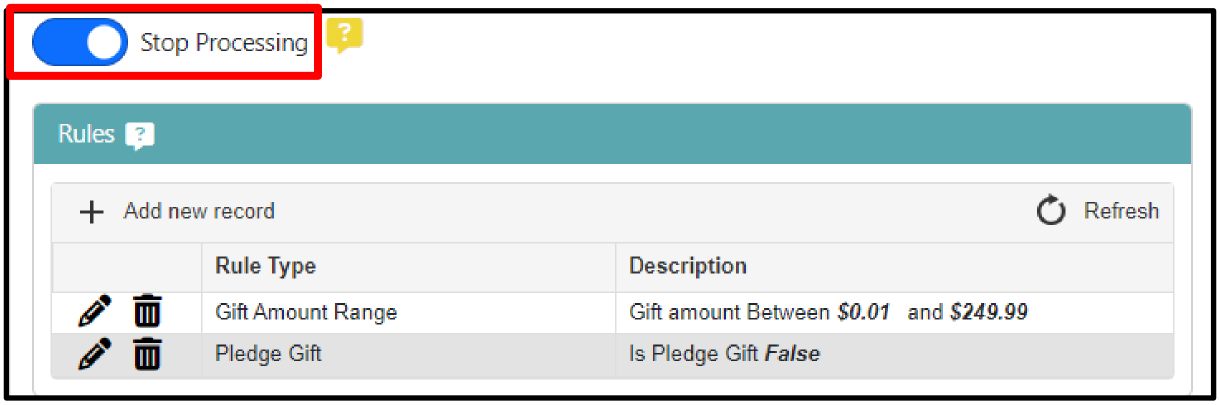
11. The **Add/Edit Global Acknowledgement Rule** screen displays.



12. The specific **Acknowledgement Appeal** (Letter) that qualifying donors receive is linked here in the **Acknowledgement Appeal** field.



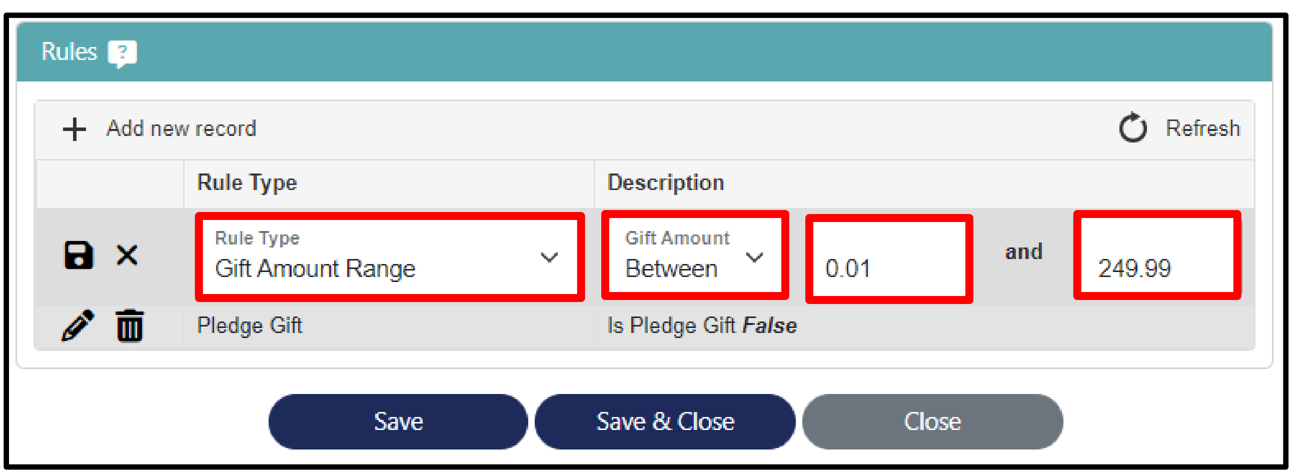
13. If checked, the **Stop Processing** button will stop the application of Rules beneath this rule IF this Rule evaluates as true.
    - Rules are carefully ordered & considered in applying Stop Processing:
        - Stopping Processing on any rule that proves true effectively prevents Donors from qualifying for any below it.
        - If Stop Processing is not toggled on, donors may receive multiple, possibly incorrect, acknowledgements.



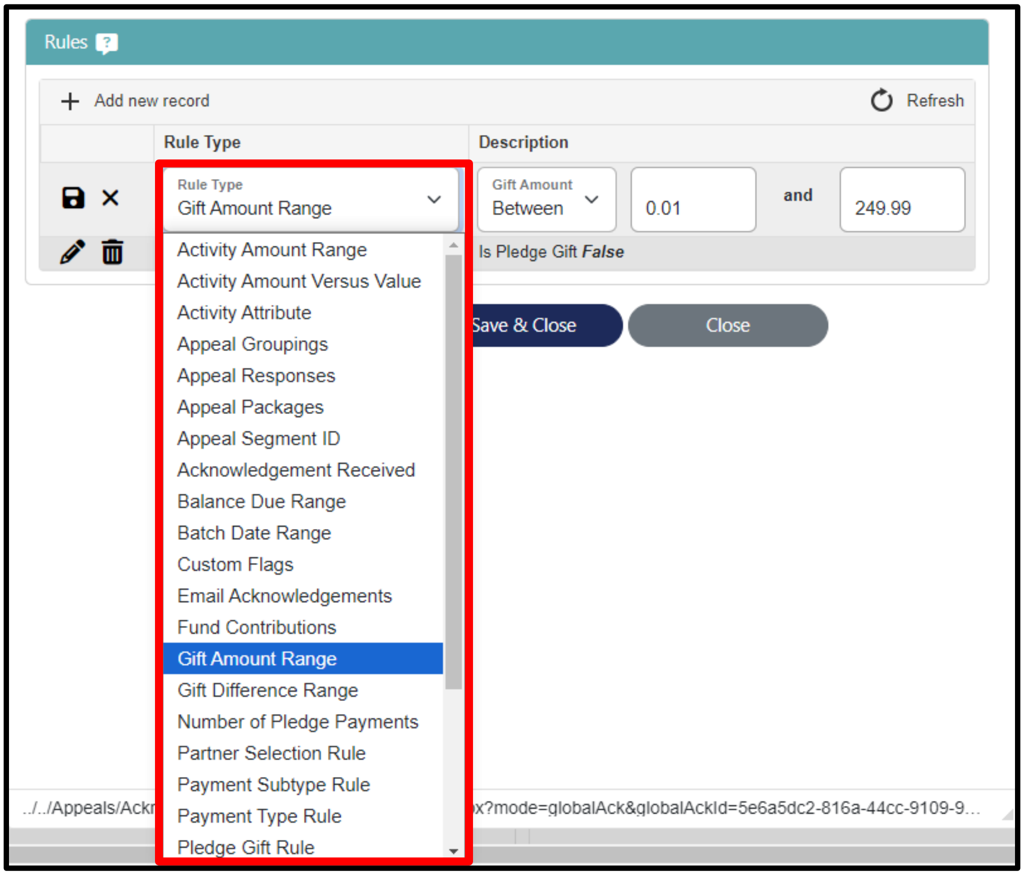
14. **Rules** are most often created in groups of at least two.
    - Usually, Rules capture ranges of desired contributions and/or unique elements about the Contribution or Donor such as:
        - Was it for a specific Product?
        - Was it a Pledge?
        - Was a certain Donor Flag checked?

15. Each **Rule** also has an **Edit** button – we will click **Edit** next to the first Rule.

16. When in **Edit** mode, the **Rule Type** dropdown, **Operator Values** dropdown, and **Value** field all display.



17. Clicking on the **Rule Type** dropdown displays the 27 Categories of filterable Rule Types.



18. If Users edit the value, they must click the **Save** button on the **Rule Type** row; clicking the Save below would NOT save any row changes.

19. Clicking **Save and Close** returns us to the Main Page.

Utilizing Global Acknowledgement Rules STEPS

Two types of Global Acknowledgement rules can be leveraged once all Global Rules are created: the **Default** Global Rule and the **Select Global Rules**. The Default Global Rule is simply defined as the SINGLE most often implemented rule for Appeals. The Select Global Rules covers ALL other Global Rules that could be implemented for Appeals.

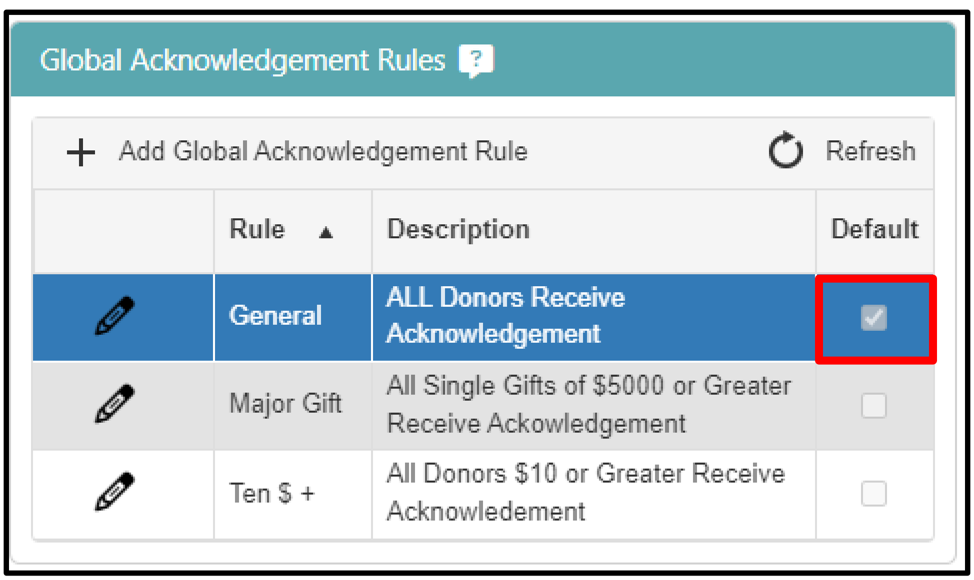
To utilize both of these types of rules follow the instructions below. In using, users must ensure that:

- The appropriate setup is done under the Appeals>Global Acks sub-module.
- The correct setting is selected under the Appeal the user wishes to use Global Acks for.

To use the **Default Global Rule**

1. Navigate to **Appeals>Global Acks**.

2. Click the **Default** checkbox to the far right of the desired **Global Acknowledgement Rule** (Or confirm it is already checked).

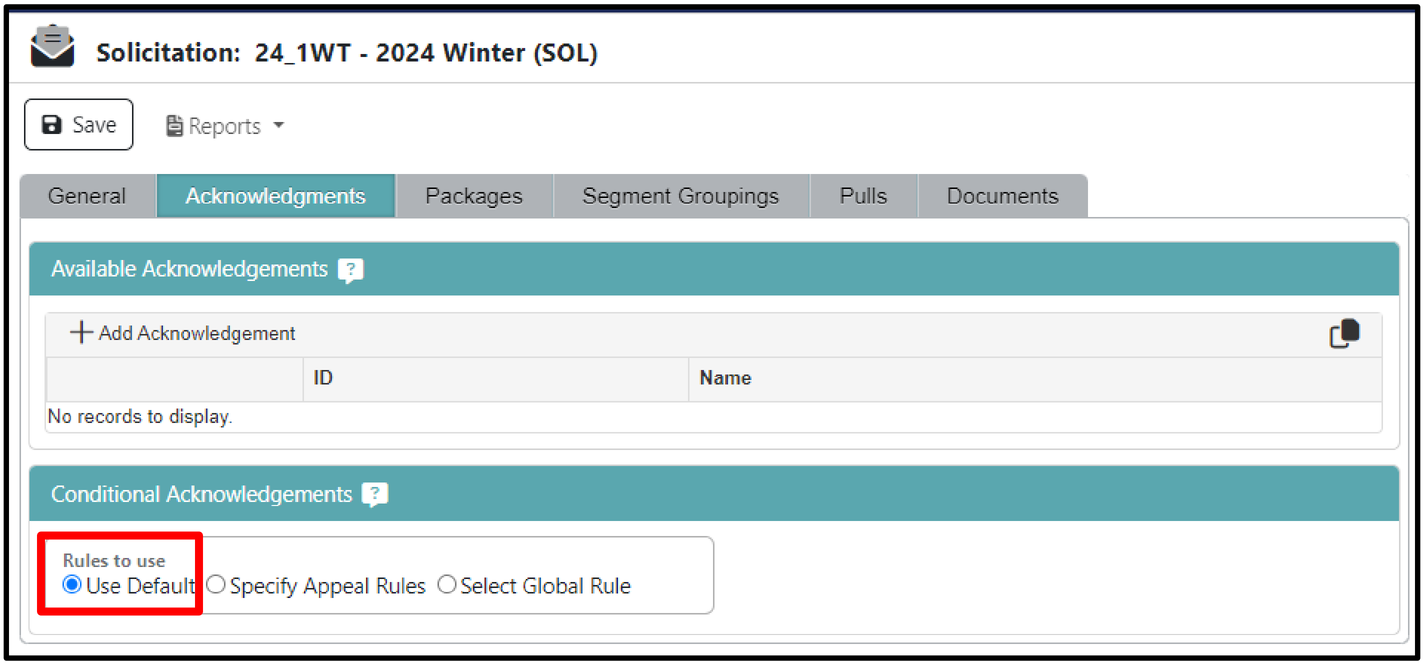


3. Navigate to the desired Appeal via **Appeal>Locate Appeal**.

4. **Open** the Appeal.

5. Navigate to the **Acknowledgements** tab of the Appeal.

6. Under the **Conditional Acknowledgements** section, check the **Use Default** radio button.

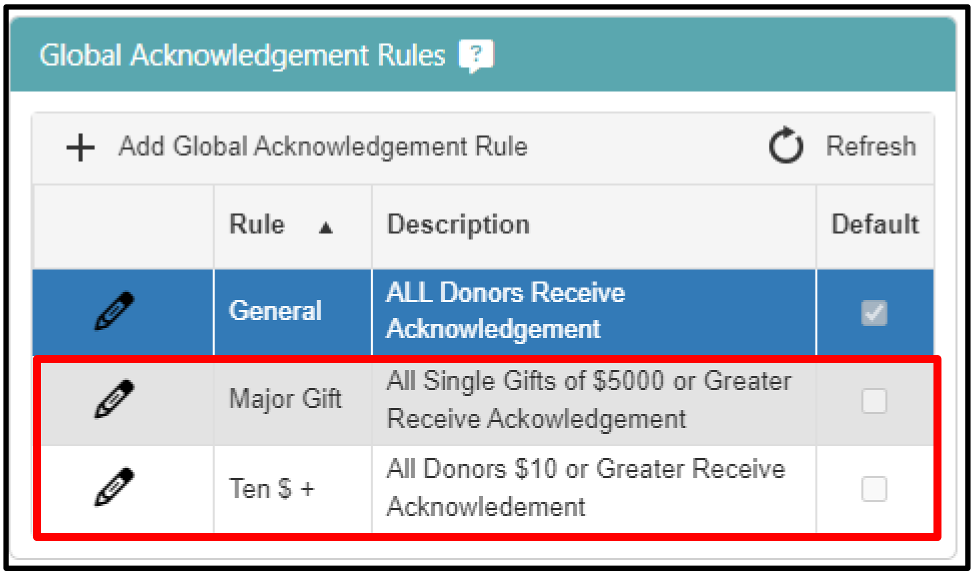


7. The Appeal will now leverage the Default checked, **Global Acknowledgement Rule** and its Rules and Conditions to process all Acknowledgements for this Appeal.

To use the **Select Global Rule**

1. Navigate to **Appeals>Global Acks**.

2. Ensure that there are Rules that have been setup that are **NOT** labeled as the Default – see the example of the two below that fit this category.



Global Acknowledgement Rules

+ Add Global Acknowledgement Rule   Refresh

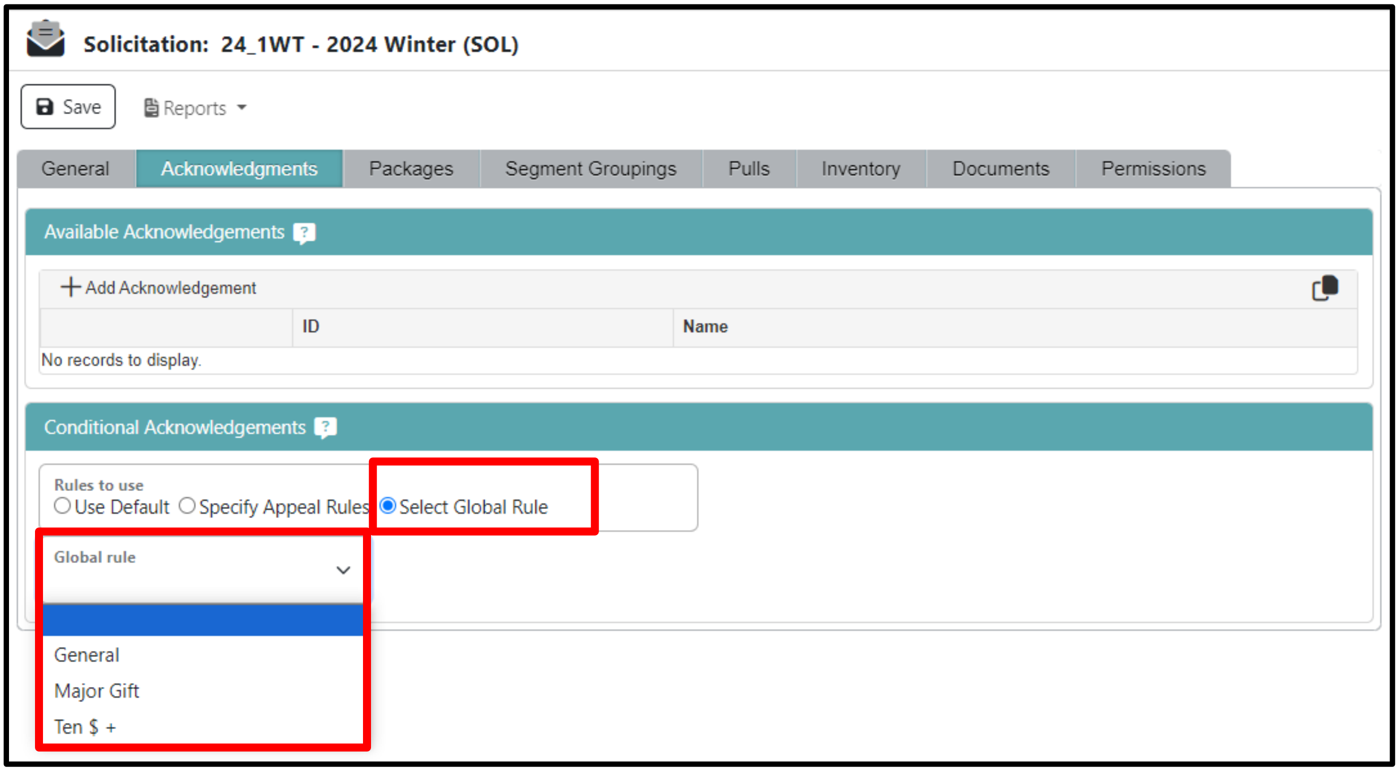
	Rule ▲	Description	Default
	General	ALL Donors Receive Acknowledgement	☑
	Major Gift	All Single Gifts of $5000 or Greater Receive Ackowledgement	☐
	Ten $ +	All Donors $10 or Greater Receive Acknowledement	☐

8. Navigate to the desired Appeal via **Appeal>Locate Appeal**.

9. **Open** the Appeal.

10. Navigate to the **Acknowledgements** tab of the Appeal.

11. Under the **Conditional Acknowledgements** section, check the **Select Global Rule** radio button.



12. Select the Desired **Global Rule**.

13. The Appeal will now leverage the Global Acknowledgement Rule and its created Rules and Conditions to process all Acknowledgements for this Appeal.

New Solicitations

This section will focus on creating a new Solicitation Appeal record from the **Appeal module>New Solicitation sub-module**.

By default, when a user creates a new Solicitation record, they receive Seven tabs, with multiple sections, to complete/evaluate:

General – Basic Identification info: Appeal ID, Name, Status, etc.

Acknowledgements – Where specific Ack letters are linked to the Appeal. Enables the copying and use of pre-existing templates or building of unique, one-off Acks.

Packages – Mailing or Communication options are defined – Regular mail, 1st Class, special packaging, email, etc.

Segment Groupings – Enables users to further define Appeal for Report purposes**.**

Pulls – Major section of Solicitation where mailing groups are defined, segmented, and generated based on specific criteria that is copied or uniquely generated.

Inventory – Inventory items shown to a Rapid Entry operator whenever placing an order motivated by this Appeal. Operator may select any number of the associated items. Users can rearrange the order by dragging & dropping.

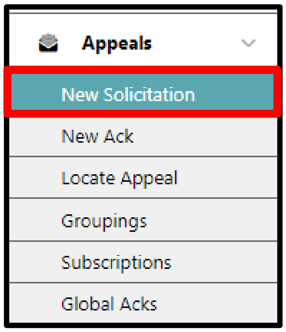
Documents – Storage location for any accompanying documents: vendor contracts, donor lists, letters, etc.

Permissions – Enables users to set security by Roles on which users can view or not view the Appeal in Rapid Entry.

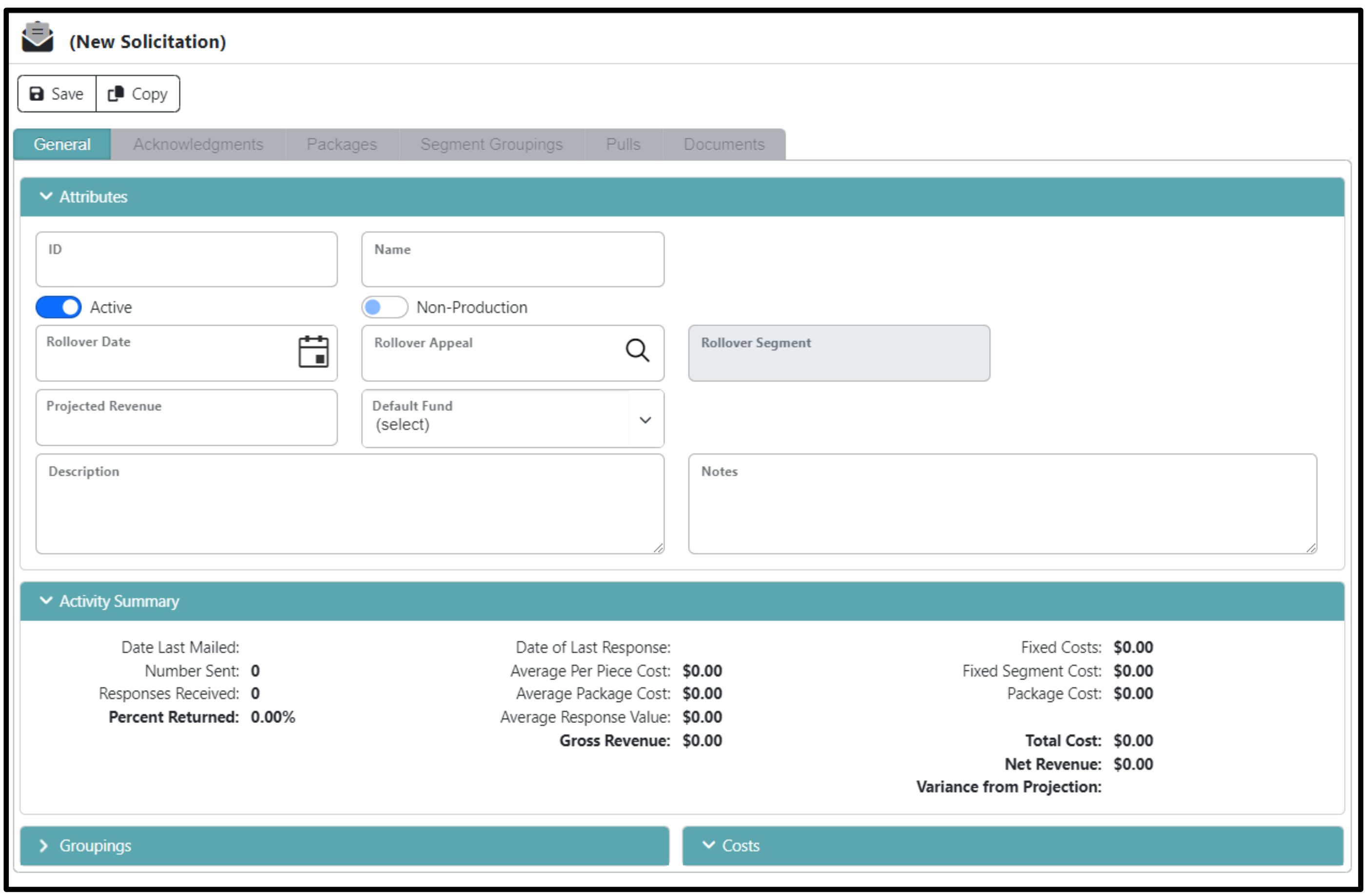
Creating New Solicitation STEPS

Generating a New Solicitation Record

1. Click on the **Appeals Module>New Solicitation** sub-module.



2. The **New Solicitation** record displays.

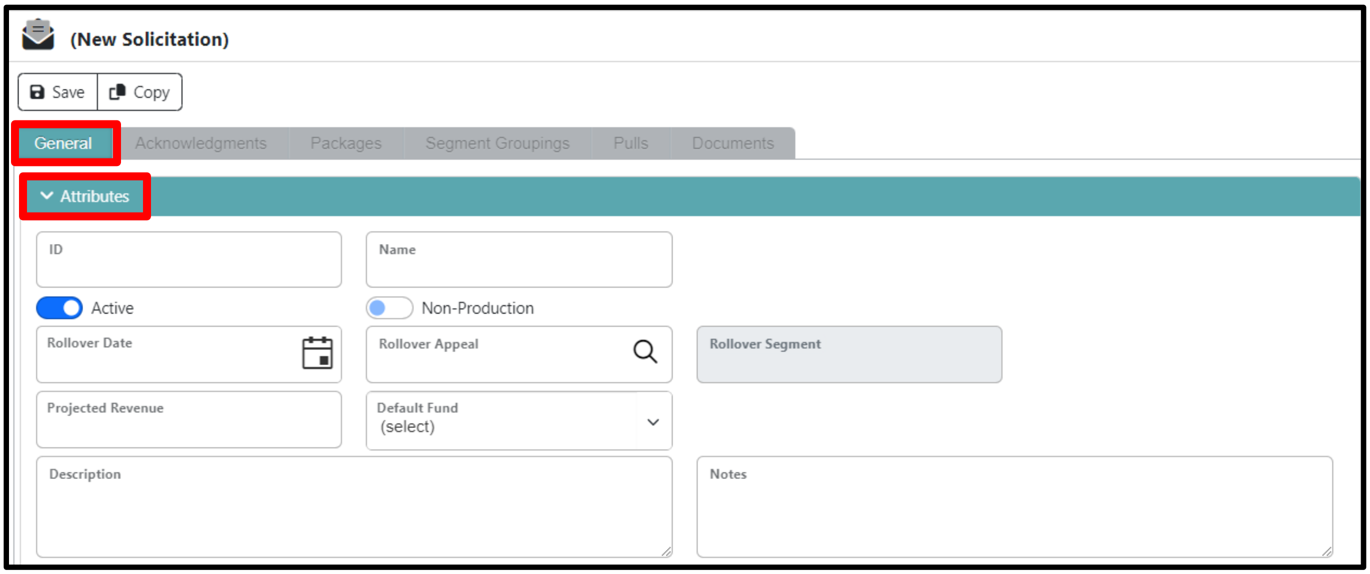


GENERAL TAB

The **General** tab Tracks the basic information about the Appeal including ID, Name, Activity, Grouping & Costs.

Attributes

The **General** - **Attributes** section enables users to define the basic required fields to save an Appeal: **ID** and **Name**.



1. In the **ID** field, enter the desired ID.
    - Recommended that users use a combination of date and distinct name in the ID field with a longer, more descriptive value in the **Name** field.
    - For this example, we will be entering an **ID** of **25 _1WT** to represent the **2025 Winter Solicitation Appeal**.

2. In the **Name** field, enter **2025 Winter Solicitation Appeal**.

3. Leave the **Active** toggle selected.
    - Users might toggle this off to plan this appeal as an upcoming appeal and only activate during the date range of that appeal.
    - If Toggled off, the appeal is NOT selectable from Rapid Entry and would prevent donations from mistakenly being attributed to this Appeal.

4. Leave the **Non-Production** toggle unselected.
    - User would un-toggle if interested in just creating a test appeal.
    - Unselected will also prevent the Appeal from displaying in Reports.
    - Commonly used for list rental/exchange Pulls.

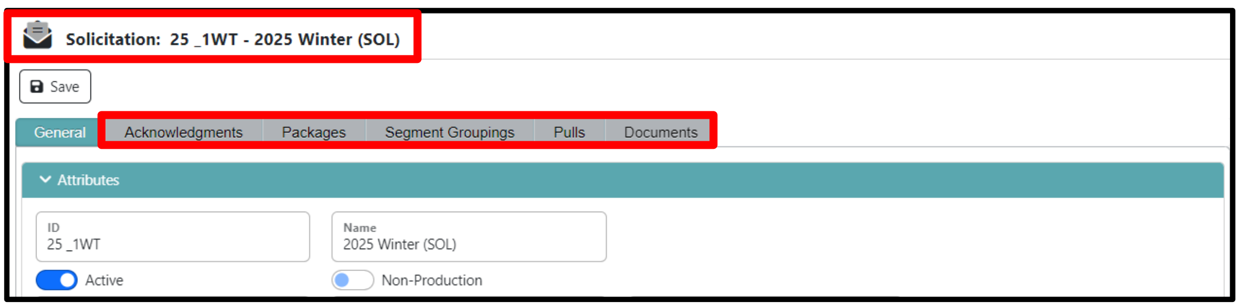
5. In the **Projected Revenue**, users can choose to enter an estimate of what the total revenue will be for sales for comparison to actual amount after the event.

6. In the **Default Fund** field, users select from the dropdown list.
    - Users should receive direction from the **Finance/Accounting** department as to which fund to select.

7. In the **Description** field, enter a short accounting the purpose of the acknowledgement.
    - Be as specific as possible, this field will inform future users as to the target of this solicitation and whether it is viable for their use.

8. Leave the **Notes** field blank.
    - Notes are generally added to define something unique about the appeal that a user should know. Limited to specific audience, one-time use, etc.

9. Click **Save** to save required **ID** & **Name** fields as well as other completed fields.



10. Observe the results of the save:
    - Remaining **Tabs** become active.
    - Appeal’s **ID** and **Name** are stamped on the Record header.

Activity Summary

The **General – Activity Summary** section generates summarized <u>non-editable</u> information that captures the current status of the Appeal. Valuable metrics regarding the Solicitations mailed, Cost of Mailings, and Total Cost and Net Revenue are displayed. Extremely valuable when desiring a quick snapshot of the Appeal's progress.

An existing appeals snapshot (24_WT) has been added below the current to display some ongoing values.

Activity Summary

Date Last Mailed:		Date of Last Response:		Fixed Costs:	$0.00
Number Sent:	0	Average Per Piece Cost:	$0.00	Fixed Segment Cost:	$0.00
Responses Received:	0	Average Package Cost:	$0.00	Package Cost:	$0.00
Percent Returned:	0.00%	Average Response Value:	$0.00		
		Gross Revenue:	$0.00	**Total Cost:**	$0.00
				Net Revenue:	$0.00
				Variance from Projection:	

24 Winter Appeal Activity Summary

Activity Summary

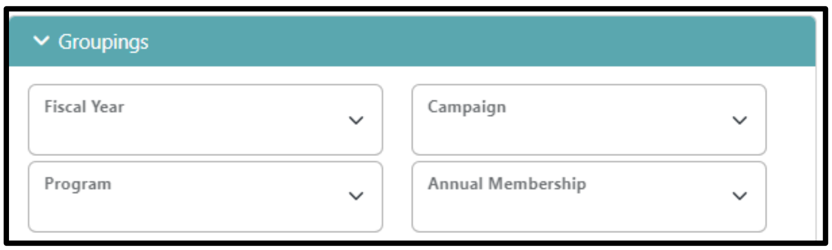
Date Last Mailed:	01/01/2024	Date of Last Response:	03/01/2024	Fixed Costs:	$9,200.00
Number Sent:	2,678	Average Per Piece Cost:	$3.80	Fixed Segment Cost:	$0.00
Responses Received:	271	Average Package Cost:	$0.36	Package Cost:	$965.16
Percent Returned:	10.12%	Average Response Value:	$125.93		
		Gross Revenue:	$34,126.25	**Total Cost:**	$10,165.16
				Net Revenue:	$23,961.09
				Variance from Projection:	($21,038.91)

Groupings

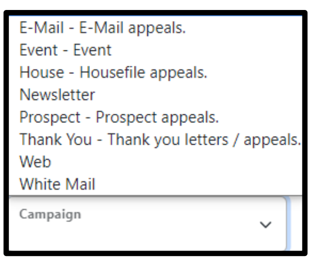
The **General – Groupings** section is an optional section that enables users to leverage Administrator created Groupings **Categories** and Grouping **Values** to further label an Appeal and create more refined reporting. Both Grouping Categories and the accompanying Values are created and maintained by clients and can represent any values or organization desired.

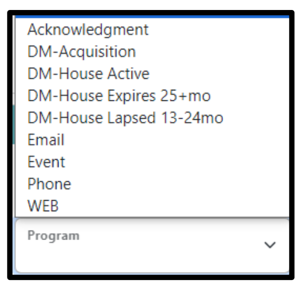
For specific steps on how to create Groupings and Grouping Options, see the Grouping sub-module overview on page 84 of this manual.

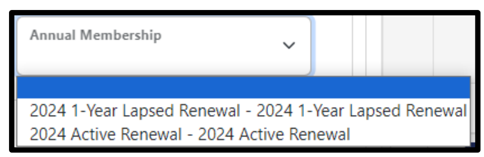
The example below contains some of the more often used **Groupings Categories** utilized in the CRM.



Below are four common **Groupings Value** examples used by Aegis Clients:

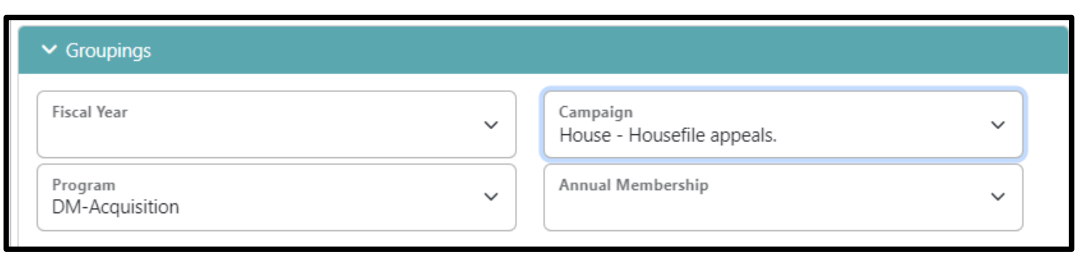






1. Click on the desired dropdown, select a value.
1. More than one **Category** can be selected.

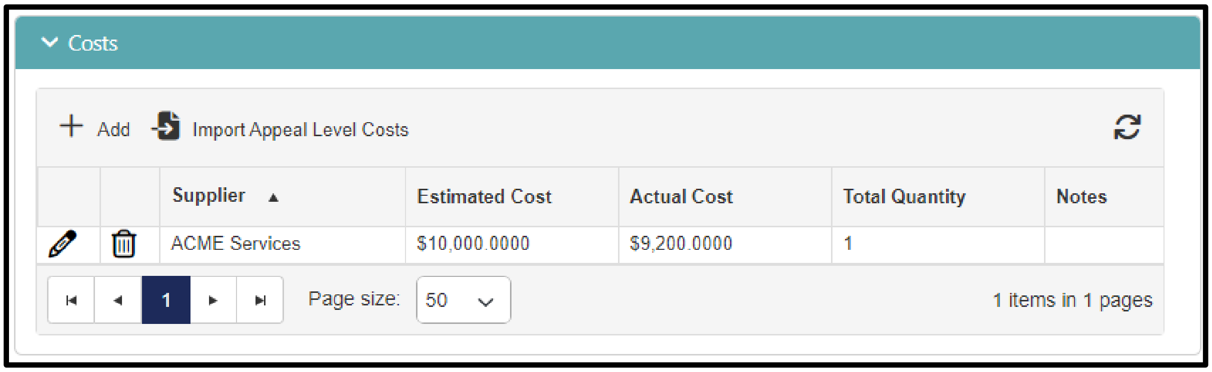
2. Observe the added **Groupings** to the Appeal.



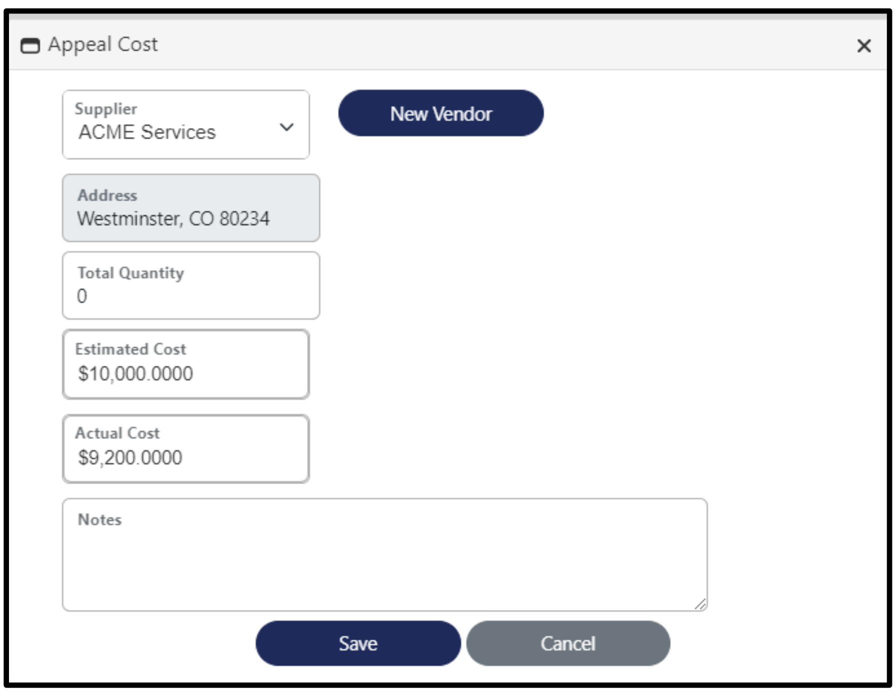
Costs

General – **Costs** section is where users can track costs for the Posting, Packaging (paper, envelopes), Design, and possibly Consulting expenses for the Appeal outside of the Per Piece cost. Users could track items such as the cost to hire a Marketing firm, set up Legal requirements, or initial cost in procuring a Mailing service.

These costs are factored into the overall cost and reflect in the Activity Summary.



6. Click on the **+ Add** button.



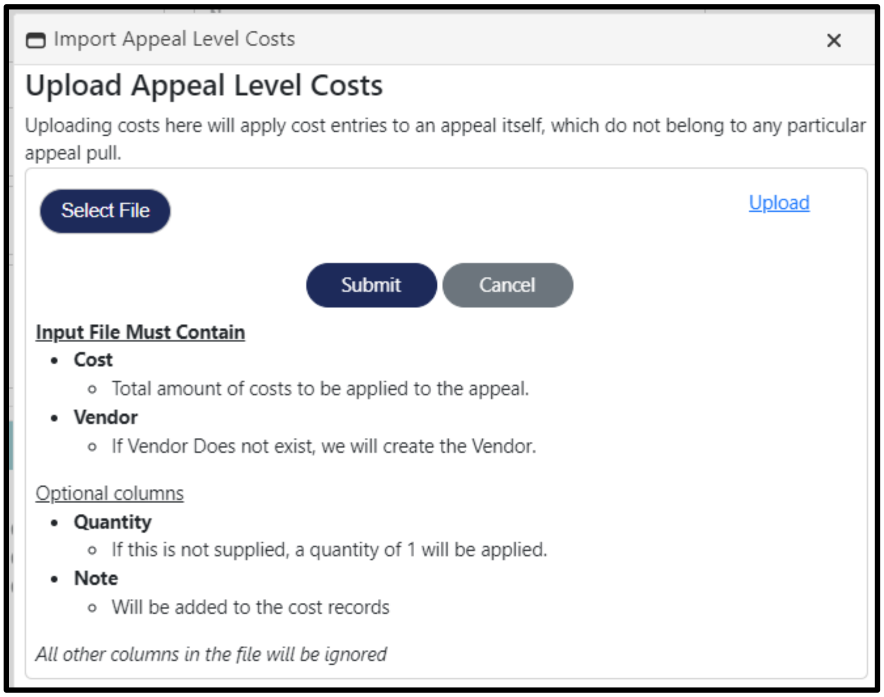
7. Select the desired **Supplier** from the dropdown menu.
2. New Vendors can be added via the New Vendor button and will be stored under the Vendors module.

8. **Address** will populate from Vendor record.

9. Enter the **Total Quantity**, **Estimated Cost**, and **Actual Cost** (when determined), and any desired **Notes**.

10. Click **Save**.

Costs can also be imported into the system via the **Import Appeal Level Costs** link and by following the directions listed.



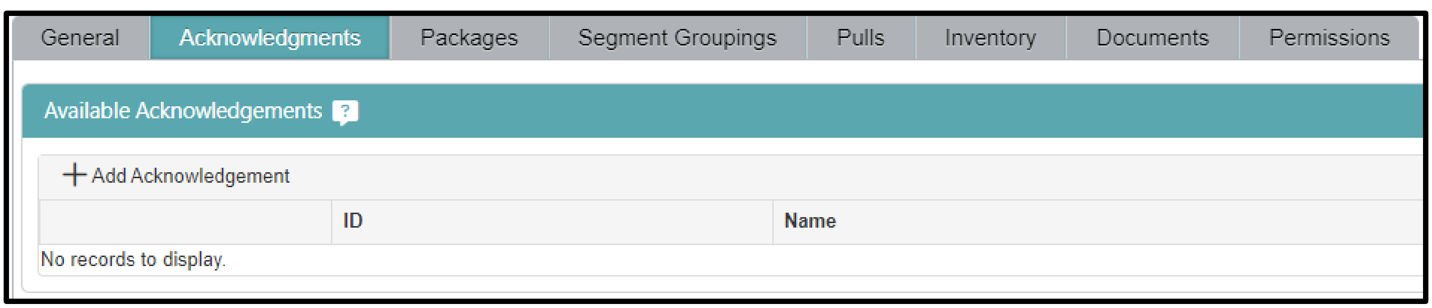
ACKNOWLEDGEMENTS TAB

The **Acknowledgements** tab enables users to link specific **Acknowledgement** appeal (letters) to the current **Solicitation** appeal record. This section also defines how the Acknowledgement appeals are used by the Solicitation and can range from one-off letter to appeal scenarios, to utilizing repeatable templates, to manually defining conditions.

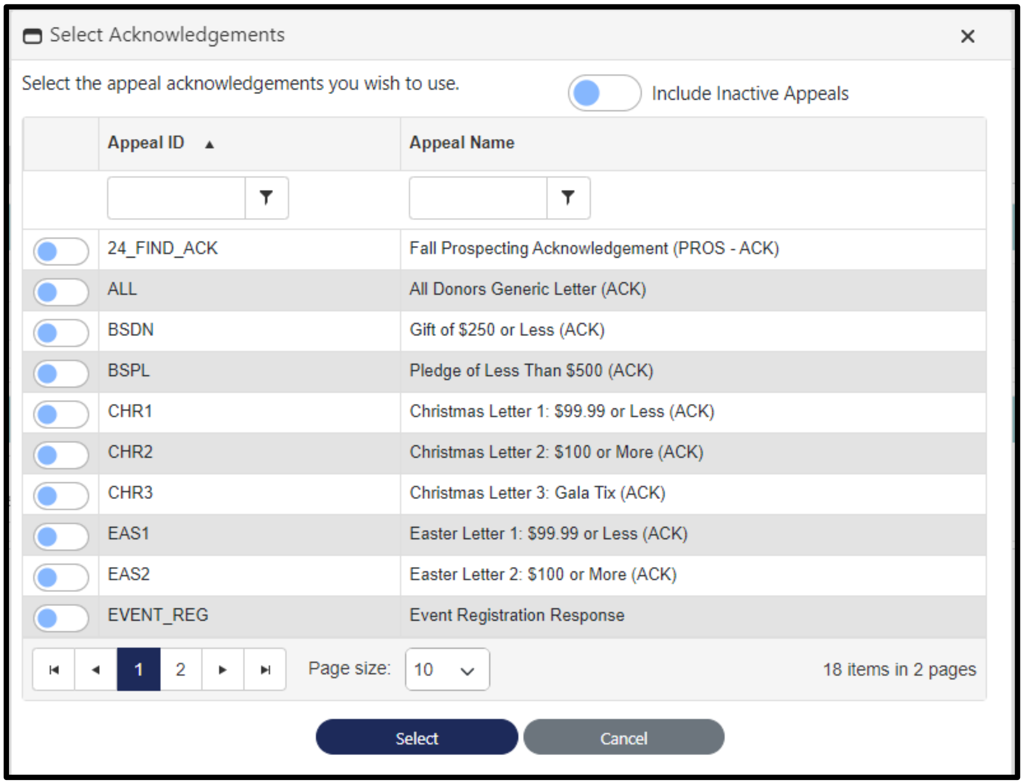
Available Acknowledgements

The **Acknowledgements – Available Acknowledgements** section enables the Acknowledgement Appeal letters added under this section will be displayed to Rapid Entry Operator and require **MANUAL** selection. Rapid Entry operators will see a display of the available Acknowledgements, click on the desired ACK, and that letter will be sent to that Donor.

This option is rarely used as the ONLY option, since it puts the burden on the Operator to manually remember to designate a particular ACK for each donating user to this Appeal, but when it is combined with the Conditional Acknowledgements section below, it can be effective. For instance, if an especially high amount donation of $100,000.00 occurs, an organization might want a differently worded Available Acknowledgement to be available to send.



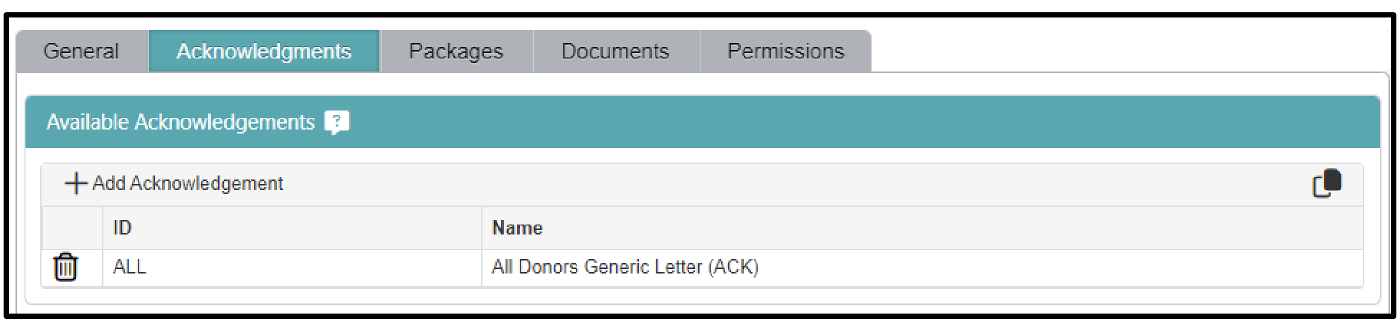
5. Click on the **+Add Acknowledgement** button.



6. Click on the desired follow up **Acknowledgement** toggle.

7. Click **Select**.

8. Once **Added**, users can observe the added line.
    - Users CAN add multiple Acknowledgments, but ANY letters listed in this section would be delivered to ALL donors contributing to this Appeal.
    - For example, users might want to have the system deliver a secondary thank you acknowledgement AND a complimentary calendar to ALL donors who give a second time.



Conditional Acknowledgements

The **Acknowledgements** – **Conditional Acknowledgements** section is where users can choose to target specific, pre-existing **Acknowledgement Appeal** records to be processed by one of three different settings. These ACKS will be **AUTOMATICALLY** selected FOR the Rapid Entry Operator when processing donations.

- **Default** - Leverages an existing **Global Acknowledgment Rule** found under the **Appeals** module>**Global Acks** sub-module, which has been marked as the **Default**.
- **Specify Appeal Rules** – Enables users to create unique **Conditions** and **Rules** tie them to an existing **Acknowledgement Appeal** record. Used specifically for Appeals whose Condition & Rules are NOT replicable.
- **Select Global Rule** - Leverages an existing **Global Acknowledgment Rule** found under the **Appeals** module>**Global Acks** sub-module, which has **NOT** been marked as the **Default**.

NOTE: To use this section effectively, user must have:
- **ONE** – Existing **Acknowledgment Appeal** records to tie to any of the three **Conditional Acknowledgement** radio buttons.
- **TWO –** Existing **Global Acks** in order to use either the **Default** or **Select Global Rule Acknowledgement** radio buttons under **Conditional Acknowledgements**.

USE DEFAULT RADIO BUTTON

4. Click the **Use Default** radio button.

5. The system will automatically leverage the **Global Ack** set as Default in processing Acknowledgements for this Appeal.

6. See screen shot above.

SELECT GLOBAL RULE RADIO BUTTON

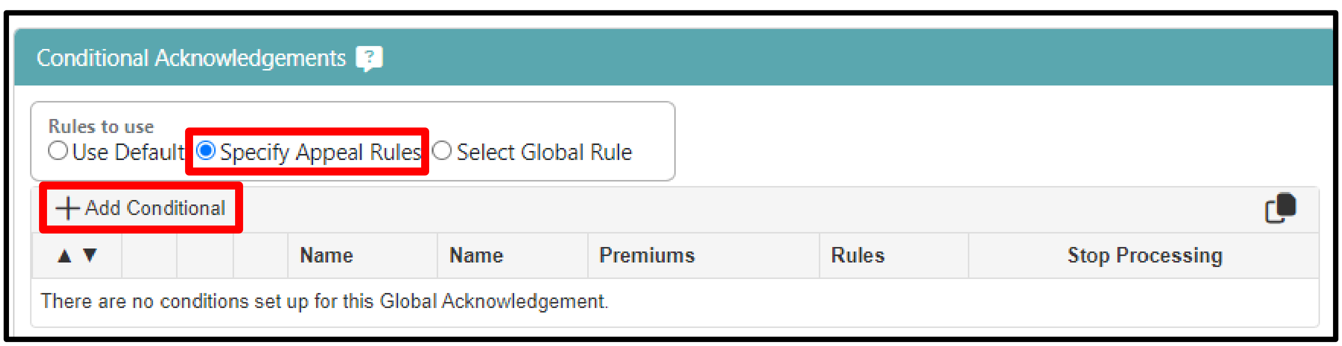
3. Click the **Select Global Rule** radio button.

4. From the **Global Rule** dropdown, select the desired Global Rule to apply.

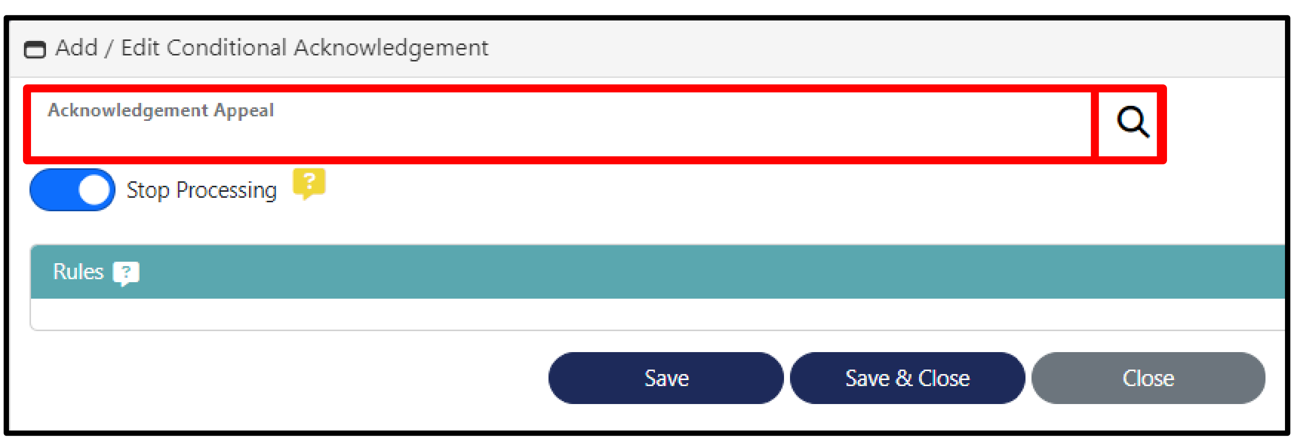
SPECIFY APPEAL RULES RADIO BUTTON

13. Click the **Specify Appeal Rules** radio button.

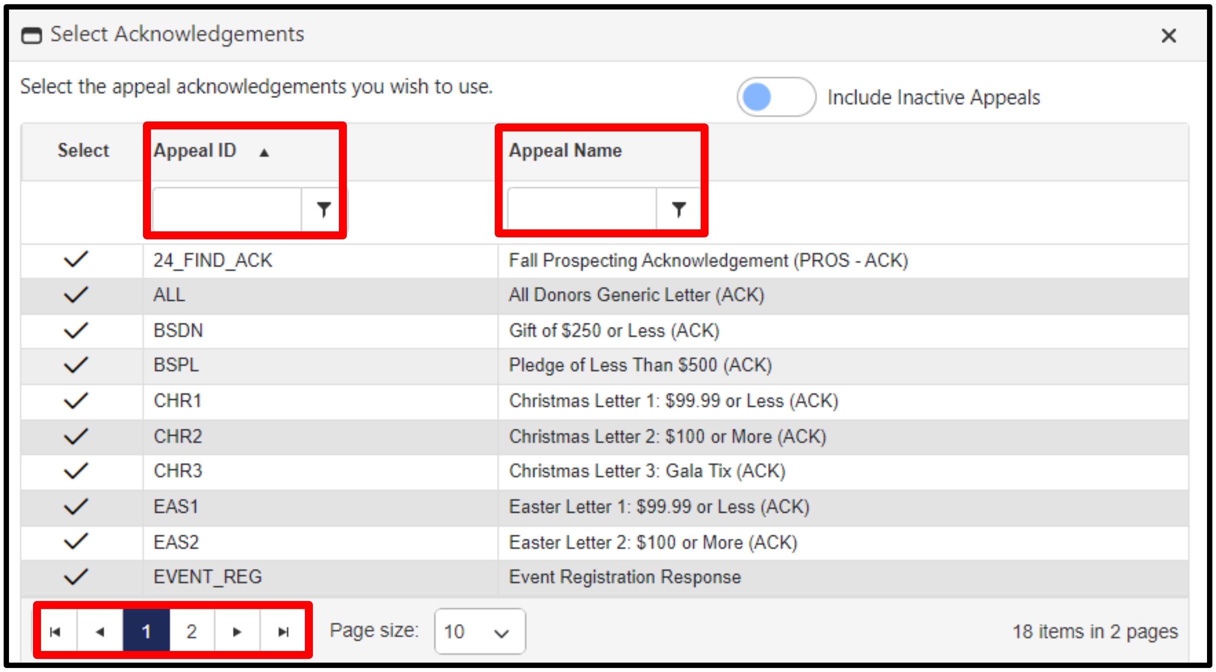
14. Click the **+Add Conditional button**.



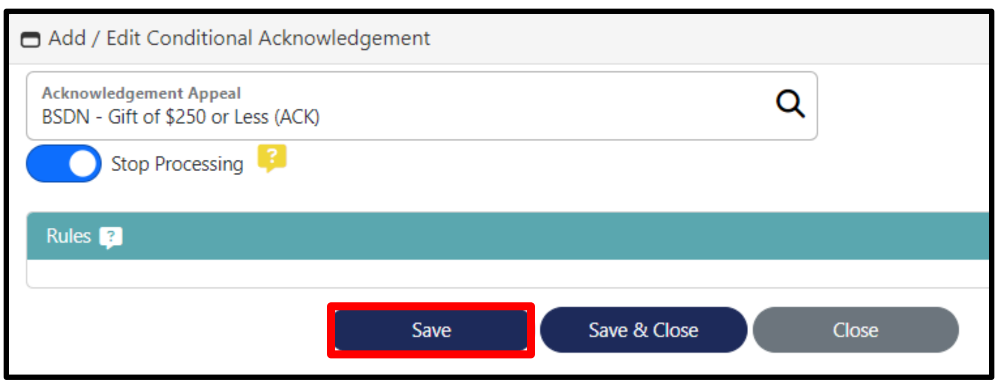
15. In the **Acknowledgement Appeal** lookup field enter the name of the desired **Acknowledgement Appeal** record.



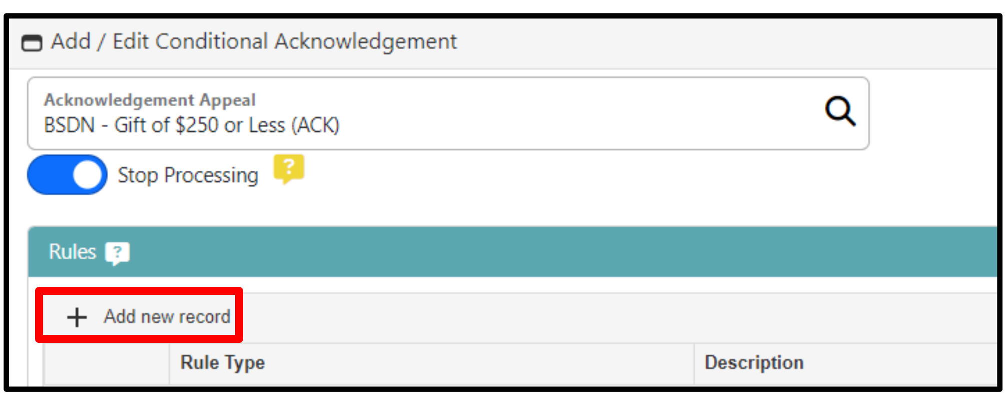
16. Alternately, click the **Lookup icon** and select the desired **Acknowledgement Appeal** from dropdown by clicking the **checkbox** from under the **Select** column.
    - User can also scroll pages or filter results by **Appeal ID** or **Appeal Name**.



17. Once the desired **Acknowledgement Appeal** is selected, click the **Save** button.



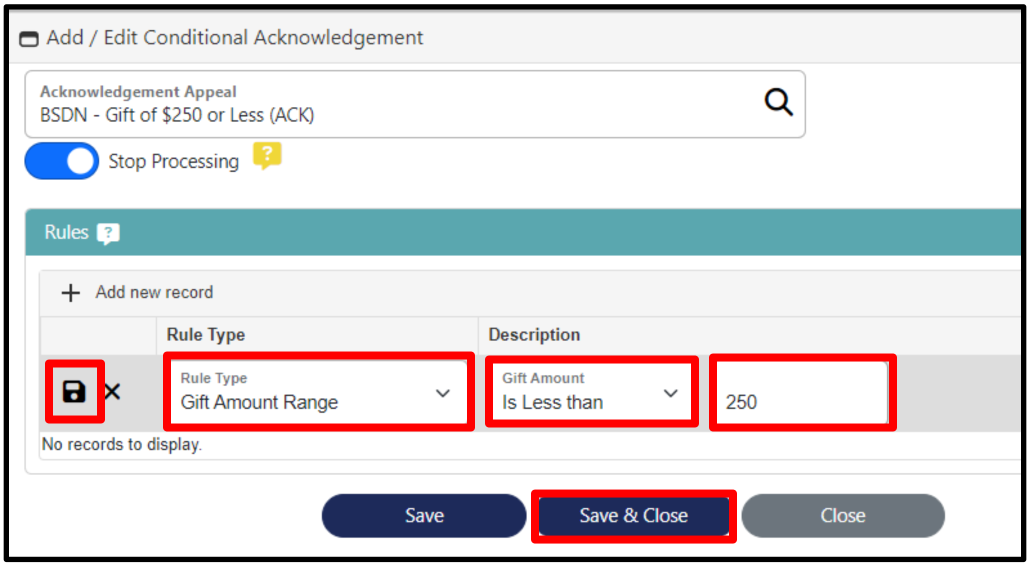
18. Click on the **+Add new record** button that displays under the **Rules** section.



19. Add a **Rule Type** of **Activity Amount Range**.

20. Add an **Amount** of **Is Less Than**.

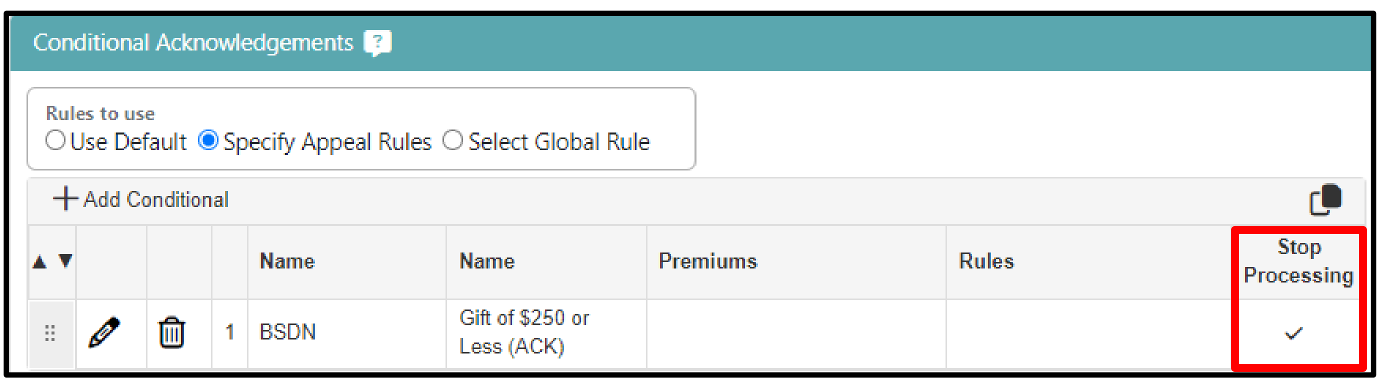
21. Add a **Value** of **250**.



22. Click the **Save <u>ICON</u>** to the left of the row.
    - There is no auto-save or reminder if NOT saved; users must remember to click here for initial save of row.

23. Click the **Save & Close** button on the bottom of record.

24. The Rule is added under the **Specify Appeal Rules** selection.



Stop Processing feature will sometimes be <u>UNCHECKED</u> for both Available and Global Acks: this enables clients to send multiple acknowledgement responses to a particular gift type. For example, a client might send an Email response AND a Paper response.

PACKAGES TAB

The **Packages** tab enables users to define the mailing methods and costs used to distribute the Solicitations associated with the Appeal. Packages can also be strictly associated and costed out on the particular **Solicitation's Segments** that are defined on a **Solicitation's Pull**. Once associated, these Packages can then multiply the associated Unit Cost times the number of targeted constituents for the Segment to get the total price of delivery.

User also have the opportunity to Upload a **Letter Template** that will function as a "hand-crafted" response that is then appended to, or signed by, a staff member or account manager. **Major Donor Account Managers** often use this function to store the response that they will use to reply directly to their assigned donors.

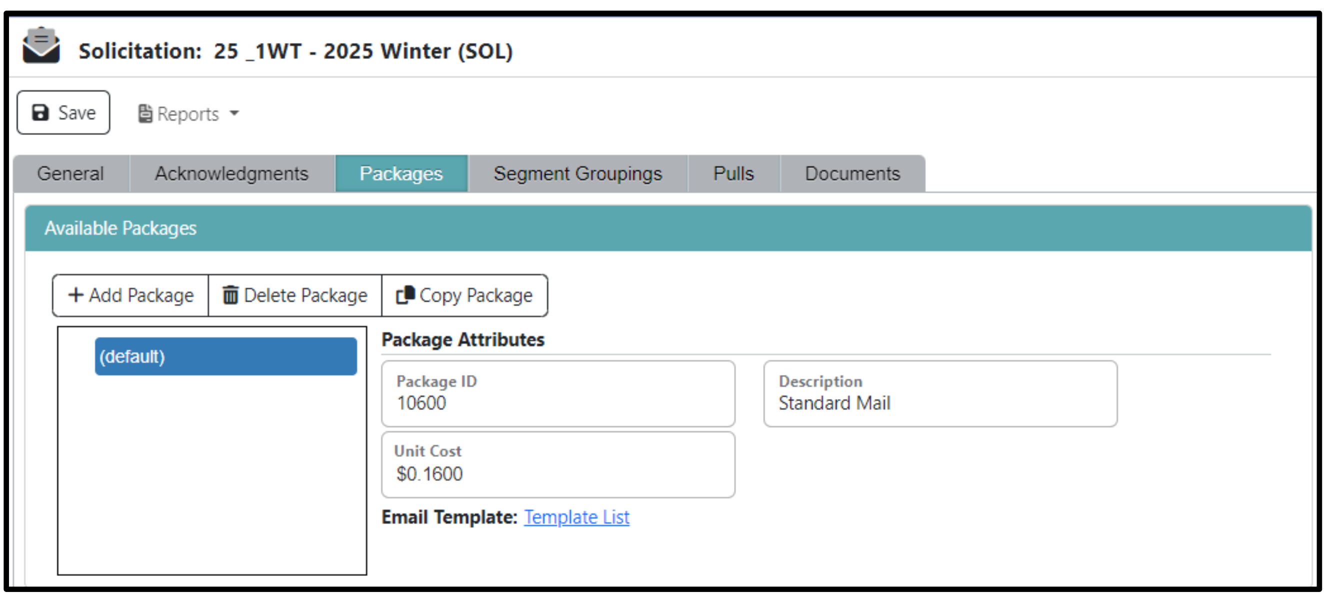
Available Packages

1. In the **Package ID** field, enter a desired ID– type over the (default) value.

2. Users can also choose to use the **Copy Package** button to clone an existing Package from a different Appeal.

3. In the **Description** field, enter a short description of the Package.
    - This usually is the type of mail being used to respond: **Standard**, **First Class**, etc.

4. In the **Unit Cost** field, enter the estimated or exact unit cost for a piece of the mail type being delivered.
    - This estimates the cost of the Acknowledgements being delivered.



5. Click on the **Template List** link next to the **Letter Template** field.

6. The **Email Templates** pop-up screen displays.

7. Users can browse to a desired **Email Template** and select.

Components

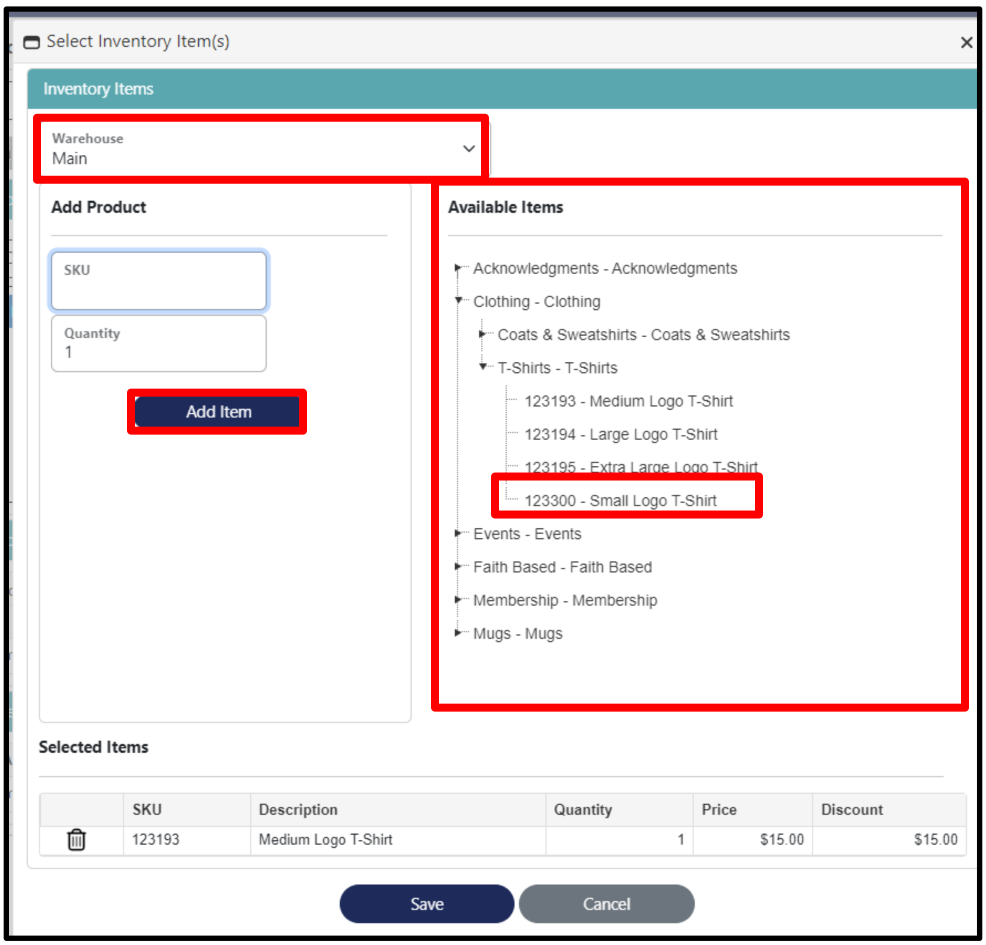
Users can choose to add **Components** to be delivered with **Solicitations**. For instance, an organization might choose to send a free T-Shirt or Calendar as an initial motivation to donate. Setting a component also ensures it is tied into **Inventory** and will depreciate amounts.

1. Click on the **+Add Component** button.

2. From the **Warehouse** dropdown, user select the desired Warehouse to select an Item to add as a Component.
3. **Available Items** – on right – display according to Warehouse selected.

4. From **Available Items**, users expand selections until reaching desired item, then double click the item to select as the Component.

5. Users must then click **Add Item** - on left - to Add item as the Component.



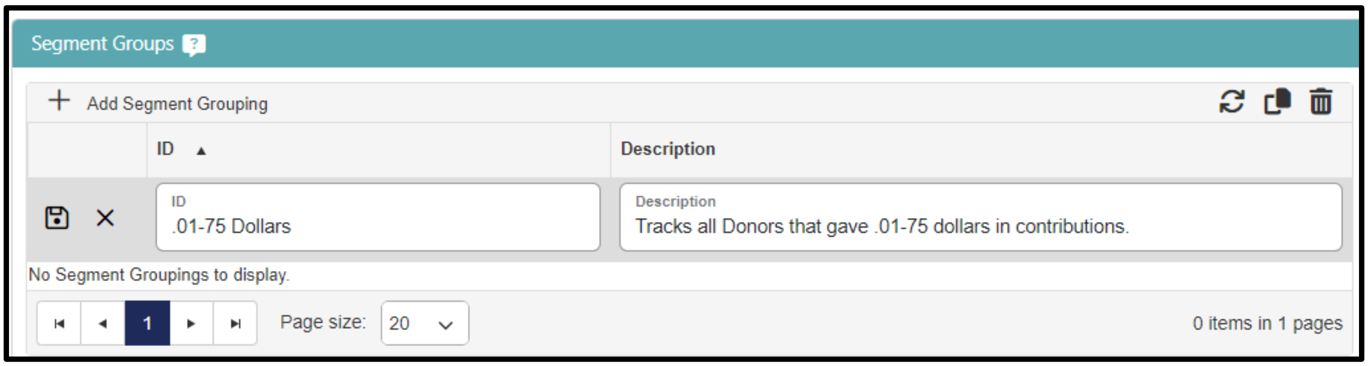
6. Click **Save** to add the Component to the Solicitation.

SEGMENT GROUPINGS TAB

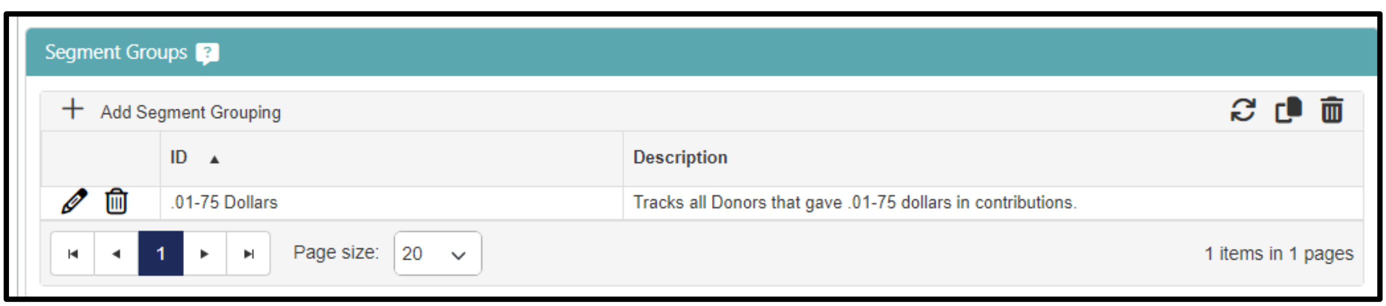
Segment Groupings

Enables users to add an ad hoc grouping of **Segments** in addition to packaging for reporting purposes.

1. Click on the **+Add Segment Grouping** button.
2. A new **Segment Grouping** line displays.



3. In the **ID** field, enter the desired **ID**.
4. In the **Description** field, enter a desired **Description**.
5. Click the **Save** button.
6. Observe the added **Segment Grouping** line.



PULLS TAB

The Appeal **Pulls** tab is the central area for creating and managing the targeted Donors that make up an Appeal's Solicitation segments.

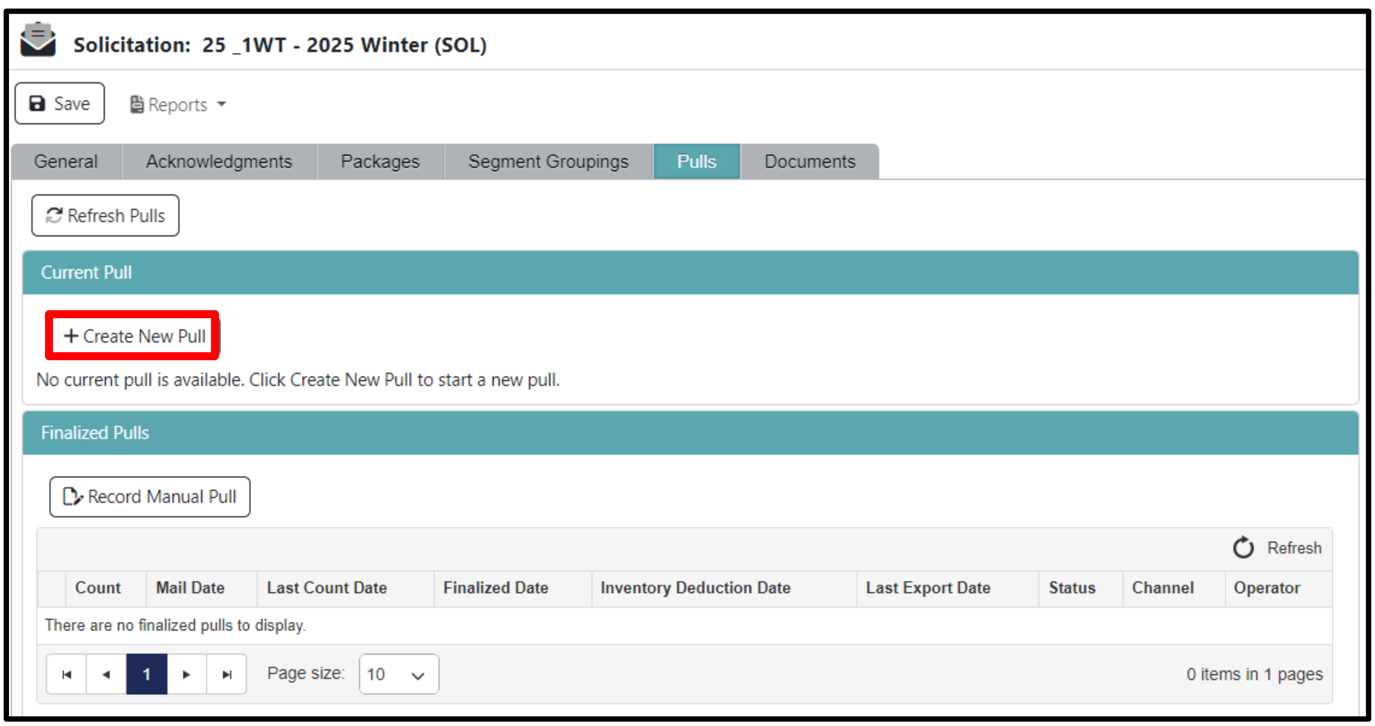
Unless there are unusual circumstances, a user should always copy a Pull from a previous Appeal in creating a Pull for a new Appeal. This saves valuable time in setting up Appeals and can be easily done from the **Copy Appeal** function – covered at the end of this manual – or by utilizing that function from under the **Pulls** tab, which will be done in the following steps.

Creating a Pull

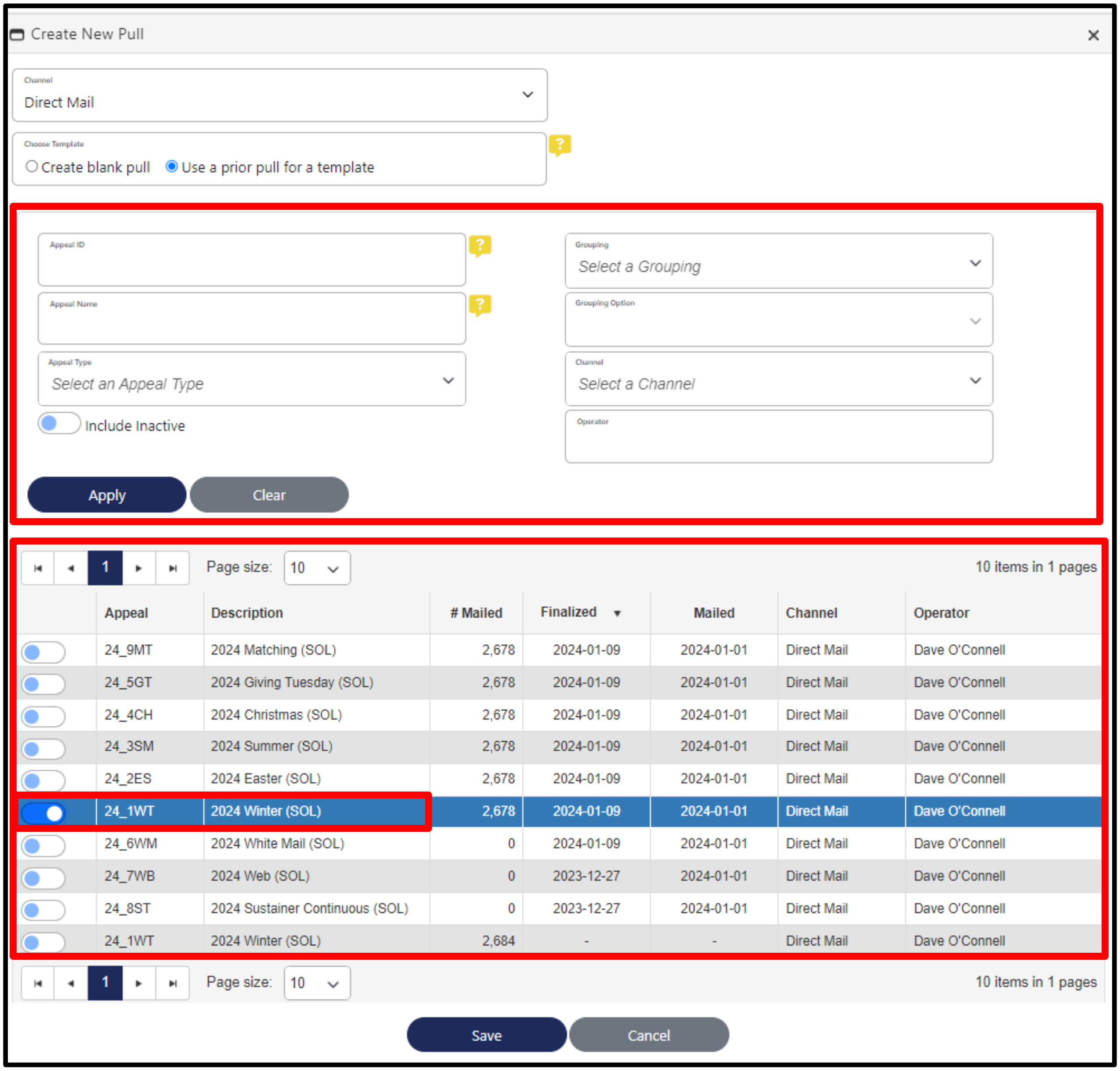
1. Click on the **Appeal**>**Pulls** tab.

2. Under the Pulls tab, there are two major sections to be aware of: **Current Pull** and **Finalize Pulls**. As we build a new Pull, we will discuss how these are used.

3. Click on the **+Create New Pull** button.



4. The **Create New Pull** screen displays. From this screen users can:
    - Use the top locate section to find an Appeal to copy.
    - Toggle an existing active Pull from the bottom Appeal list to copy.



5. For this example, the **24_1WT Appeal** is Toggled on to copy that Appeal's Pull.
    - Copying an existing Appeals Pull section is valuable as it enables users to set up the other Appeal tabs sections manually, but then leverage a highly repeatable Pull from a different Appeal.
    - As a reminder, users can **Copy an ENTIRE Appeal**, including the Pull when initially creating a Solicitation – please see the **Copying Appeals** section of this Manual for how to conduct this operation.

6. Click the **Save** button.

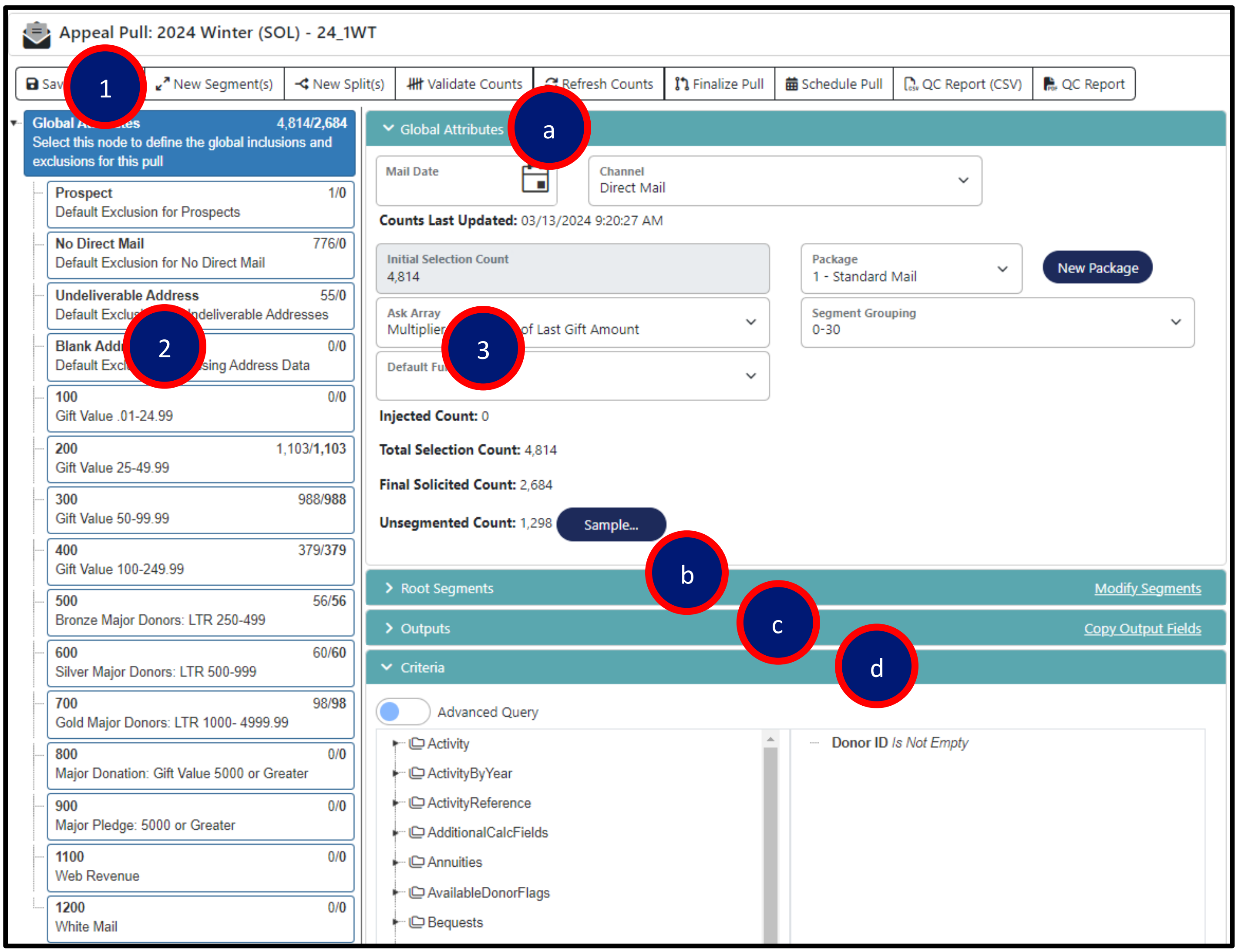
Pull Record Overview

The **Appeal Pulls** tab is a multi-sectioned record that displays different Pull information dependent on the Pull stage/Level of Interaction desired by the user.

A new Pull initially displays the **Global Attributes** segment and its **Global Segment Properties** (right side). Clicking on any **Individual Segment** below the Global Attributes displays the **Individual Properties Section** of that selected segment.

In this section we will examine an existing Pull copy and the functions of the:

1. **Button Bar**
2. **Segment Menu**
3. **Segment Properties: Global, Default, and Individual**
    a. **Global Attributes** and **Individual Segment Attributes**
    b. **Global Root Segments** and **Individual Segment Splits**
    c. **Global Outputs**
    d. **Global** and **Individual Criteria**



Button Bar

The **Button Bar** displays frequently used functions across the top of the page for easy access. Some buttons are used to update and some to report; each are covered below.

Save and Close – Saves any changes to Pull record & returns user to the Pull Tab.

New Segment – Used to create a New Segment section. Users may have the need to create and insert a new Individual Segment into the Segment menu.

New Split – Enables users to sub-divide a segment that they highlight from the Segment menu for more granular breakdown/reporting purposes. The Global Attributes segment or any of the four Default segments, CANNOT be Split.

Validate Counts – Used to run a database check and pull which Donors currently qualify for Solicitation across all the Segments in the Segment menu. Depending on the size of the Pull/Number of Segments, this could take several minutes. Users will be alerted once completed.

Refresh Counts – Used to run a refresh of the current Pull counts of Donors to update with any changes that have occurred since the last Validated Count. Usually done just before Exporting final file to Mailing vendor/internal mailing team to ensure accurate final counts.

Finalize Pull – Used to confirm the Pull as Complete. Auto-generates the Export File that will be sent to Mailing Vendor. This action should be taken on the date the Vendor needs to receive the Mail file in order to prepare the file contents for delivery at a later date (Mail Date). In order for a Finalized Pull to execute, the Global Attributes Segment MUST have the Mail Date field completed.

Schedule Pull – Used to set the timing for an automatically delivery of a Pull file to designated users – internal or external in any of multiple file formats.

QC Report (CSV) – Generates a Quality Control (QC) Report in a Comma Delimited format on the Segment totals including Name, Counts, filter parameters, etc.

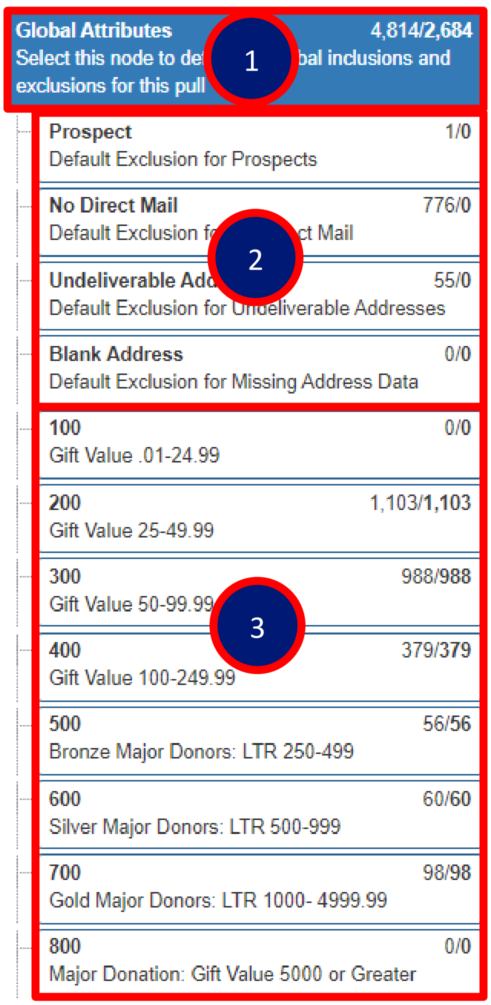
QC Report - Generates a QC Quality Control (QC) Report in a PDF format on the Segment totals including Name, Counts, filter parameters, etc.

Segment Menu

The **Segment** menu is composed of a list of individual segment records. These records are the client defined sub-divisions of the targeted donors/constituents for solicitation. Each segment record is pulled based on the makeup of its **Criteria** (filters) that enable it to target a distinct group of records.

Since Segments are often used repeatedly, and can be complex to set up, users are encouraged to **Copy** an existing Appeal Pull. Even if the users new Pull is going to be different to some degree, users should consider copying; it is easier to edit an existing display than to create a fully built out Pull from scratch.

There are **THREE** important divisions of Segments within ANY Segment menu:



1. **Global Attributes** – The topmost Segment is actually the repository for all the Segments below it. It is hierarchically listed first, and all other segments are indented underneath. It has specialized sections that will be discussed in the coming pages that can affect all the Default and Individual Segments in its hierarchy.

2. **Default Exclusion** – The first four segments listed under Global Attributes: Prospect, No Direct Mail, Undeliverable Address, and Blank Address. These are automatically generated whenever ANY Appeal is created and CANNOT be deleted or edited. They serve the important purpose of excluding potential donors in any of those listed segments from being included in the Solicitation attempt.

3. **Individual** – All other Segments that fall after the Blank Address Default Segment. These are user defined with distinct filters and a focused solicitation audience.

Segment Properties

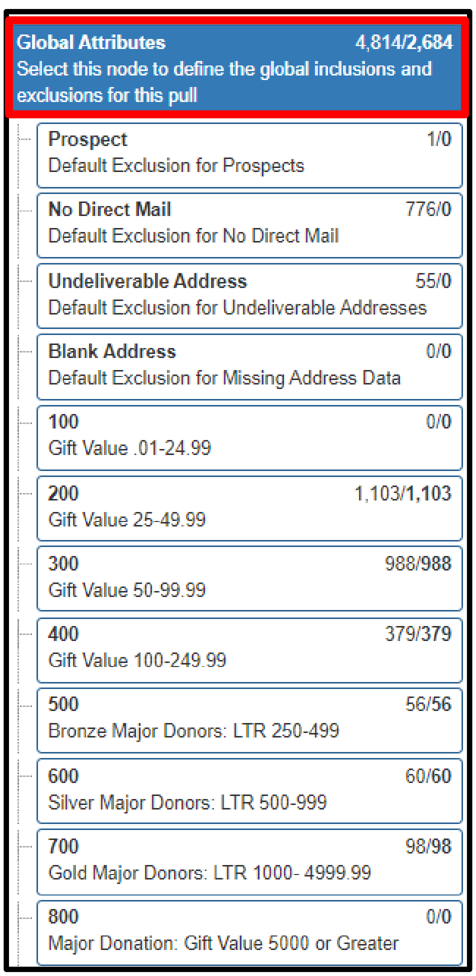
When one of the three types of Segments are selected from under the menu Bar – **Global Attributes**, **Default Exclusion**, or **Individual** - the right side, **Segment Properties** display for the selected Segment.

The display of the **Global Attributes Segment Section** differs from that of the **Default Exclusion** and **Individual** Segment Sections. We will cover the three types of Segment properties in the following pages in the order of **Global Attributes, Individual,** and then **Default Exclusion**.

Global Attributes Segment Properties

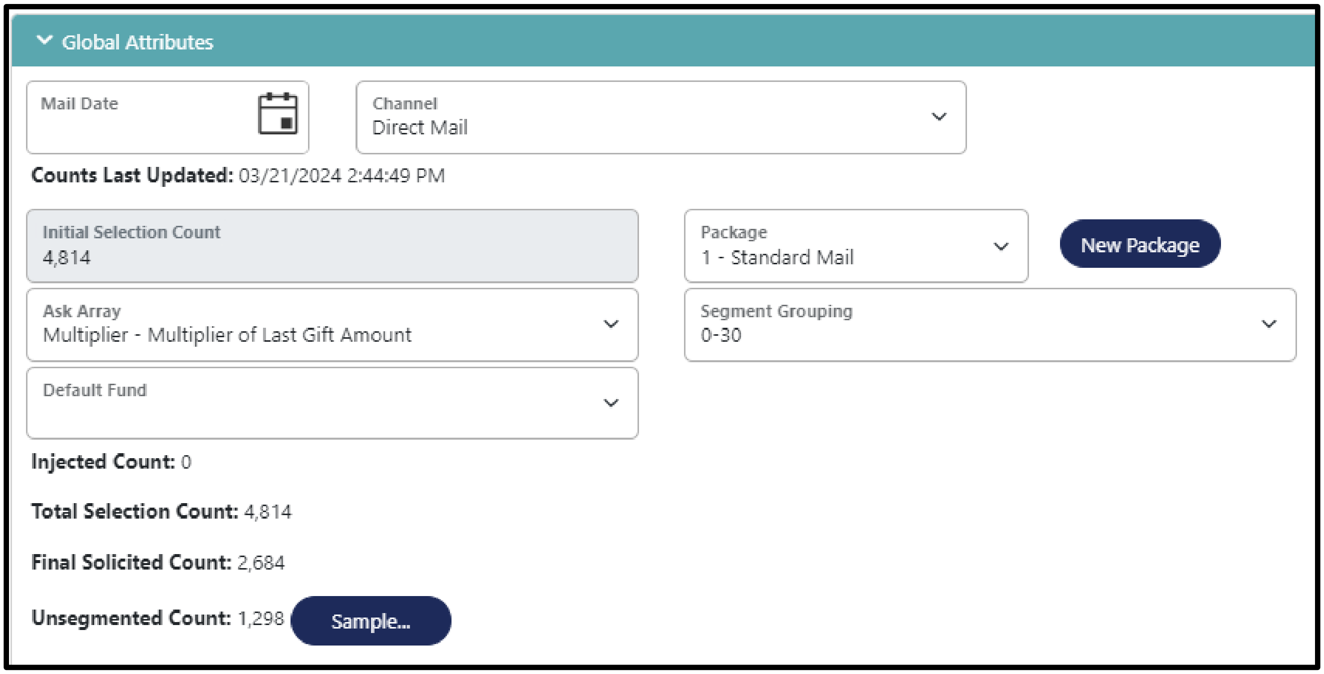
The **Global Attributes** segment is the main segment under which all other segments reside hierarchically. It can be configured to control how its child segments behave through the settings and fields under its **Properties**.

We will look at each of the sections: **Global Attributes**, **Root Segments**, **Outputs**, and **Criteria** and the field and button behavior within each area.



Global Attributes Section

Global Attributes include a mix of Fields that must/can be completed at different stages of the Appeal and some focused, summarized segment numbers.



Mail Date – The date on which the Solicitations are mailed. When the **Finalize Pull** button is clicked on the Button Bar, this field MUST be completed.

Counts Last Updated – Provides date/time of last Count run against segments.

Channel – Captures the method of communication by which the Appeals solicitations will be delivered. The most common is **Direct Mail**, but **Email** and **Phone** are also common values.

Initial Selection Count – Populates as a result of the Pull having the **Validate Counts** button clicked from the **Pull's** Button Bar. Because it is tied to the Global Attributes segment, it will bring in the total number of targeted donor records.

Package – Describes by what delivery method solicitations that qualify for this segment will be distributed. This can be trumped at the Individual Segment level, by changing the field value on those segments. The Packages created under the Appeals>Packages tab are those that display in the dropdown.

- Users can also click the **New Package** button to the right of this field to create any additional packages desired.

Ask Array – An ask array is an optional, calculated field built to determine an amount money that will be solicited as a SECONDARY ask on the initial Donor Acknowledgment letter. If an Ask Array is set up, the system, when sending the initial Acknowledgement, inserts a scan code (similar to the initial solicitation) on the bottom of the Ack letter. The calculations of this field can be overwritten if an Individual Segment field value differs.

Segment Grouping – Enables the user to leverage any Segment Groupings created under the Appeal>Segment Groupings tab for reporting purposes.

Default Fund – Enable users to tie any transactions that are taken against this Segment to be attributed to the selected Default Fund. The value of this field can be overwritten if an Individual Segment field value differs.

Injected Count – List the number of additional donors added to the Pull once Finalized thru Upload Adjustment function under existing Pull menu.

Total Selection Count – Total amount of records available for Solicitation.

Final Solicited Count – Total amount of records that will be targeted in this segment after all Criteria filters are applied.

Unsegmented Count – All the records that are were not considered for the Solicitation due to Opt Outs or Exceptions.

Sample Button – Displays the first 200 results of the Unsegmented Count. Users often run this report to confirm that Opt Outs/Exceptions are running correctly.

Query Results

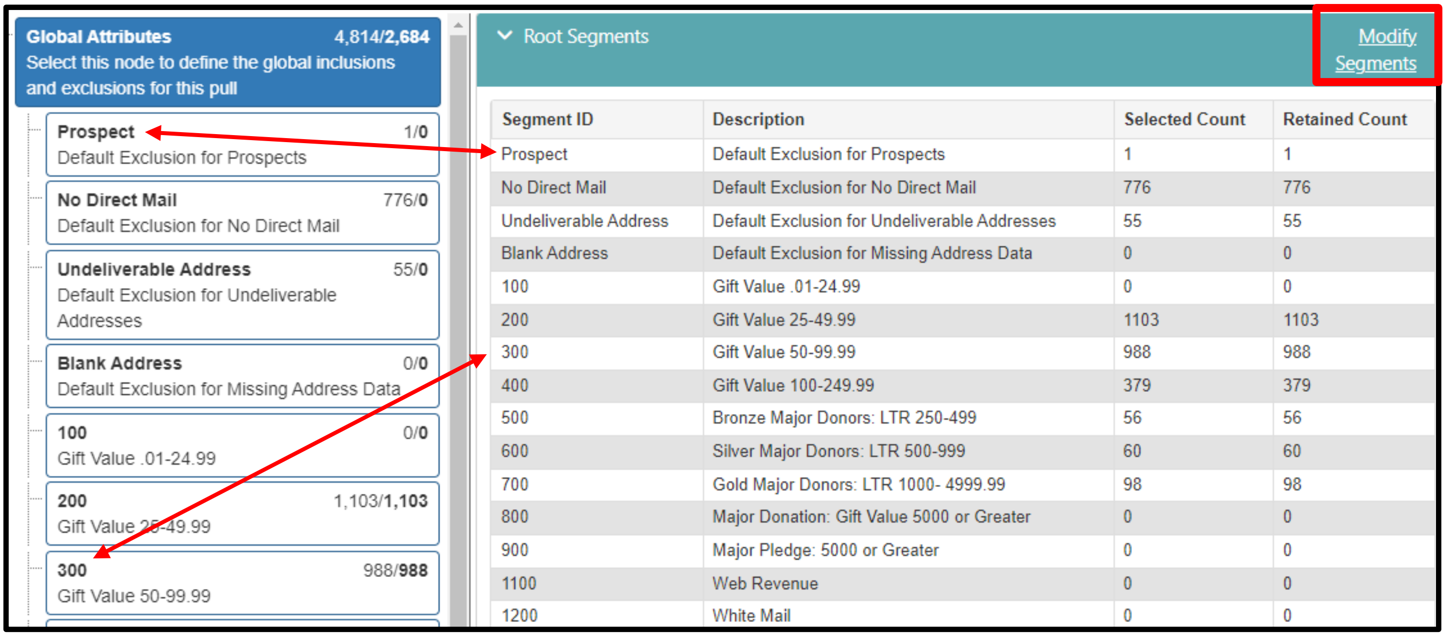
Query Name: 24_1WT
Query Owner: doconnell@wearemoore.com
Result Count: Displaying top 200 as sample result.
Execution Time: 00:00:00.1620384
Query Criteria: (no criteria defined)

Donor ID	Salutation	DefaultAddress1	DefaultAddress2	DefaultAddress3	DefaultCity	DefaultStateProv
40668733		59551 Salem Rd			Union	NJ
40213519		80850 Williamsbrook Dr			Saint Joseph	MO
40170973		75287 Aspen Dr Apt 211			S Burlington	VT
40674873	Mr. Hietman	43512 Farischon Rd			Spring Brook Township	PA
40663025		49461 Wales Ave			Huntington Woods	MI
40671230	Mr Schomisch	68299 Arrowhead Rd			Fremont	WI
40671971	Ms. Cooper	15675 Box 595			Roselle	IL
40667885		1950 La Bonne Vie Dr Apt C			East Patchogue	NY

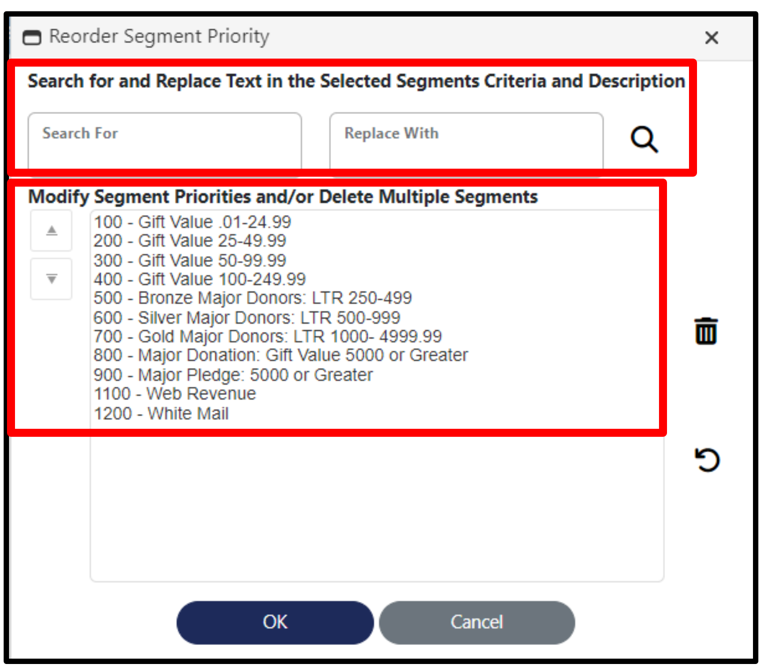
Root Segments Section

Root Segments provide a more concise view of the Segments menu values (left column). If desired users can easily Copy and Paste these values into **Word** or **Excel** for distribution.

Values include **Segment ID**, **Description**, **Selected Count**, and **Retained Count**.



Users can also **Modify the Segments** by clicking that link in the upper right corner. This screen enables users to Search for and Replace Segment text in the upper section and Reorder, or Delete, selected Segments in the lower section.

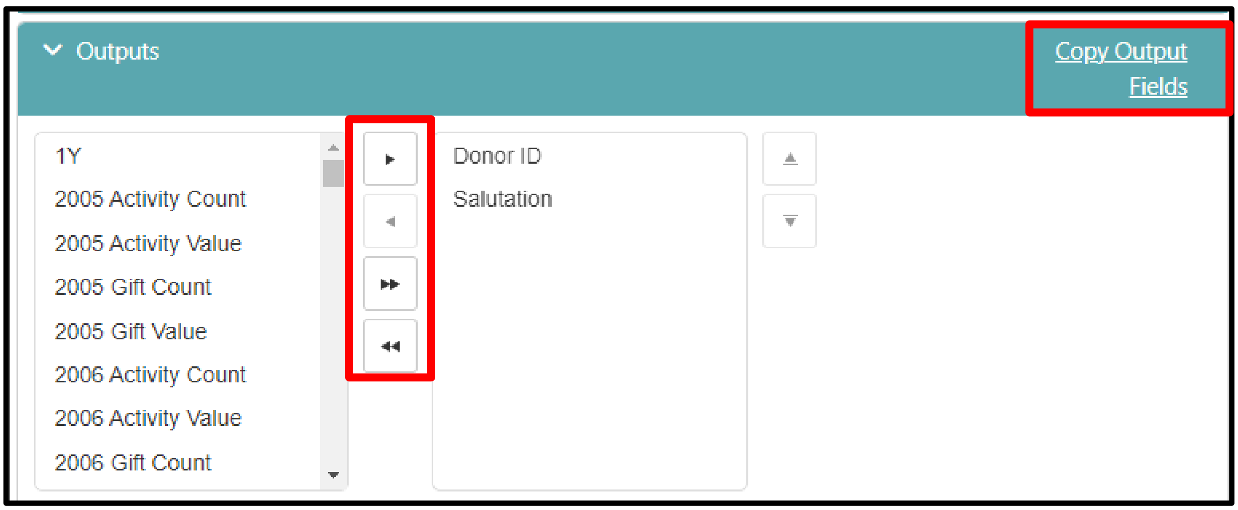


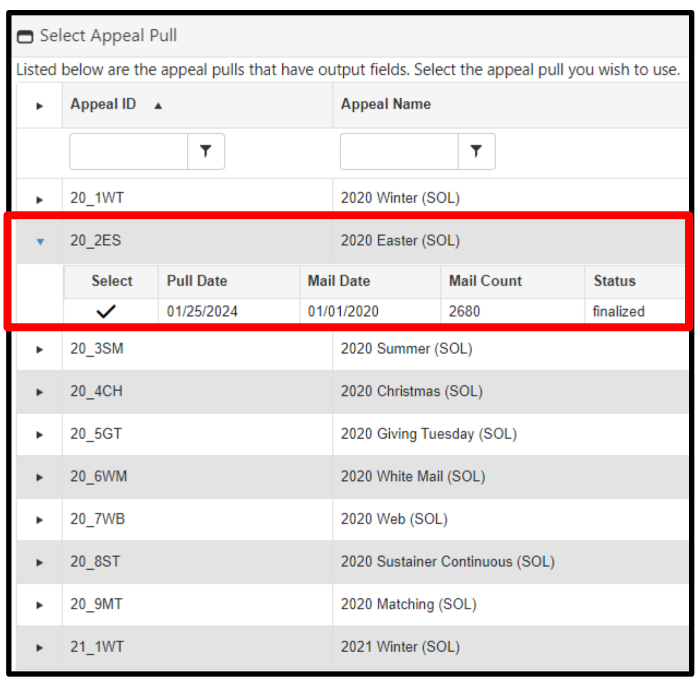
Outputs Section

Outputs controls the exact fields (and data) for Solicitations sent to the clients Mailing Vendor (external or internal) via the **Export Report** when Pull **Finalized**.

Users can scroll through and manually add via the left/right column arrows the Output fields the desire.

User can also utilize the **Copy Output fields** link in the upper right corner. The copy button enables users to copy fields from a specific Pull under an expanded Appeal record by selecting the checkbox next to the desired Pull.





PLEASE READ - Important Note regarding the Outputs Section:

Even if a user does **NOT** add fields by either **Manually** selecting or utilizing the **Copy Output fields**, the following **22 fields** will **ALWAYS** be selected/inserted automatically in the Mailing Vendor, **Export Report**. Thes fields CANNOT be removed from the Export report.

- Donor ID
- Salutation
- DefaultAddress1
- DefaultAddress2
- DefaultAddress3
- DefaultCity
- DefaultStateProv
- DefaultPostalCode
- DefaultCountryCode
- DefaultCART
- DefaultDPBC
- DefaultFIPS
- DefaultDMA
- Appeal
- AppealSegment
- CheckDigit
- PackageID
- Annual Membership
- Campaign
- Fiscal Year
- Program
- DefaultScanLine

Criteria Section

The Criteria section enables users to apply Filters to Modules and their fields to determine which Donor records are selected for Segment Solicitations.

The **Global Attributes Criteria** should be set once an Appeal is created manually OR copied. If the Pull is manually generated, it has to contain at least one default filter. If a client does not have any specialized filters, Aegis recommends that filter be set to **Donor ID** *Is Not Empty*.

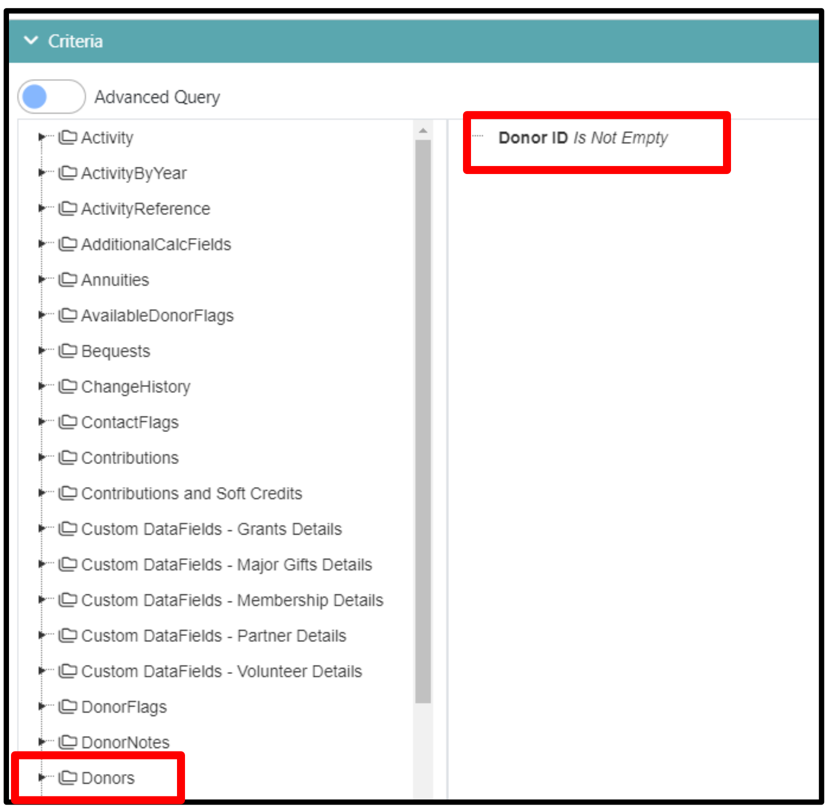
If the Pull is copied, then it reflects the filters of the originating Appeals Global Attributes Criteria.

If an Appeal is targeted for the entirety of a user's Donor module population, it should be left with the filter of **Donor ID** *Is Not Empty*.

However, if users are creating an Appeal that targets a more specific population of the Donors module and want all the Individual segments to be affected by this filter, then the user should manually select the **Global Attributes Segment** criteria.

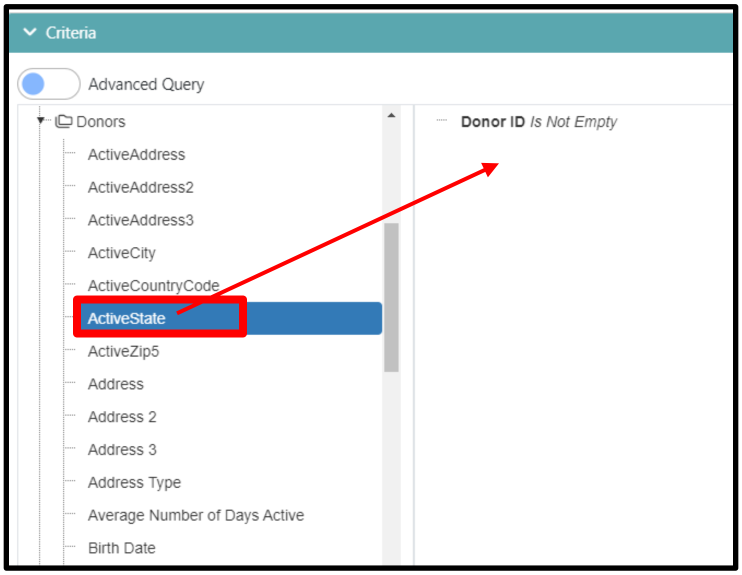
In the following scenario, a Criteria filter is added that filters **Donors** for an **Active State of Illinois**.

1. Observe the default filter of **Donor ID** *Is Not Empty*.



2. Expand the **Donors** folder from the left-hand column.

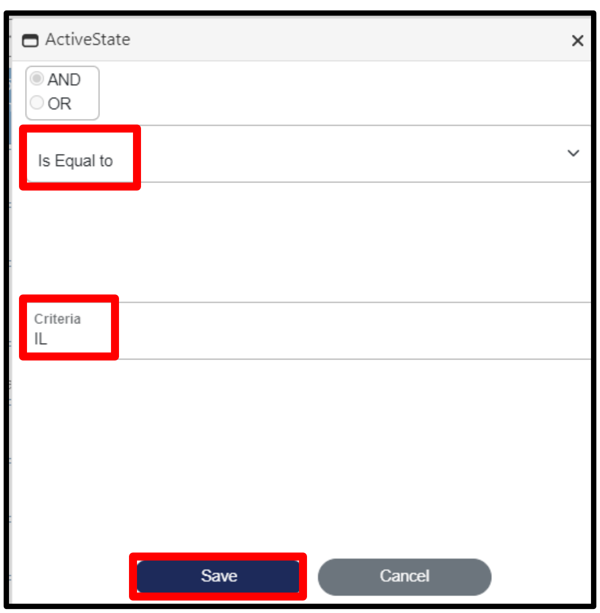
3. Scroll to the **Active State** field and drag and drop that field into the right-hand column under the **Donor ID** *Is Not Empty* filter.



4. From the **Donor ID** pop-up window, click in the **Operator** drop-down.

5. Keep the value of **Is Equal to**.

6. In the **Criteria** field, enter **IL**.



7. Click **Save**.

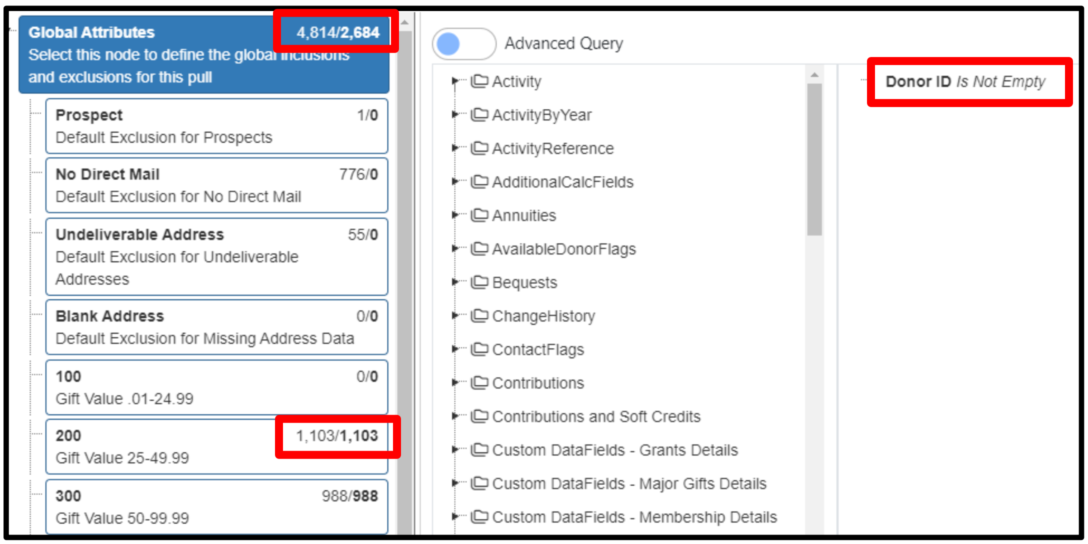
If users are interested in additional lessons on how to **Add/Edit or Configure Criteria**, they should visit the **Queries Manual** and review the **Adding Criteria** section. Multiple examples and step by step processes are discussed.

IMPORANT NOTES:

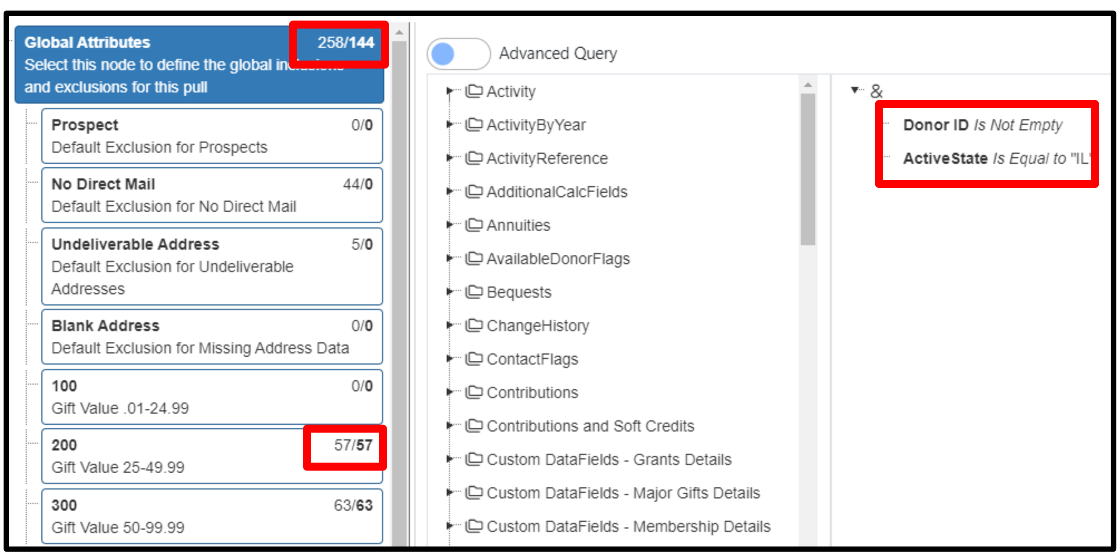
- The Exclusionary segments: **Prospect**, **No Direct Mail**, **Undeliverable Address**, and **Blank Address** are ALWAYS excluded under any Appeal.
- **Deceased Donors** are ALWAYS automatically excluded from Pulls (no Segment listed) – no counts are taken for their omission.

Finally, please remember: **If a criteria filter is added to Global Attributes – it affects ALL Child segments below it** (Default and Individual) – see screens below:

BEFORE Additional **ActiveState** Is Equal to "IL" filter Added:



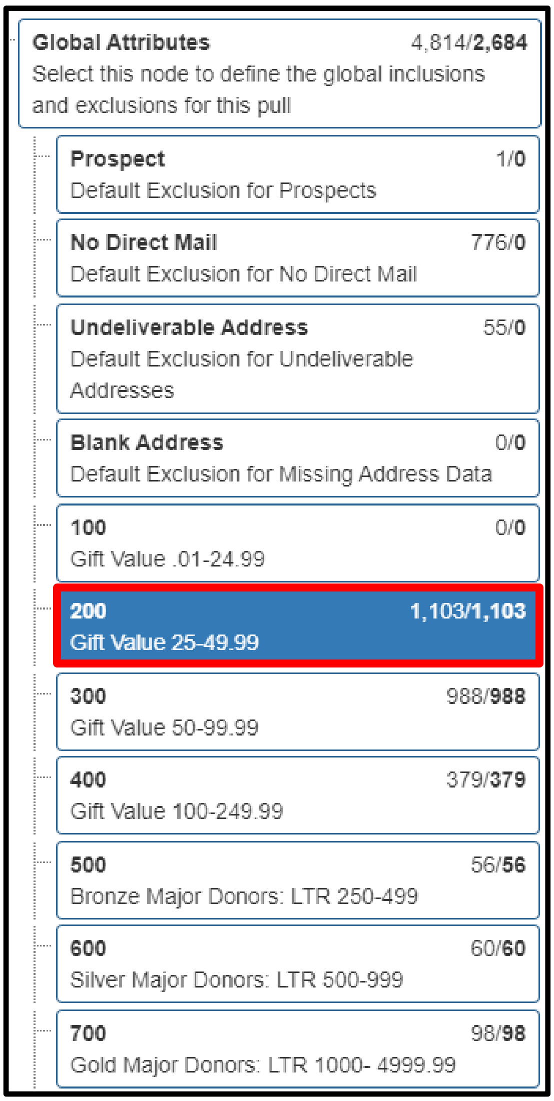
AFTER Additional **ActiveState** Is Equal to "IL" filter Added:



Individual Segment Properties

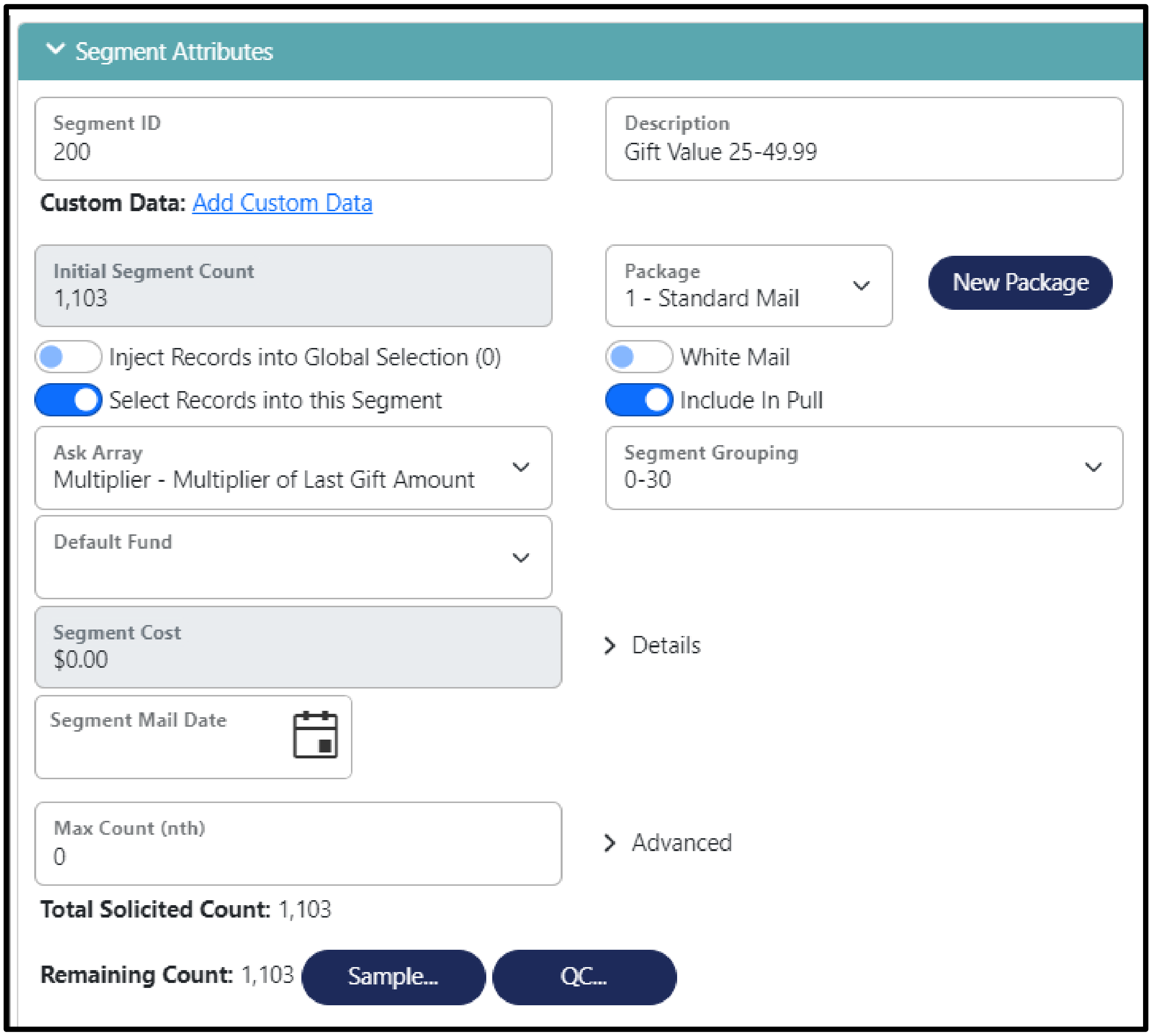
The Properties of an **Individual segment** are different than that of the Global Attributes segment. Unlike a Global Attribute, an Individual segment's properties directly affect only that individual segment selected and do not affect any other segment in the list.

We will look at each of the individual sections: **Segment Attributes**, **Segment Splits**, and review **Criteria** and the field and button behavior within each area.



Segment Attributes Section

Segment Attributes are made up of multiple fields, toggles, links, and reports that enable users to configure many options unique to the selected Segment.



Segment ID – Client defined value that easily identifies the Segment. Often multiple digit numbers are used so users can easily locate the Segment. Creating initial IDs ending in multiple zeroes enable users to insert new segments between already existing Segment IDs. IDs are stamped on the Tiles in the Segment menu.

Description – Client defined value used to house a short description of the Segment. Helpful if a short summary of the targeted prospect list per its most evident criteria is included. Description is stamped on Tiles in the Segment menu.

Custom Data: Add Custom Data (Link) – Exists to add Segment Attributes. An example is List#. List# is a value assigned by the clients list broker to define the origin is an acquisition list to assist in tracking list effectiveness.

Initial Segment Count – Reflects the Count of the Segment Donor records pulled as calculated by the user **Validating** or **Refreshing Counts** from the **Pull Button Bar**.

Package – Describes by what packages solicitations that qualify for this segment will be delivered. Will trump the Global Attributes setting if completed. The Packages created under the Appeals>Packages tab display in the dropdown.

- Users can also click the **New Package** button to the right of this field to create any additional packages desired.

Inject Records into Global Selection (0) (Toggle) – Unsupported at this time.

White Mail (Toggle) – Enable users to label the Segment as strictly for collecting White Mail. This segment would then serve as a repository for any unscanned and/or anonymous donations contributed to the Appeal.

Select Records into this Segment (Toggle) – If toggled ON, indicates any donors found that meet the Segment's Criteria will be included in the Pull. However – IF the user unchecks the toggle on **Include in Pull (see below)**, they will see record counts, but the records themselves will NOT be selected and will be skipped in the Pull and the Export.

Include In Pull (Toggle) – If toggled ON, indicates any donors found that meet the Segment's Criteria should be included in the Pull. Users could choose NOT to include this particular segment into the Pull by toggling OFF. This could be due to testing/marketing purposes.

Ask Array – An ask array is a calculated field built to determine an amount money that will be solicited as a SECONDARY ask on the initial Donor Acknowledgment letter. If an Ask Array is set up, the system, when sending the Acknowledgement, inserts a scan code (similar to the initial solicitation) that is generated by the Ask Array's calculations and placed on the bottom of the Ack letter. The calculations of this field will trump any value in the same field of the Global Attributes segment.

Segment Grouping – Enables the user to leverage any Segment Groupings created under the Appeal>Segment Groupings tab for reporting purposes.

Default Fund – Enable users to tie any transactions that are taken against this Segment to be labeled with the selected Default Fund. The selection from this dropdown will trump any value in the same field of the Global Attributes segment.

Segment Cost – Displays the Total Cost entered by the user for the segment in the Total Cost field of the Details section to the left of the field.

Segment Mail Date – If a Segment Mail Date is recorded, that value trumps the Mail Date of the Appeal's Global Attributes Mail Date. There is a column on all of the segment detail reports that prints the segment mail date and shows the appeal mail date if the segment date is blank.

Max Counts (nth) – Enables users to reduce the number of total returns of solicited donors for this segment to the named number. Returns a random sample from all result to that number. Clicking on **Advanced** enables user to Sort on a particular field for results.

Retain Unmailed Records – Enables users to retain the cleared results from the setting in the Max Counts (nth) field above for other segments.

Total Solicited Count – Total amount of records Solicited from this segment.

Remaining Count – Total amount of records that were targeted by this segment but did not qualify for solicitation.

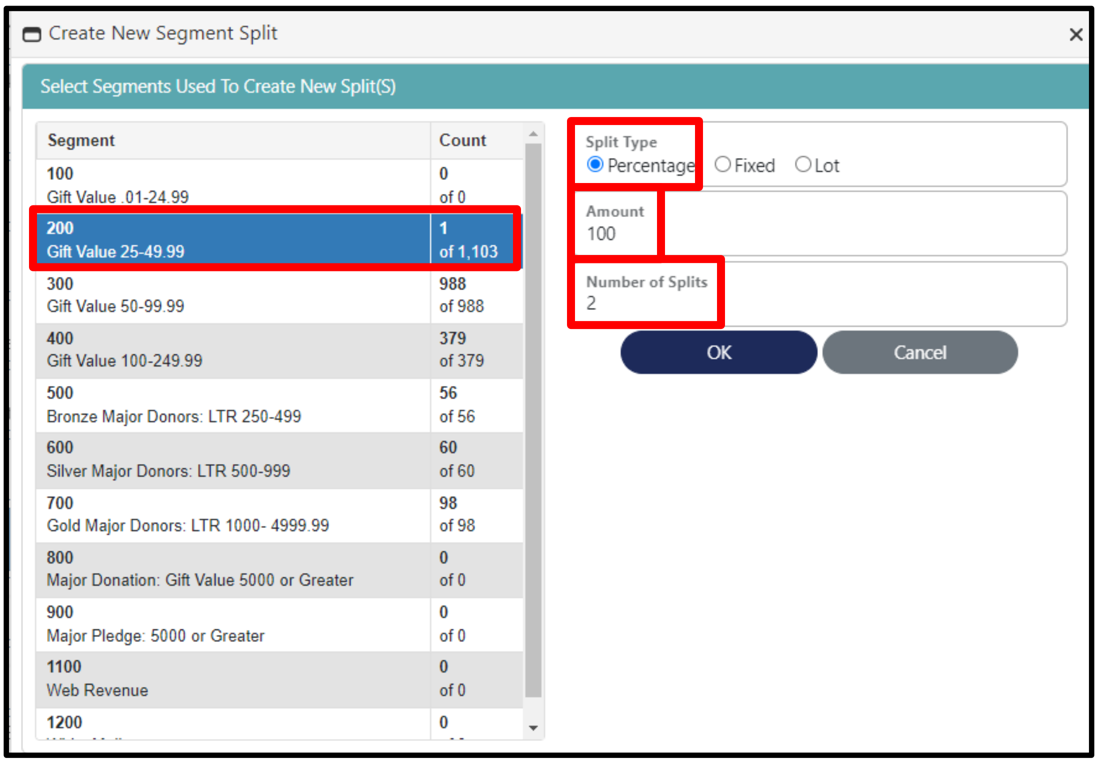
Sample (Button) – Displays the first 200 results of the **Total Solicited Count**. Users often run this report to confirm that solicitation data is in line with their expectations.

QC (Button) – Returns a Quality Control report targeting donors that initially could have been included but were excluded as a result of being labeled as **Deceased**, **Needing QC**, or **Not Segmented** or because they fell into the **No Direct Mail** or **Undeliverable Address** Default Exclusion Segments.

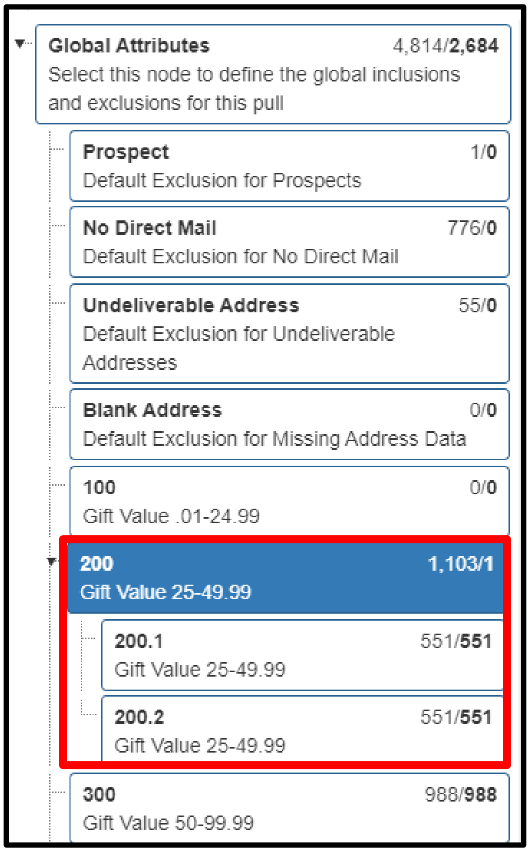
Segment Splits Section

The **Segment Splits** section displays any Splits applied to this segment that were set up from the **Pulls Button Bar>New Split(s)** button.

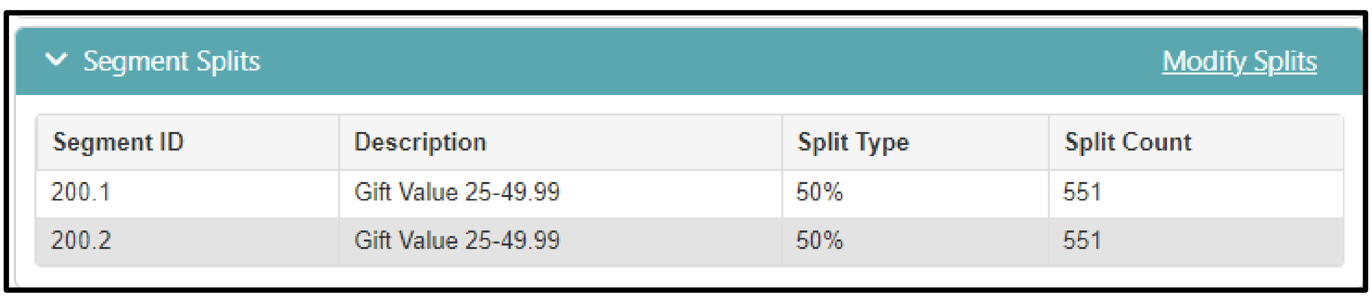
For instance, in the scenario below (from the **Pulls Button Bar>New Split(s))** a **New Split** was created for **Segment 200** that requested a **Percentage** type split of **100%** of the values into **2 Splits**.



Once the **Ok** button was clicked, the Split was applied to the **Segment** Menu with the Donor counts being parsed 50/50 accordingly.



And the Segment Splits section of the 200 Segment is also updated to reflect the two line items listing each of the sections:


Segment Splits　Modify Splits

Segment ID	Description	Split Type	Split Count
200.1	Gift Value 25-49.99	50%	551
200.2	Gift Value 25-49.99	50%	551

Users can click on the **Modify Splits** link in the upper right to edit the Split IDs, Descriptions, and/or re-order how they display.

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Criteria Section

The Criteria section enables users to apply Filters to Modules and their fields to determine which Donor records are selected for this Segment's Solicitations.

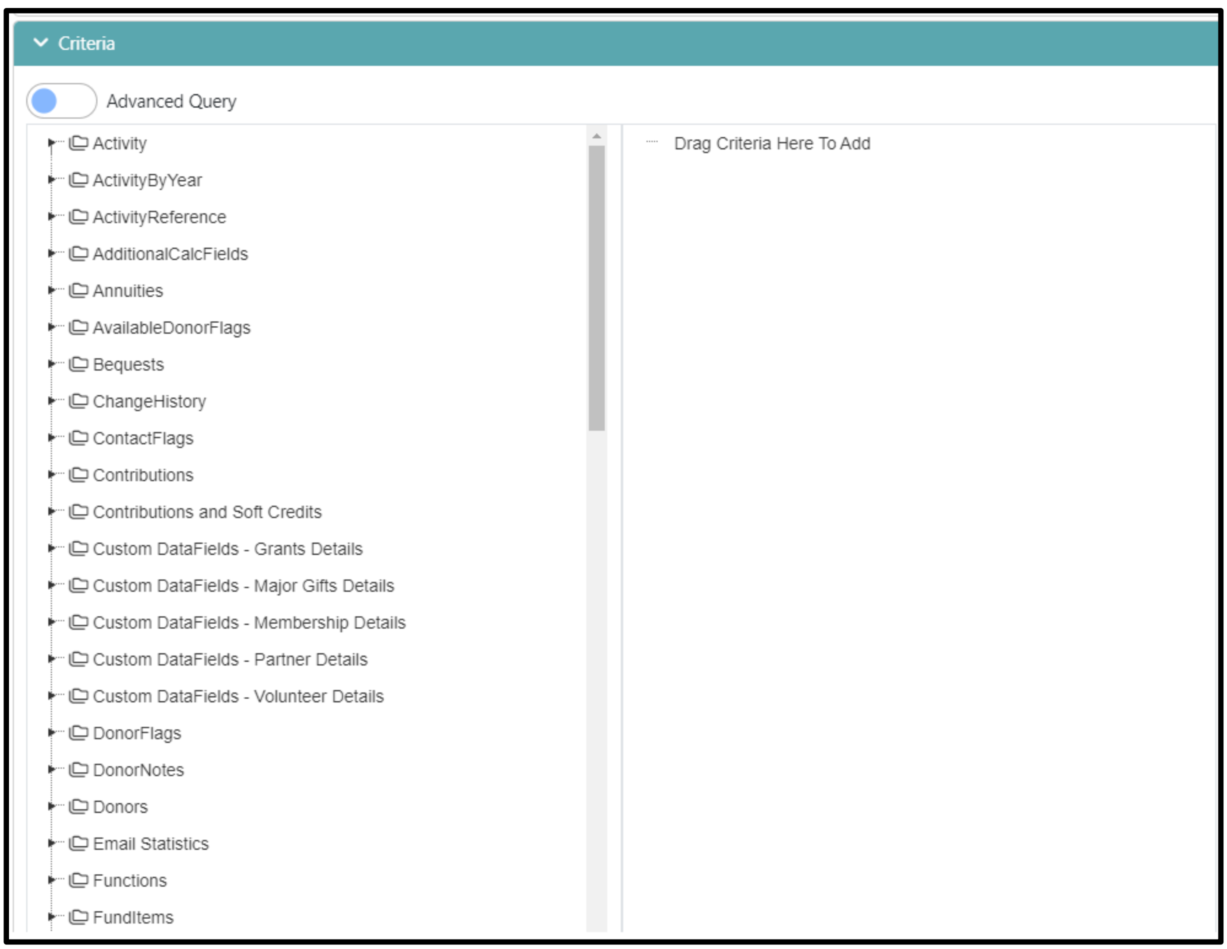
The **Criteria** for any Individual Segment is user defined, but can be edited, with appropriate permissions, as needed.

If a segment is generated as a result of a Pull being copied, then the criteria of the segment reflects the filters of the originating individual segment. It can be edited once copied.

In the example of Segment 200 below, a Criteria filter was added that filters the **LastGiftValue** that Is Greater than or Equal to "25" AND **LastGiftValue** that Is Less than or Equal to "49.99".

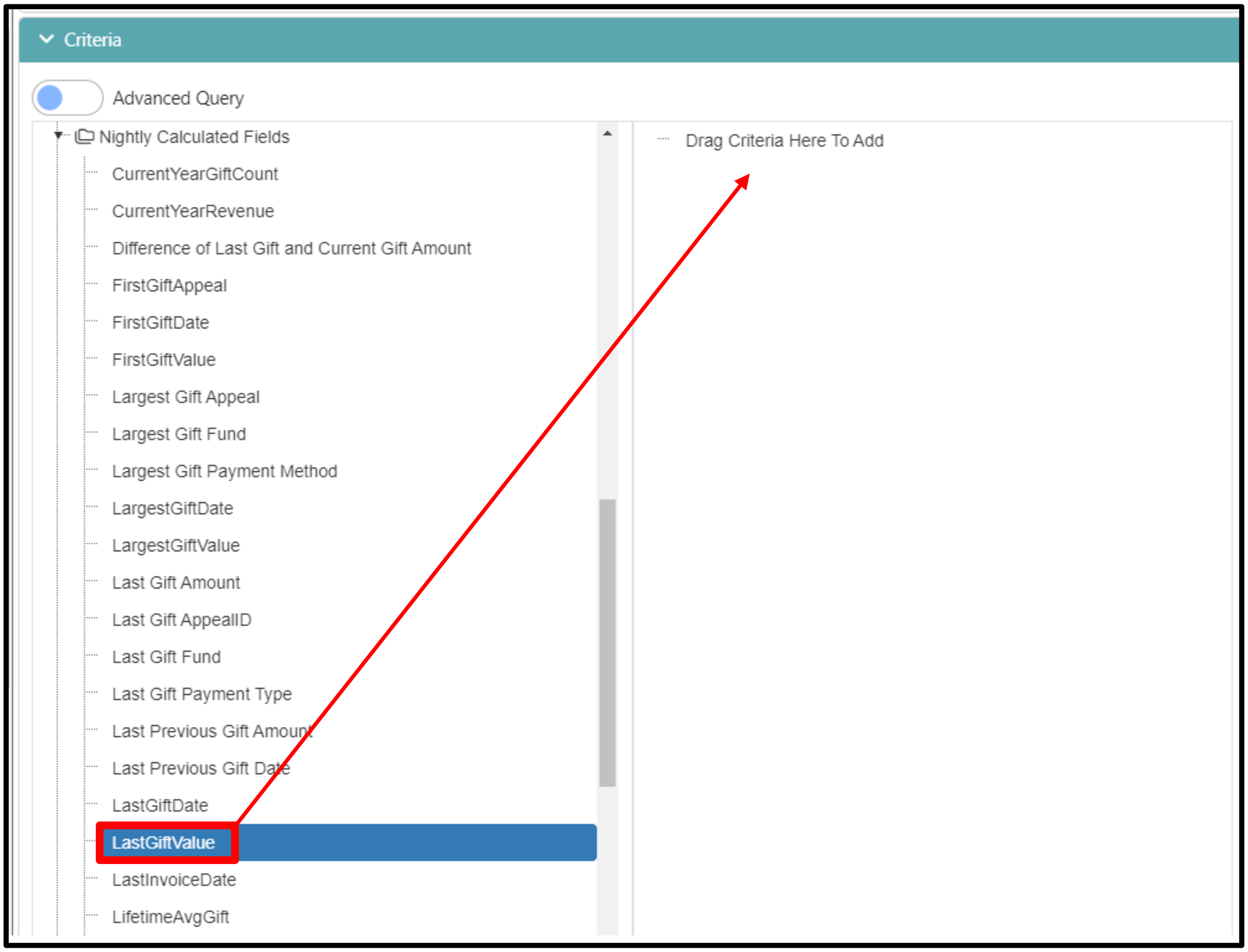
We will review how that criteria was built below:

1. Observe the default view of **Criteria** without any filters applied.



2. We will scroll to the **Nightly Calculated Fields** folder in the left-hand column.

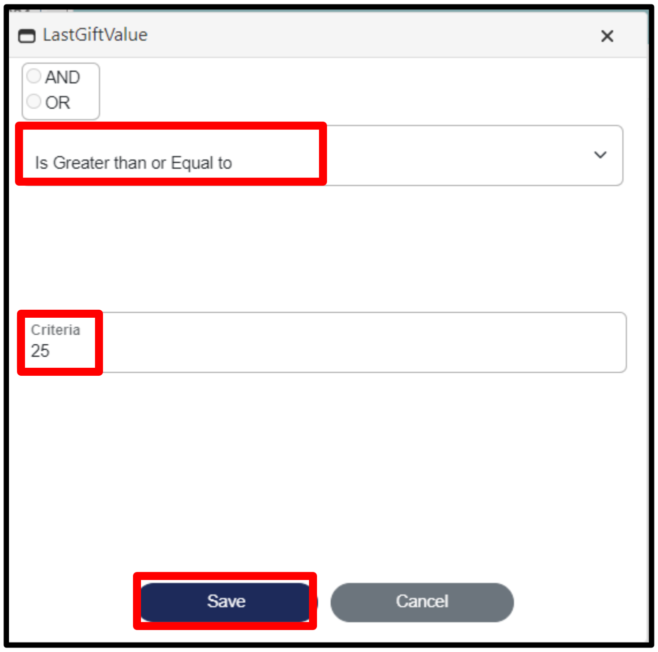
3. Then Scroll to the **Last Gift Value** field and drag and drop that field into the right-hand column on the **Drag Criteria Here To Add** text.



4. From the **LastGiftValue** pop-up window, we click in the **Operator** drop-down.

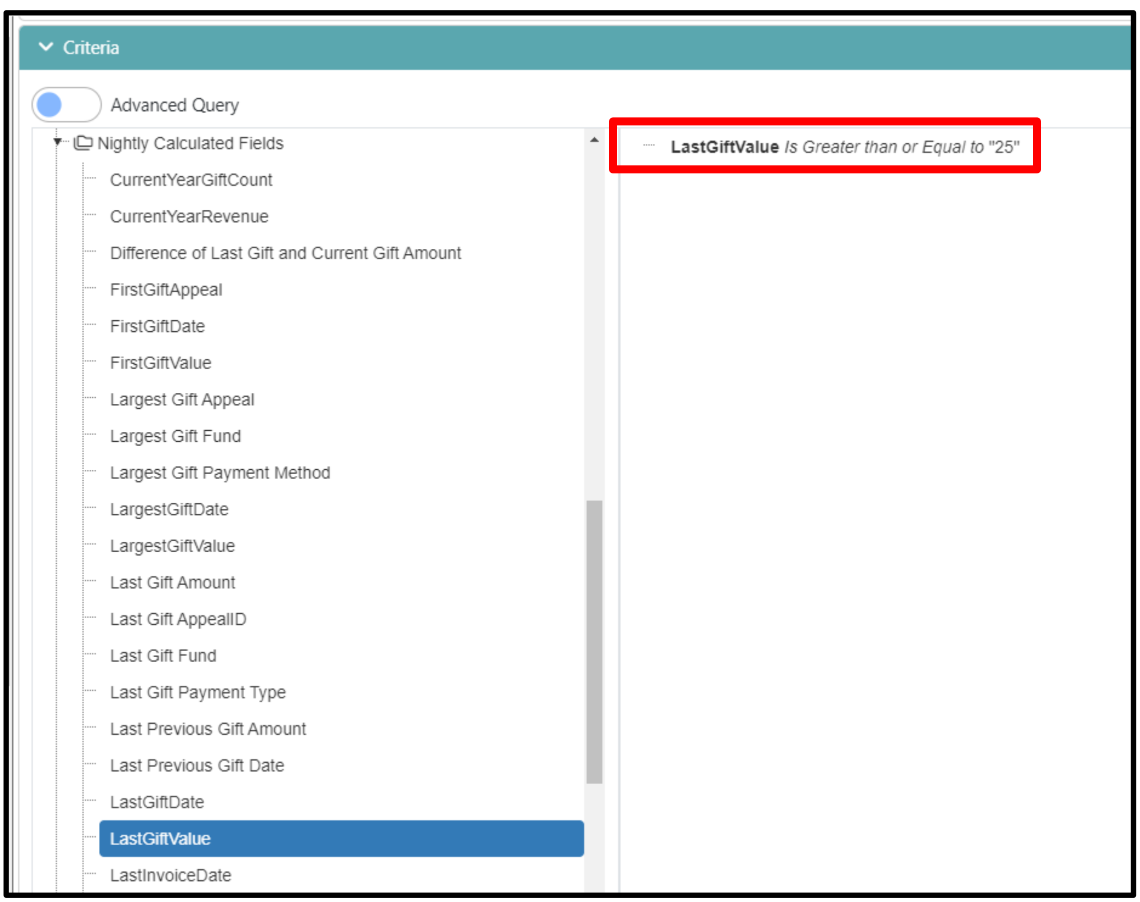
5. Change the value to **Is Greater than or Equal to**.

6. In the **Criteria** field, we enter **25.**



7. Click **Save**.

8. And observe the results:

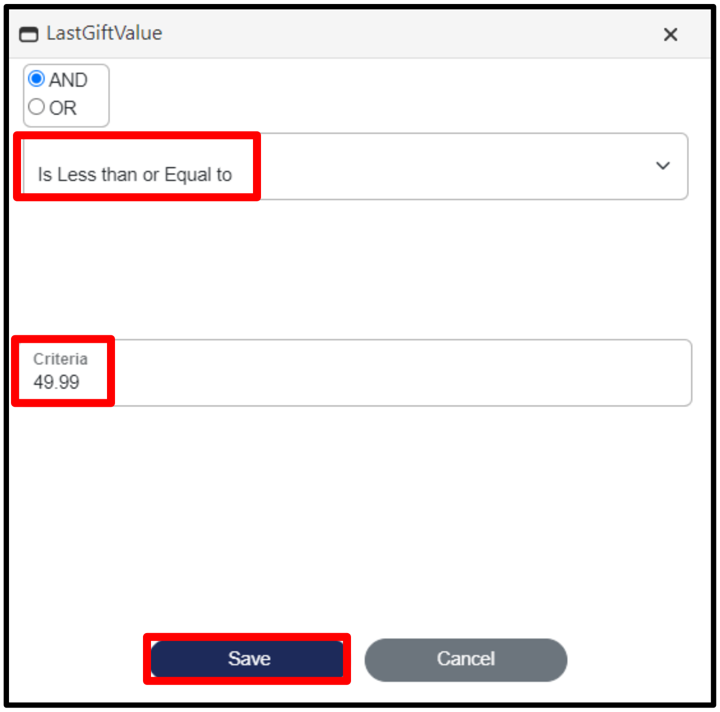


9. Then we add the second filter: From under the **Nightly Calculated fields**, grab the **Last Gift Value** field a second time and drag & drop under filter just created.

10. From the **LastGiftValue** pop-up window, we click in the **Operator** drop-down.

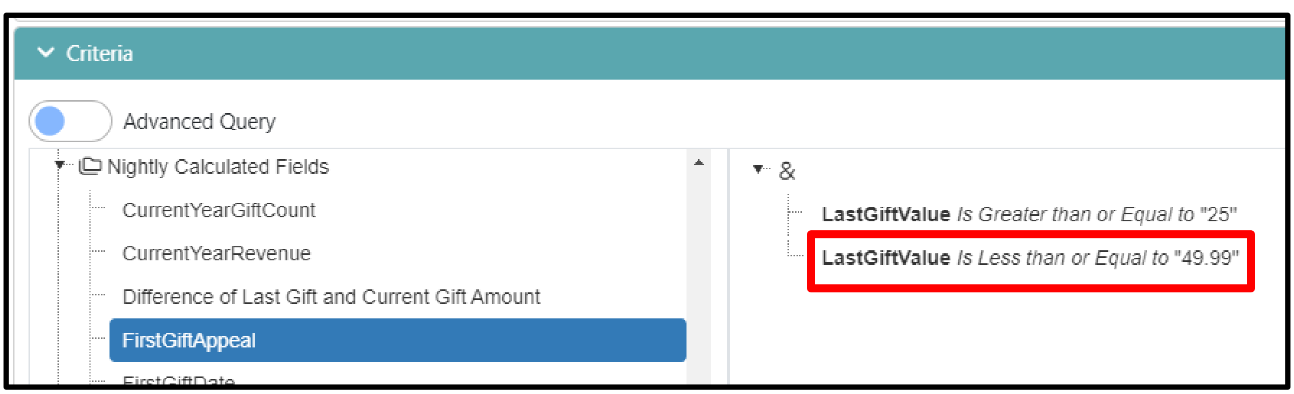
11. Change the value to **Is Less than or Equal to**.

12. In the **Criteria** field, we enter **49.99.**



13. Click **Save**.

14. And observe the results:



If users are interested in additional lessons on how to **Add/Edit or Configure Criteria**, they should visit the **Queries Manual** and review the **Adding Criteria** section. Multiple examples and step by step processes are discussed.

NOTE: The Exclusionary segments: **Prospect**, **No Direct Mail**, **Undeliverable Address**, and **Blank Address** are ALWAYS excluded under any Appeal.

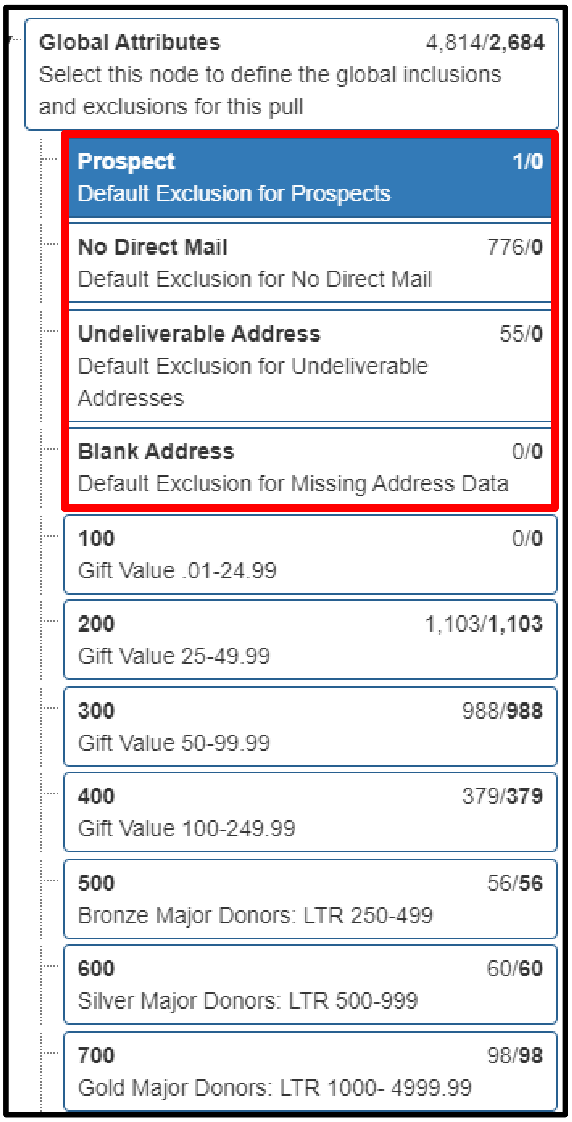
Deceased, even though NOT a Segment, area also automatically excluded.

Users can now observe the practical results of the Criteria build by looking at the Segment 200 in the Segment menu bar.

It clearly displays the **Description** – which we added earlier – that states the Segment range. It also displays (in the upper right) the number of qualifying prospects pulled via its Criteria from the total amount of available records.

Default Exclusion Segment Properties

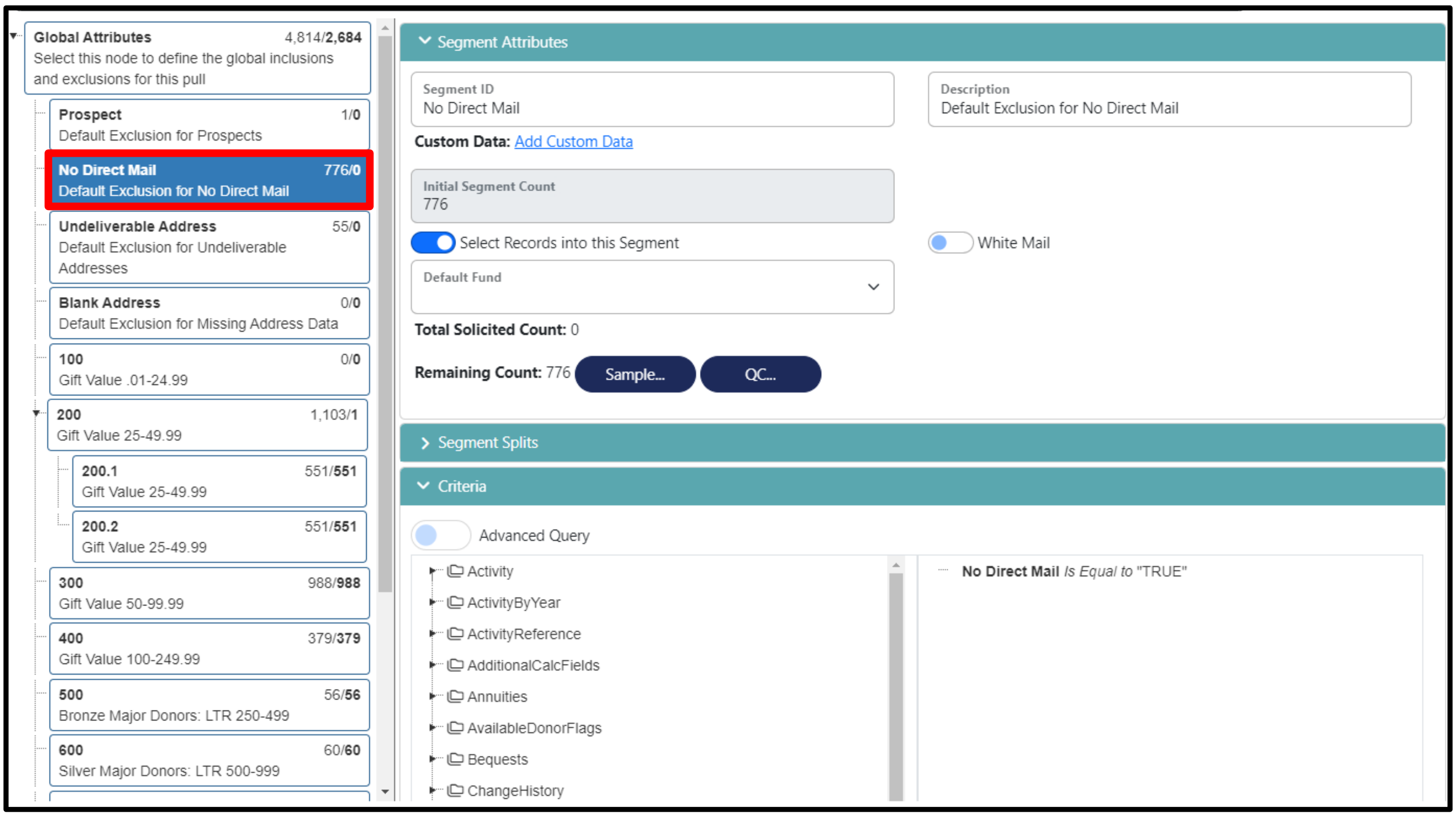
The Properties of each of the four Default segments: **Prospect**, **No Direct Mail**, **Undeliverable**, and **Blank Address** are the least configurable/editable of the three Segment types. They are designed to exclude from Solicitations each of the Donor categories indicated by their title.



Each of the **Exclusion Segment properties** are laid out the same way. They are more limited in scope than the other segment types and are usually left untouched. But, if necessary, they can be edited with the proper permissions. Users can change the **Segment ID** or **Description**, add a **Default Fund** or **Segment Split**, and even change the **Criteria**.

The purpose of these exclusions are to display stock, most frequently used, exclusionary segments to save users from having to remember to add them. They are extremely useful in reducing the risk of contacting users that are not qualified for solicitation: **Prospect/No Direct Mail**, or do not have the proper information necessary for solicitation: **Undeliverable Address/Blank Address**.

The following screenshot displays the **No Direct Mail** exclusion segment; it represents the fields and functions a user would find on the other three.



DOCUMENTS TAB

Documents

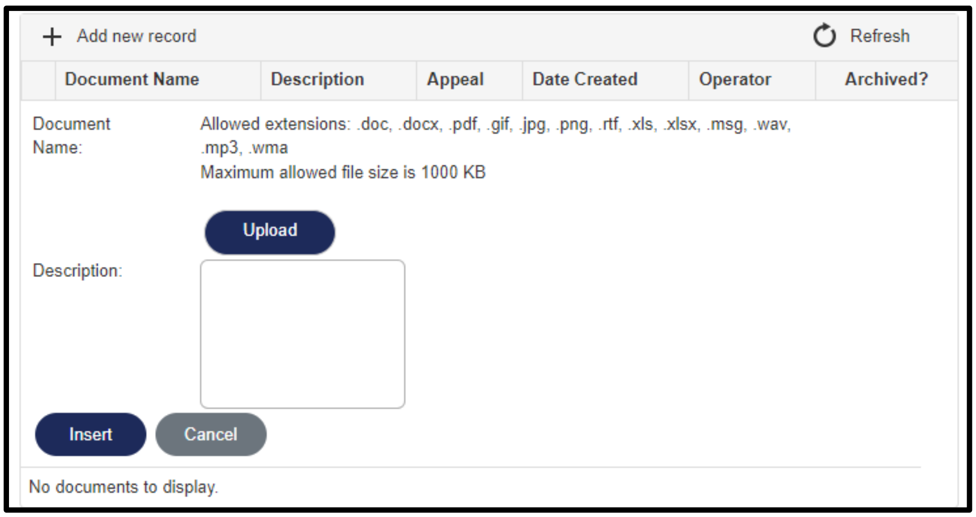
The **Documents** tab enables users to Add documents to the Solicitation record. Users can add images/larger descriptions/legal docs to the permanent record.

1. Click on the **+Add new record** button.

2. A **File Uploader** pop-up screen displays.

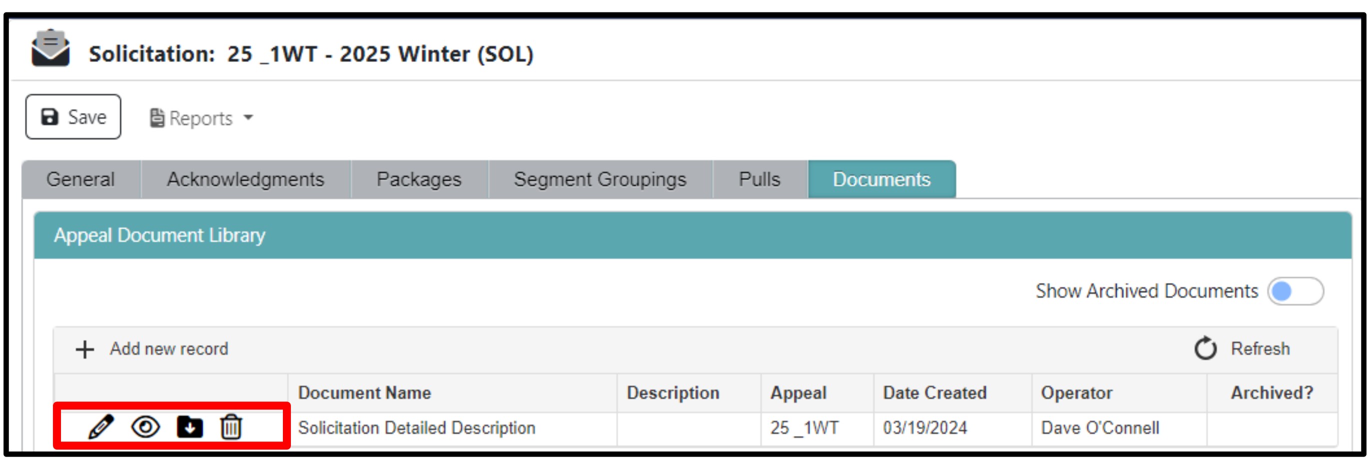
3. Users can browse to a file and **Upload**.

4. Users can also add a short **Description** as desired.



5. Click on **Insert**.

6. The file displays as an entry under the **Documents** listing.



7. Users can **Edit**, **Read**, **Download**, and **Delete** with appropriate permissions.

PERMISSIONS TAB

Permissions

The **Permissions** tab enables users to set security by **Roles** by which users can view or not view the Appeal in **Rapid Entry**.

This function can be extremely helpful for clients with a high volume of Appeals in which certain Roles – groups of users – are only required to view a sub-set of all Appeal records. Once Roles are "assigned" to those Appeals, the users assigned to those roles have no need to navigate a large number Appeals in Rapid Enry in order to find their sub-group of Appeals; only ones assigned their role will display.

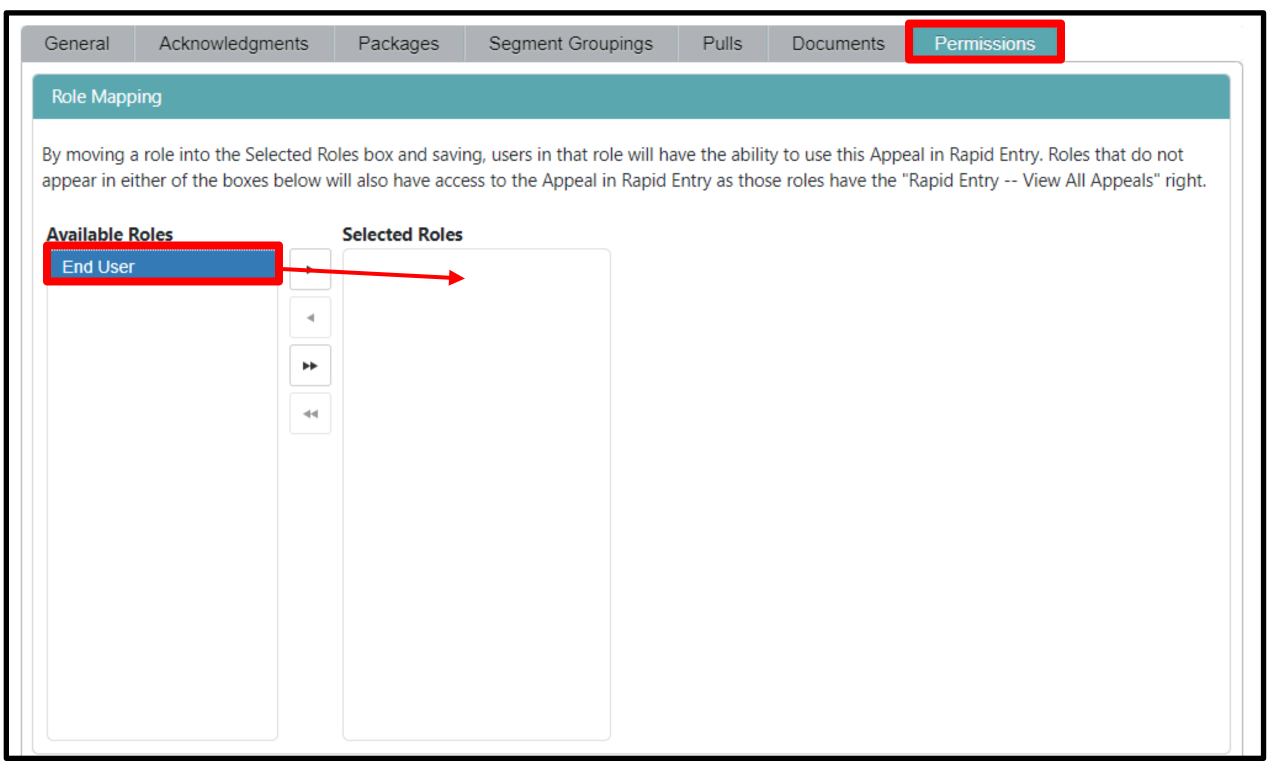
IMPORTANT NOTE: In order for this tab to function, an **Administrator** must set up the targeted user role under the **Administration>Security Roles** sub-module and ensure role has **Rapid Entry – View All Appeals** right moved from Selected Rights under Available Rights. **By DEFAULT, this right resides under Selected Rights.**

To set up Permissions:

1. Select on the **Role** under the **Available Roles** column.

2. Drag and Drop the Role to the **Selected Roles** column.

3. That role will now be able to view the Appeal in **Rapid Entry**.



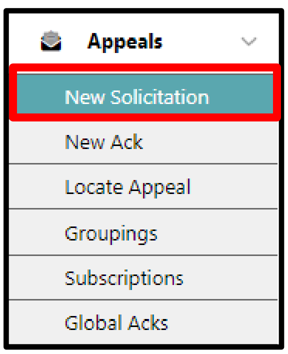
Copying Appeals

One of the most time-consuming tasks in Aegis is the creation of Appeals. The ability to **Copy Appeals** helps to ease that effort. Users can copy Appeal whenever the sub-modules of **New Solicitation** or **New Ack** are clicked on. In the copy screen that displays, users will have a choice to copy <u>all</u> or <u>parts</u> of the target Appeal. Considering the number of repeatable elements – same or similar solicitation targets, acknowledgements, pulls, pull segments, etc. – copying an Appeal saves considerable time.

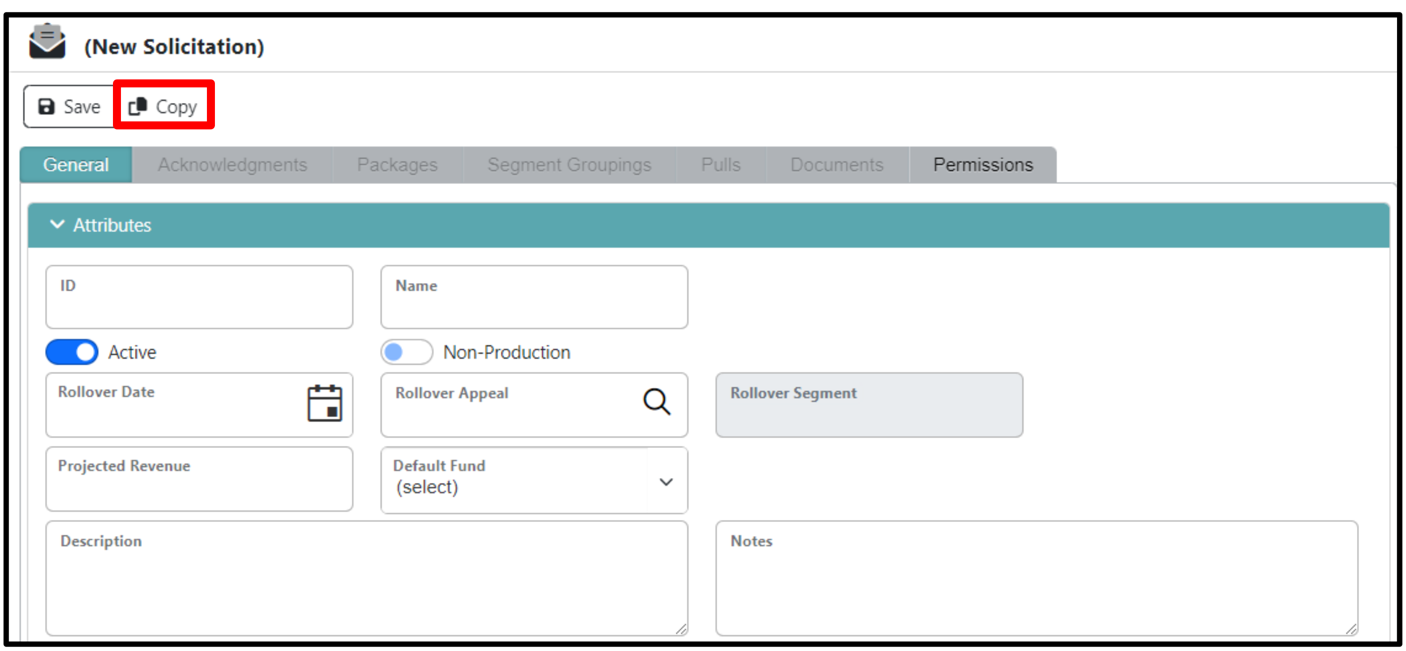
In the following example, users will see the ease with which a Solicitation Appeal can be copied and ready for processing.

Copying Appeal STEPS

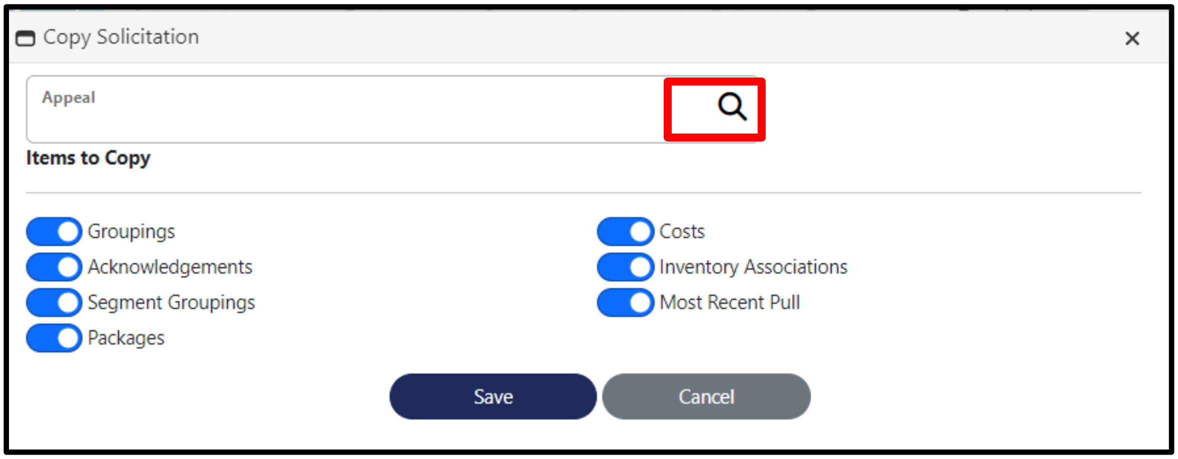
1. Click on **Appeals** module>**New Solicitation** sub-module.



2. Click on the **Copy** button from the **New Solicitation** record.

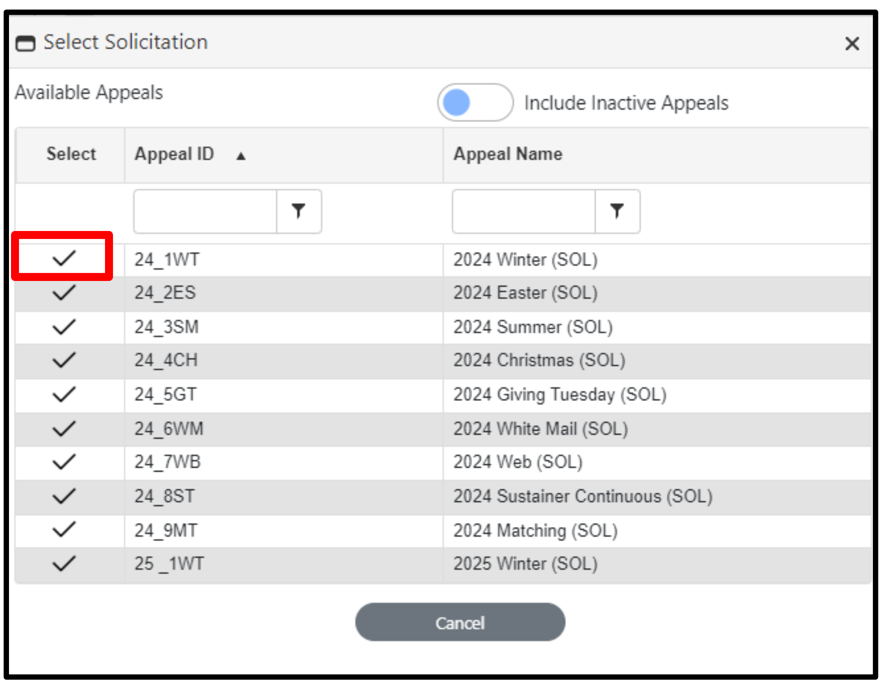


3. The **Copy Solicitation** pop-up displays.



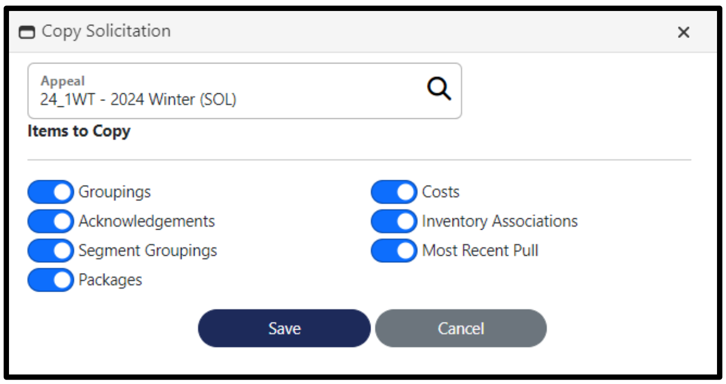
4. In the **Appeal** field, click on the **Magnify Glass** (Search) icon.
   - Users could enter an **Appeal ID** and click to search more specifically as well.

5. Select desired **Appeal** to copy using the **Select** (checkbox) column on far left.
   - For this example, **24_1WT** will be selected.



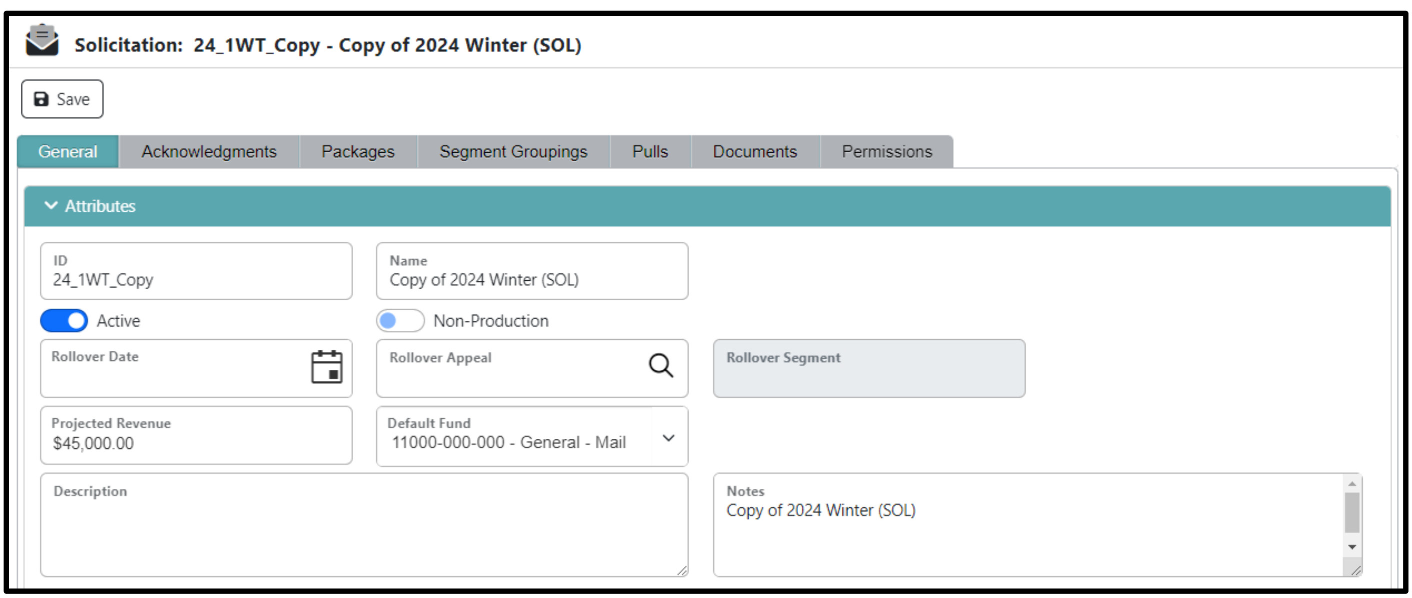
6. The **Copy Selection** screen re-displays with the **Appeal** entered.

7. Select the desired areas to **Copy**:
    - Groupings
    - Acknowledgements
    - Segment Groupings
    - Packages
    - Costs – **USERS should NEVER copy Costs – Un-toggle**
    - Inventory Associations
    - Most Recent Pull



8. Click **Save**.

9. The **Copy** displays.



10. Users should overwrite the copied text with the new, desired values in the **ID**, **Name**, and **Notes** fields, as well as adjust any other copied fields/copied sections as desired.

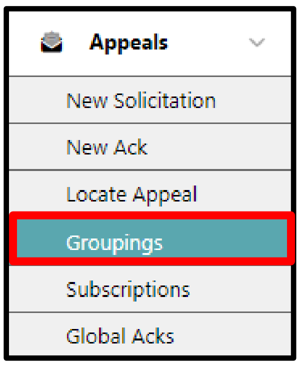
Grouping

The **Grouping** module functions as an additional tagging resource for **Solicitation Appeals**. It enables users to set up both **Grouping** and **Option Value** records that can be utilized for analysis in both the **Queries** and **Analytics** modules. A Grouping can be set as either optional or required.

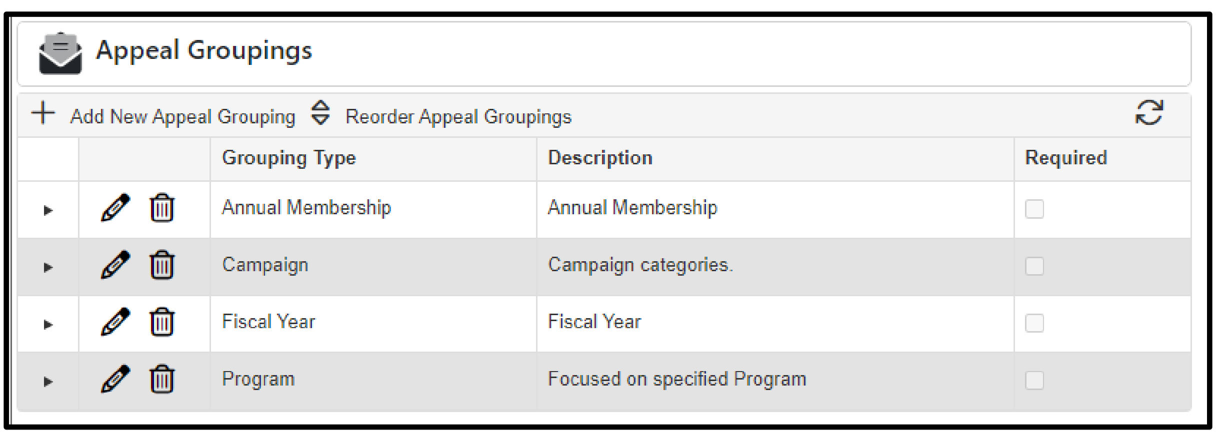
Grouping and **Option Value** selections created display as options on **Appeals** under the **General** tab>**Grouping** section. If applied to an Appeal, the Grouping fields also display in **Rapid Entry** for selection when recording contributions.

Grouping Set Up STEPS

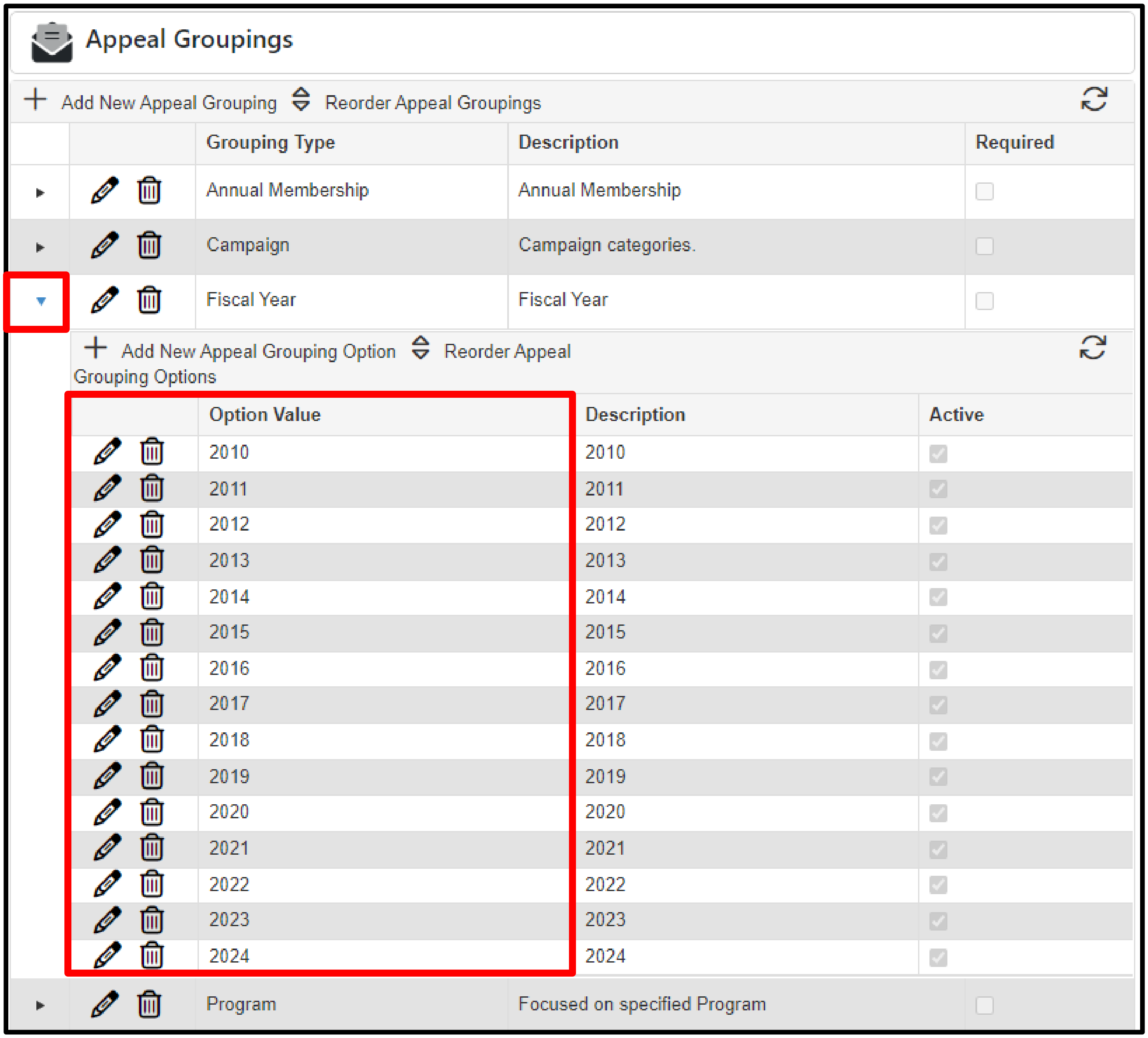
1. Click on the **Appeals** module>**Groupings** sub-module.



2. The list of existing **Appeal Groupings** display.
    - These are examples; clients will configure their own values as desired.

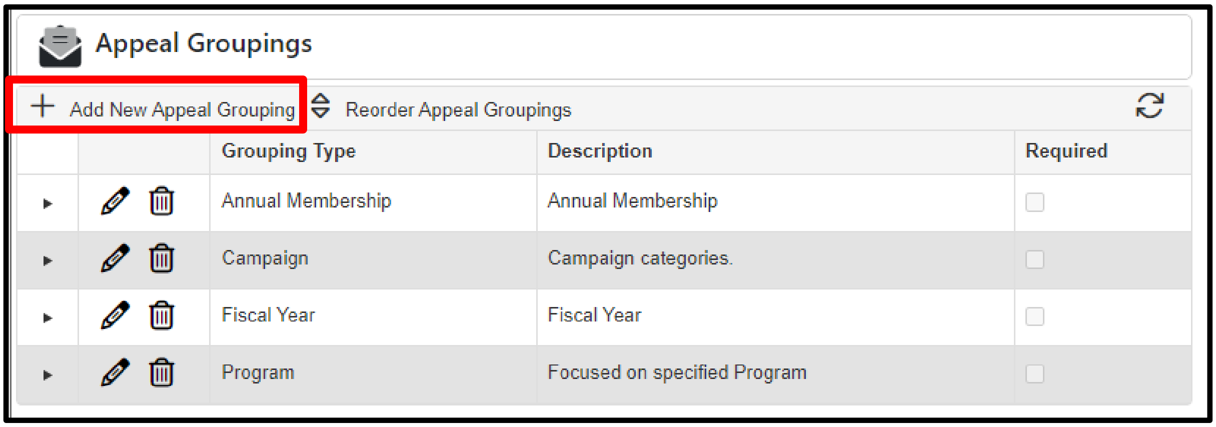


3. Users can expand a **Grouping** to view the **Option Value** records below.
    - In this example, the **Fiscal Year** has been expanded to view the yearly **Option Value** records.



4. Users can choose to **Edit** or **Delete** existing values of both the **Appeal Groupings** and **Option Value** records.

5. Clicking on the **+Add New Appeal Grouping**, adds a new **Grouping** to the list.

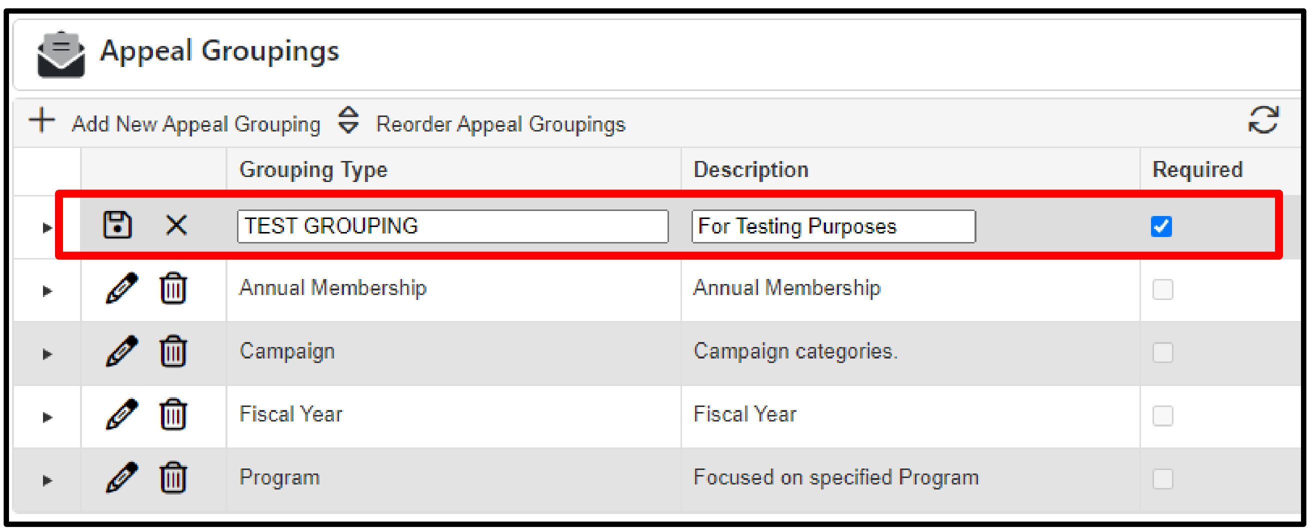


6. In the **Grouping Type** field, users enter a desired value.

7. In the **Description** field, users enter a desired value.

8. Users can also click on the **Required** checkbox to mark this selection, and an **Option Value**, as required to complete during **Rapid Entry** and during inital **Appeal Setup** in the CRM.

9. Clicking on the **Save** icon on left adds the **Grouping Type** to the List.



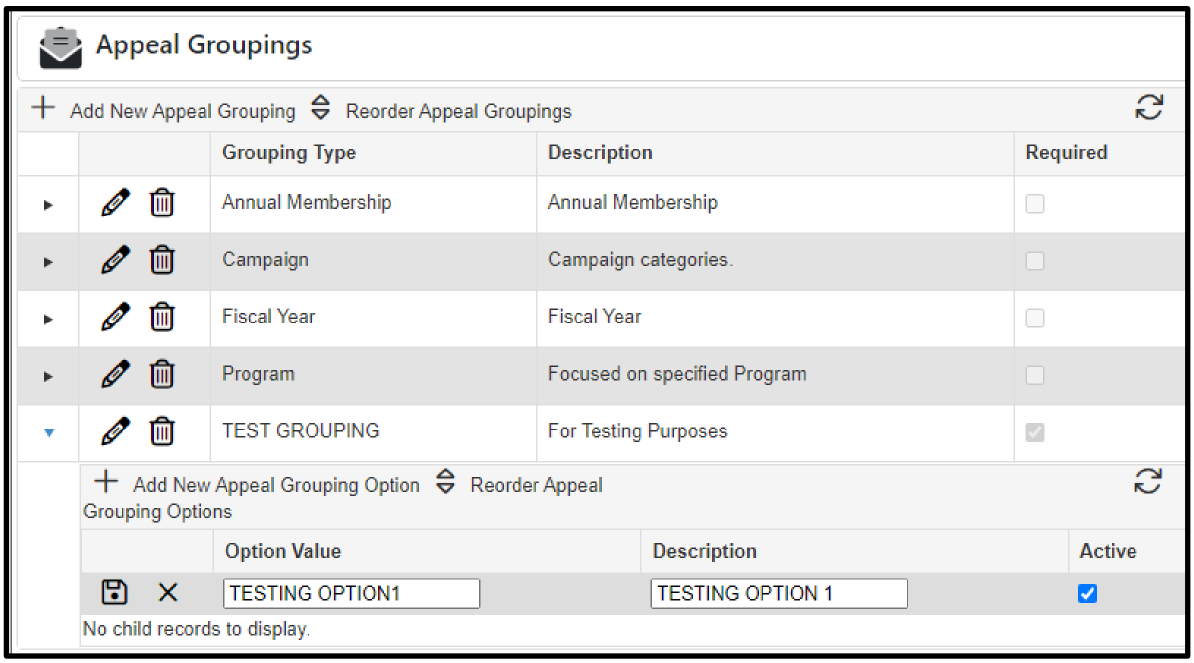
10. Once the **Grouping Type** is saved, users expand that new **Grouping** and click on the **+Add New Appeal Grouping Option** button.

11. In the **Option Value** field, users enter the desired value.

12. In the **Description** field, users enter the desired value.

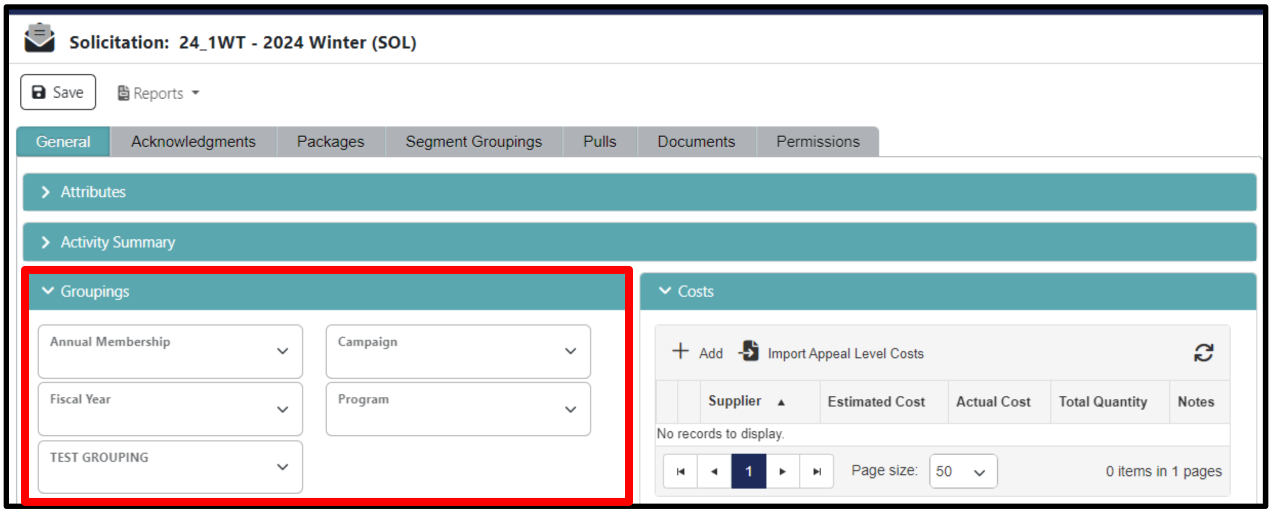
13. Users check the **Active** checkbox as desired.
    - Inactive values will NOT display in **Rapid Entry** OR in the **Aegis CRM**.

14. Clicking on the **Save** icon on left adds **Option Value** to **Grouping Option** List.



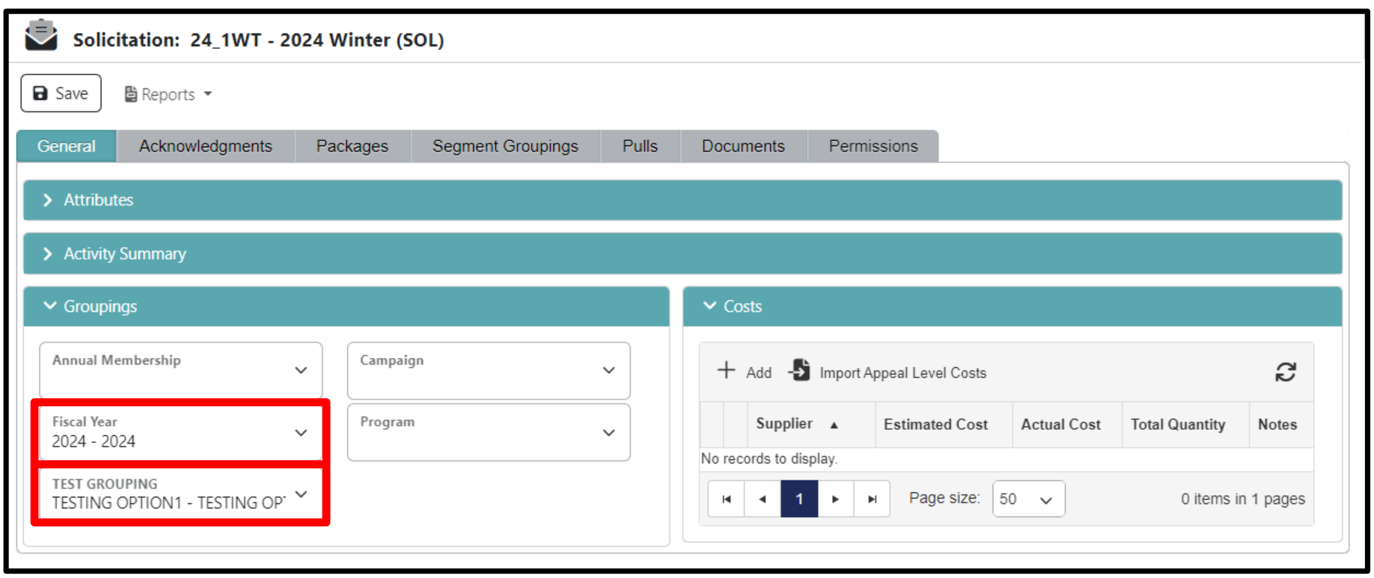
15. Users may add as many optional values as desired.

16. These options then become available under all **Solicitation Appeal** Records.



17. Once selected, will display as either optional or required in **Rapid Entry** transactions against that **Appeal**.

- Uses can choose multiple selections as desired.
- Groupings are only available under **Solicitation** Appeal Types.



Subscriptions

Subscriptions track a specific association between a Donor and a group that they are "subscribed" to – belong to. This group could be a:

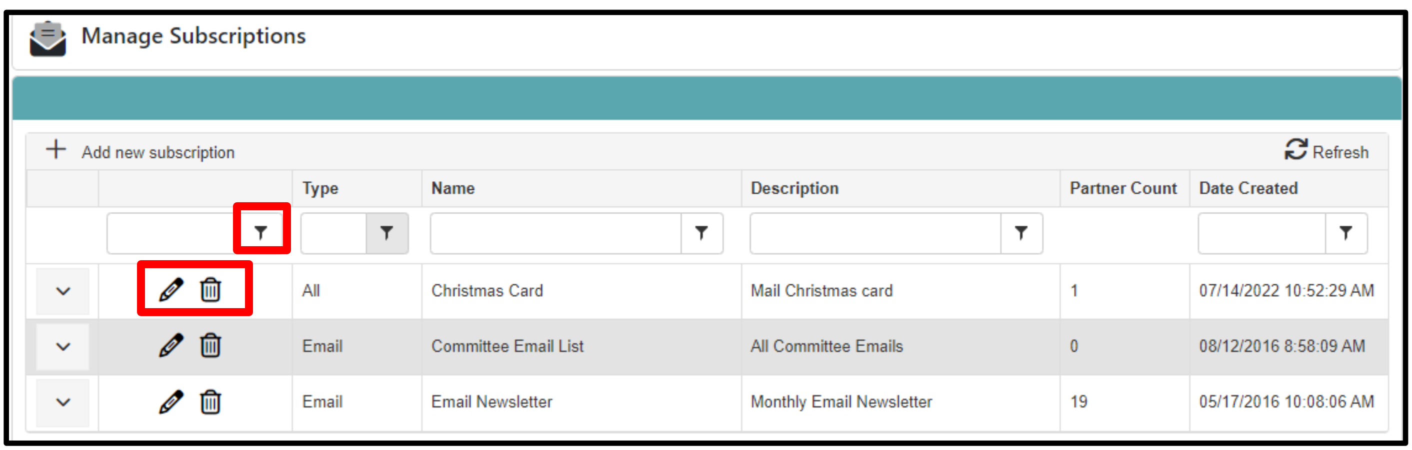
- **Committee** they belong to.
- **Newsletter** they are subscribed to.
- **Christmas card** they are supposed to receive.
- **Phone list** they agreed to be a part of.

Subscriptions do not have any direct transactional weight in the system; they are not products with costs associated with them; they are basically a type of stamped association between a group and the Donors that belong to that group.

Subscriptions can be leveraged in **Queries** and **Analytics** and are valuable at tracking and reporting on Donor-Group associations.

Subscription Set Up STEPS

1. Click on the **Appeals** module>**Subscriptions** sub-module.



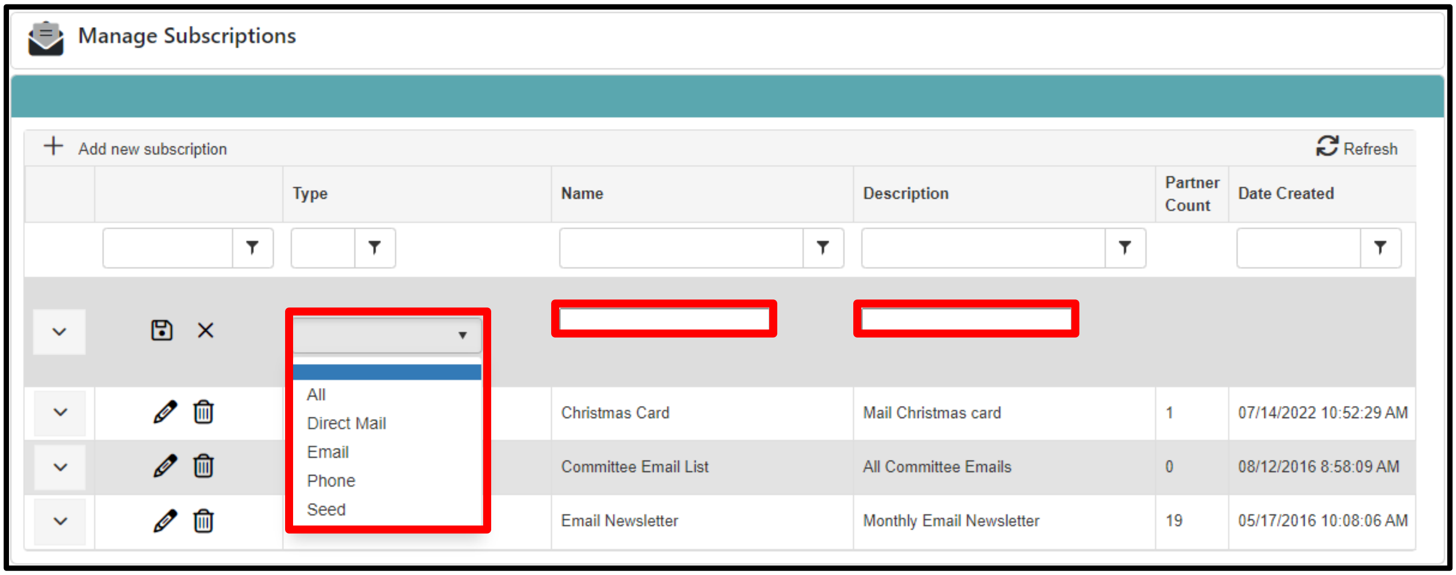
2. The list of existing **Subscriptions** display.
    - These are examples; clients will configure their own values as desired.

3. Users can **Edit** or **Delete** a Subscription as needed from the far-left column.

4. Users can also **Filter** out Subscriptions by using the Filter buttons below each column header.

5. Users can click on the **+Add new subscription** button to create a new subscription record.

6. A new **Subscription** row displays.



7. From the **Type** dropdown, select the desired Type of Subscription.
   - Types describe how the subscription will be delivered.

8. Under the **Name** column, enter the desired value in the blank field.

9. Under the **Description** column, enter the desired value in the blank field.

10. Click on the **Save** button.

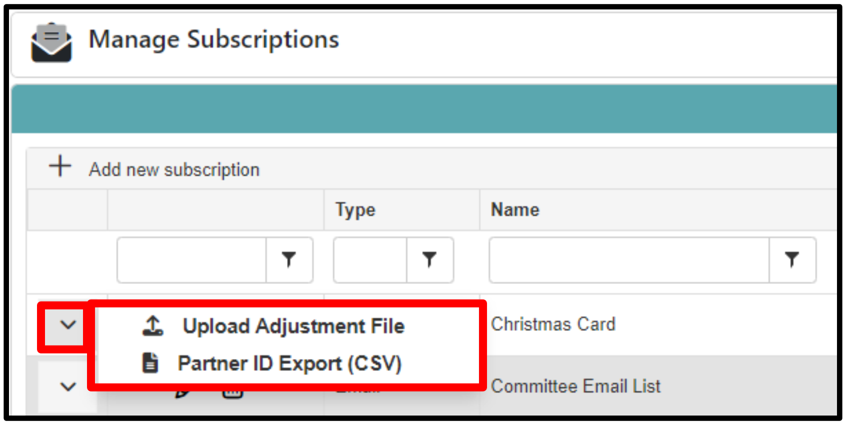
11. The new **Subscription** is added to the list.

12. Each entry has the **Date/Time** auto stamped under the **Date Created** column.

13. Users can also view the <u>number of associated</u> **Donors/Partners** currently subscribed under the **Partner Count** column.

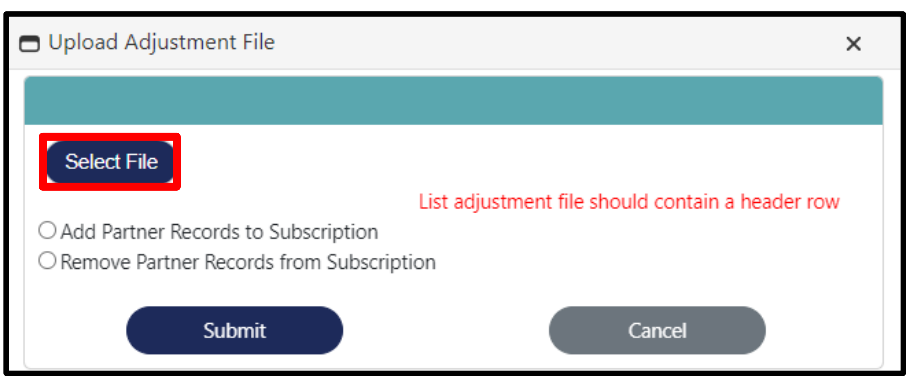
Adding Donors to a Subscription STEPS

1. Click the **Actions** dropdown on far left of the desired Subscription from the Manage Subscriptions home page.



2. Clicking on **Upload Adjustment File** enables users to import a list of records that will either:
   - **Add Partner Records to Subscription**
   - **Remove Partner Records from Subscription**

3. Users can use the **Select File** button to browse to a location and select the desired file for upload to either **Add** or **Remove** Partners (Donors) from the Subscription.



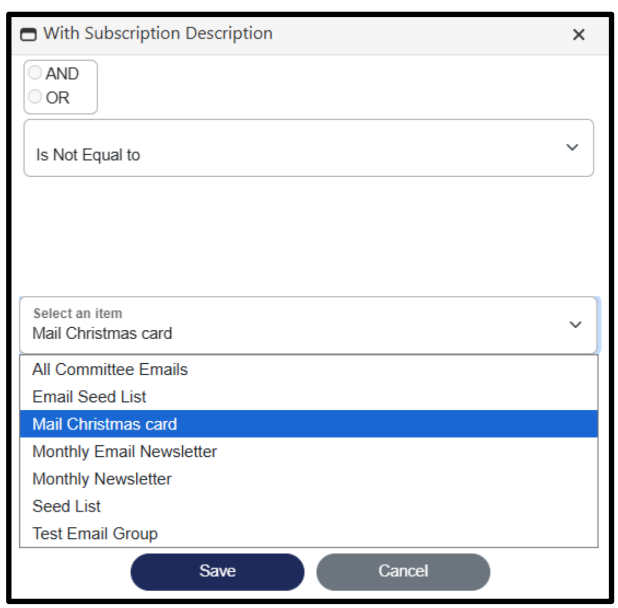
4. Once the **Submit** button is clicked, the Donors tied to the Subscription will be updated as **Added or Removed** in the CRM.
    - Users will see the **Partner Counts** column number increase with the amount of the upload in the **Manage Subscriptions** home screen.

NOTES for Adding Records to a Subscription - **READ before attempting:**

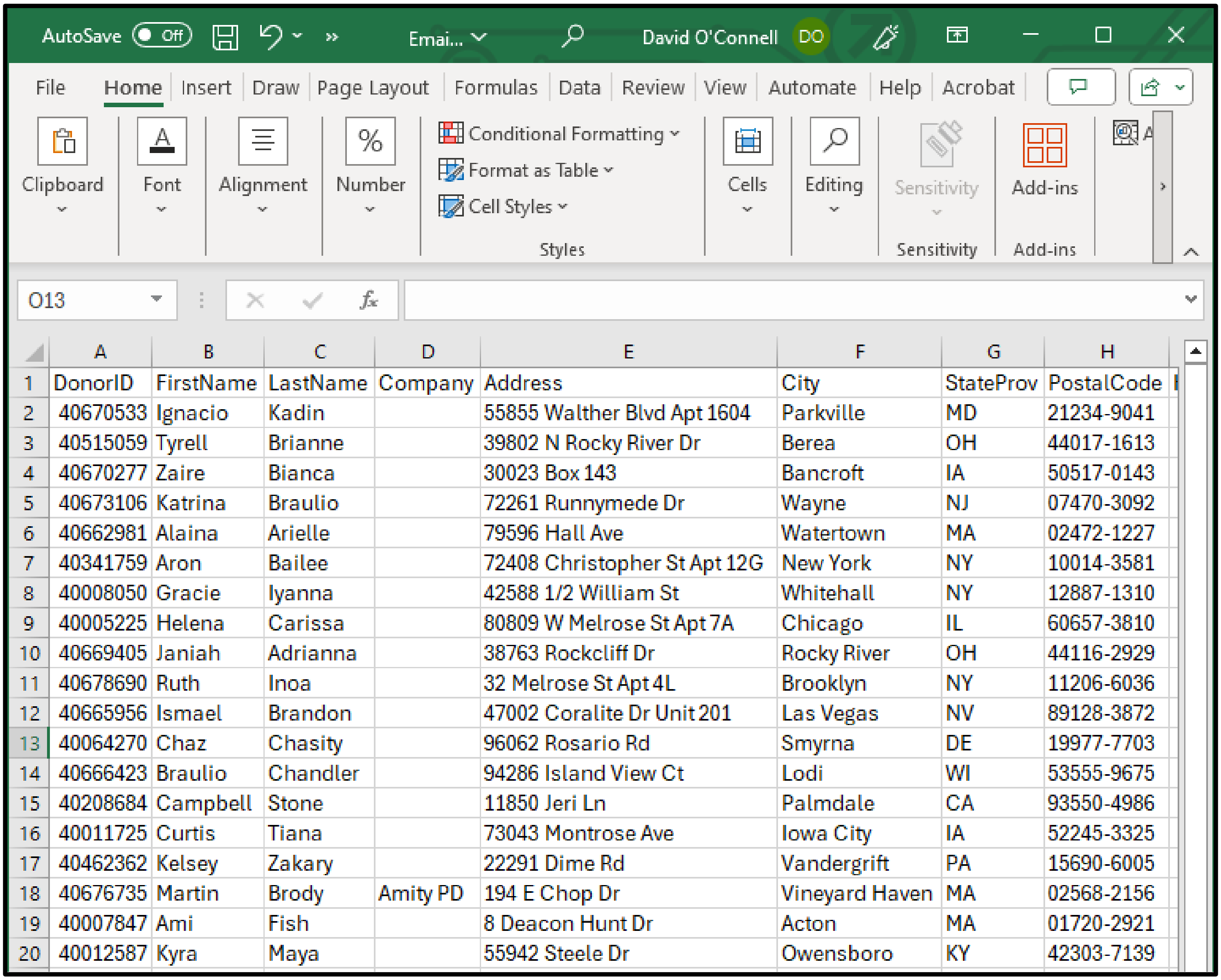
A. IF **Add Partner Records to Subscription** is selected, then the File must:
    - NOT contain duplicates
    - NOT contain a Donor that is ALREADY a member of that Subscription
    - Be formatted with the following fields in Excel:

DonorID	FirstName	LastName	Company	Address	City	StateProv	PostalCode	HomePhone	BusPhone	MobilePh	Email
40669405	Janiah	Adrianna		38763 Rockcliff Dr	Rocky River	OH	44116-2929	(403) 767-8890			JaniahAdrianna@demo-data.com
40678690	Ruth	Inoa		32 Melrose St Apt 4L	Brooklyn	NY	11206-6036			(781) 785-4433	Inoaruth@demo-data.com
40007847	Ami	Fish		8 Deacon Hunt Dr	Acton	MA	01720-2921				afish@demo-data.com
40012587	Kyra	Maya		55942 Steele Dr	Owensboro	KY	42303-7139				debbydlee@demo-data.com

B. **RECOMMENDED:** Aegis strongly suggests users create a Subscription import Query to aid with setting up the adding of new subscribers.
This Query would:
    1. Use the **Contacts** Query Type
    2. Include AT LEAST the **Fields** listed in the screenshot above as **Output**
    3. Have **Criteria** set up so that it brings back users that do NOT currently have the desired Subscription to Add.
        a. This can be done by setting up Criteria using the Subscription folder and filters that Is Not Equal to the Subscription the user wishes to add the users to - see screenshots below.

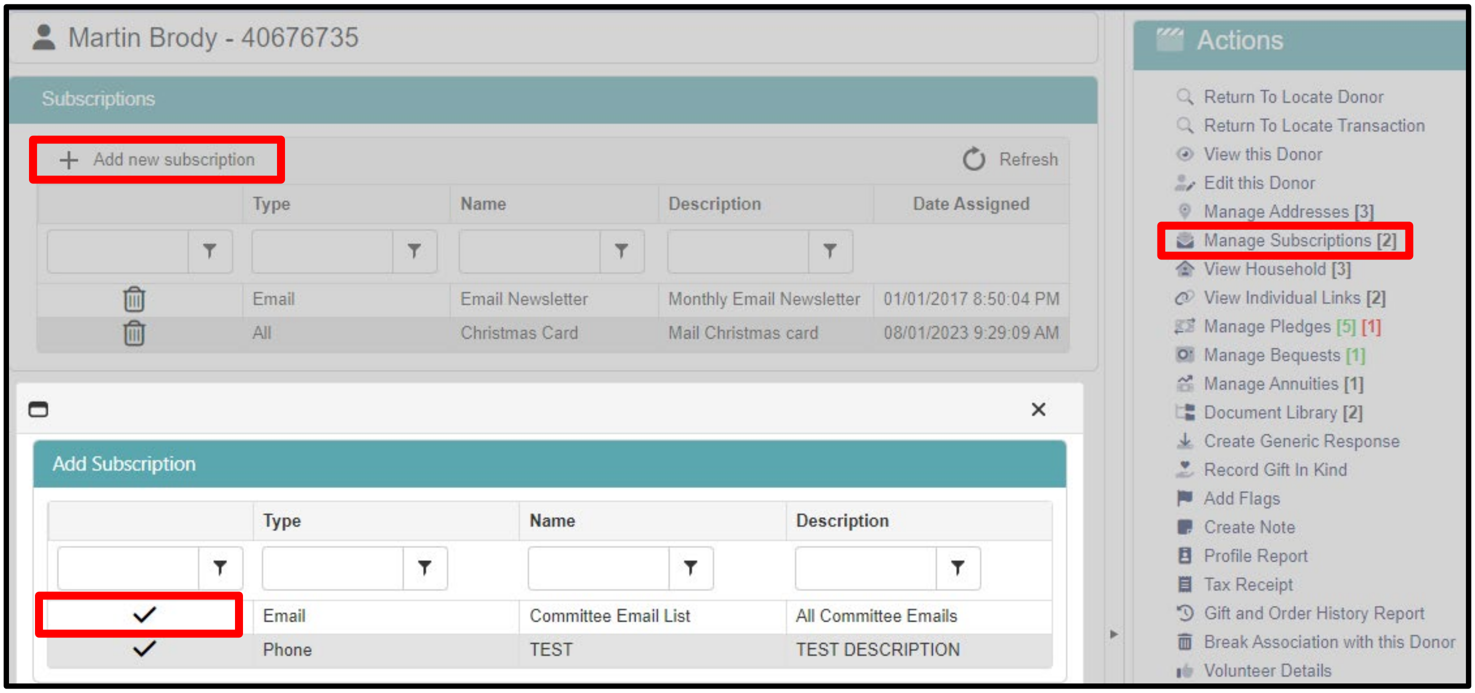


5. Users can also click on the **Partner ID Export (CSV)** to create a download (Export) of an Excel CSV file to save or distribute.
    - This file contains <u>all the current Donors that have this Subscription</u> associated with their **Donor** Record.



DonorID	FirstName	LastName	Company	Address	City	StateProv	PostalCode
40670533	Ignacio	Kadin		55855 Walther Blvd Apt 1604	Parkville	MD	21234-9041
40515059	Tyrell	Brianne		39802 N Rocky River Dr	Berea	OH	44017-1613
40670277	Zaire	Bianca		30023 Box 143	Bancroft	IA	50517-0143
40673106	Katrina	Braulio		72261 Runnymede Dr	Wayne	NJ	07470-3092
40662981	Alaina	Arielle		79596 Hall Ave	Watertown	MA	02472-1227
40341759	Aron	Bailee		72408 Christopher St Apt 12G	New York	NY	10014-3581
40008050	Gracie	Iyanna		42588 1/2 William St	Whitehall	NY	12887-1310
40005225	Helena	Carissa		80809 W Melrose St Apt 7A	Chicago	IL	60657-3810
40669405	Janiah	Adrianna		38763 Rockcliff Dr	Rocky River	OH	44116-2929
40678690	Ruth	Inoa		32 Melrose St Apt 4L	Brooklyn	NY	11206-6036
40665956	Ismael	Brandon		47002 Coralite Dr Unit 201	Las Vegas	NV	89128-3872
40064270	Chaz	Chasity		96062 Rosario Rd	Smyrna	DE	19977-7703
40666423	Braulio	Chandler		94286 Island View Ct	Lodi	WI	53555-9675
40208684	Campbell	Stone		11850 Jeri Ln	Palmdale	CA	93550-4986
40011725	Curtis	Tiana		73043 Montrose Ave	Iowa City	IA	52245-3325
40462362	Kelsey	Zakary		22291 Dime Rd	Vandergrift	PA	15690-6005
40676735	Martin	Brody	Amity PD	194 E Chop Dr	Vineyard Haven	MA	02568-2156
40007847	Ami	Fish		8 Deacon Hunt Dr	Acton	MA	01720-2921
40012587	Kyra	Maya		55942 Steele Dr	Owensboro	KY	42303-7139

6. As reminder, to manually associate **Donors** to a Subscription (not import), users can:
    a. Clicking on a **Donors** record.
    b. Clicking the **Manage Subscriptions** Actions menu link.
    c. Clicking on **+Add new subscription**.
    d. Clicking on the **check box** next to the desired **Subscription Type**.



7. Only the Subscriptions the Donor is **NOT** currently linked to display as choices.

Processing Appeals

The following is a list of **major steps** a user should take from start to finish in creating, processing, and deactivating a basic Solicitation Appeal.

1. Create **Acknowledgements** (**Ack**) to be leveraged in the **Solicitation** (**Sol**).
    - Check to see if Acks exist already.
    - If existing Acks don't quite fit - Copy them and modify.

2. Create the **Solicitation**.
    - Best practice – COPY an existing Sol.

3. Link **Acknowledgements** to the **Solicitation** (see Step 1).
    - If copied from previous Sol, can choose to leave as is or edit.

4. Create/Edit the **Pull**.
    - If copied from previous Sol, can choose to leave as is or edit.
    - Users may also copy from previous Sol ONLY the Pull.

5. Click the **Refresh/Run Counts** button from **Pull** tab button bar to populate **Segments**.

6. Build Out **Additional Sol Tabs** – Packages, Segment Groupings, & Docs.
    - If copied from previous Sol, can choose to leave as is or edit.
    - At this point, Permissions tab values are NOT copyable.

7. Enter a **Mail Date** on the **Global Attributes** segment.

8. IF **Solicitation** is ready to process: Click on the **Finalize Pull** (or **Schedule Pull**) button from **Pull** tab button bar.

9. IF not previously done, users set **Appeal** as **Active** so available in **Rapid Entry**.

10. IF set up correctly, **Export** file will be sent to Mailing service with Solicitations.
    - IF users need to manually generate an Export file, they can click on Pull dropdown, Export option.

11. **Solicitations** Mailed by mail vendor. **Donors** respond – transactions logged in **Rapid Entry/Imported** to CRM.

12. **Pending Acks** generated as a result of **Transactions** under **Fulfillment>Pending Acks**.

13. Under **Fulfillment>Pending Acks**, users **Prepare Selected Acks** and send to **Fulfillment>Prepared Acks**.

14. From **Fulfillment>Prepared Acks**, users Export the Data file to Mailing service and/or Major Donor Officers.

15. Once the Appeal has passed **its End Date**, users should mark it as **Not Active,** so **Transactions** are not taken against it via **Rapid Entry** or **Imports**.