CRM Tributes Management Step by Step Guide

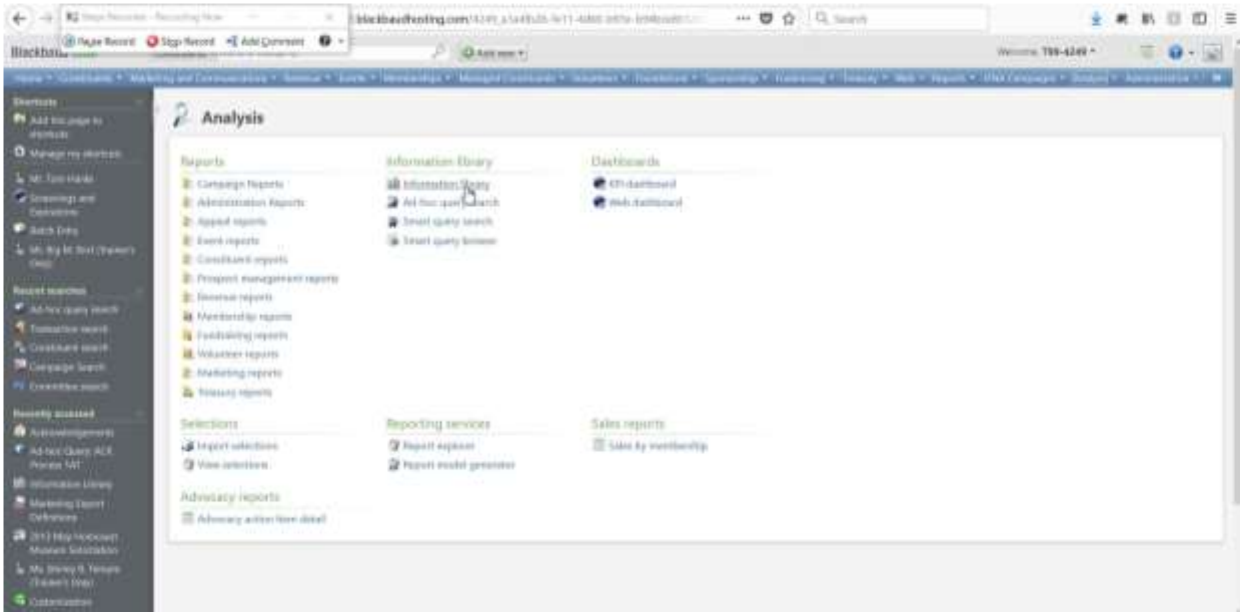
Contents

NOTE: Setting up tributes is a complex process requiring many steps. Sections 1-5 are steps that will be required only once upon setup ONLY. Sections 6-9 will show you how to process tributes after setup has been completed.

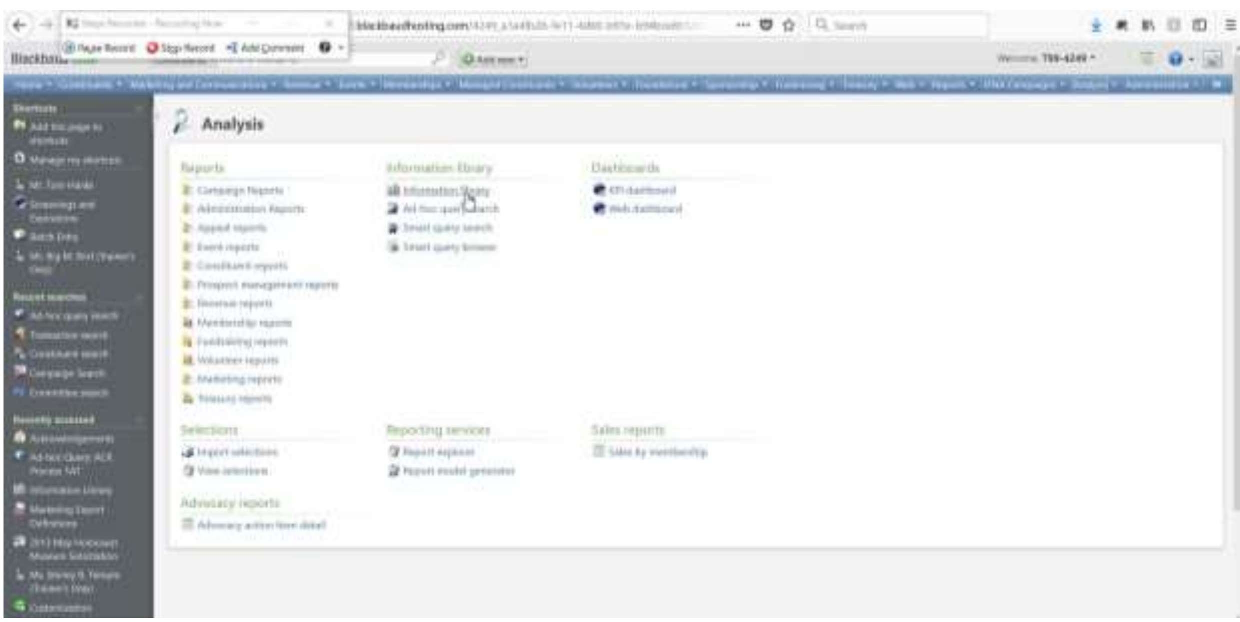
Section 1: Selection Example

This section will provide you with an example for your tribute selections. (Note: this is an example only. You will need to modify this based on your Federation needs).

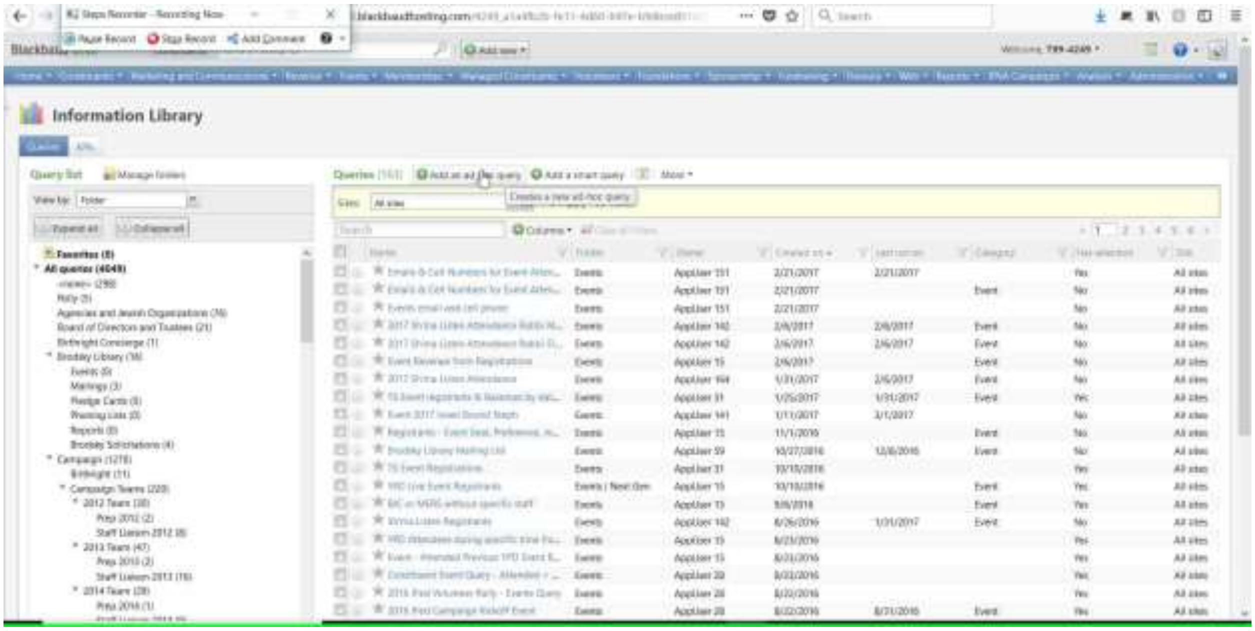
Step 1: Left click in Analysis



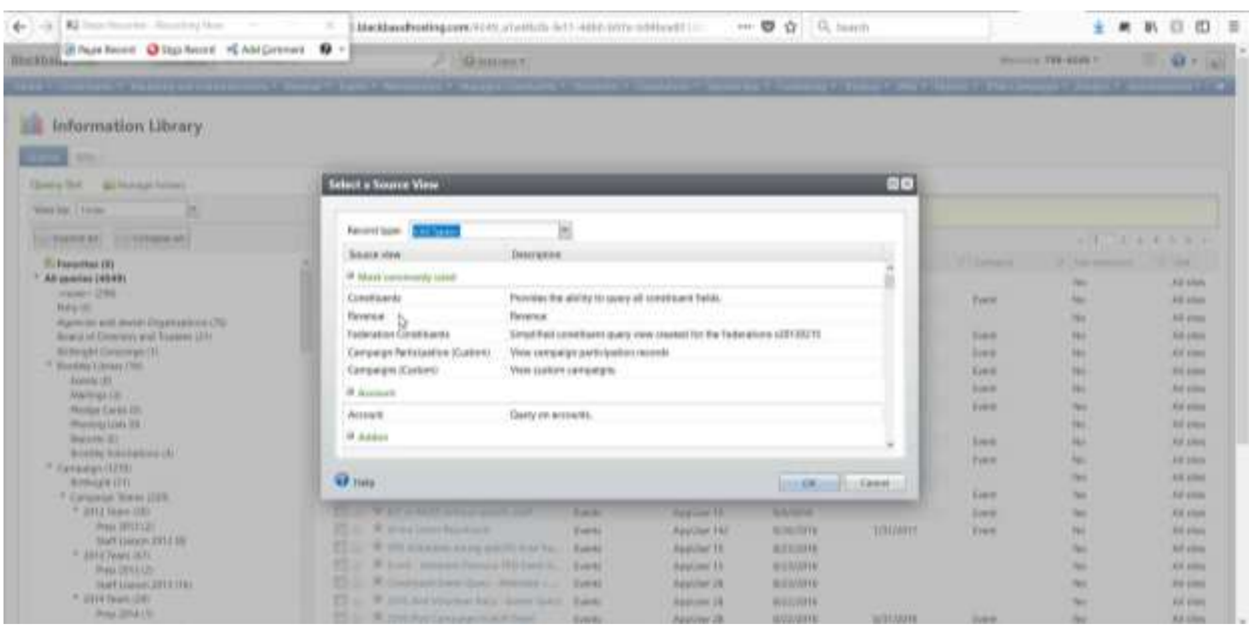
Step 2: Left click in "Information Library



Step 3: Left click Add and Ad-hoc Query



Step 4: Select Revenue under the “Most commonly used” section of the Source View.



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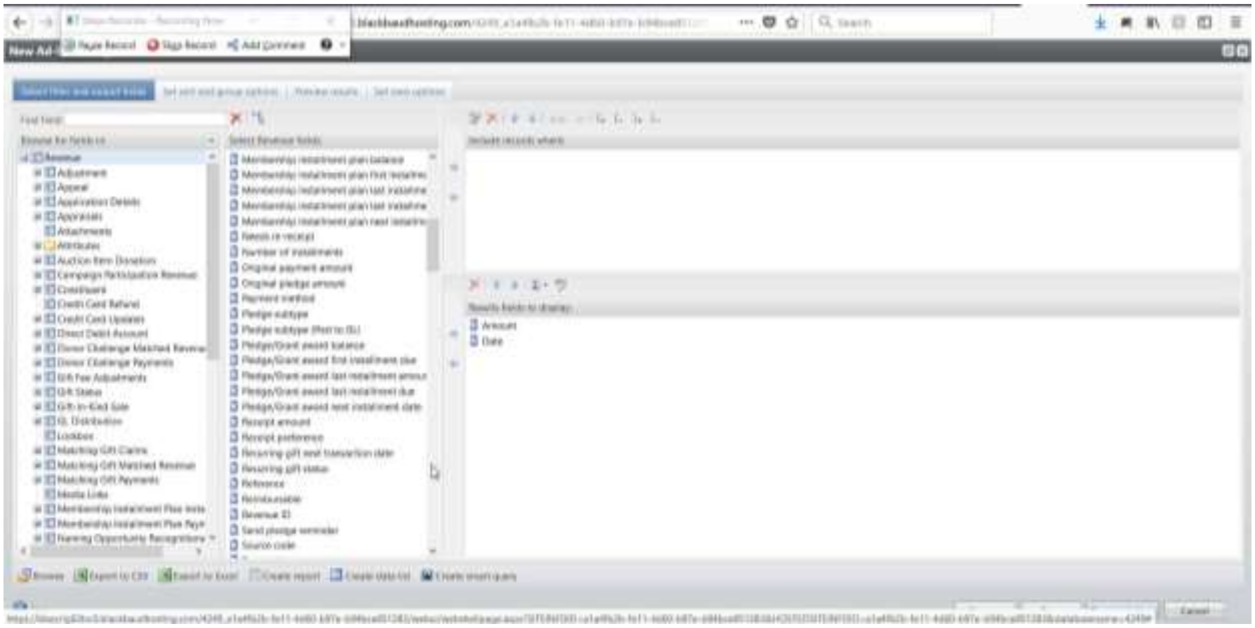
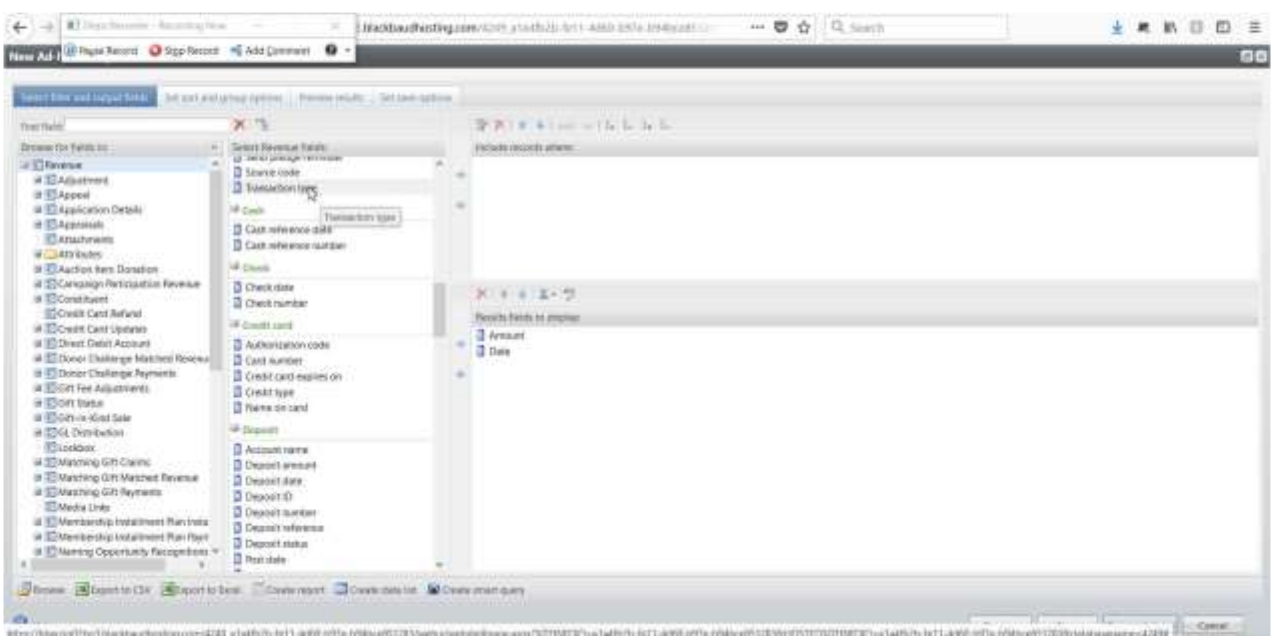
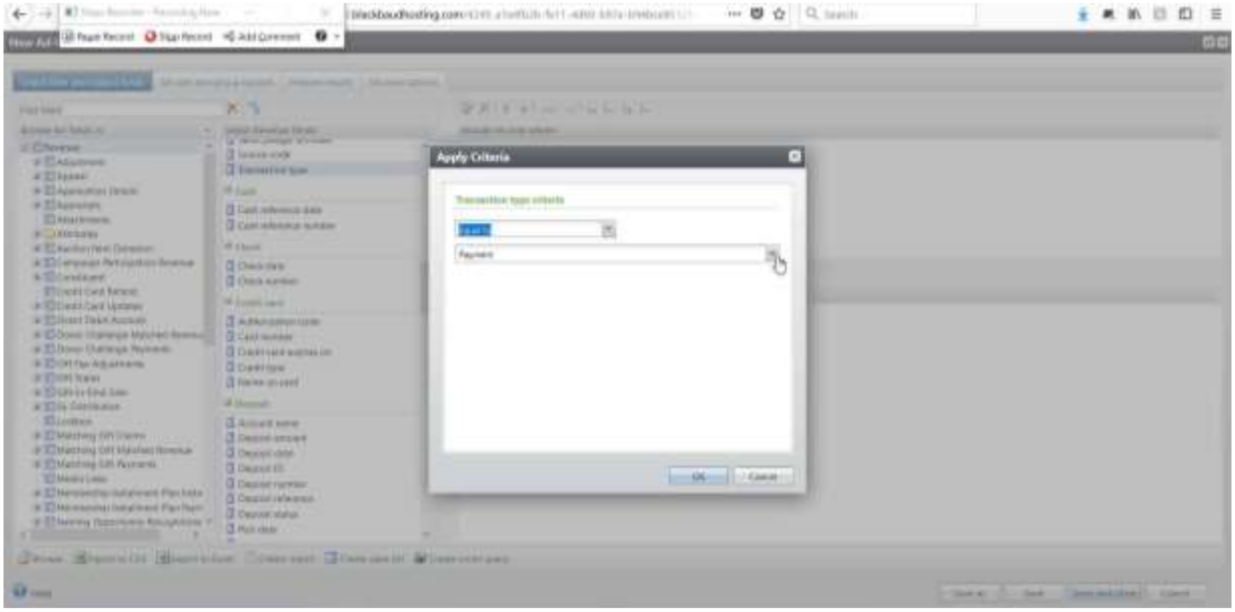
Step 5: User scroll down to the "T's" in the middle column "Select Revenue fields:"



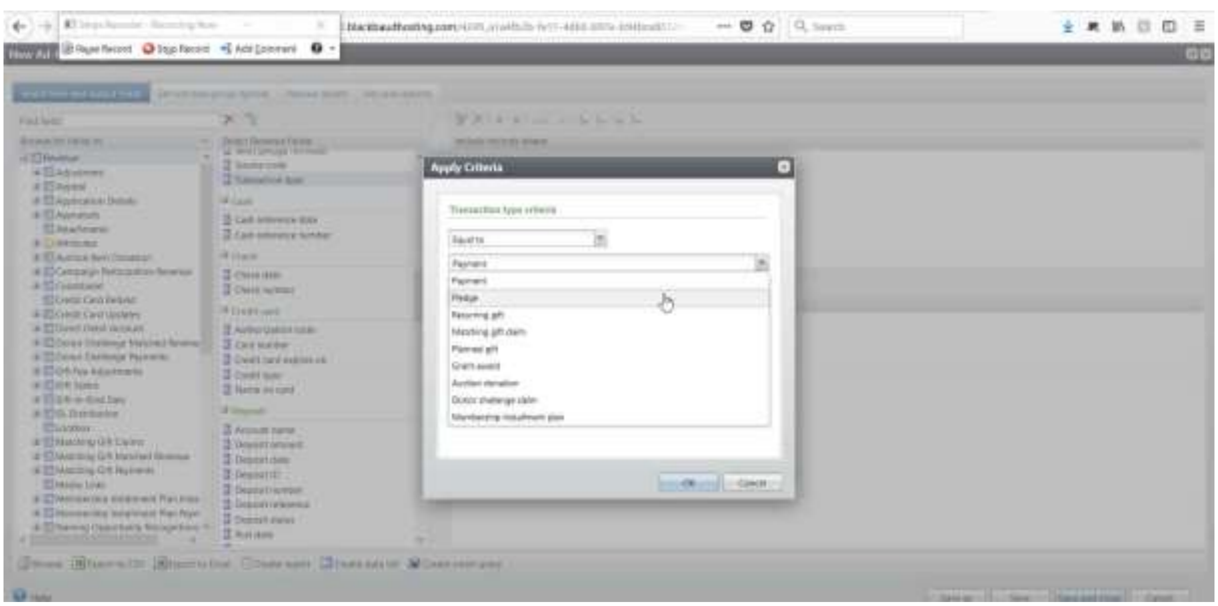
Step 6: Left double click on "Transaction Type"



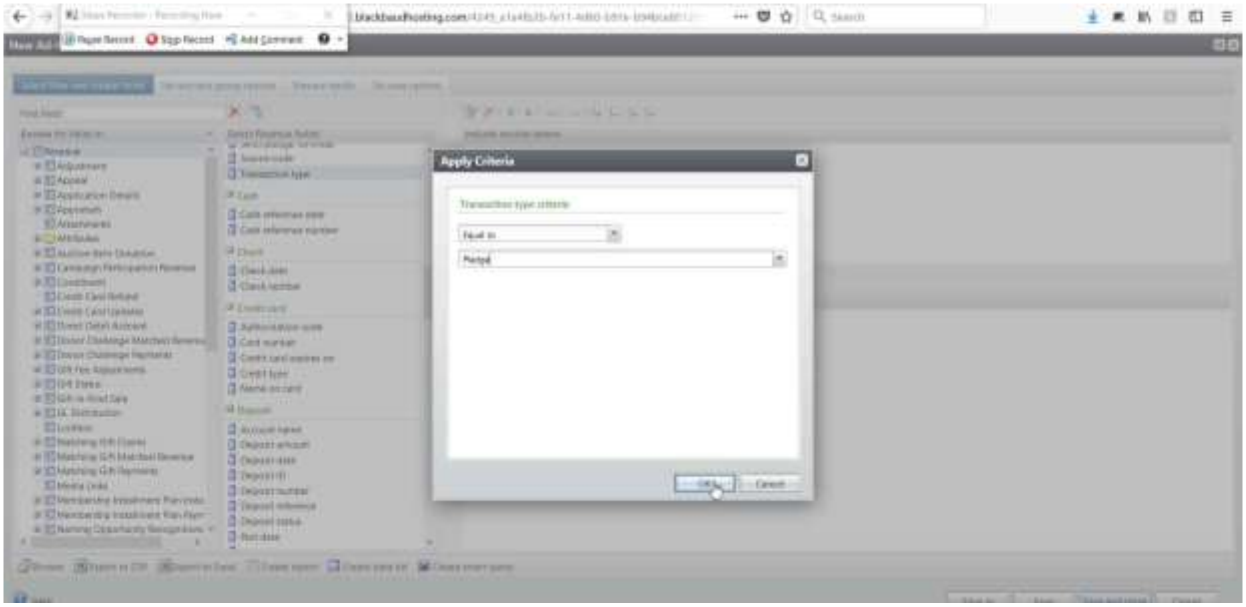
Step 7: Select “Equal to” from the drop down



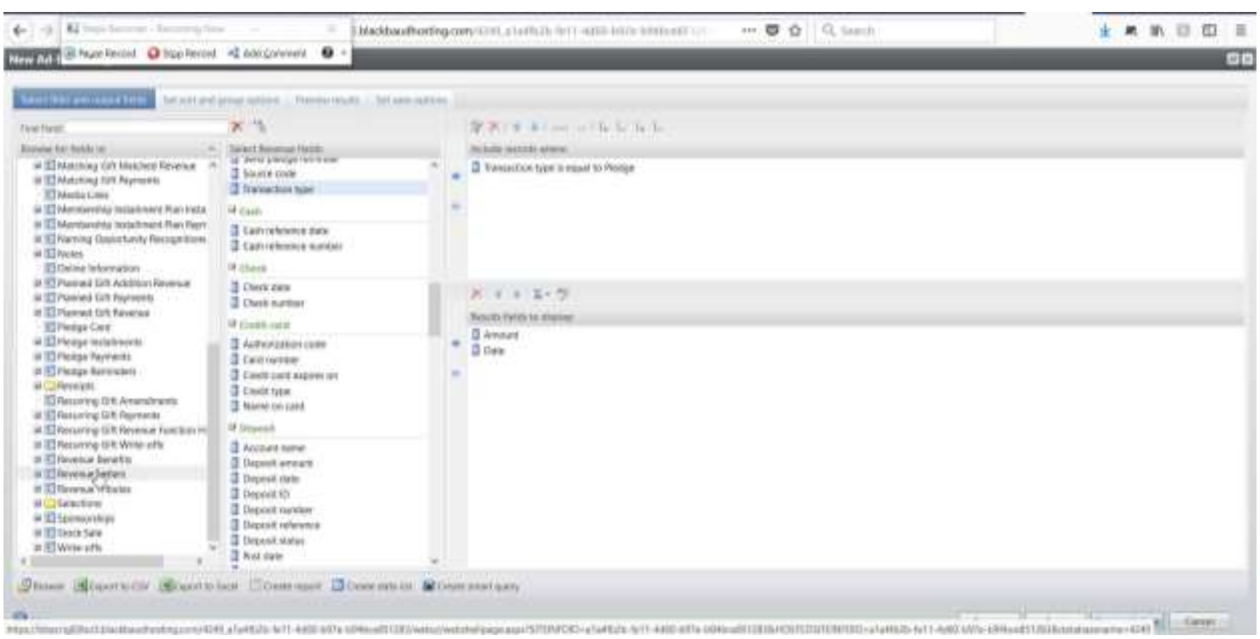
Step 8: Select Pledge from the second drop down



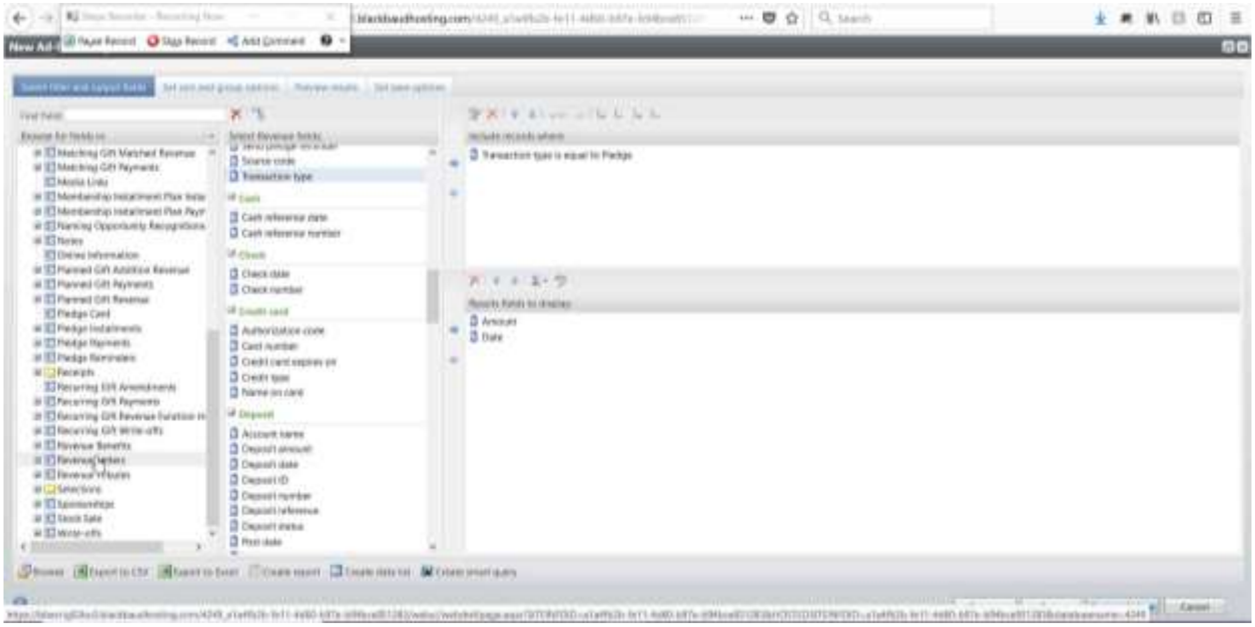
Step 9: Select Ok



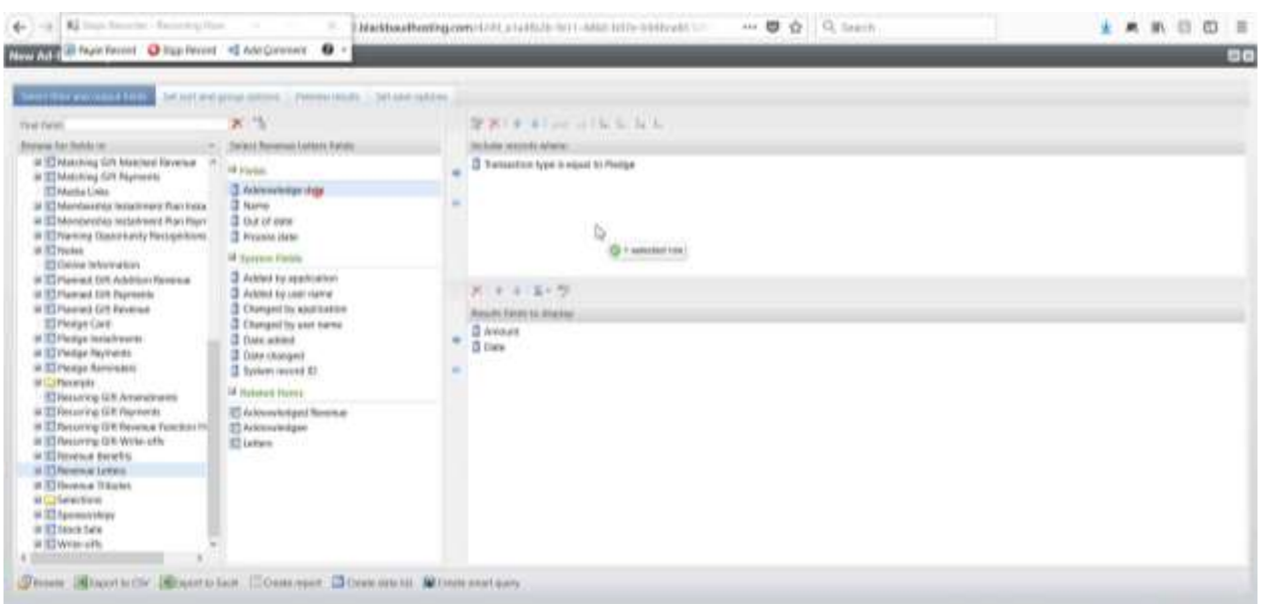
Step 10: Scroll down in the first column “Browse for fields in:” until the “R’s”.



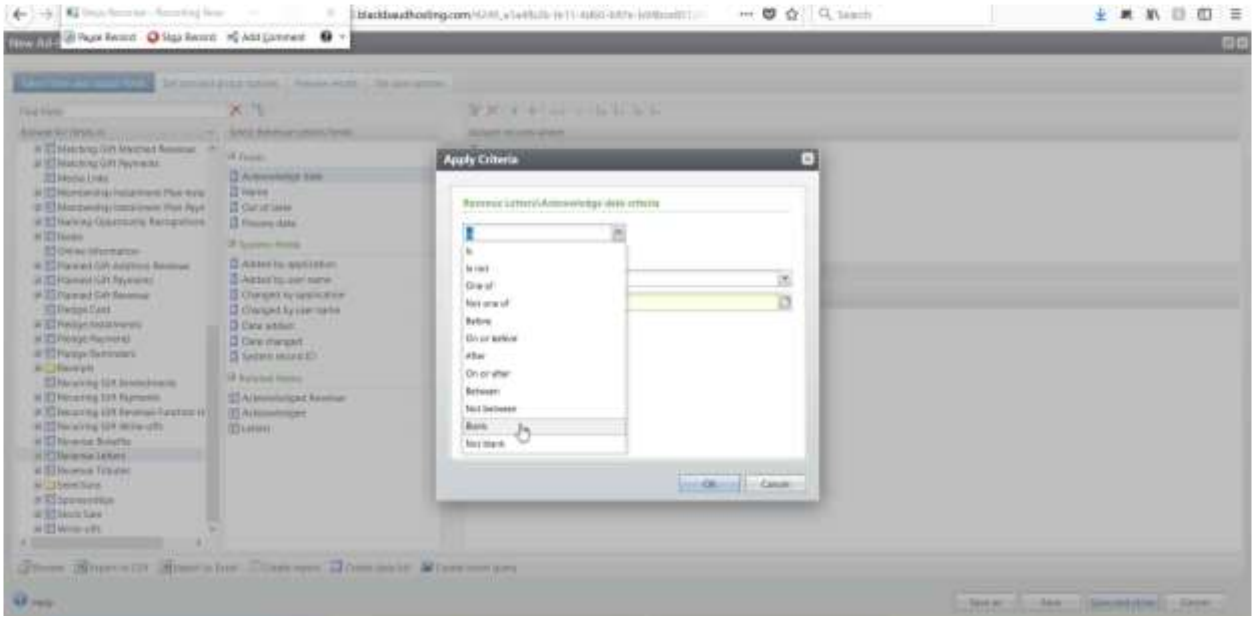
Step 11: Select "Revenue Letters" in the left hand Column "Browse for fields in".



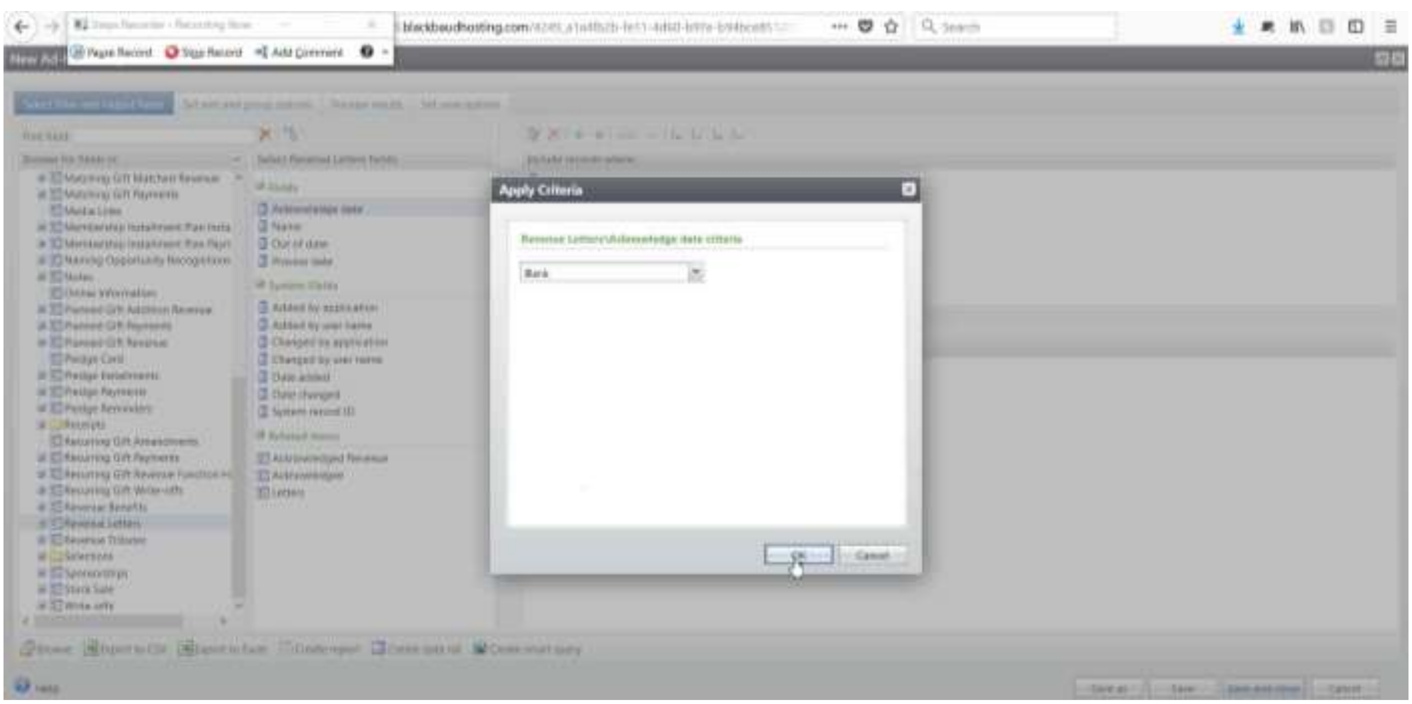
Step 12: Left double click "Acknowledgement date" from the middle column "Select Revenue Letters fields:"



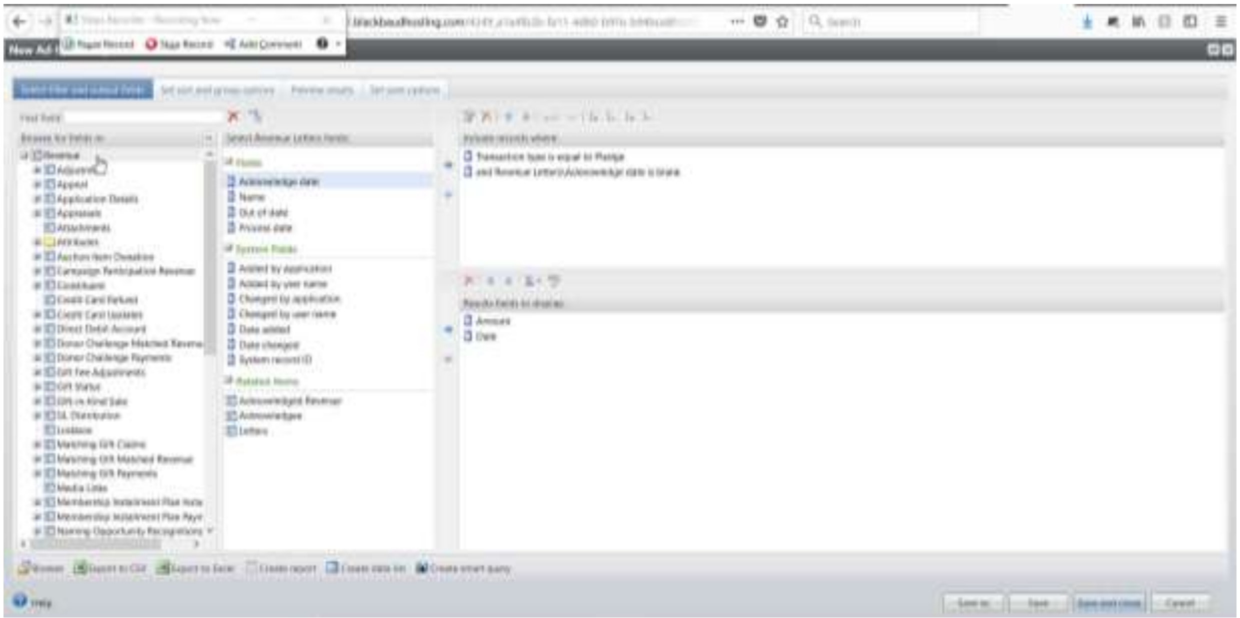
Step 13: Choose blank from the dropdown



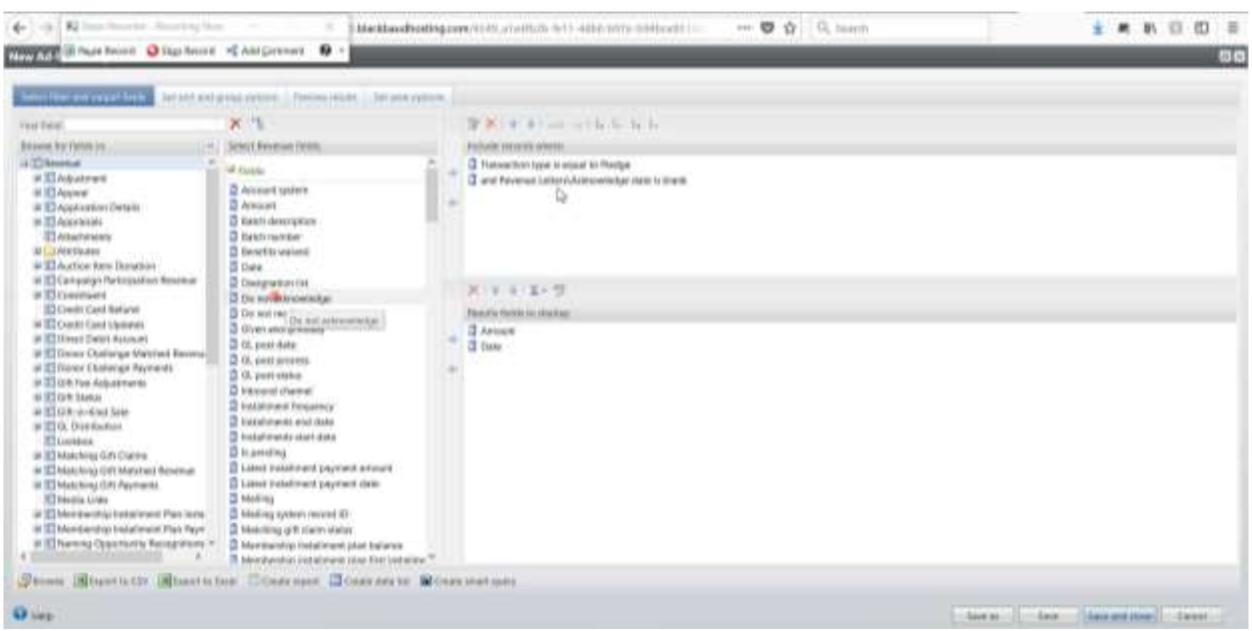
Step 14: Left click "ok".



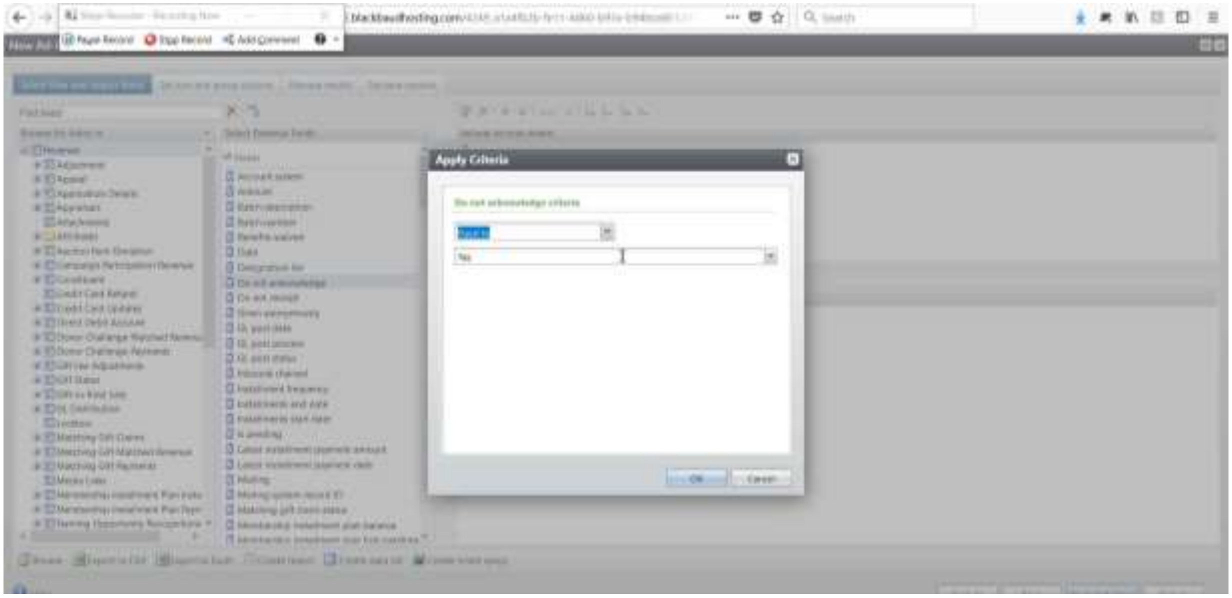
Step 15: Return to "Revenue" at the top of column one "Browse for fields in:



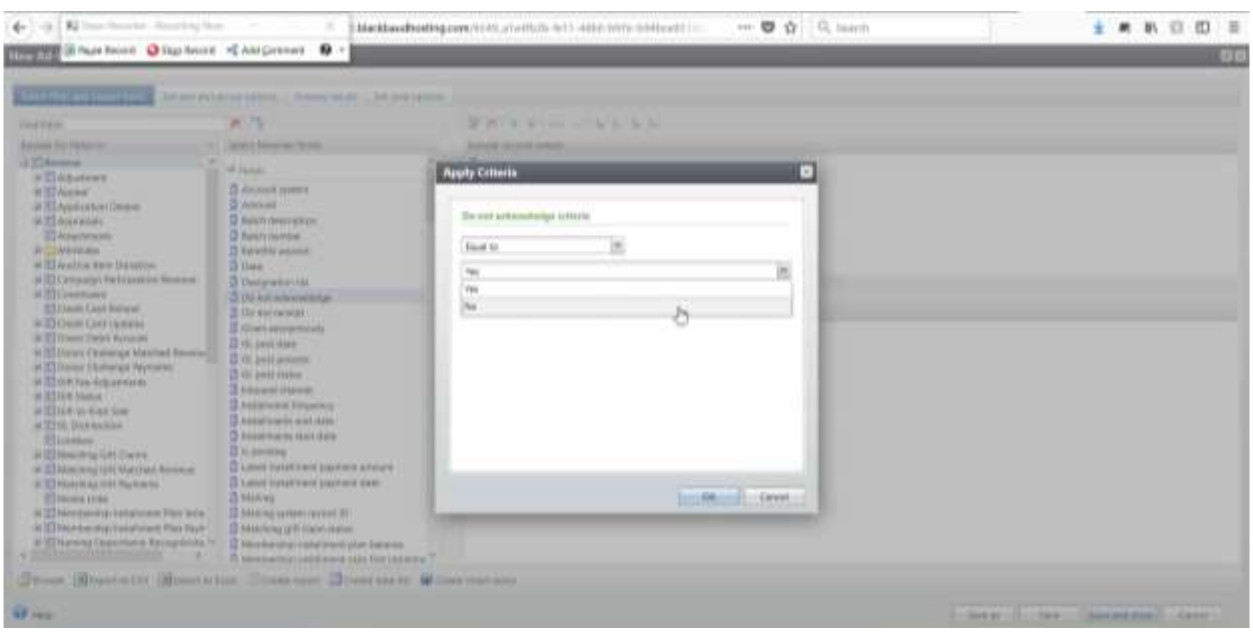
Step 16: Optional: Double click "Do not acknowledge" from the middle column "Select Revenue Letters fields:"



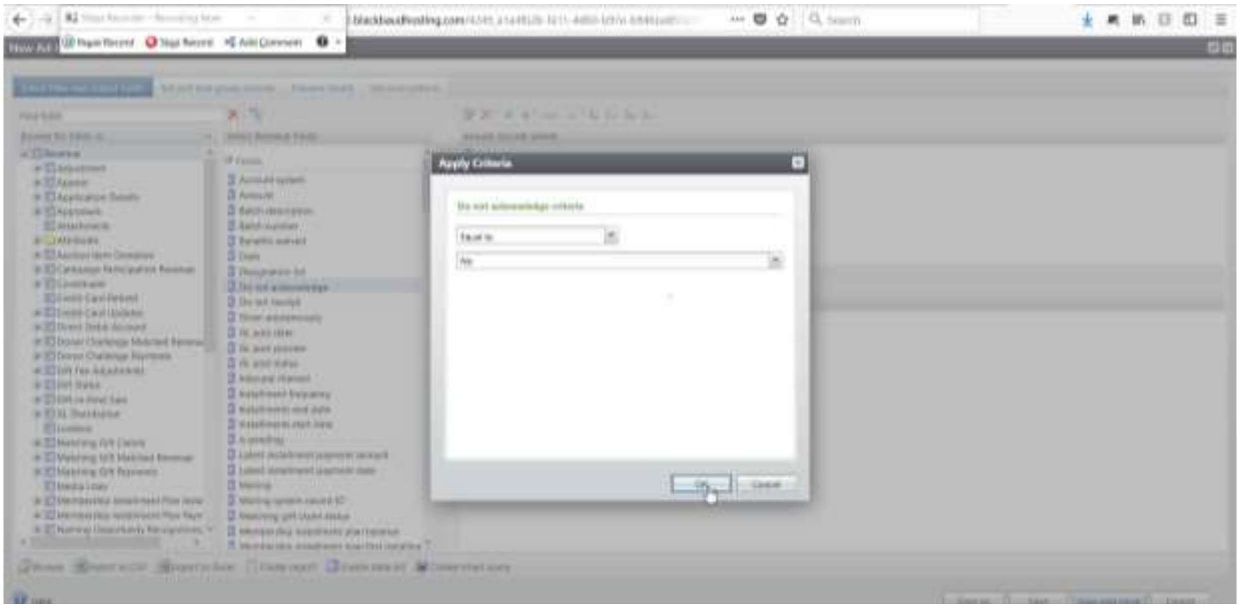
Step 17: Choose "Equal to" from the first drop down.



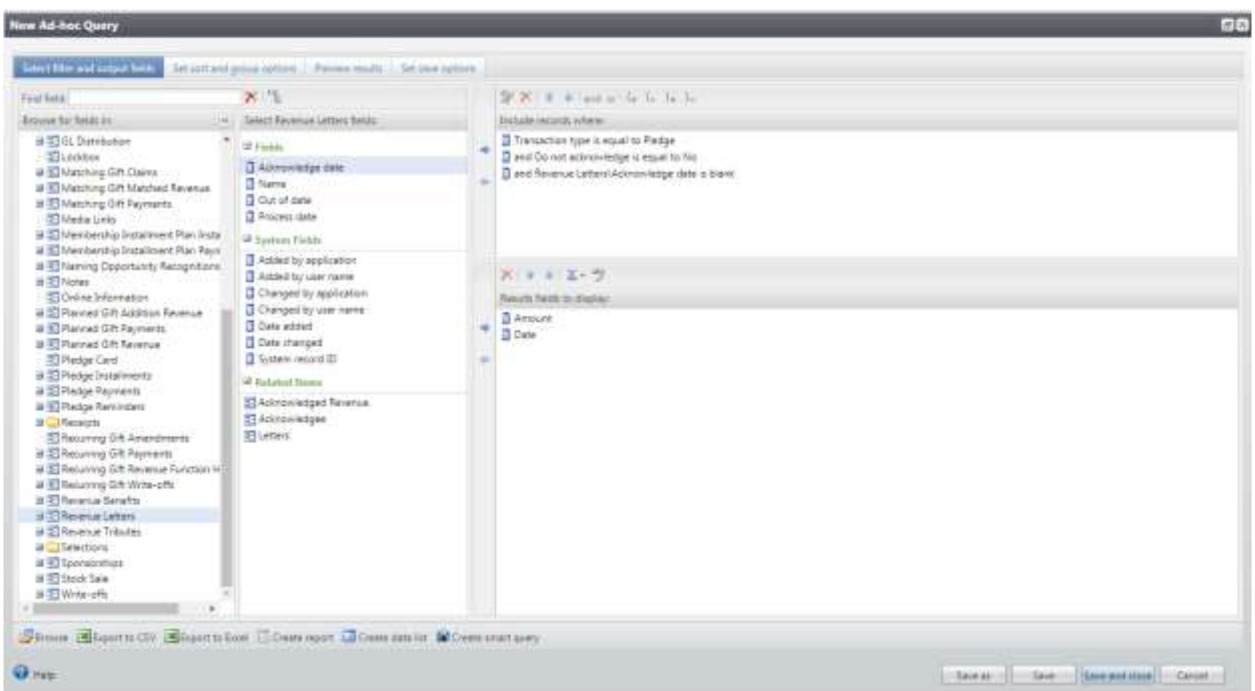
Step 18: Left Click "no" on the second dropdown, to omit those who do not want to be acknowledged.



Step 19: Left click “ok”.

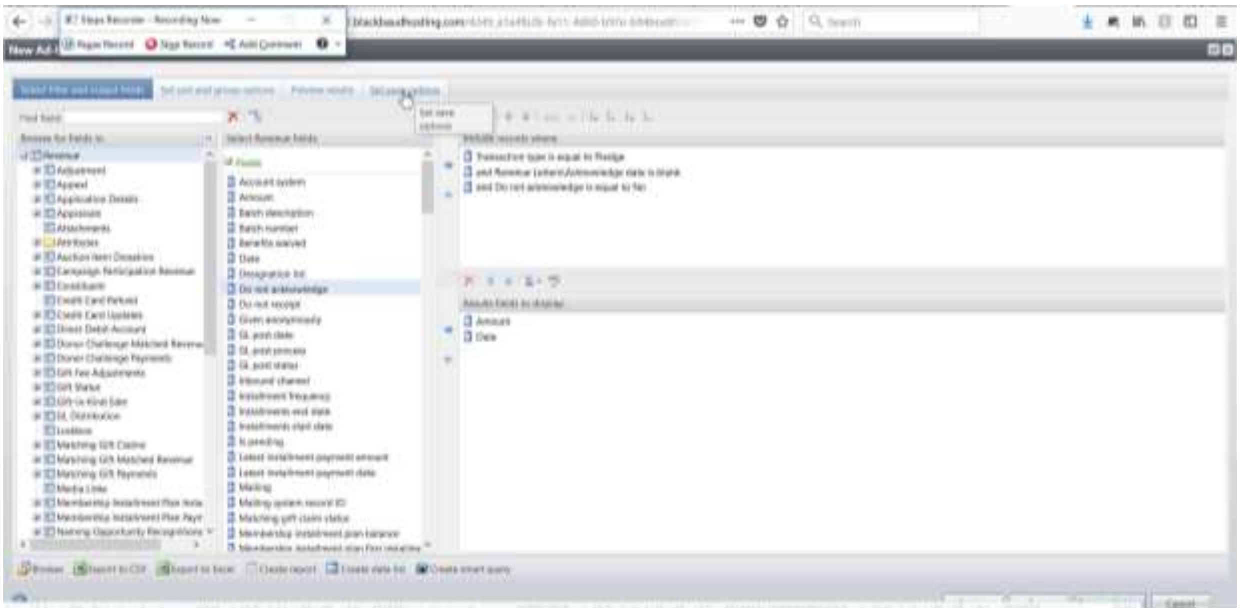


Step 20: Left click on the Preview results tab.

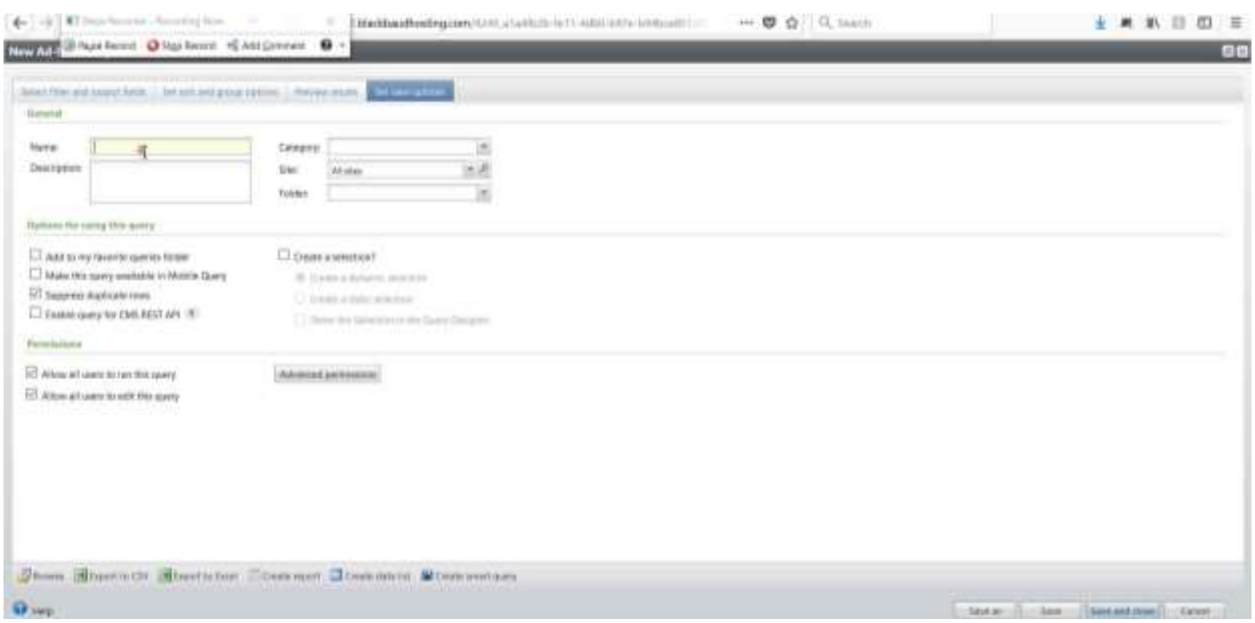


Step 21: Confirm the results equal what you expected. If not review your query until you receive the results desired.

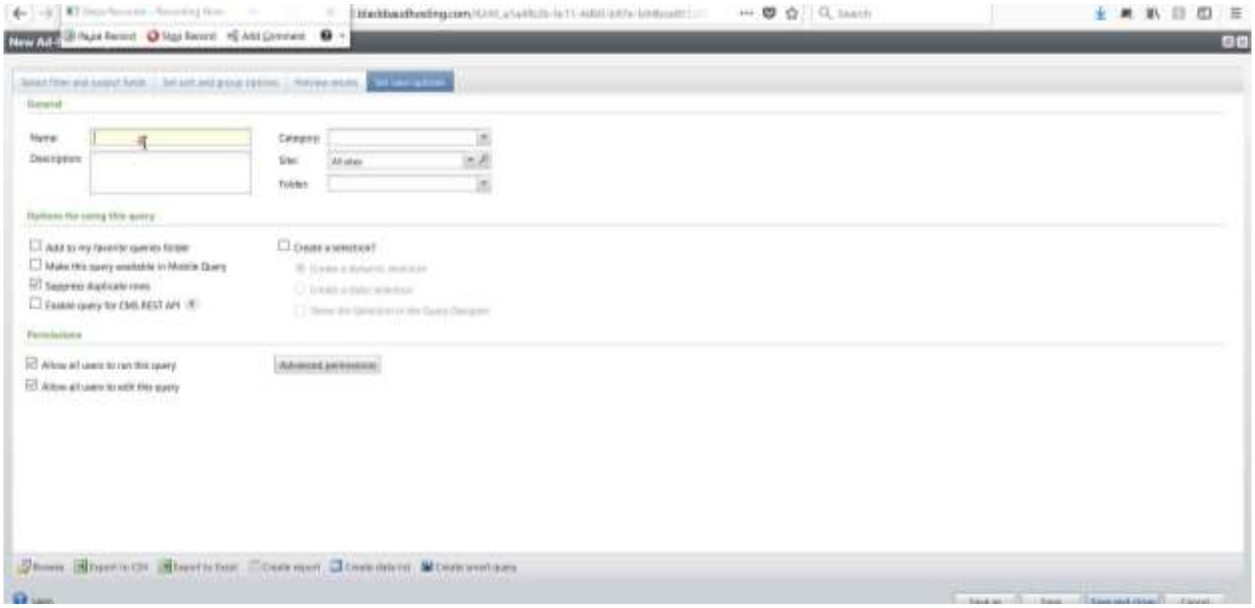
Step 22: Left click on “Set save options”.



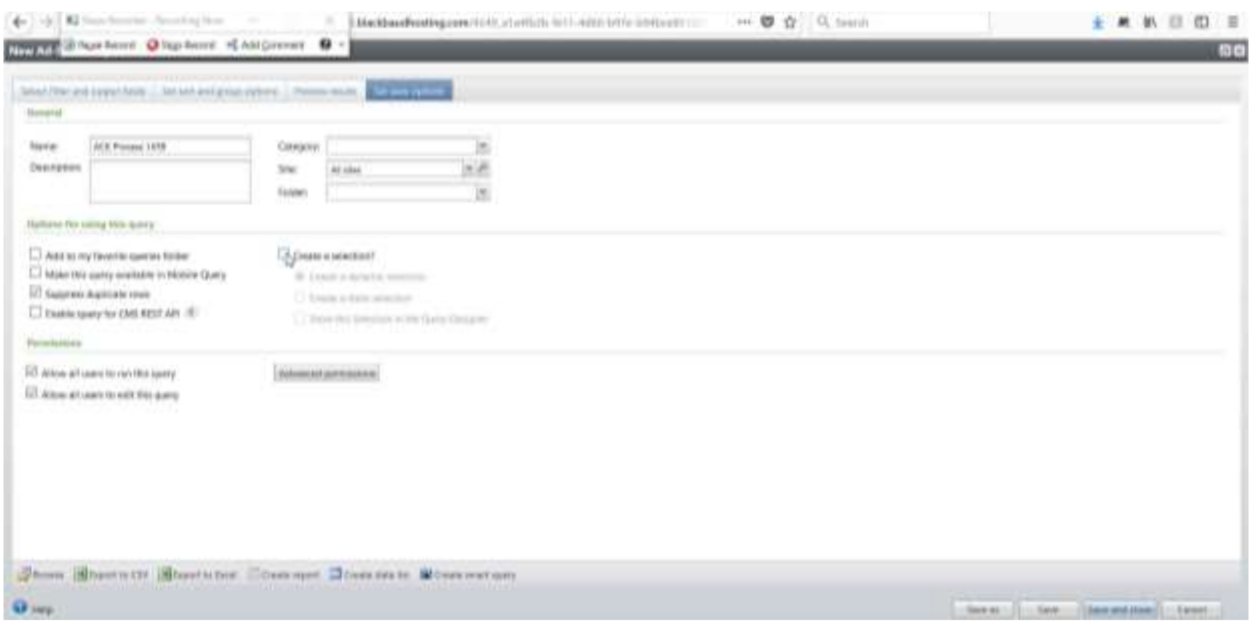
Step 23: Enter the name of the selection in the “Name Field”. Be sure to use your Federation naming conventions/format.



Step 24: Optional: Select a Category from the drop down if desired.

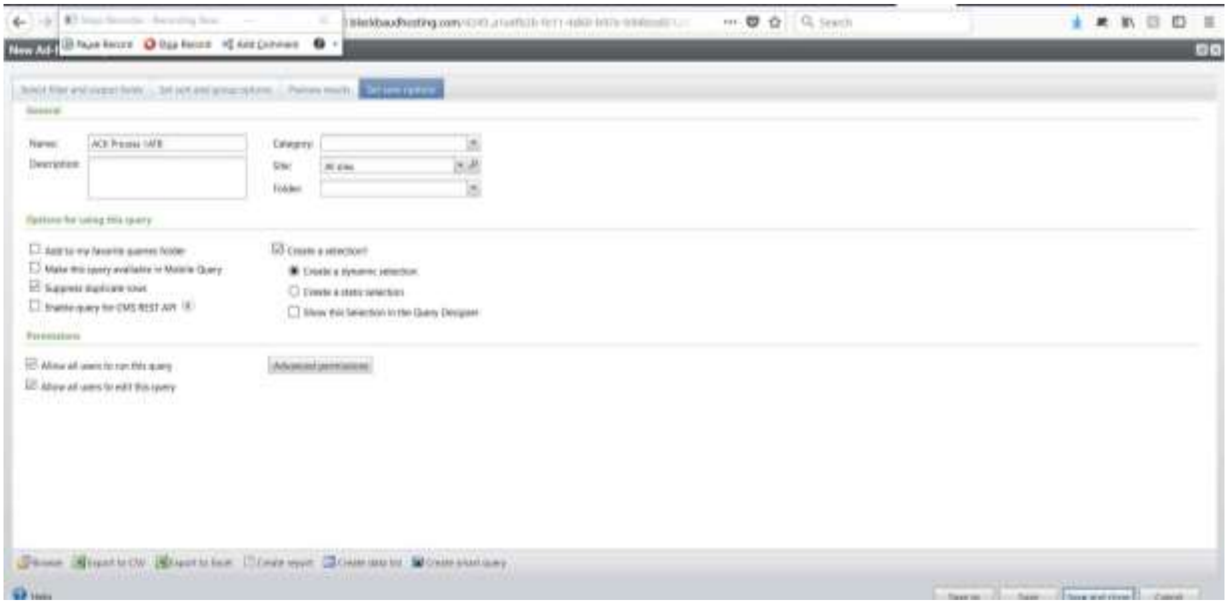


Step 25: Left click "Create a selection?"



Previous Next

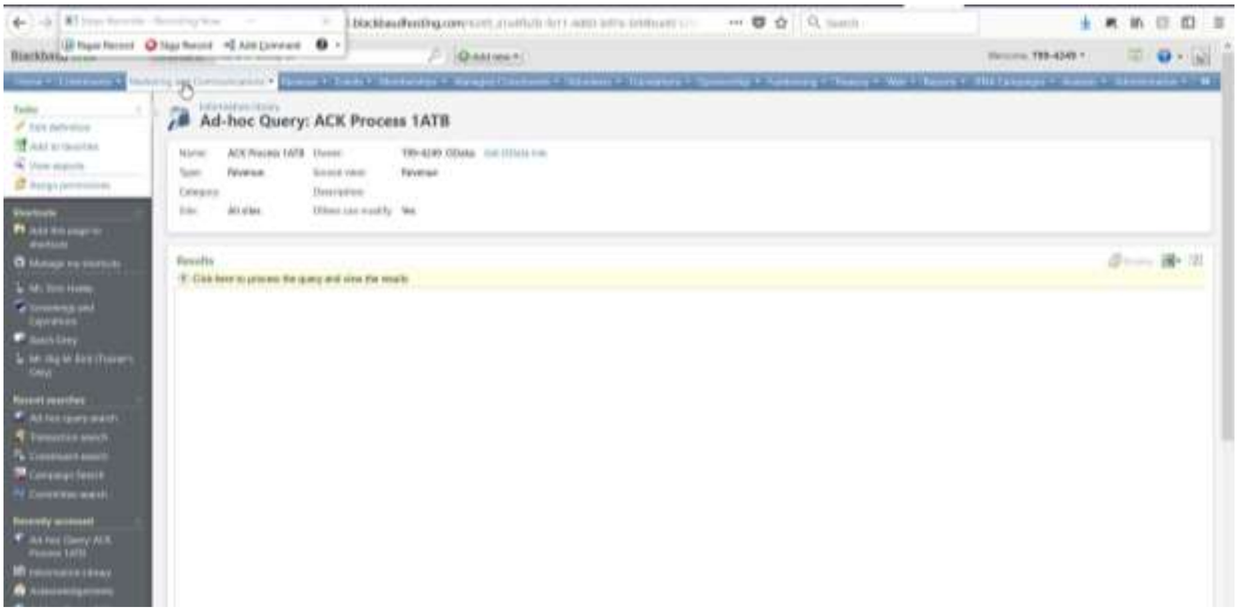
Step 26: If not selected, left click on “Create a dynamic selection”.



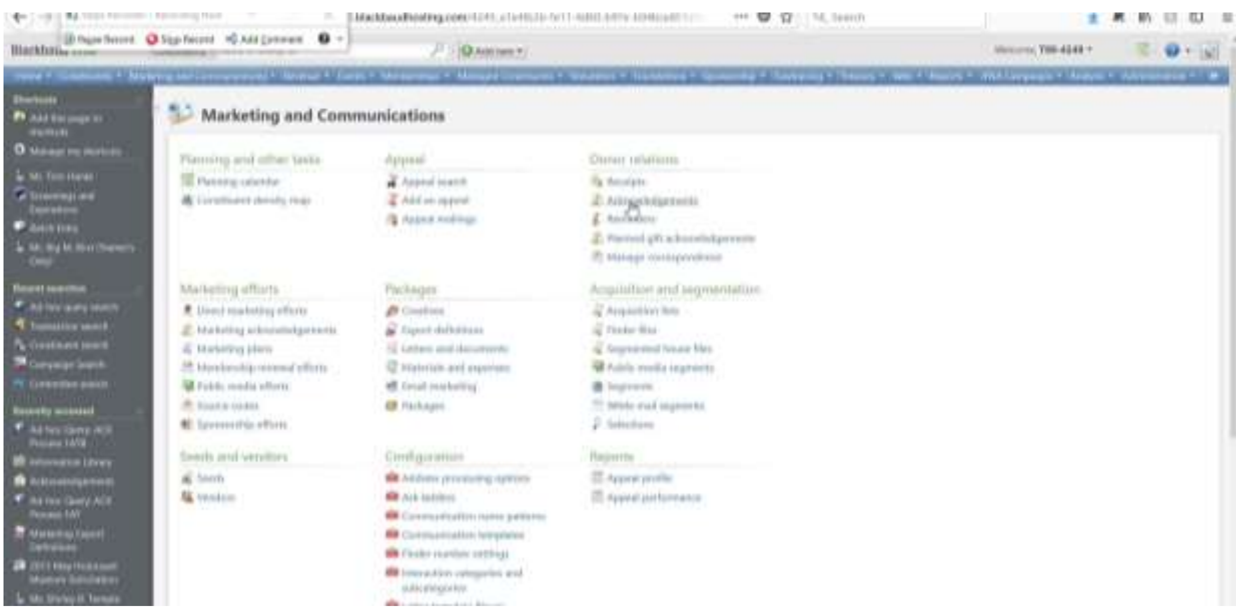
Section 2: Creating a Header File

Creating the Header file will pull information for selected fields out of the CRM system so you can place them in a merge letter in Microsoft Word. (Note: this is an example only. You will need to modify this based on your Federation needs).

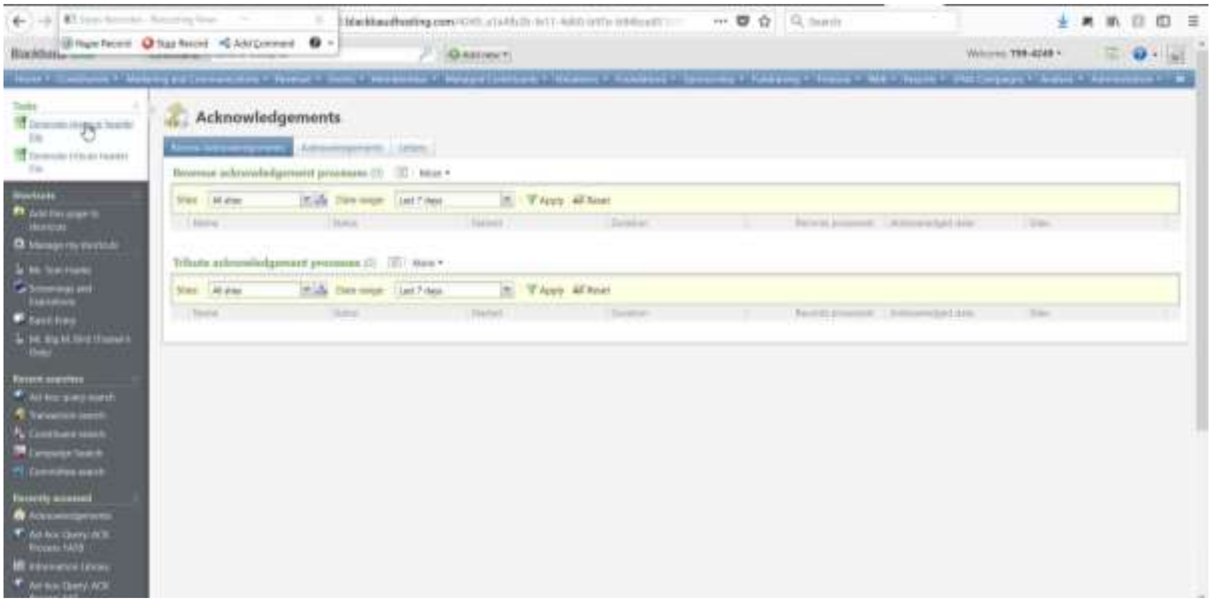
Step 1: Left click on “Marketing and Communications" functional area on the top.



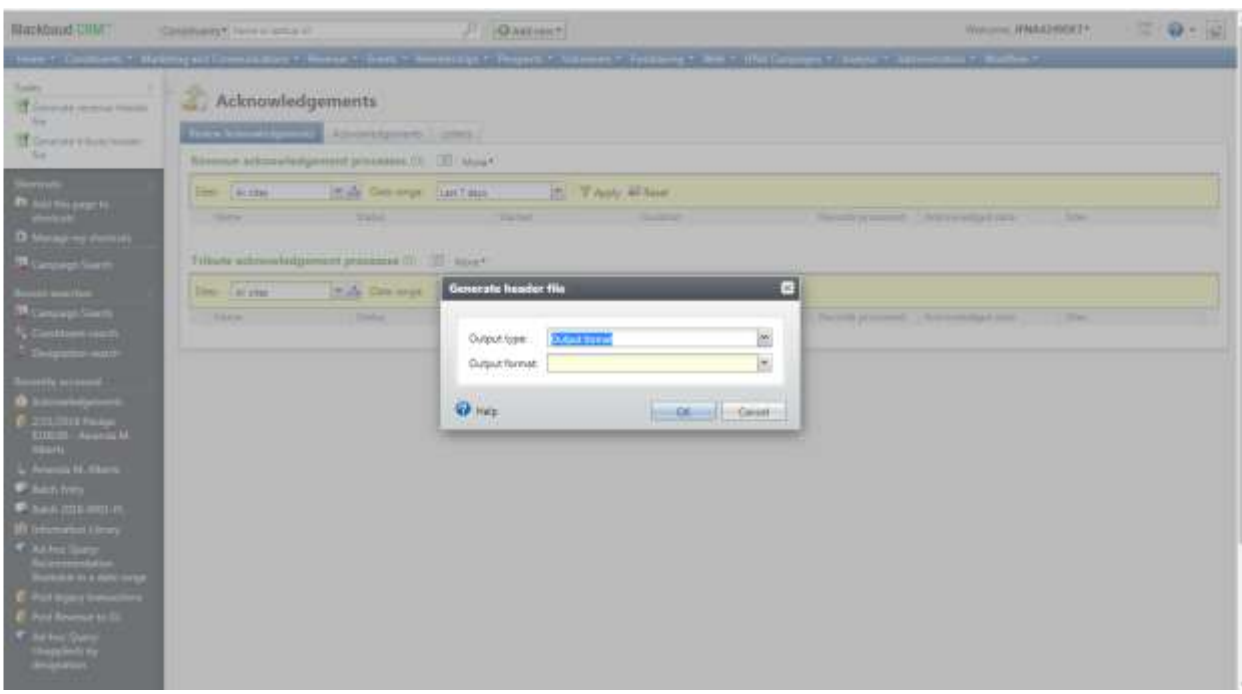
Step 2: Left click on “Acknowledgements” in the “Donor relations” section



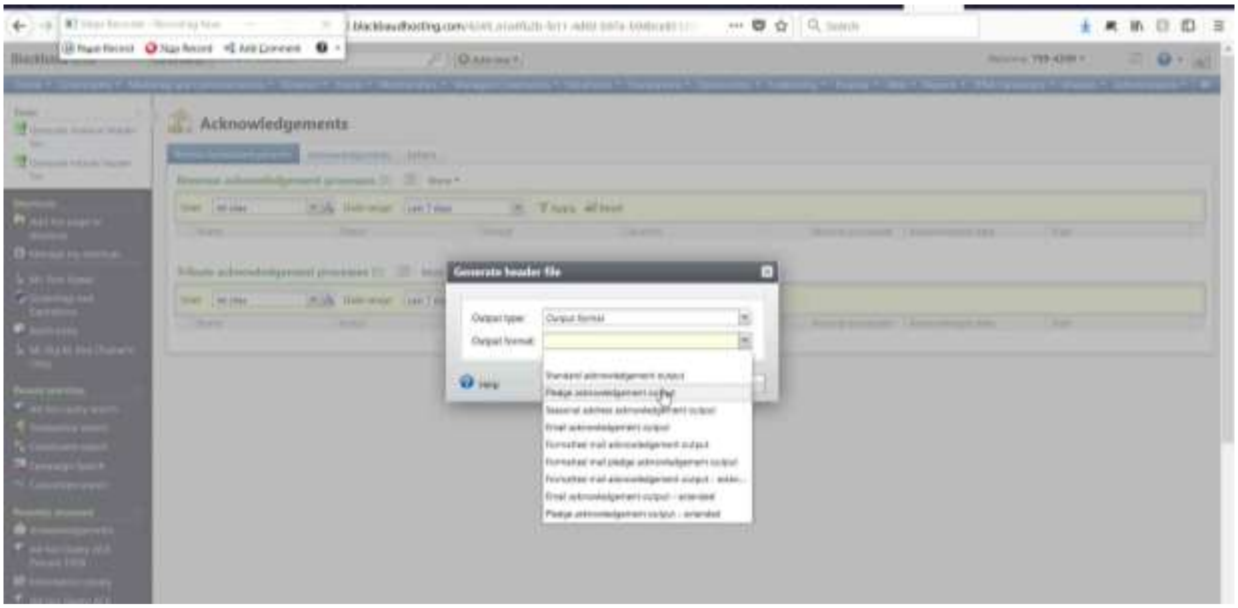
Step 3: Left click “Generate revenue header file”.



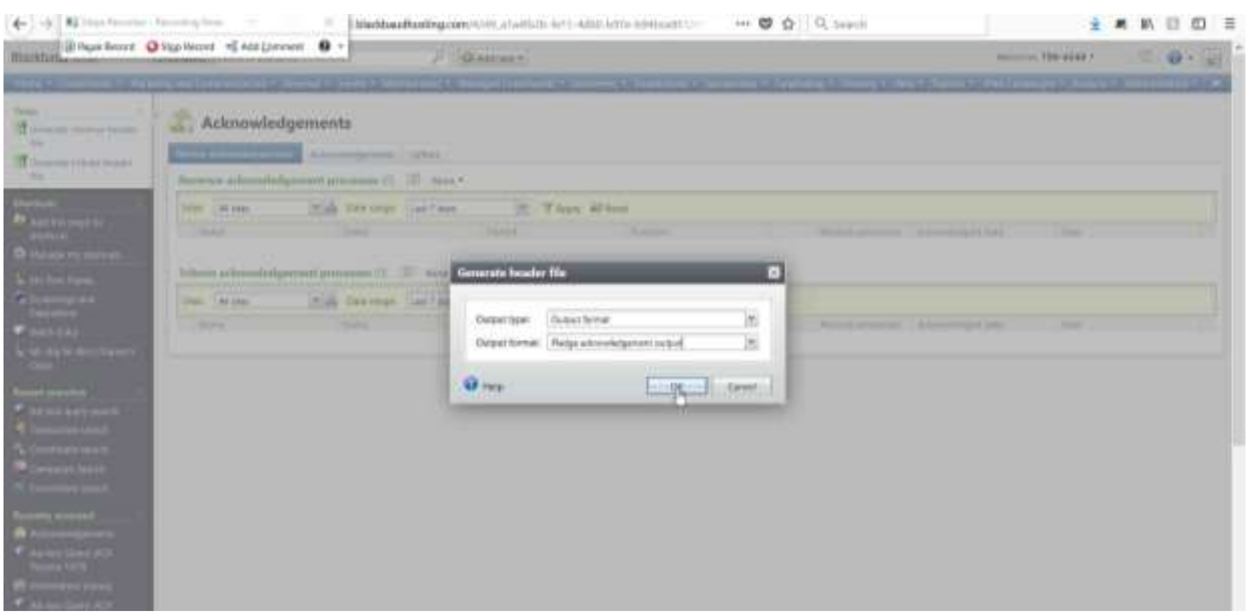
Step 4: Select “Output format” from the “Output type” drop down. (Note: For our example we will use the output format and the standard formats that are available by default from the CRM system. If the standard header files do not fit your needs, you will create an export definition. See the export definition documentation and video for further instruction.)



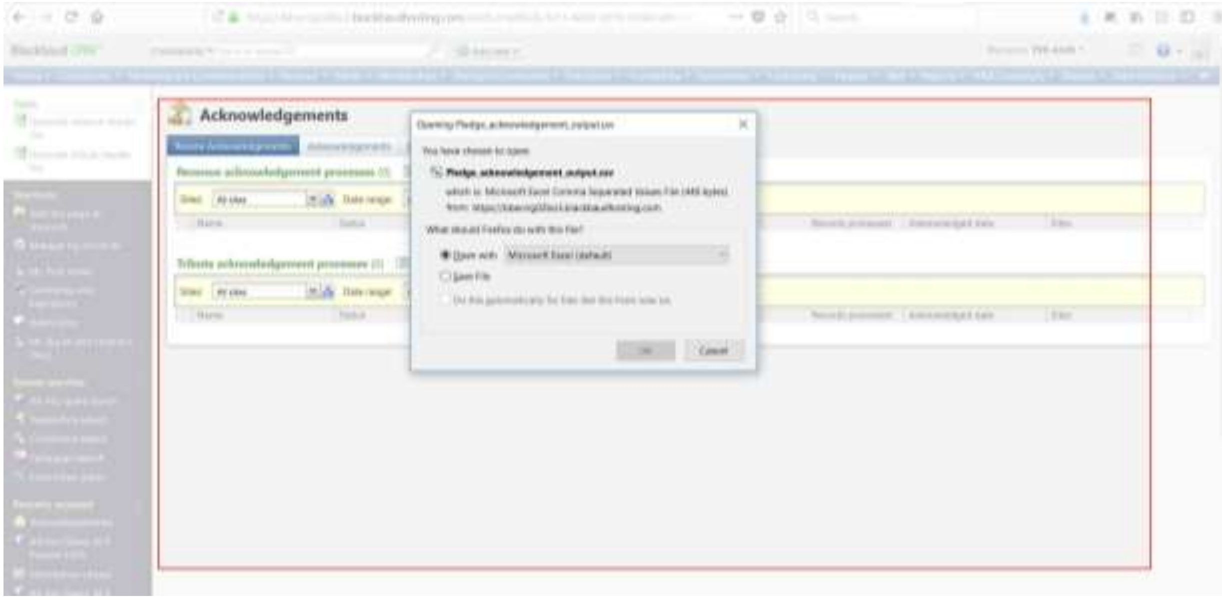
Step 5: Select “Pledge acknowledgement output” from the Output format (or your desired format).



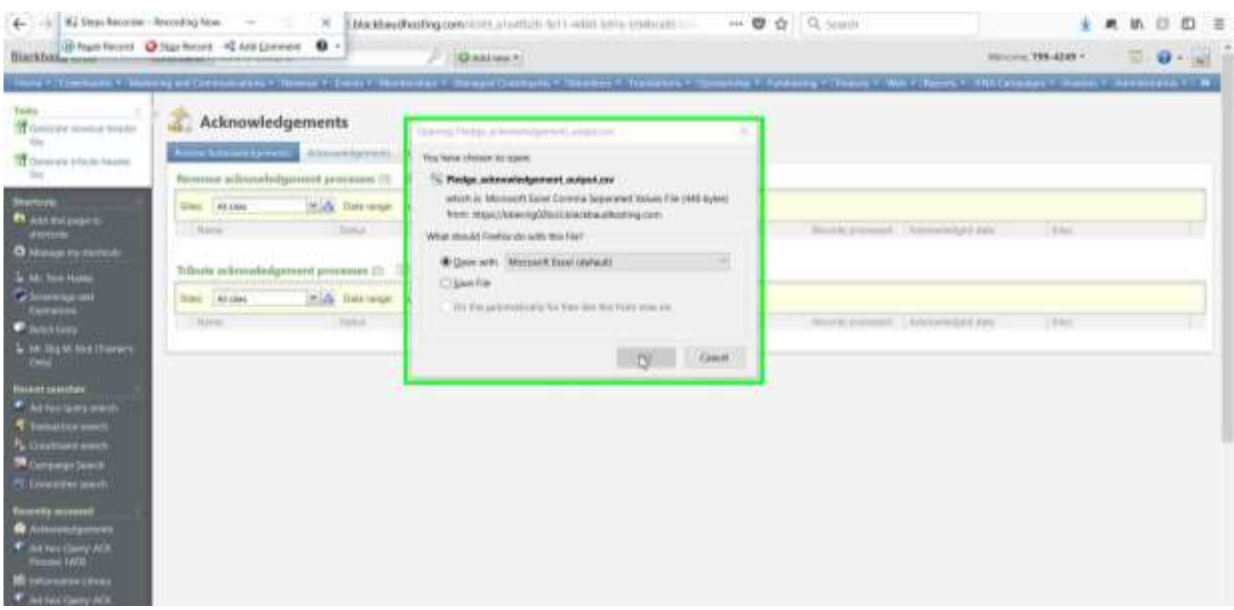
Step 6: Select Ok.



Step 7: Select “Open with Microsoft Excel”

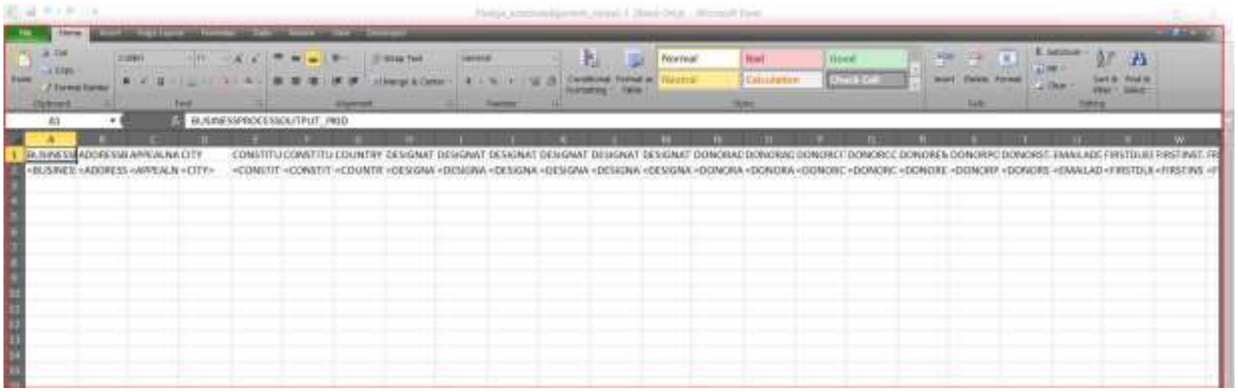


Step 8: Select “OK”.

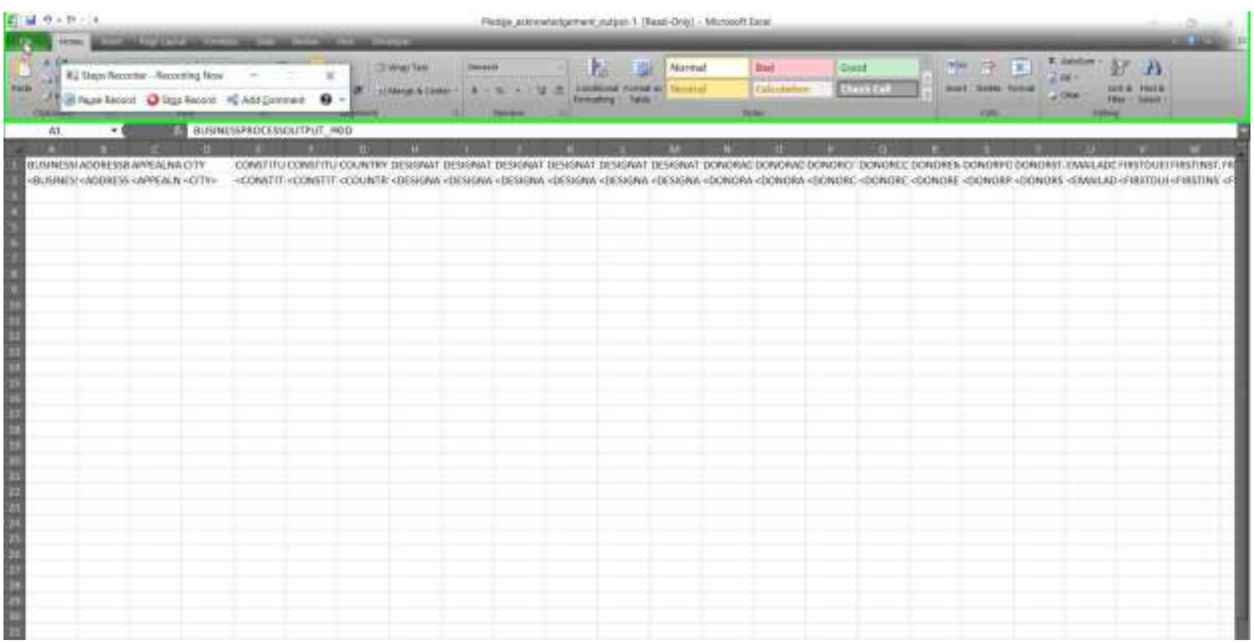


Step 9: If the file does not open automatically check for the download or open button within your browser.

Step 10: Review the open file to ensure it includes the mergable fields you desire in your letter. If not, you will need to use another standard output or create your own export definition.



Step 11: Select “File” in the upper right hand corner of Excel.



Step 12: Select "Save As".

Step 13: (3/8/2018 10:25:30 PM) Save and name the file in the location of your choice. Remember where you saved this as you will need to access this in future steps.

Diagram 2a:

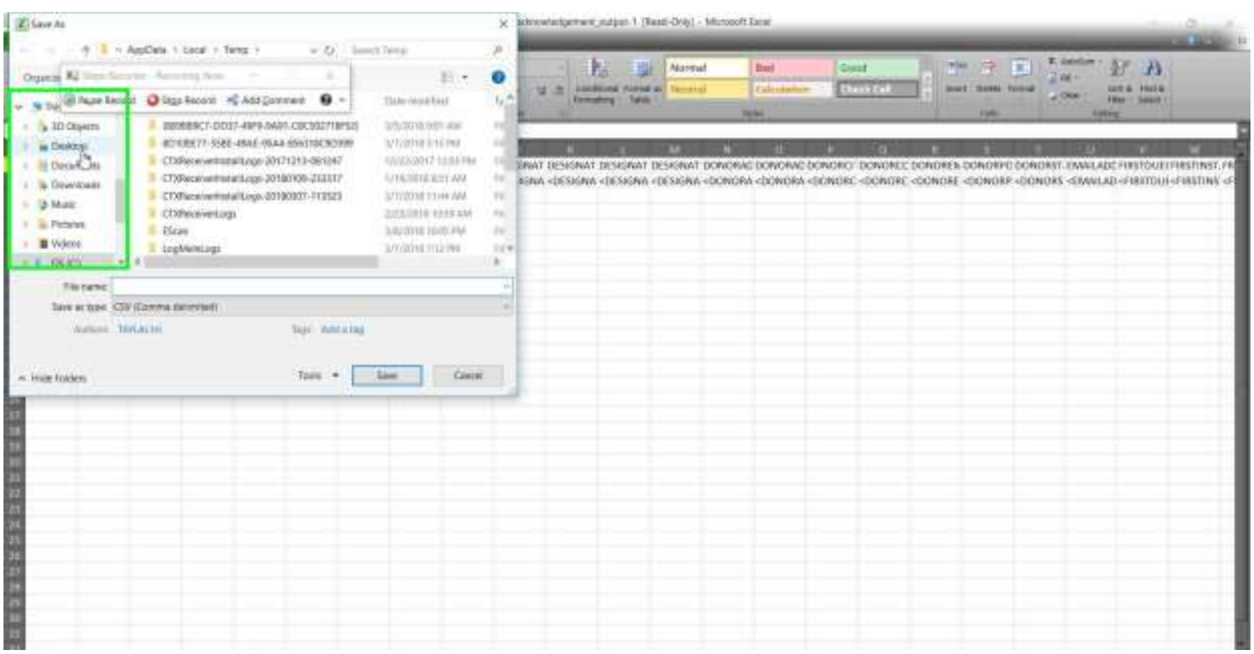
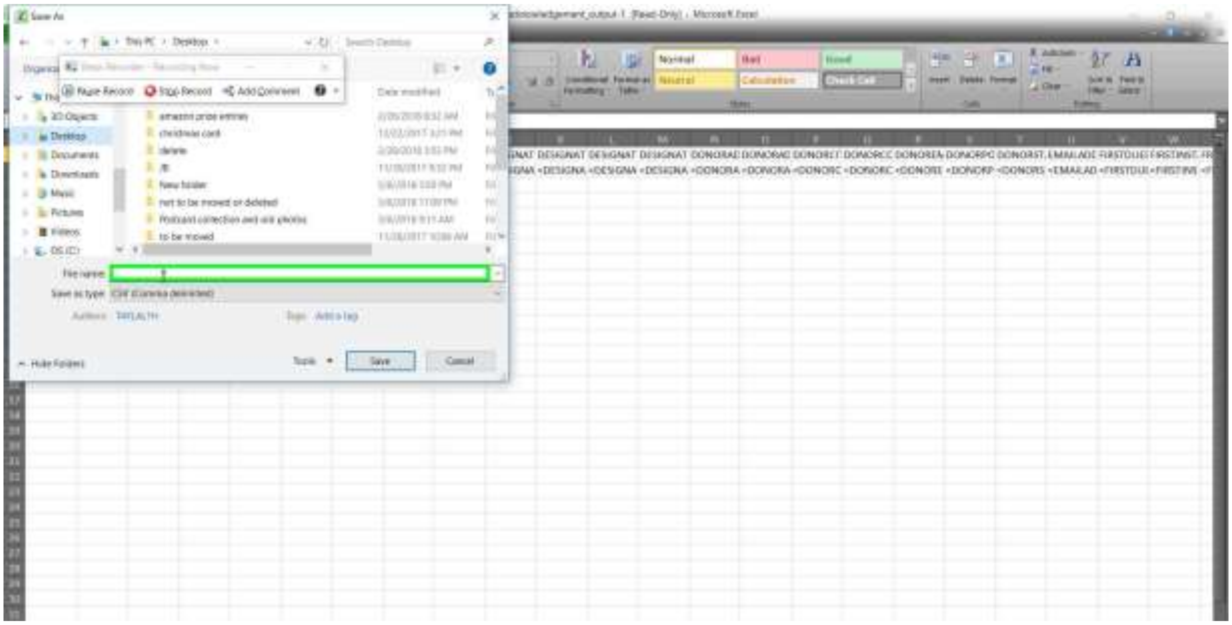
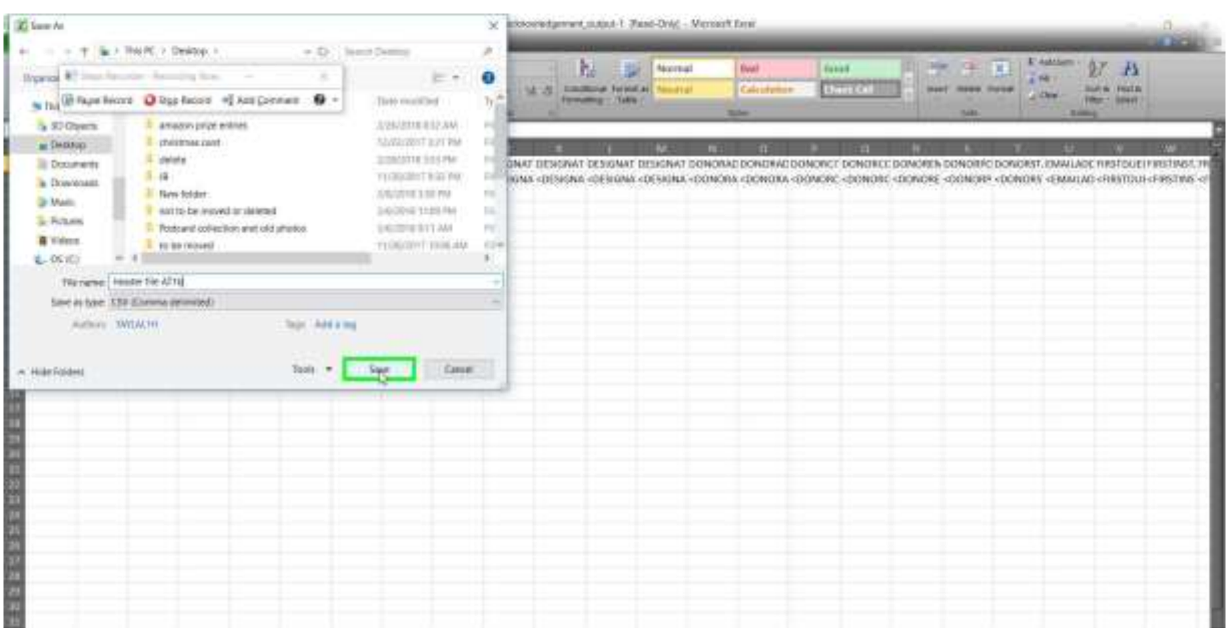


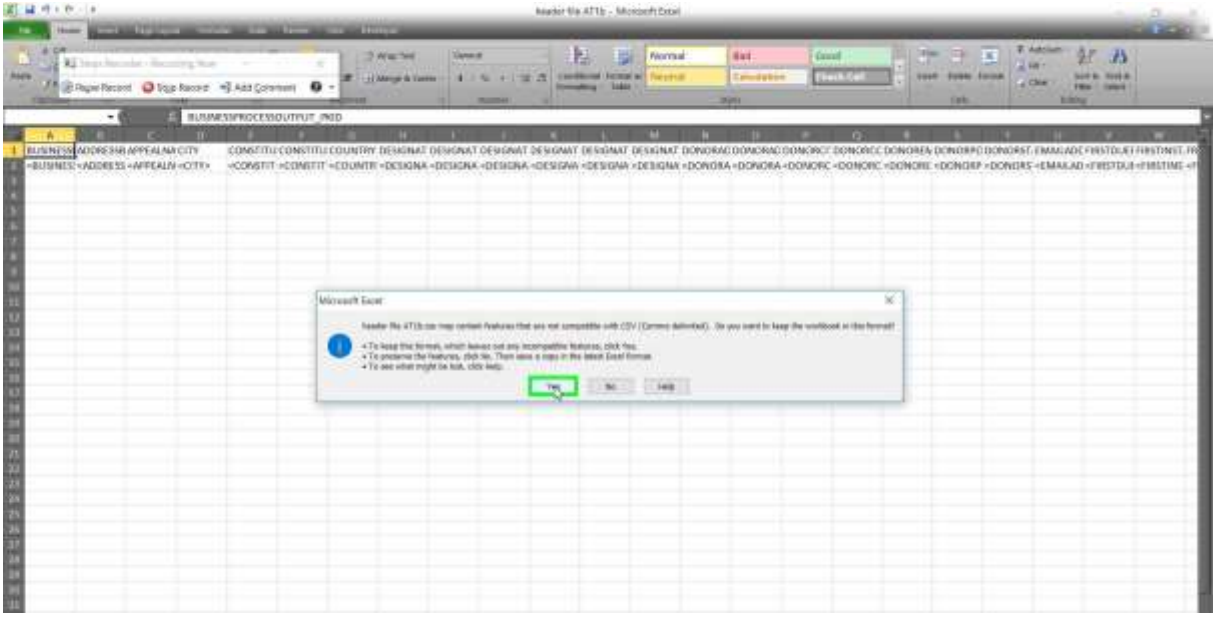
Diagram 2b:



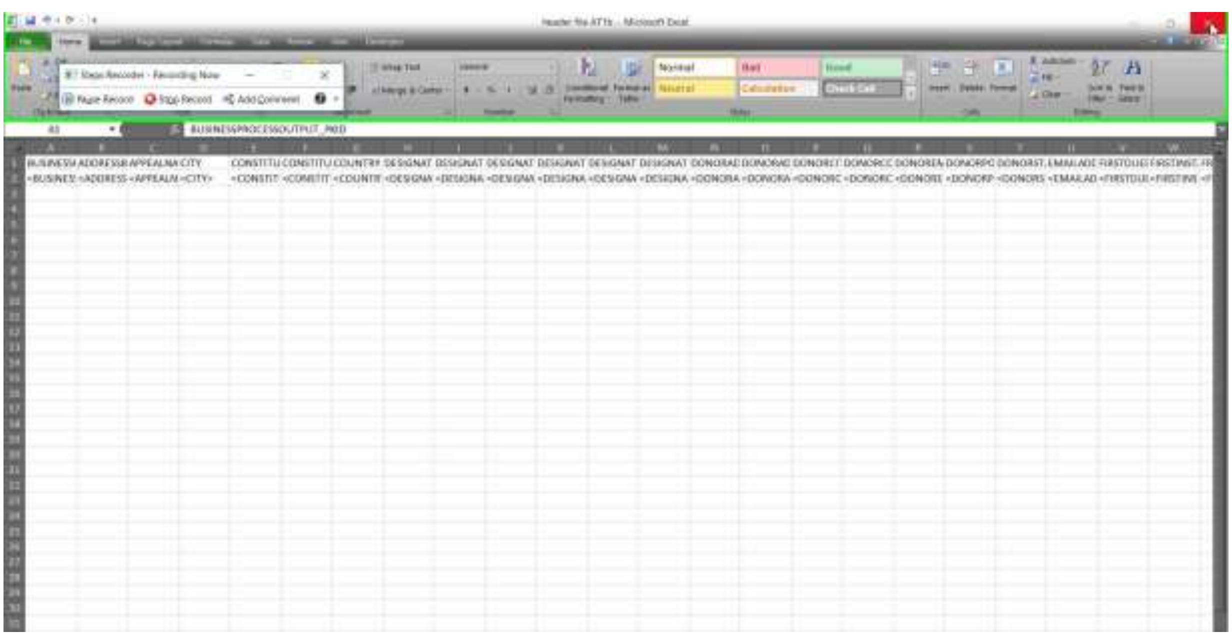
Step 14: Select “Save”.



Step 15: Select “YES” if prompted to save the file as a CSV.



Step 16: Select “Exit” to leave Excel.

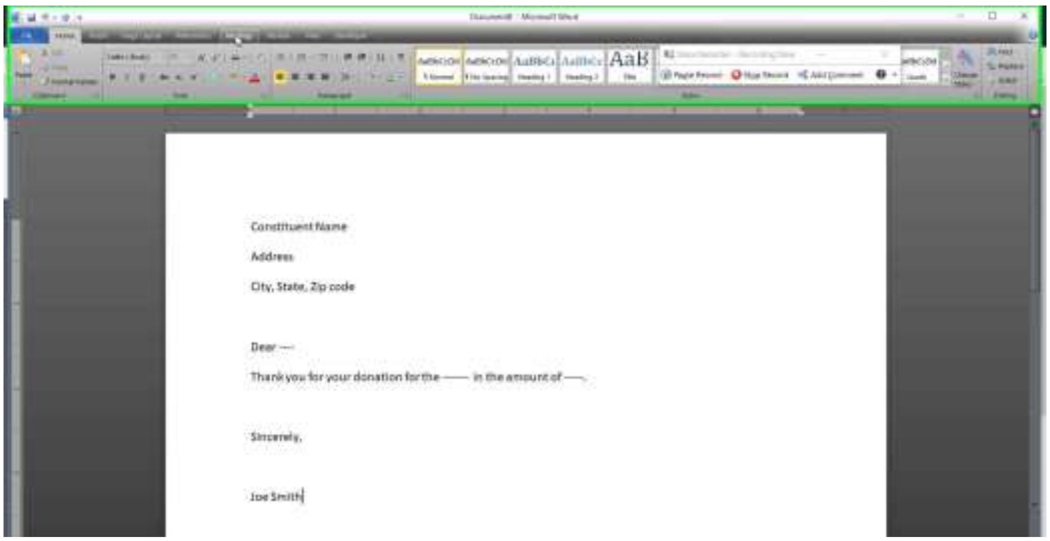


Section 3: Adding Merge Fields into the Letter

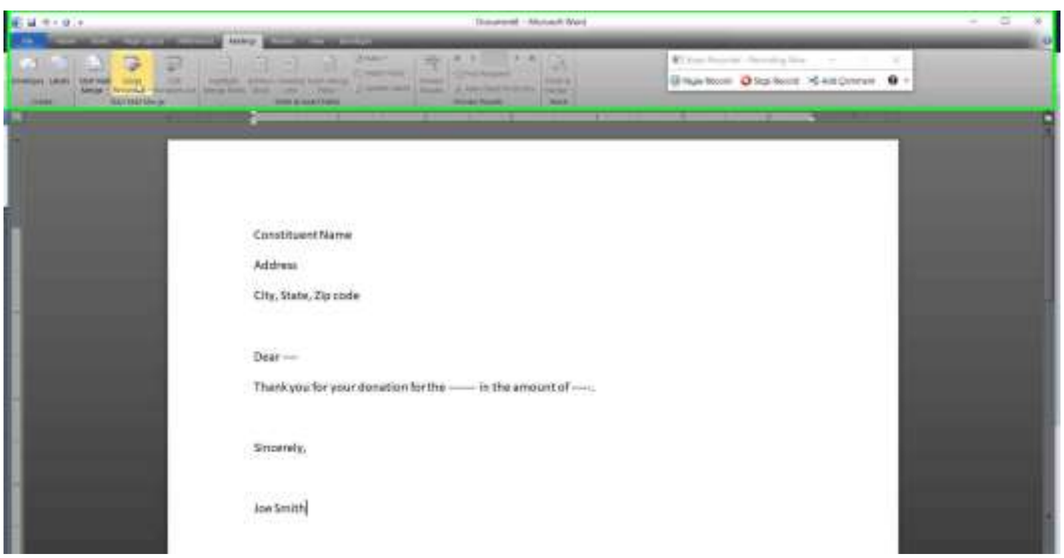
After a header file is pulled from the CRM system, the header file will be entered into Microsoft Word and each field merged into a letter.

Step 1: Open your pre-drafted acknowledgement letter in Microsoft Word.

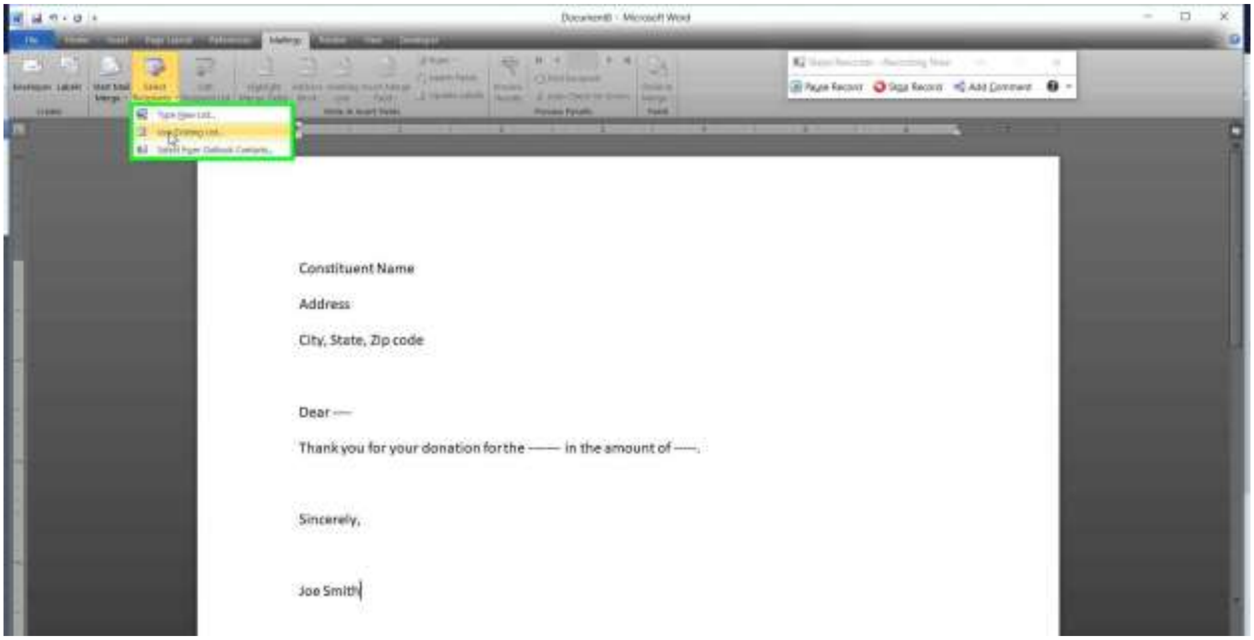
Step 2: Select the "Mailings" tab.



Step 3: Within the Mailings tab select "Select Recipients".



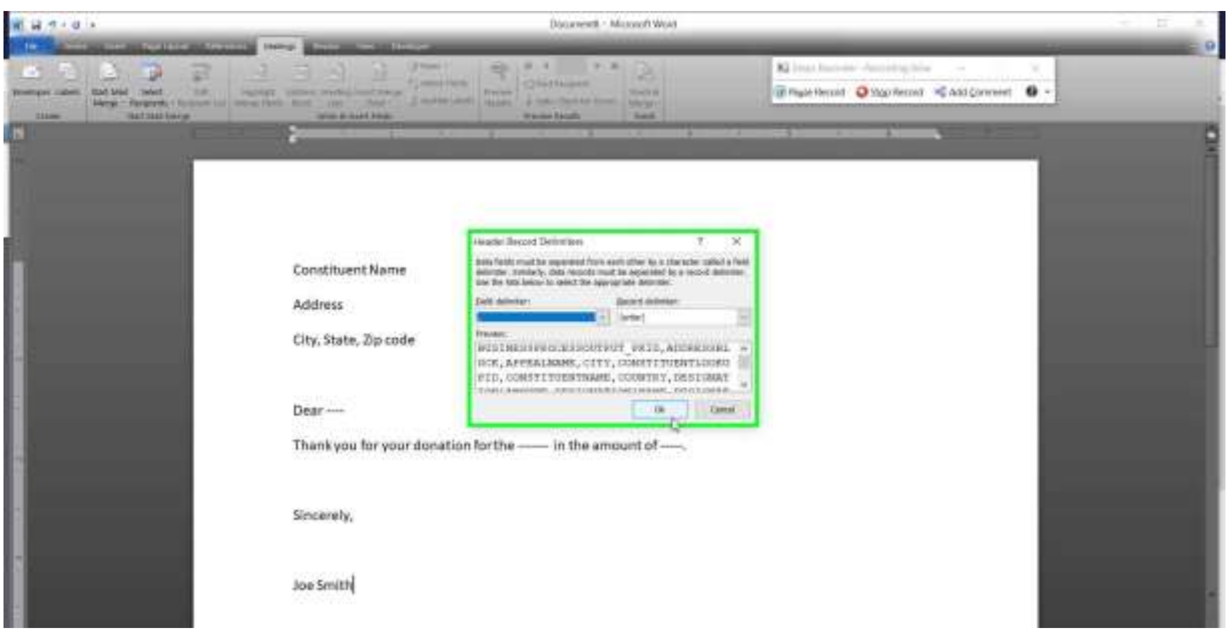
Step 4: Select "Use Existing List".



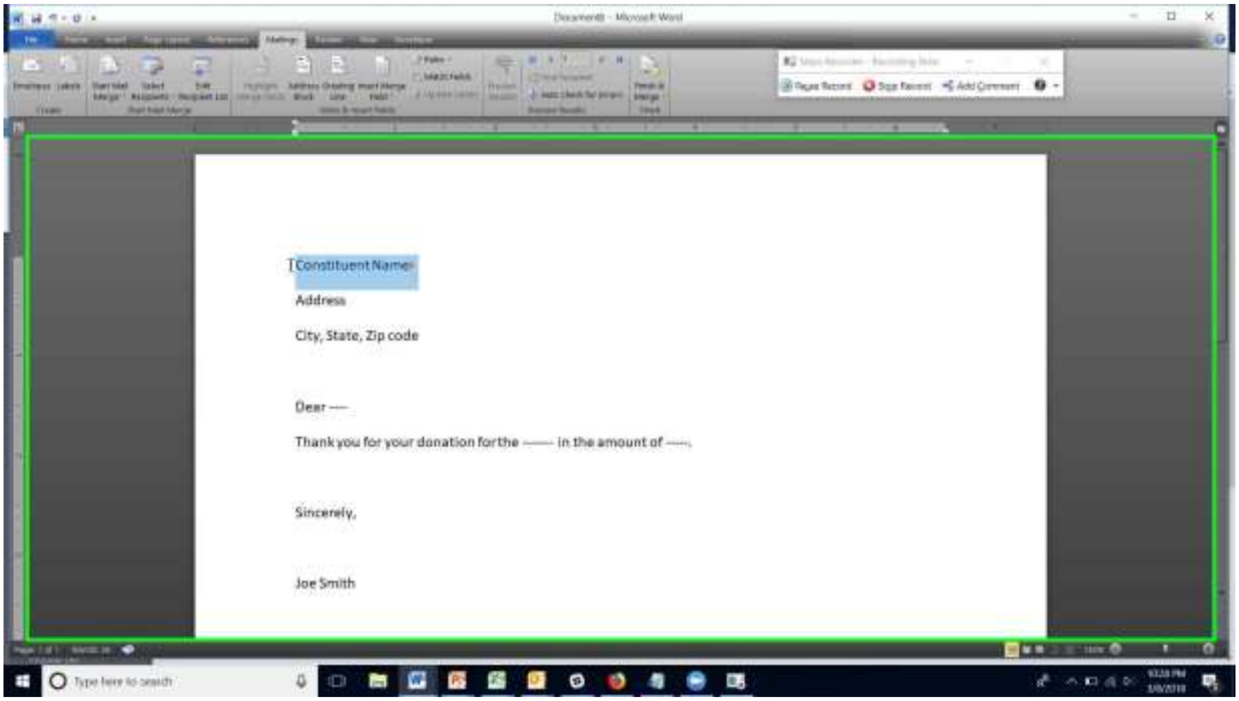
Step 5:) Locate and select the Header File you saved in Section 2.

Step 6:) Select "Open" to add the header file to the letter.

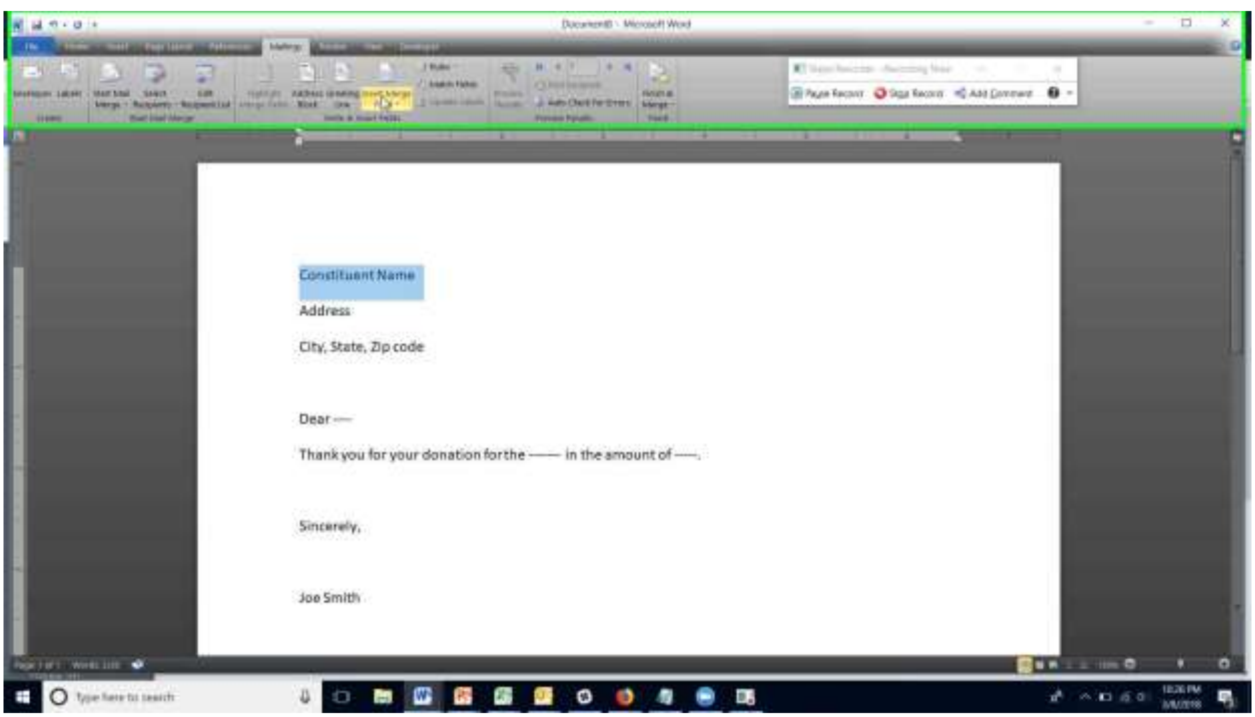
Step 7: Select "OK" to accept the defaults provided with the Header Record Delimiters.



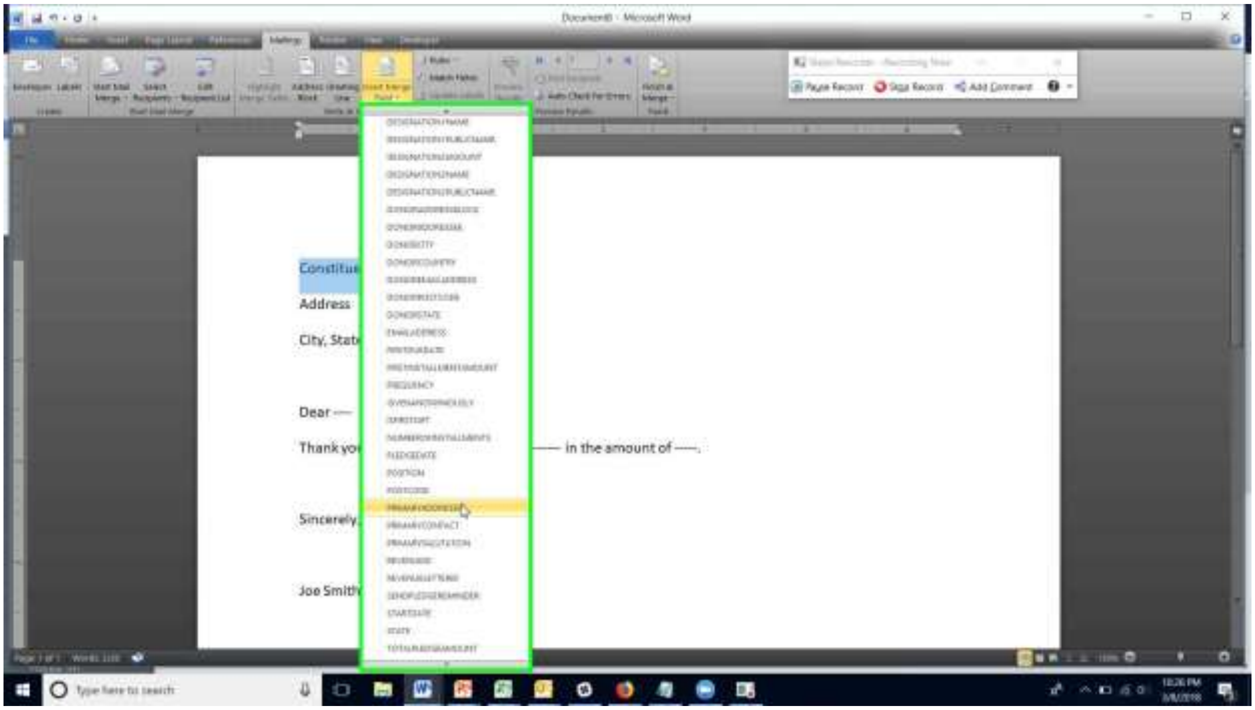
Step 8: Place the cursor in the first field to be merged in your letter.



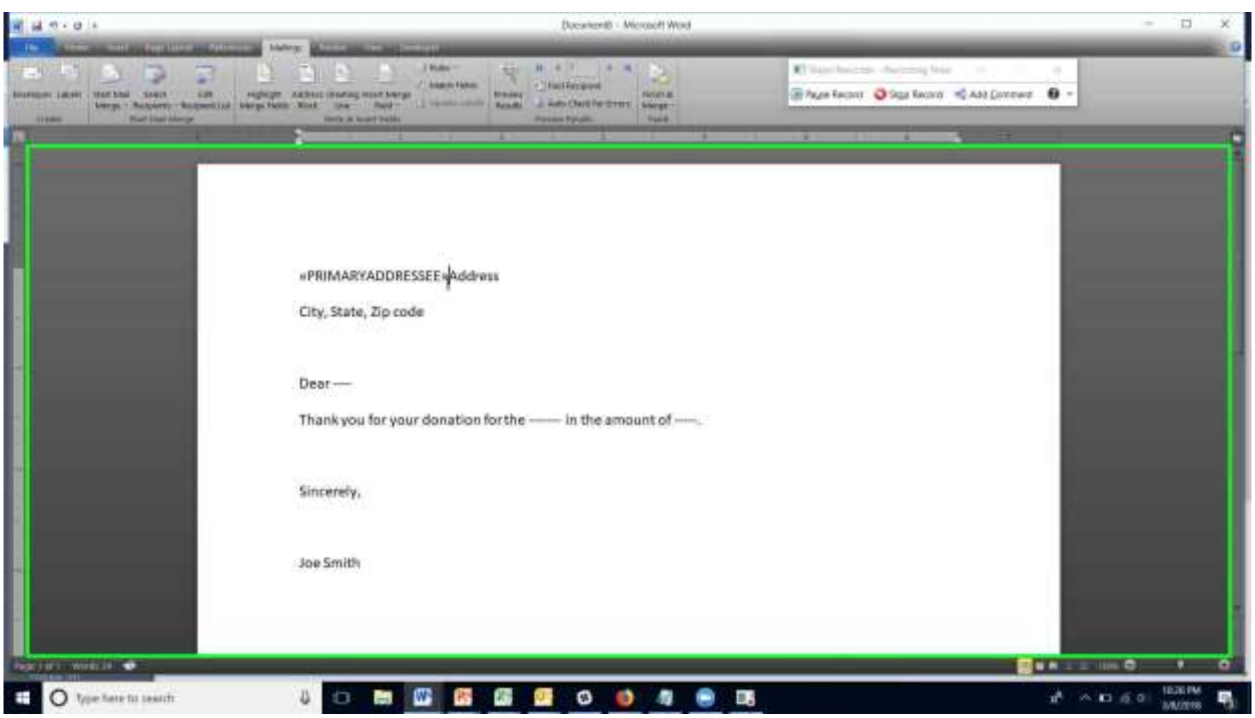
Step 9: From within the “Mailings” tab select the drop down for “Insert Merge Field”.



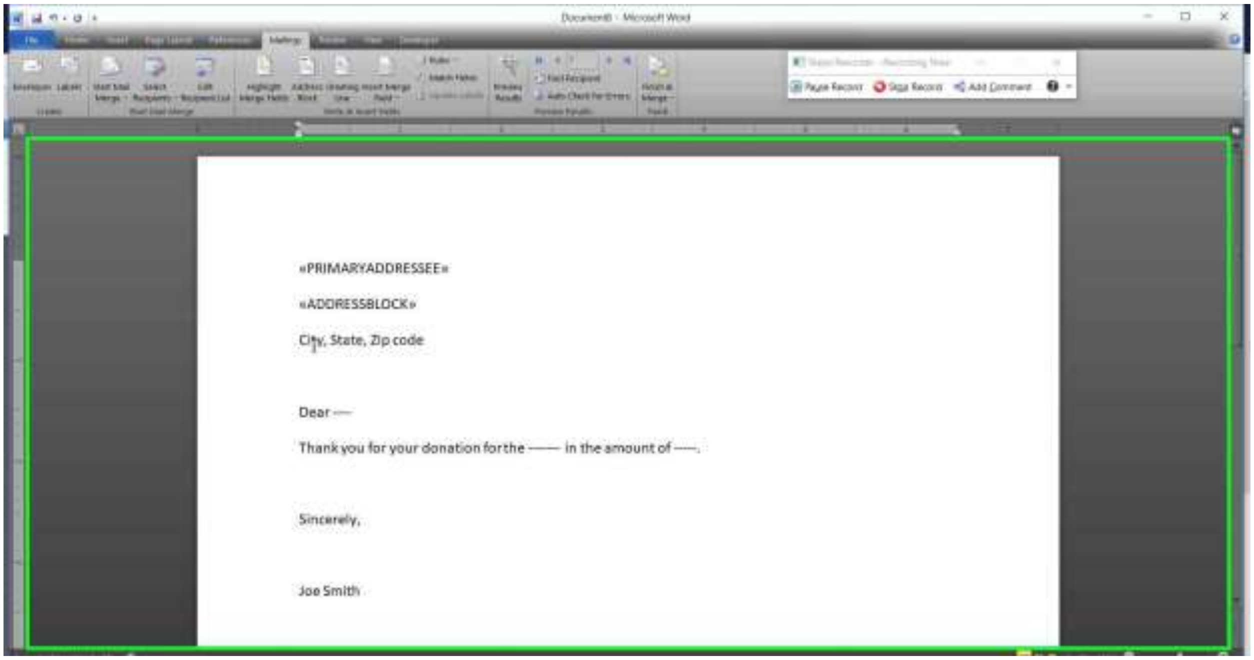
Step 10: Select the merge field of your choice. For example, to enter the constituent name, Select “primary addressee” or to enter the constituent’s zip code, select “Postcode”.



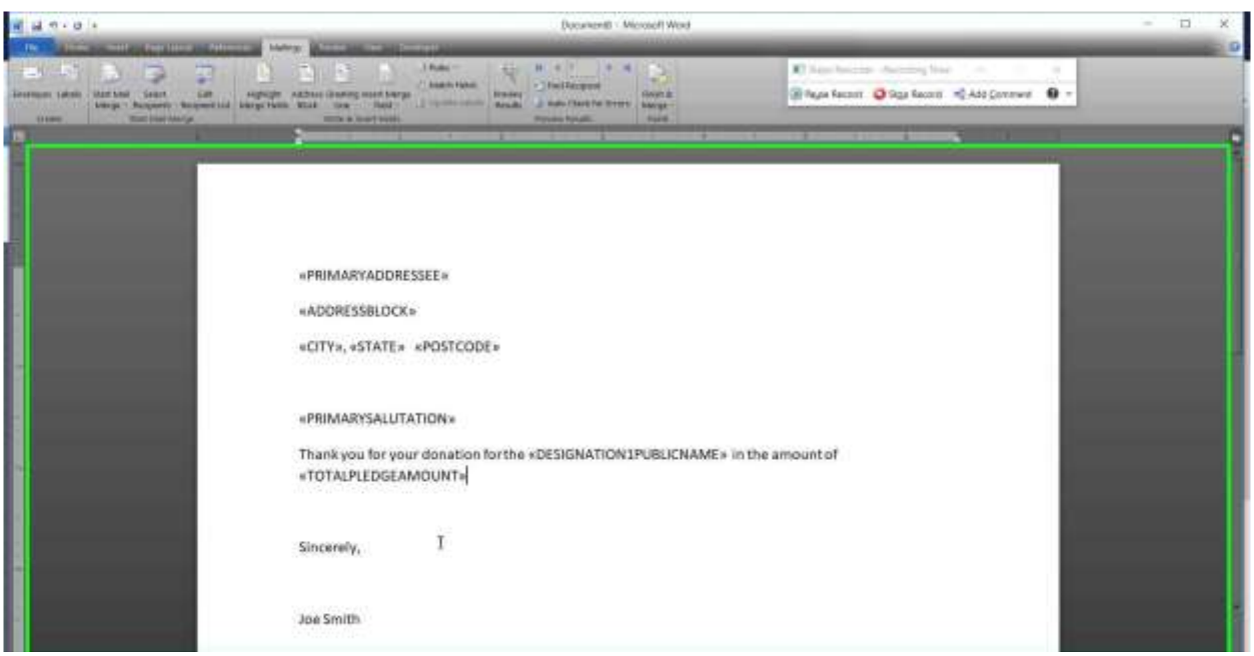
Step 11: Merge each field in this manner throughout your letter.



Step 12: User left click on "OK (button)" in "Header Record Delimiters"

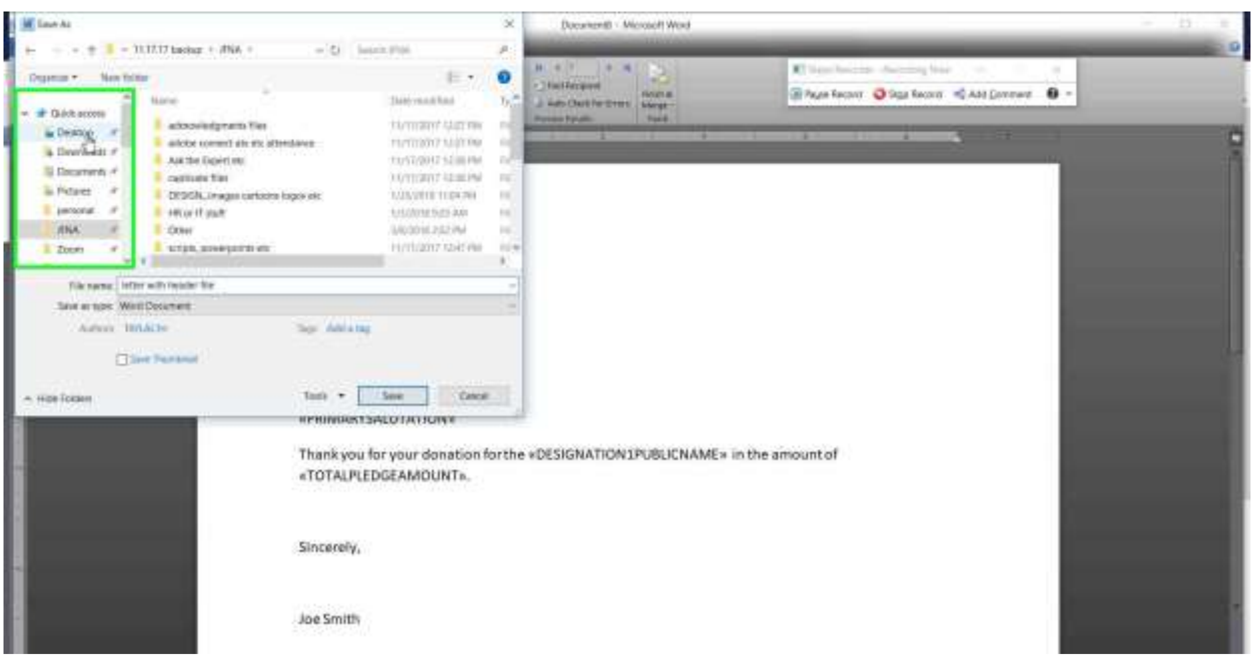


Step 13: User left double click on "Microsoft Word Document (pane)" in "Document8 - Microsoft Word"



Step 14: Select "File" from the upper left hand side of the Word Document.

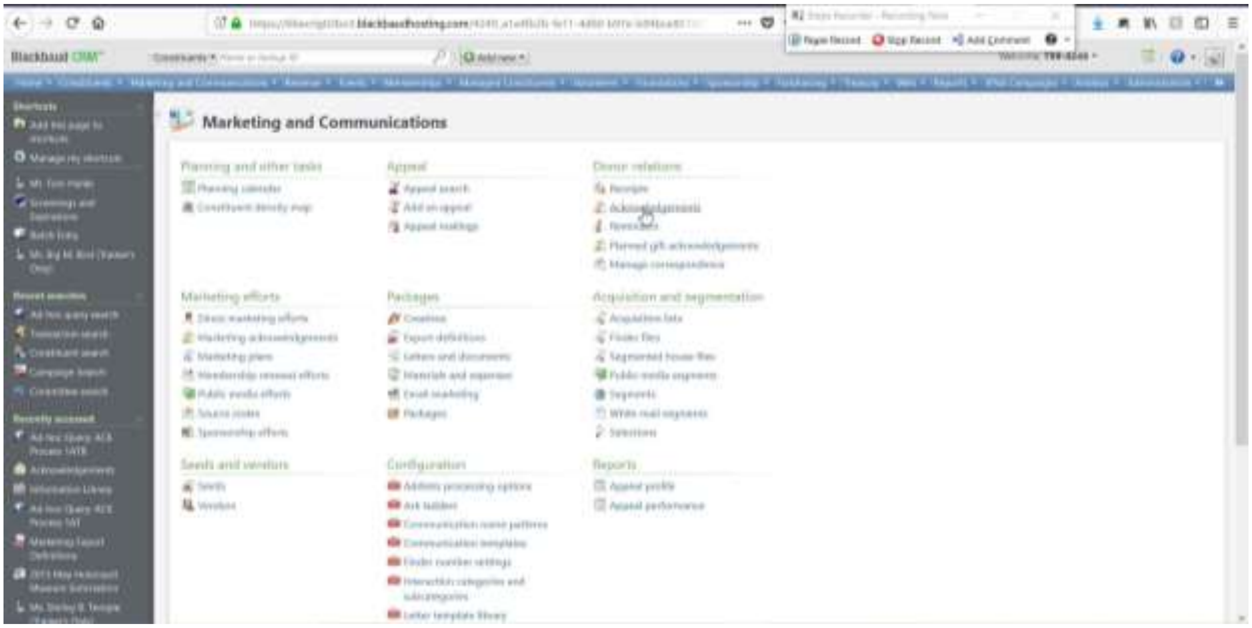
Step 15: Name and save your file. Be sure to remember where you saved the file to use in a future step.



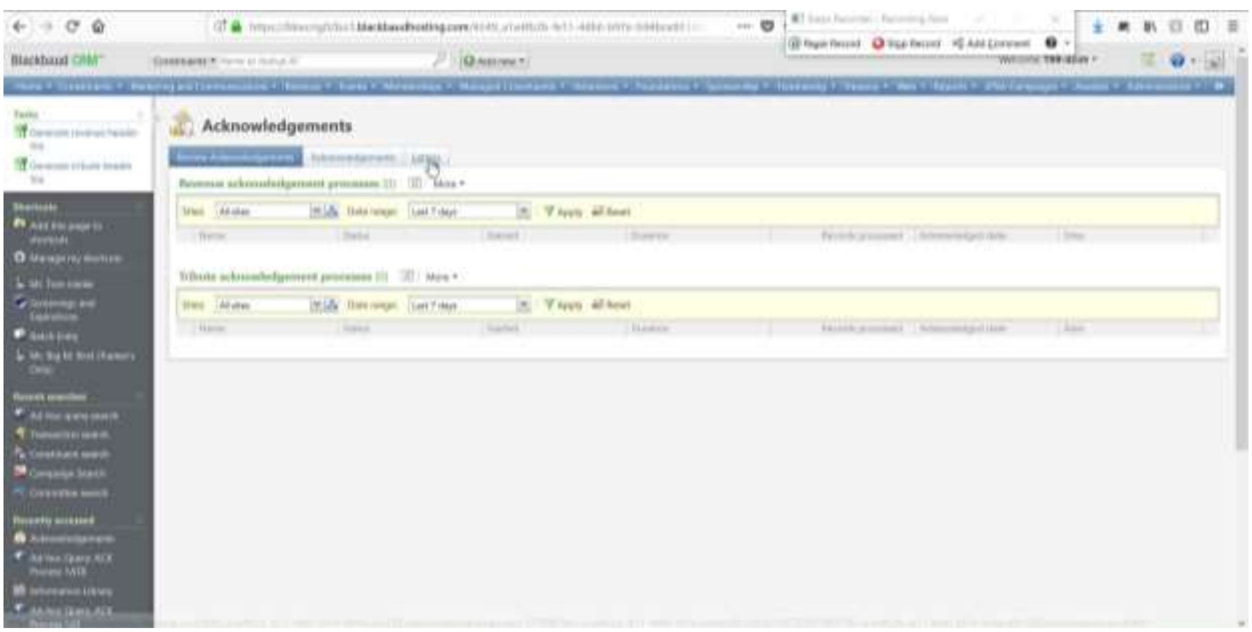
Section 4: Adding the Letter into CRM.

With the CRM fields entered into a letter, the letter much be placed into CRM for processing the letters as well as tracking the letters as delivered.

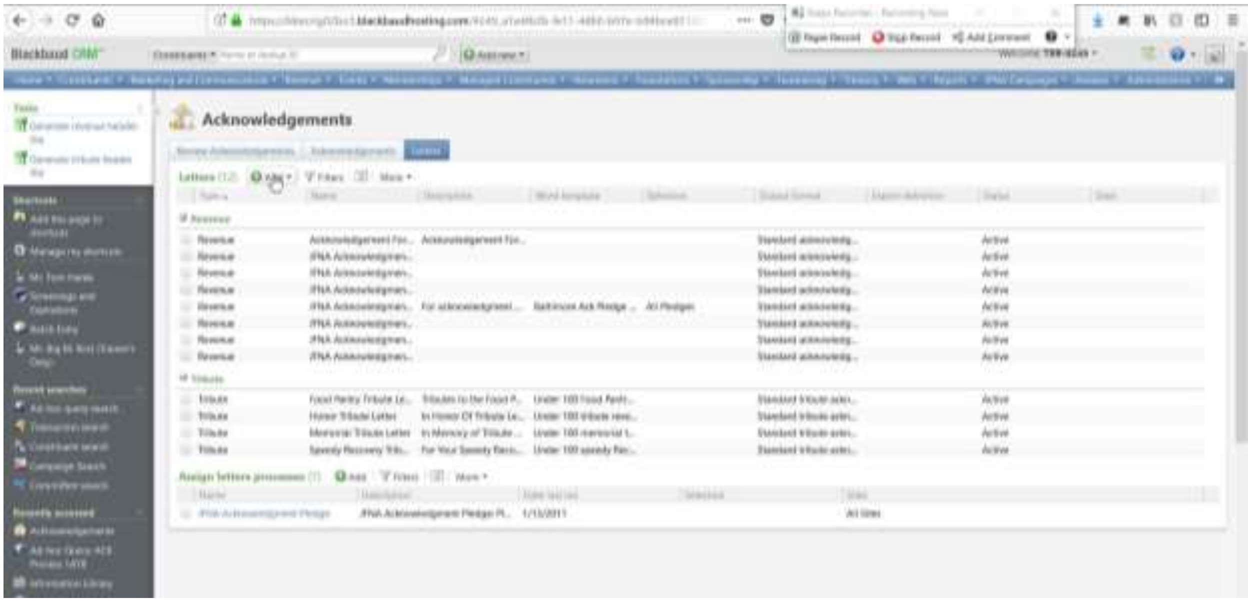
Step 1: Select “Acknowledgements” from within the Marketing and Communications Functional area.



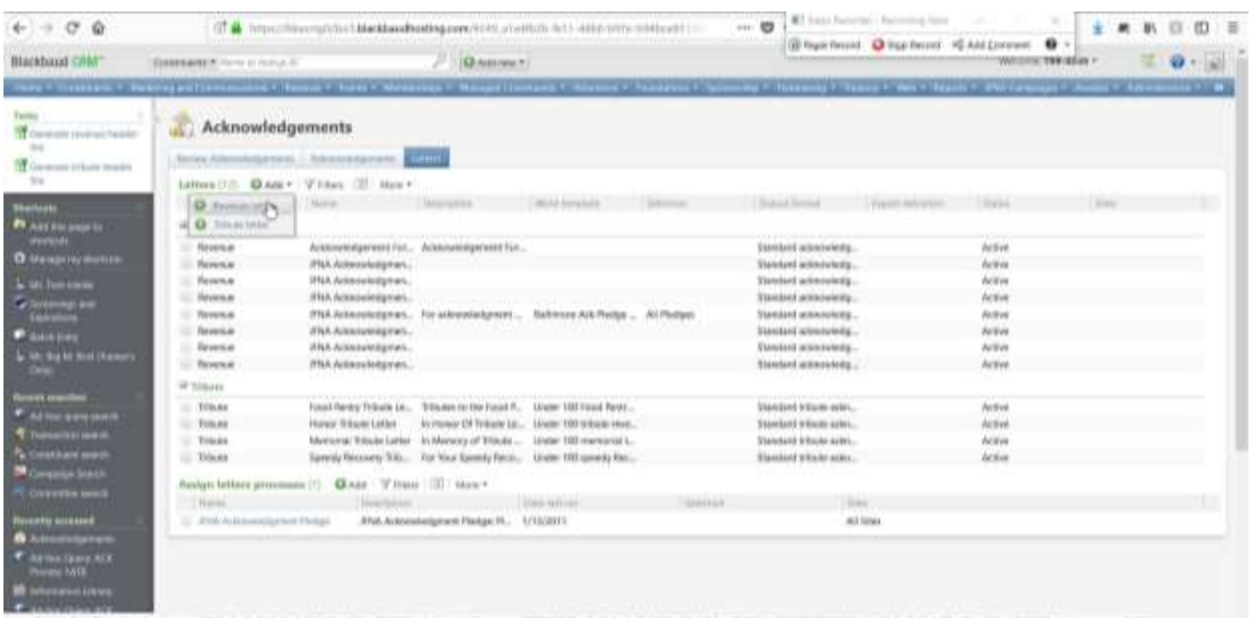
Step 2: Select the “Letters” tab.



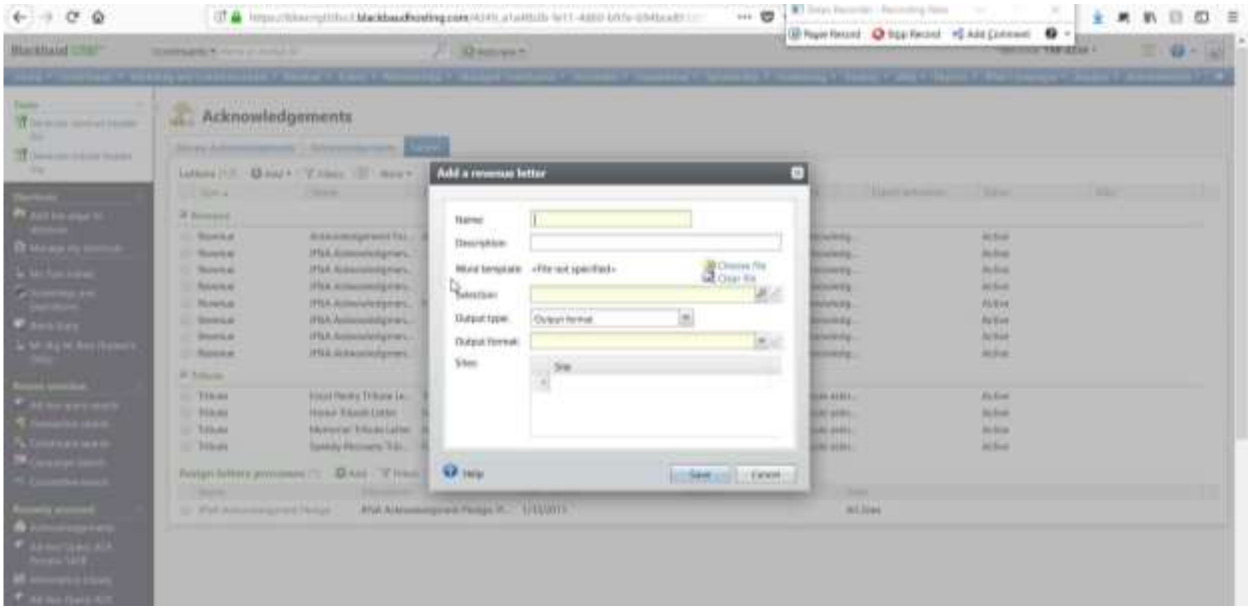
Step 3: Select "Add" from the "Letters" section.



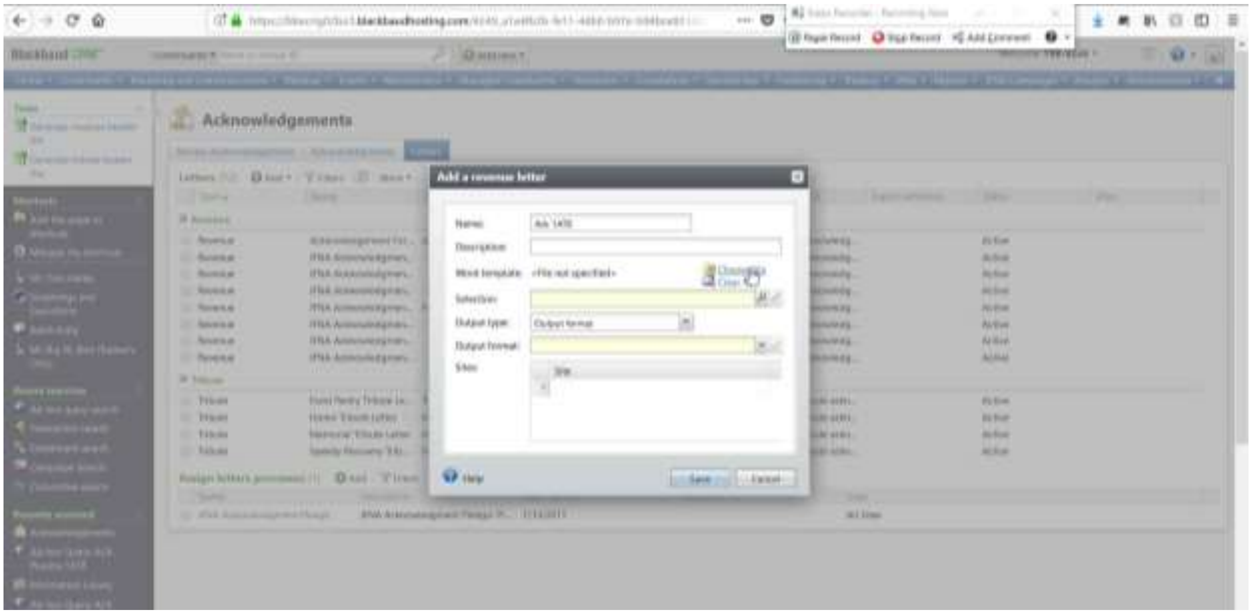
Step 4: Select "Revenue Letter"



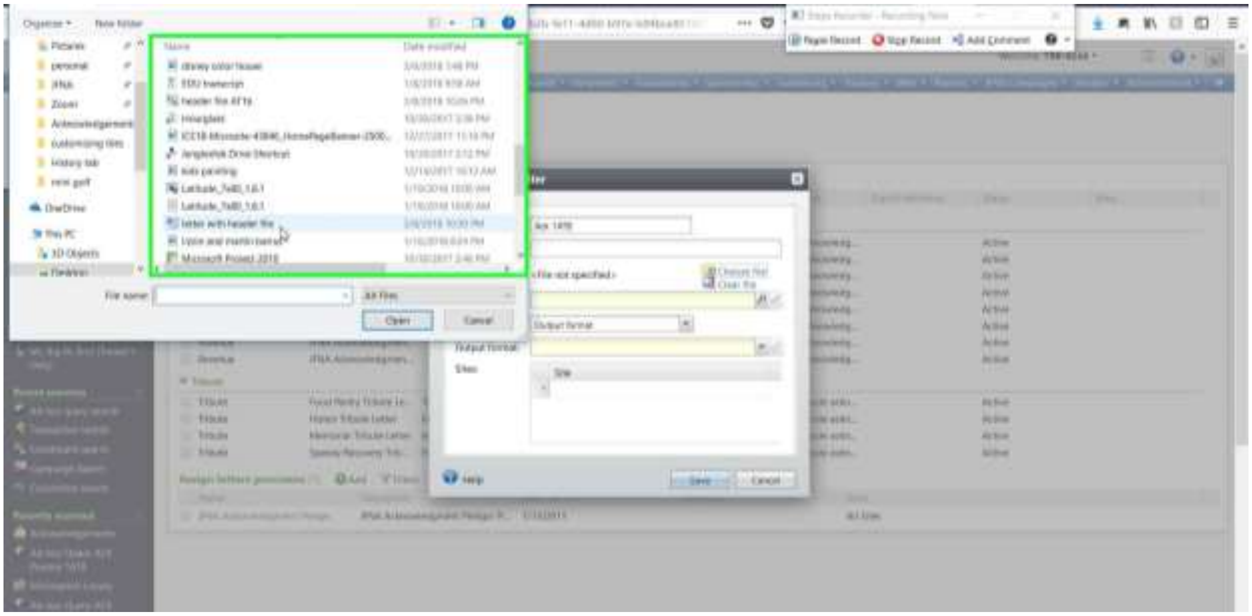
Step 5: Enter the name of your letter in CRM.



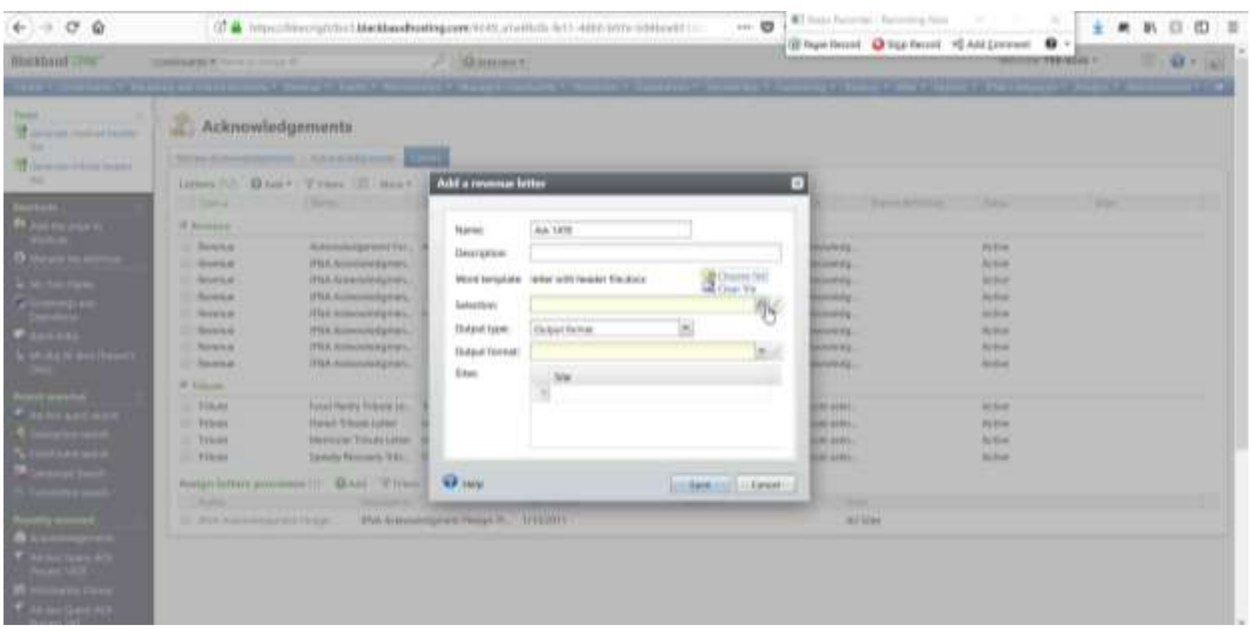
Step 6: Select "Choose file".



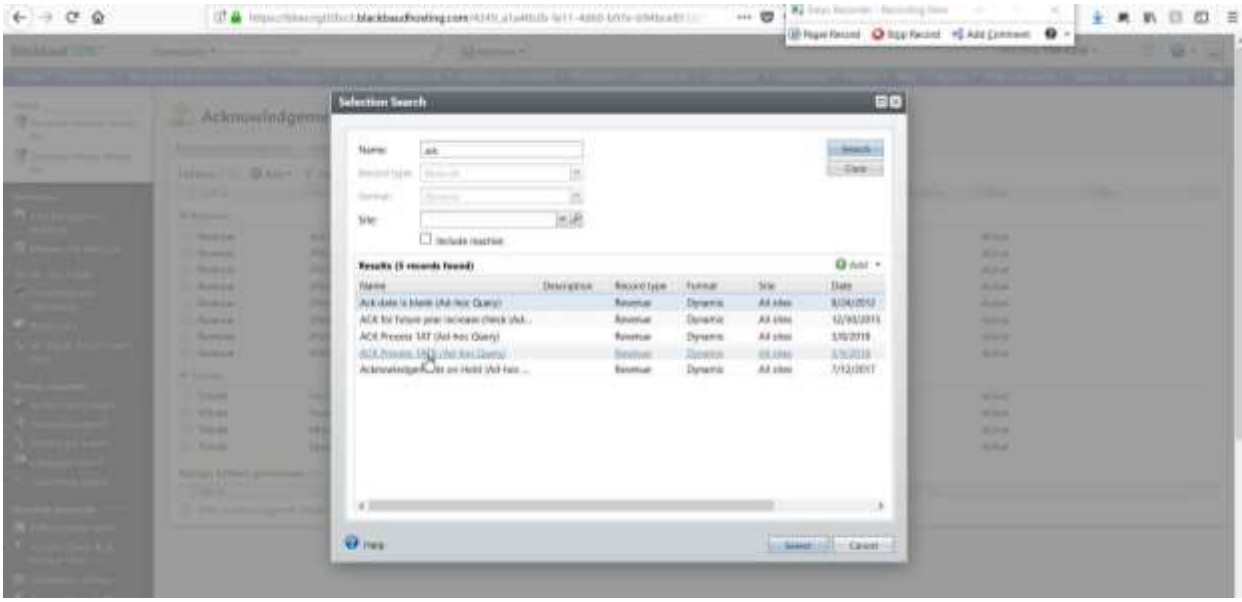
Step 7: Select the letter you created in section 3 and select "Open".



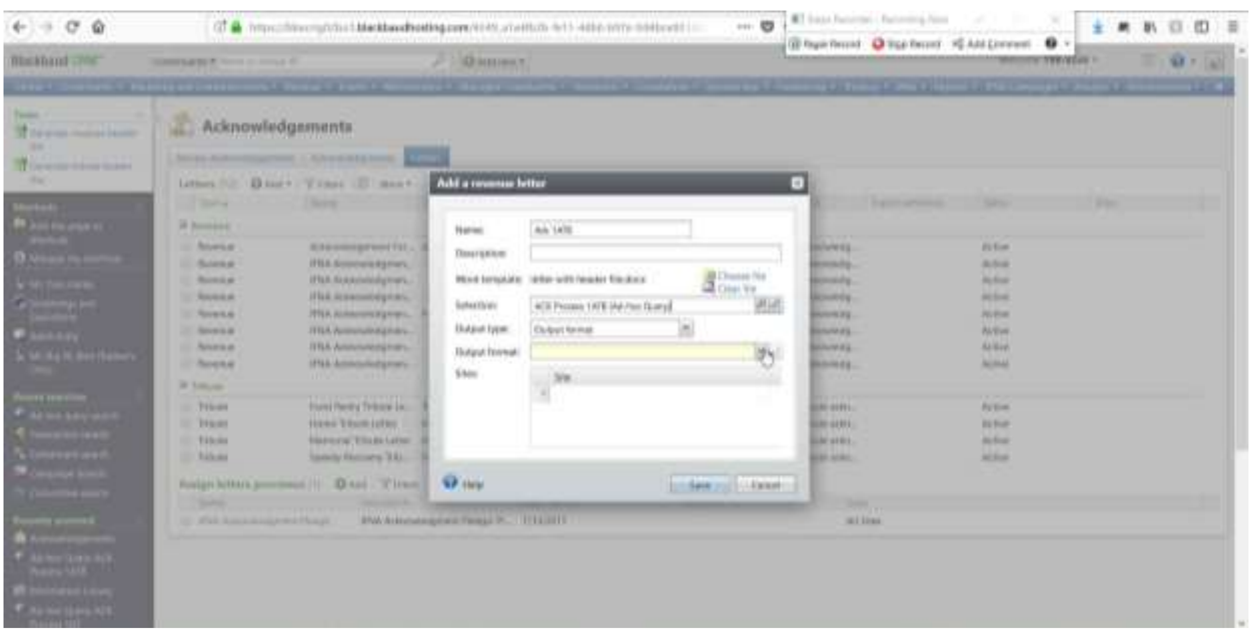
Step 8: Select the magnifying glass next to the "Selection" field.



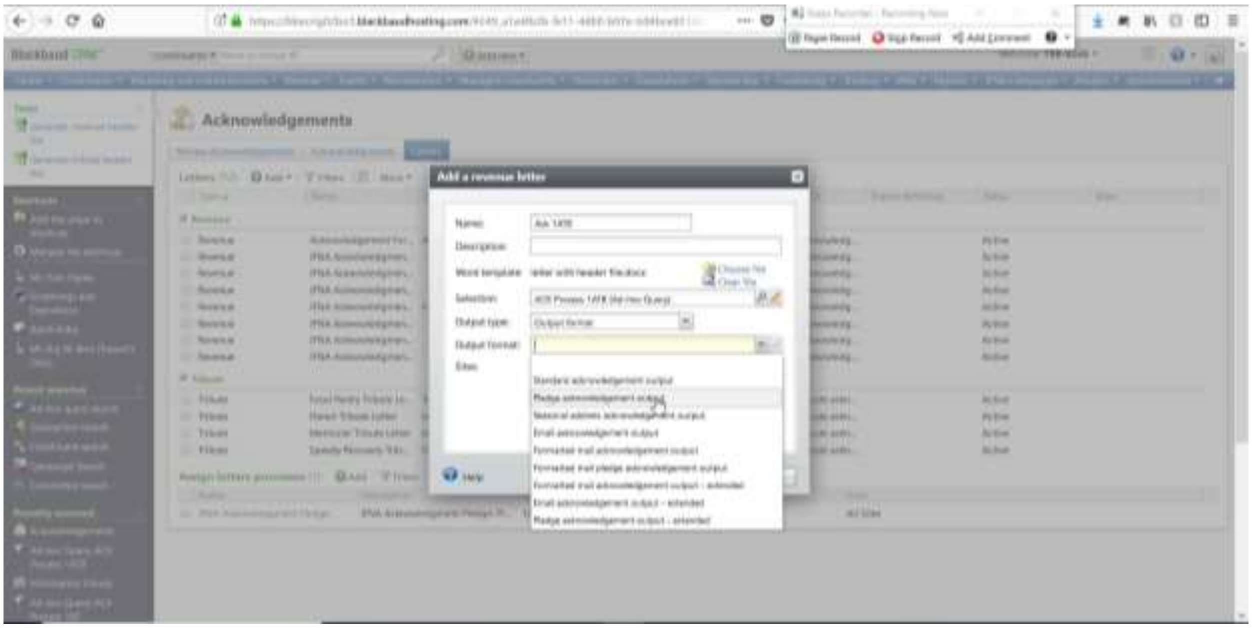
Step 9: Search for the selection you created in Section 1 and select it.



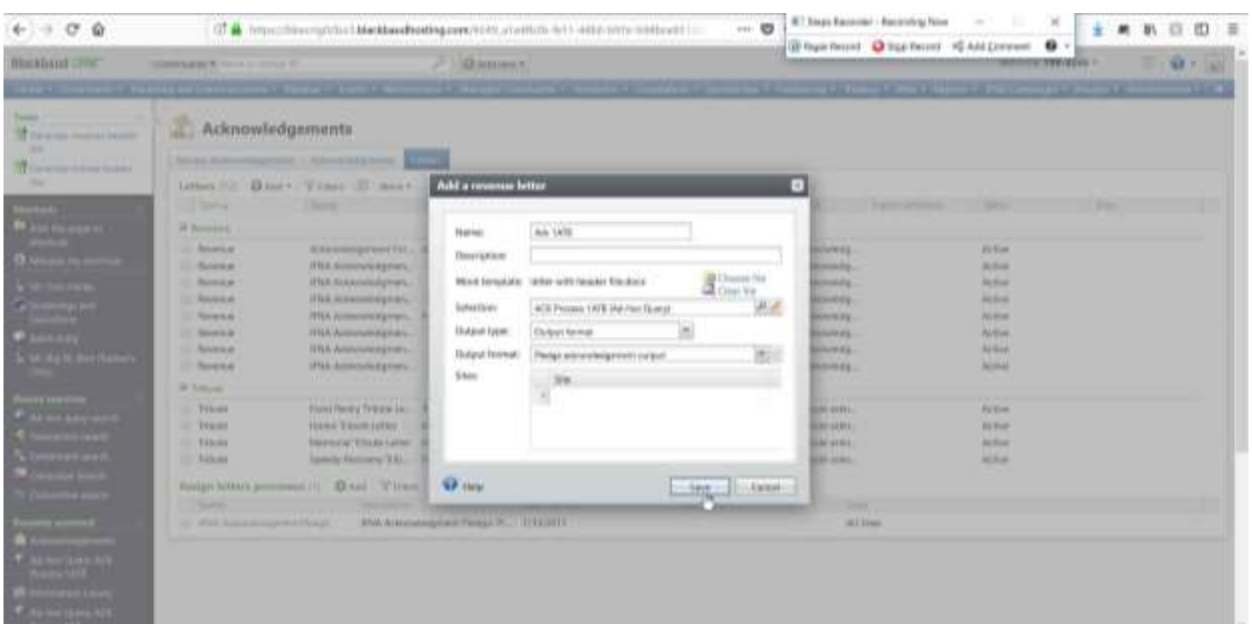
Step 10: Select the same output type you selected in Section 2. In section 2 above we selected "Output format" in the "Output type".



Step 11: Select the same output format you selected in Section 2. In section 2 above we selected “Pledge Acknowledgement output”.



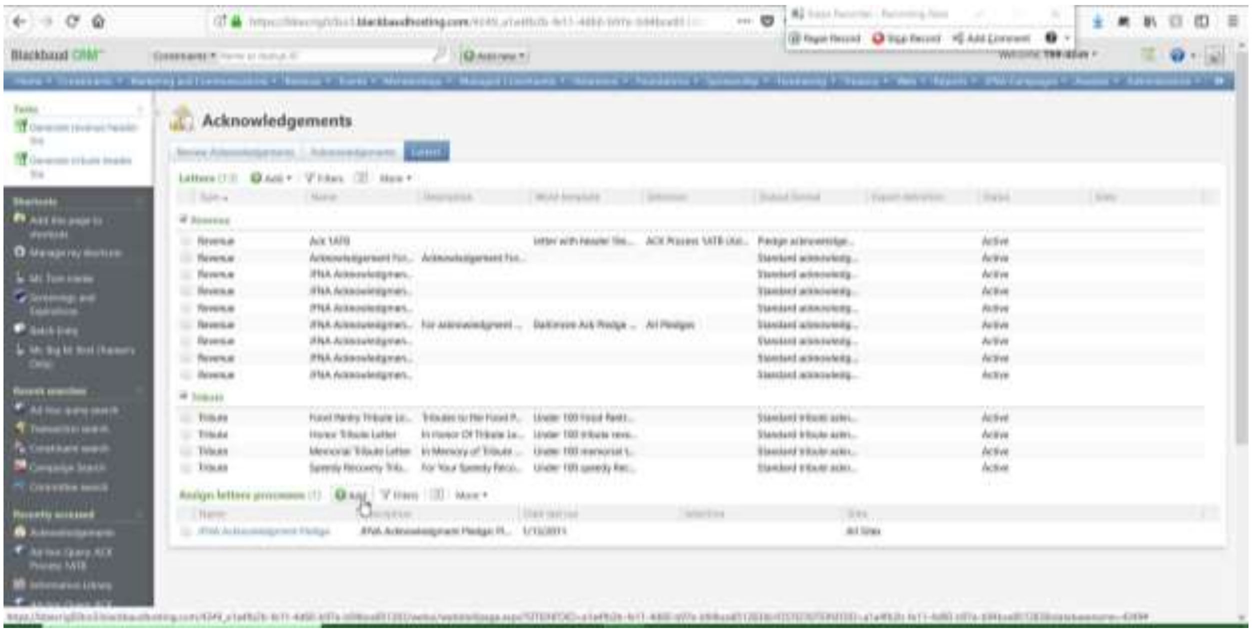
Step 12: Select “Save” to complete the process of add the revenue letter.



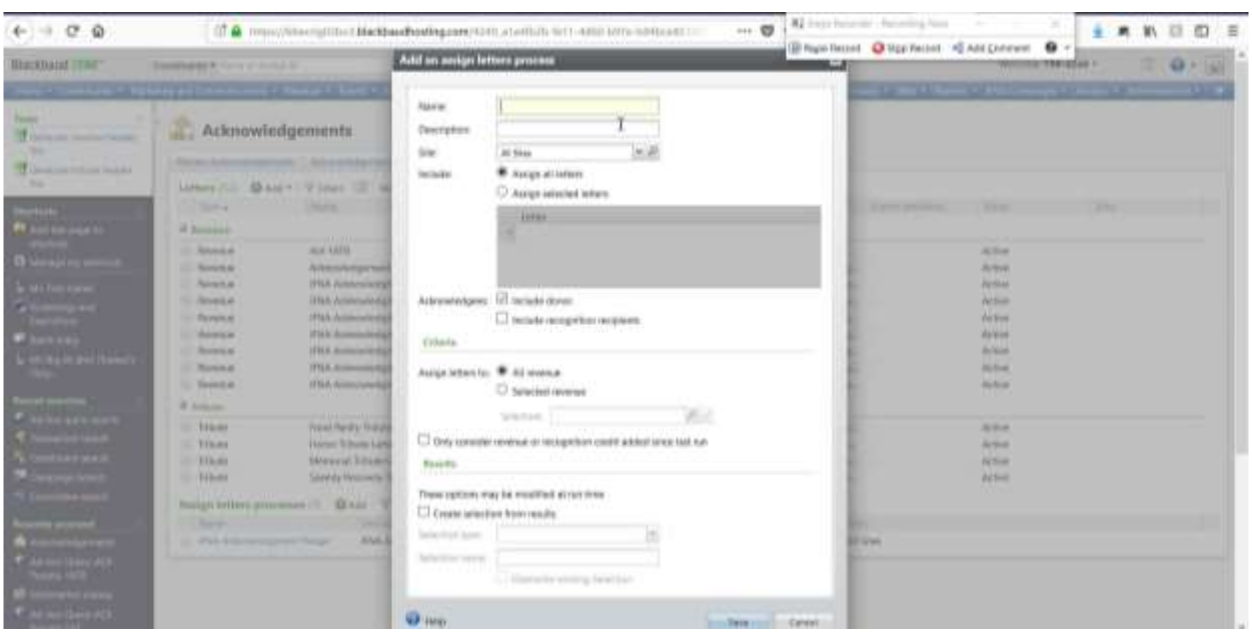
Section 5: Assigning the Letters Process

The system will match the revenue to the assigned letters in the letter assigning process. (Note: The steps in sections 5 and 6 are repetitive of section 4, however they are necessary to complete the setup of an acknowledgement process).

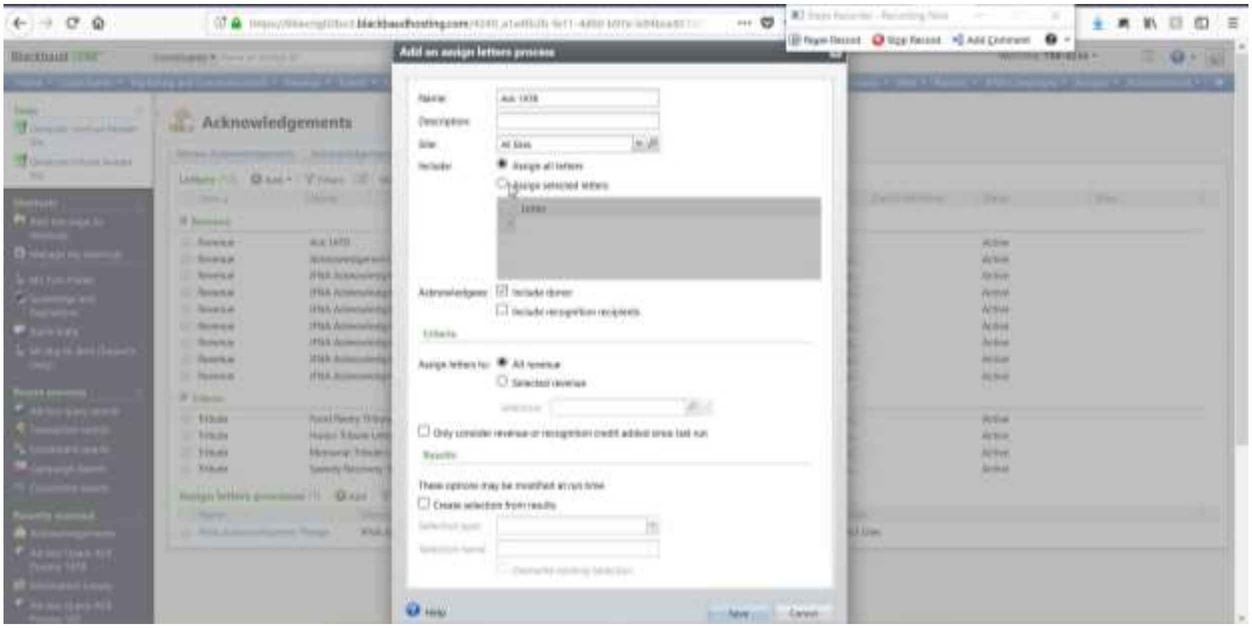
Step 1: Select "Add" from the "Assign letters processes" section of the Letters tab.



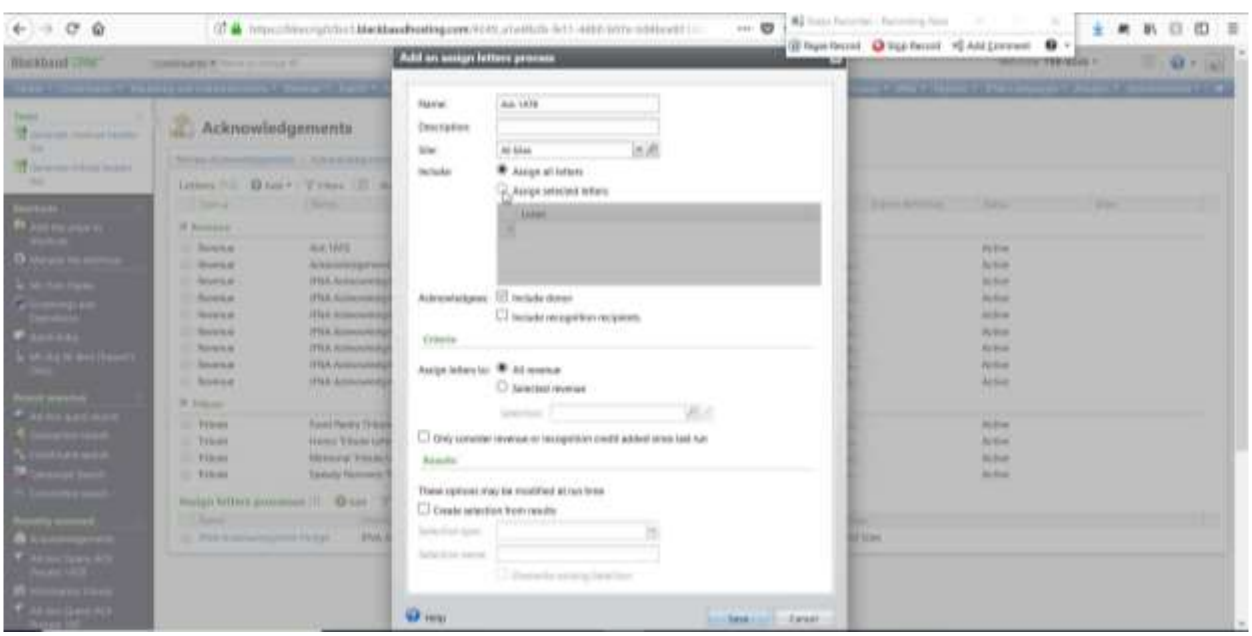
Step 2: Enter the name of your letter process.



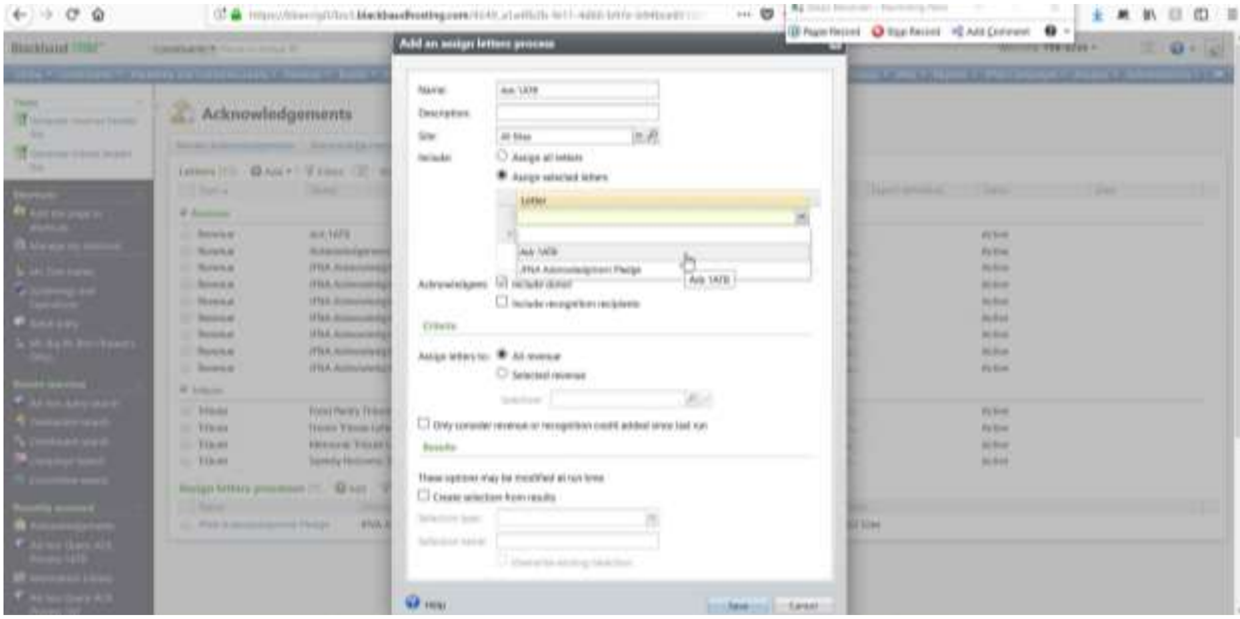
Step 3: Enter the name of your letter process.



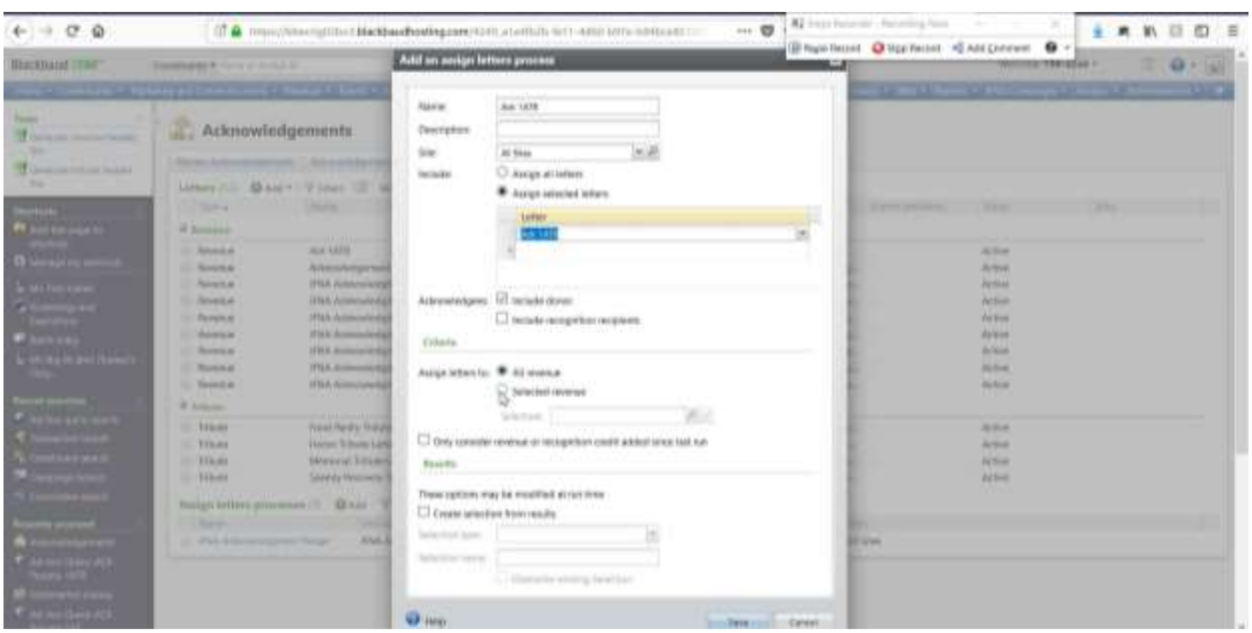
Step 4: Select "Assign all letters".



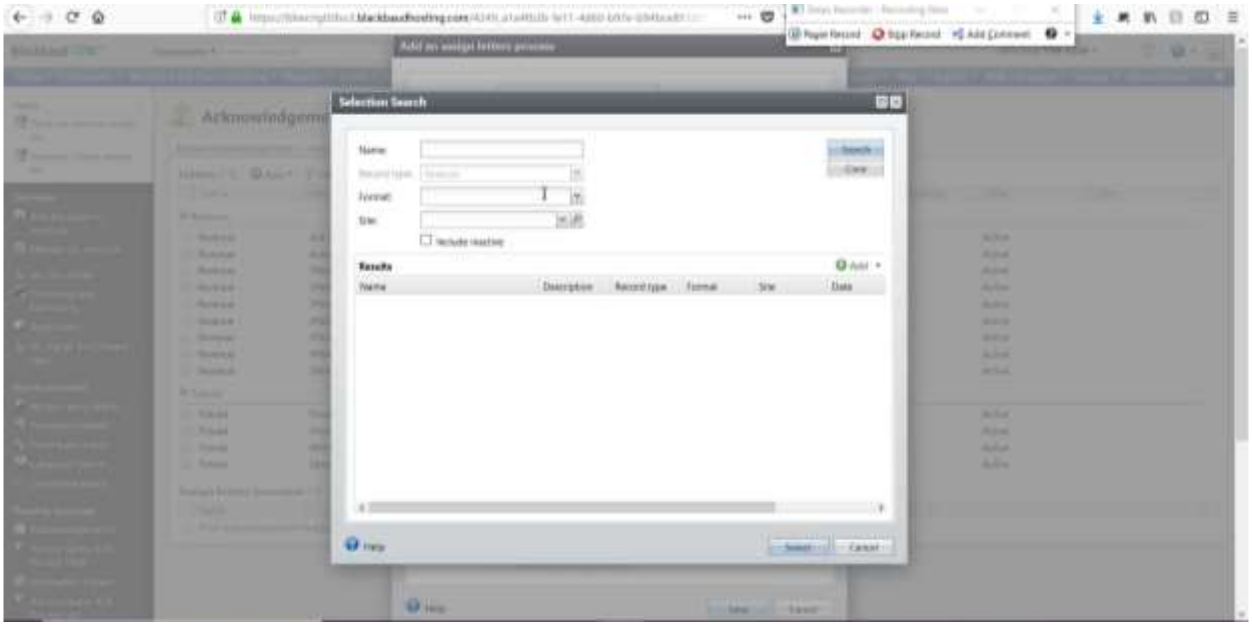
Step 5: Select the letter you created in Section 4.



Step 6: Select “Selected Revenue” in the Criteria section, and then select the magnifying glass next to “Selected Revenue”.



Step 7: Search for the selection you created in Section 1.



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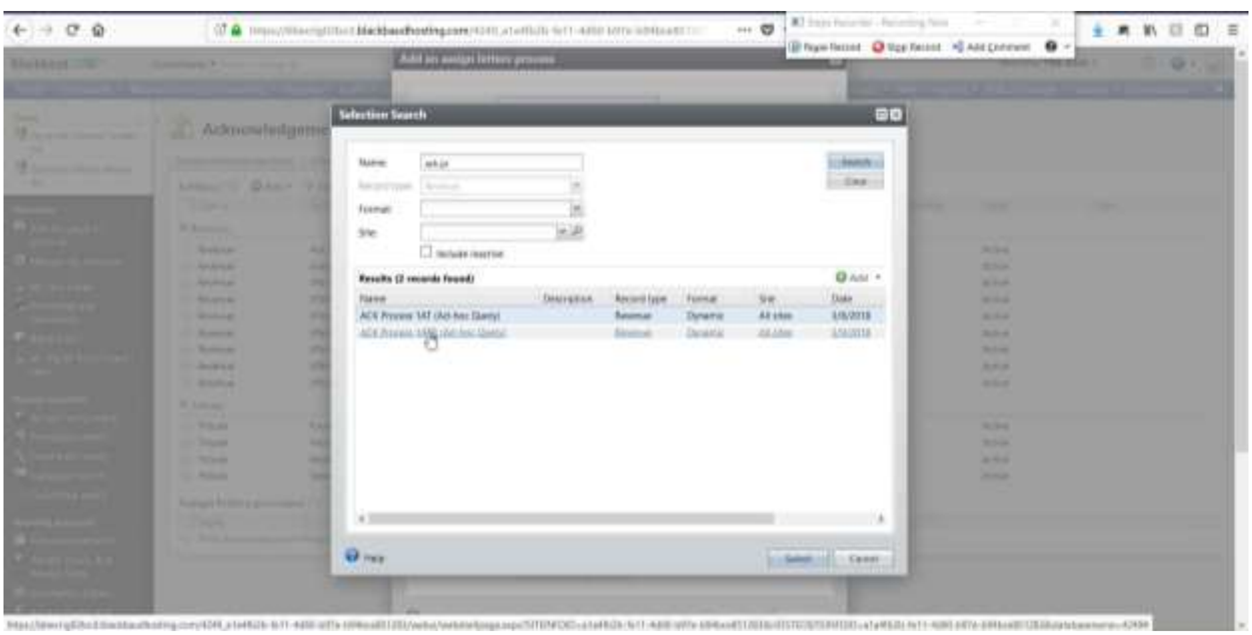
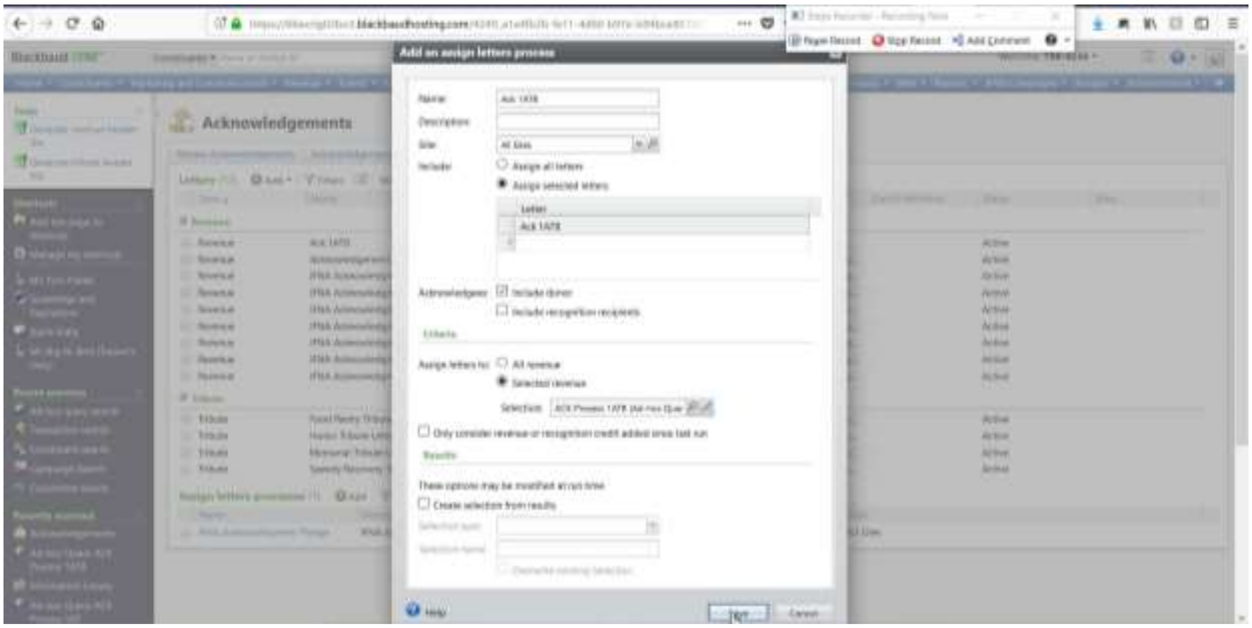
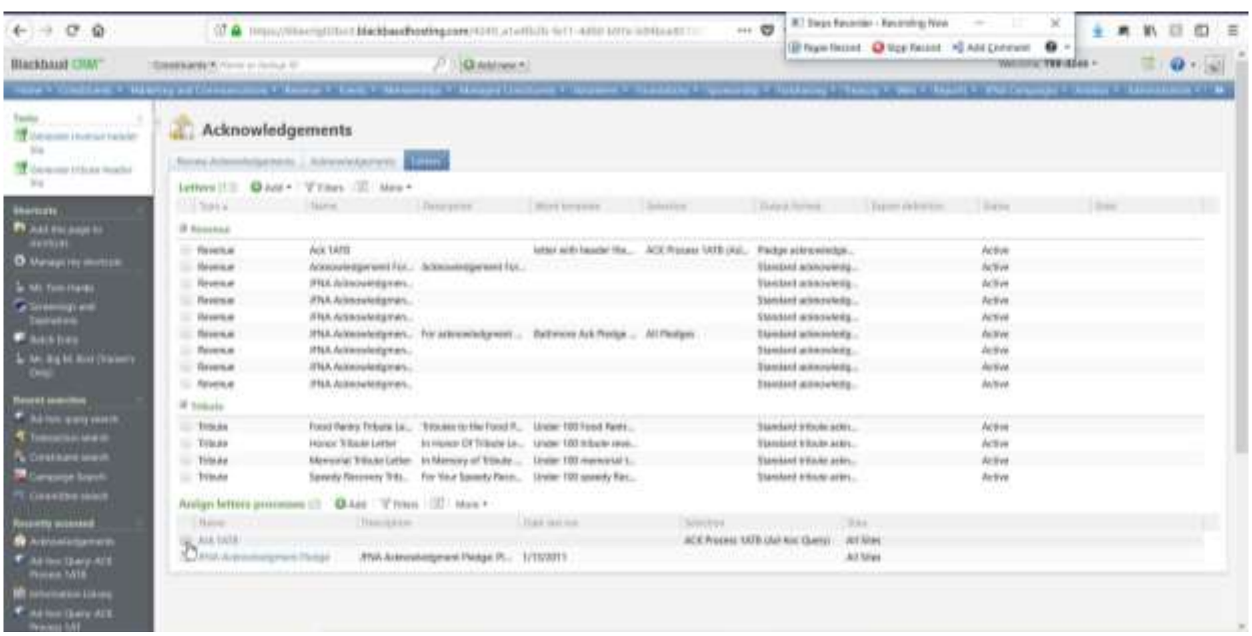
Step 8: Select the selection you created in Section 1.



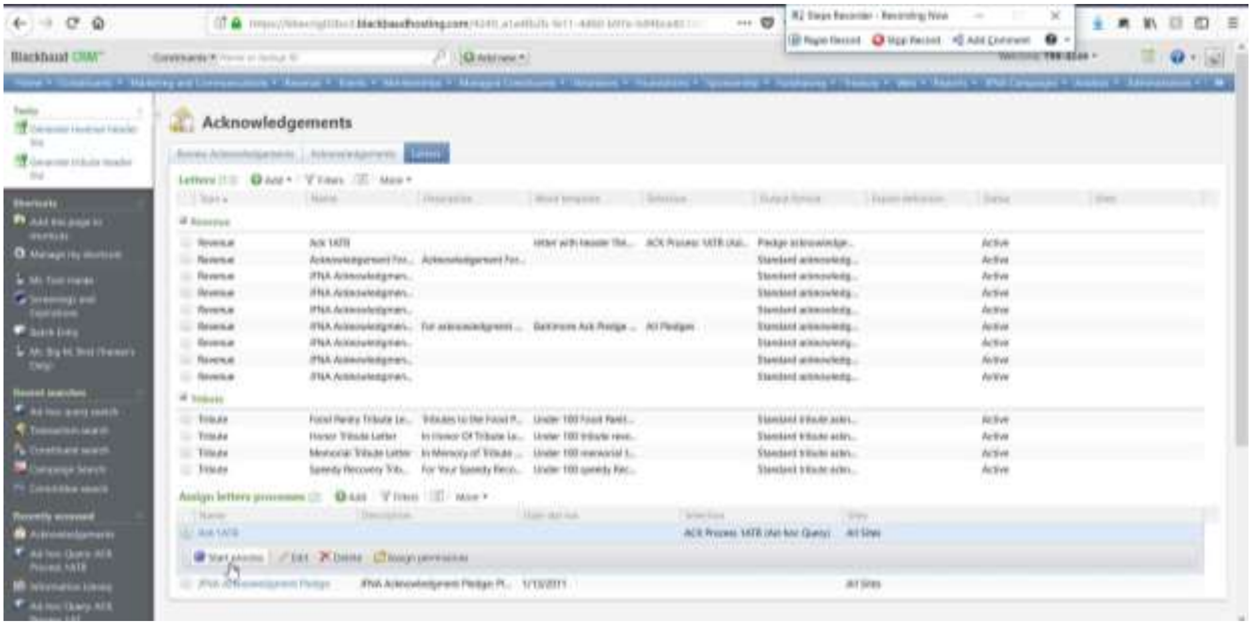
Step 9: Select Save to complete the set-up of the Assign the Letters Process.



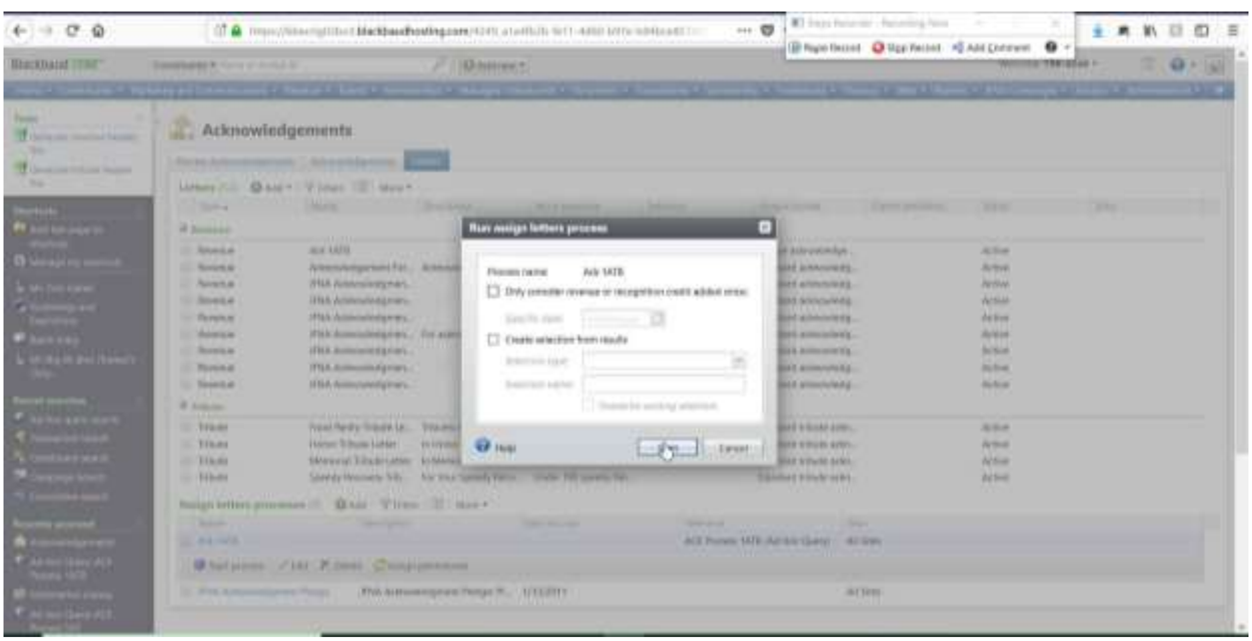
Step 10: Select the double arrow next to the Assign Letters process you created in the previous step, to expand the options available for this letter process.



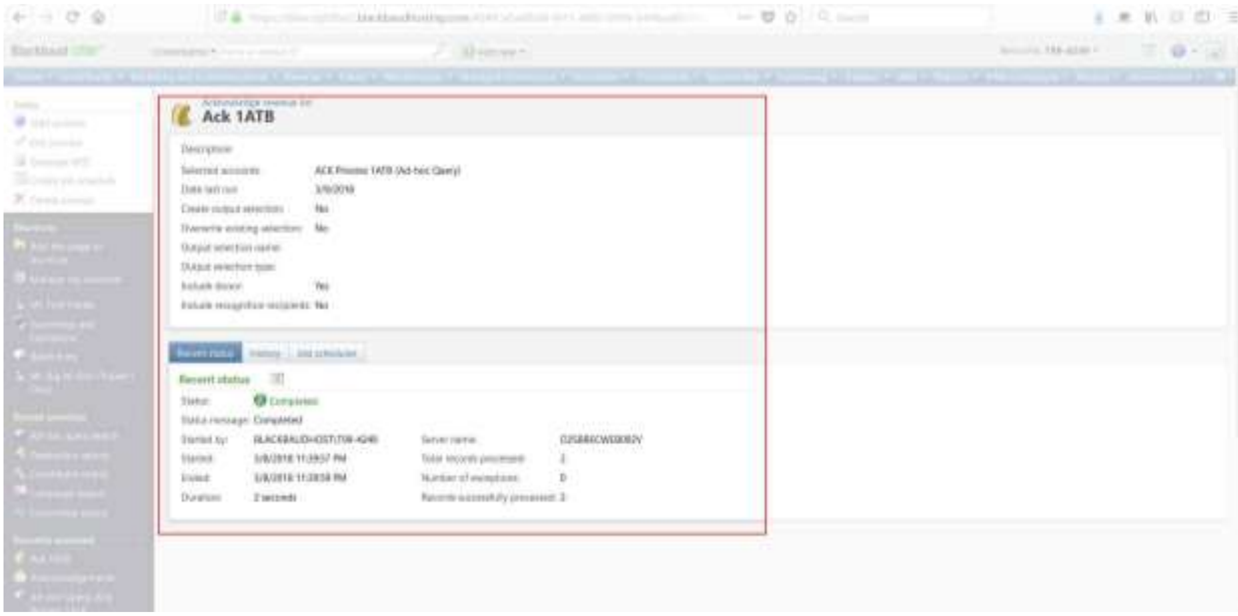
Step 11: Select "Start Process" from the available options. Note: THIS STEP IS OFTEN MISSED. Be sure to process the Assigned letter process before proceeding to the next tab/step.



Step 12: Review your settings and select "Save".



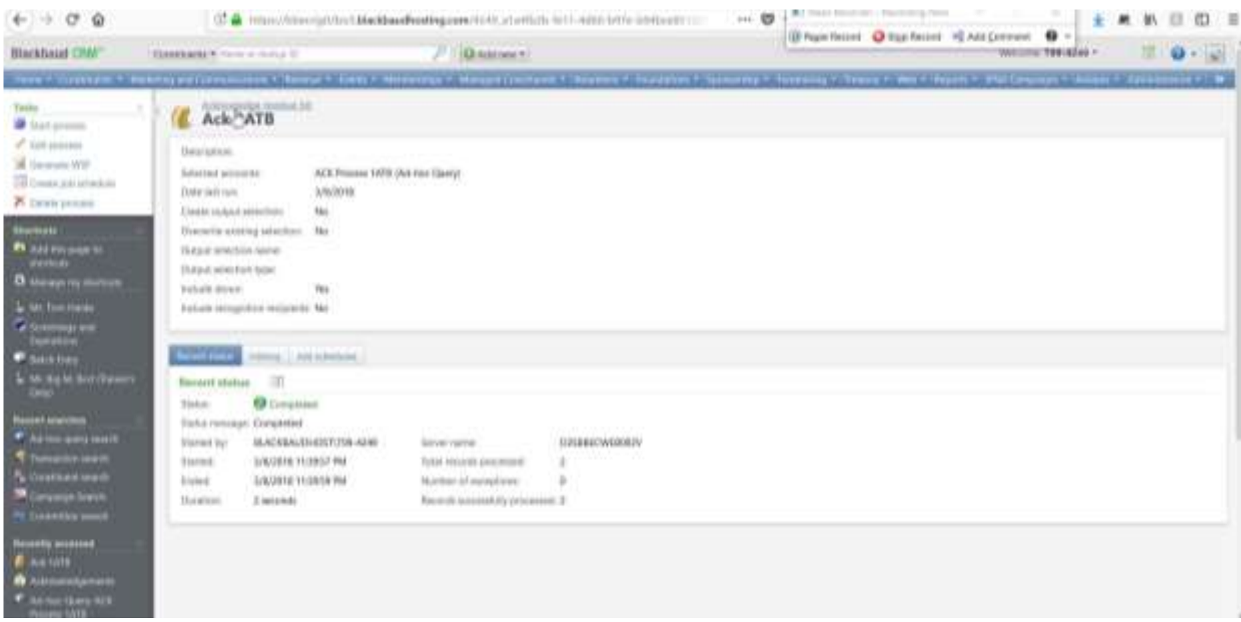
Step 13: Depending on the size of your selection and letter, the time to process will vary. Once you process you will receive a "Complete" Status. Verify the results are what you expected (typically matching the results of your selection). If the results are not correct, do not proceed, review each step for accuracy and run again.



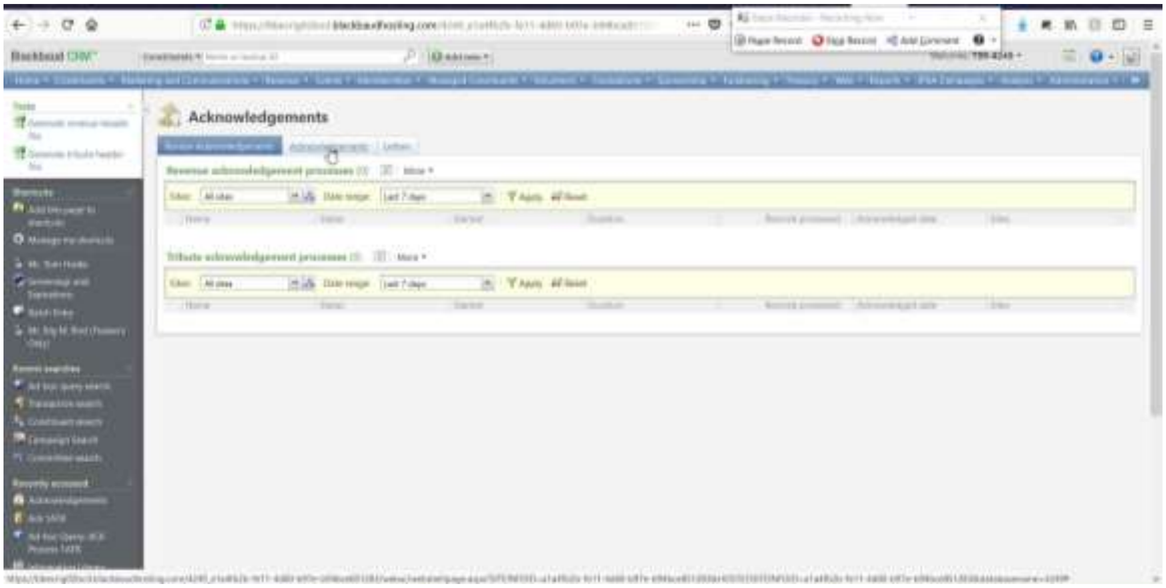
Section 6: Setting up the Acknowledgement Process

This is the final set up to process all acknowledgements in the system and ultimately produce a letter or csv file. (Reminder: The steps in section 6 are repetitive of section 4 and 5, however they are necessary to complete the setup of an acknowledgement process).

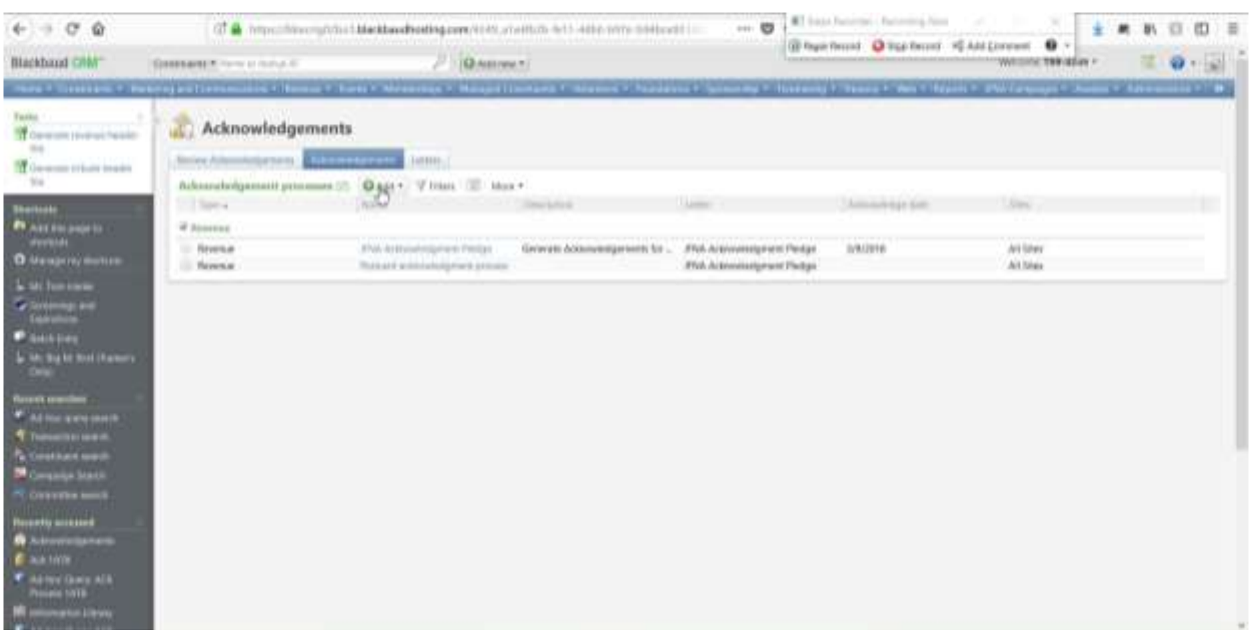
Step 1: Return to Acknowledgements by using the link above your processed letter titled “Acknowledgement revenue list”. Alternatively, you may also access this area in your “recently accessed” or in the “Marketing and Communications” module and then the “Acknowledgements” area.



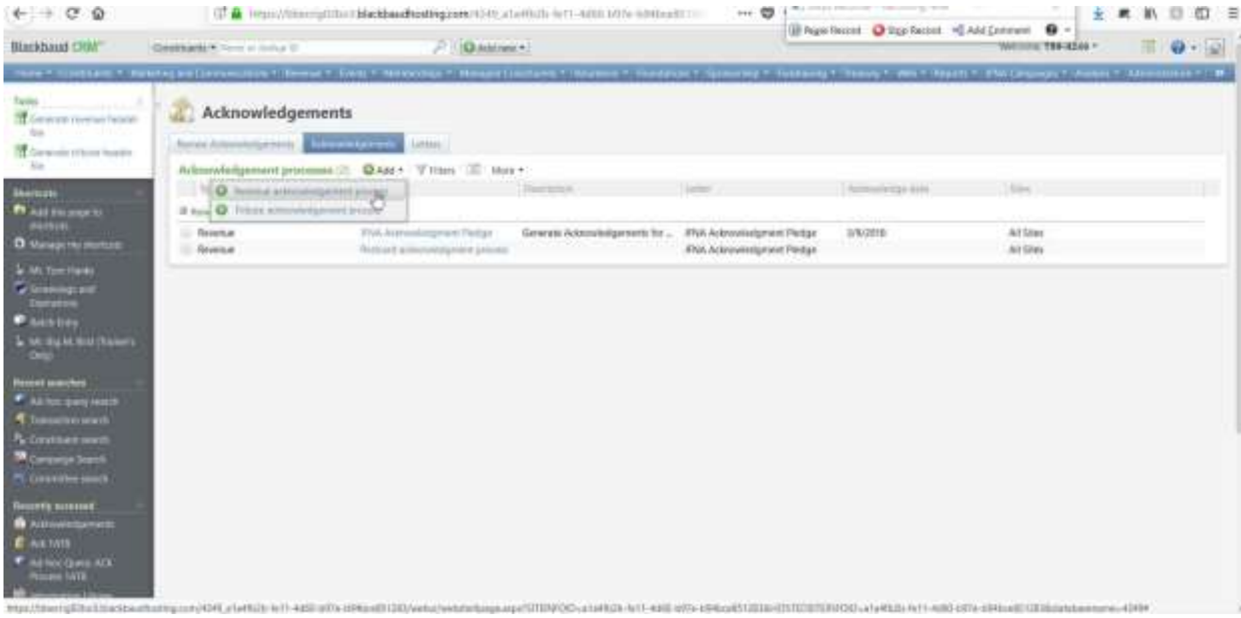
Step 2: Select the “Acknowledgements” tab.



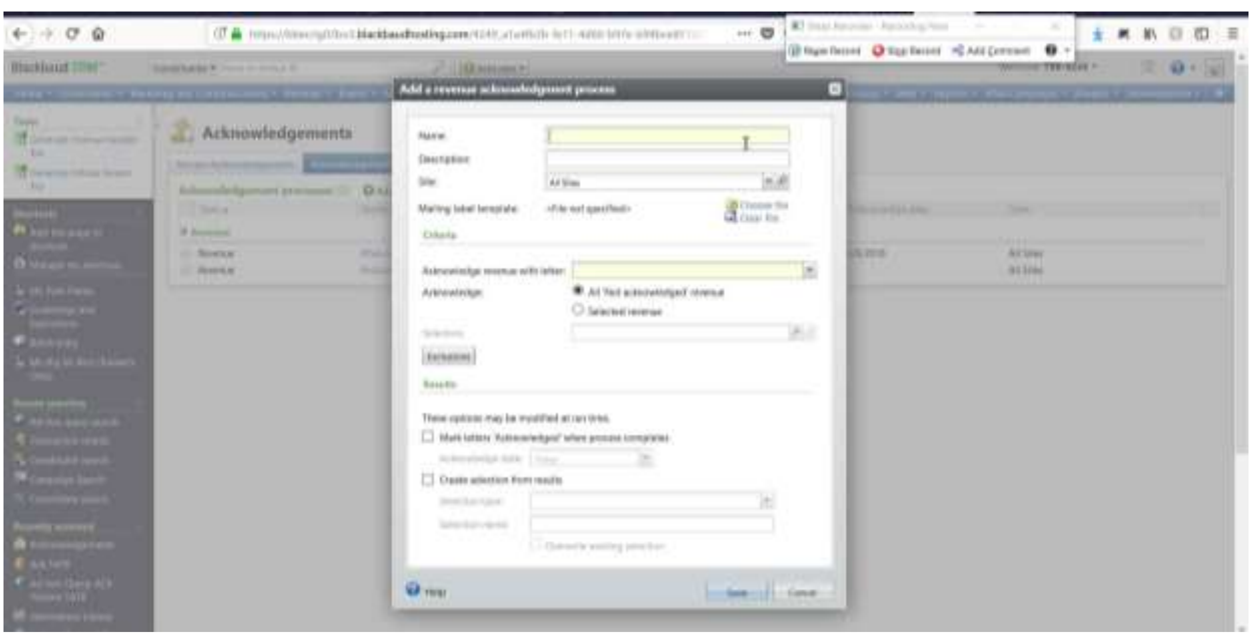
Step 3: Select “Add”



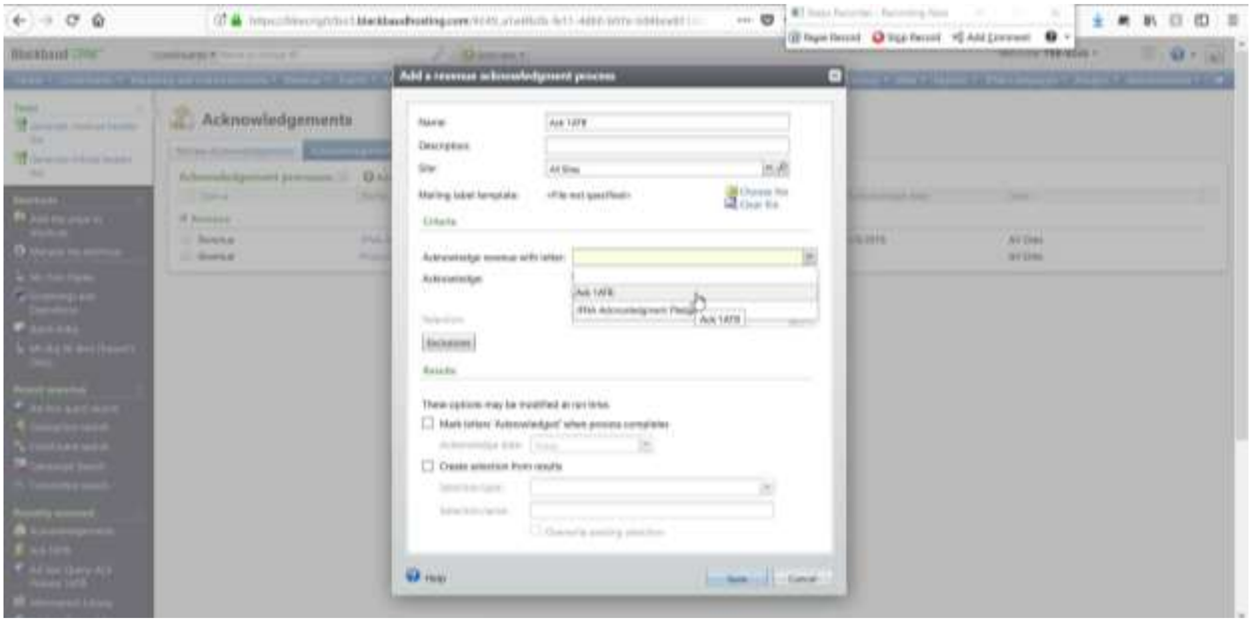
Step 4: Select “Revenue acknowledgement process



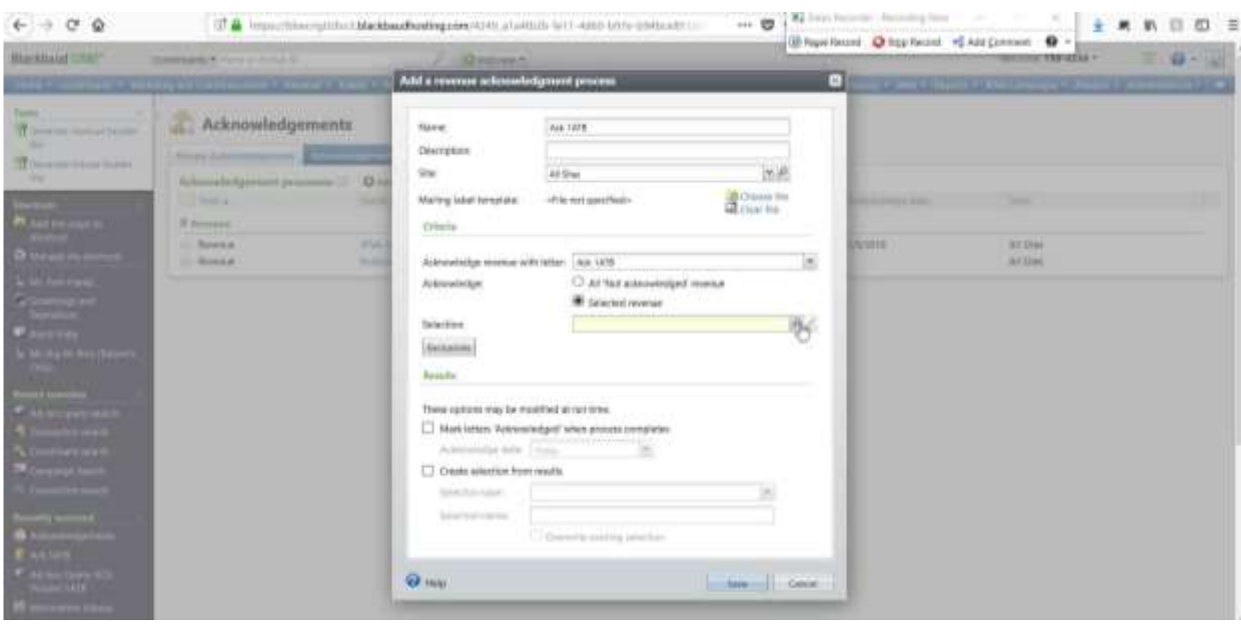
Step 5: Name your revenue acknowledgement process.



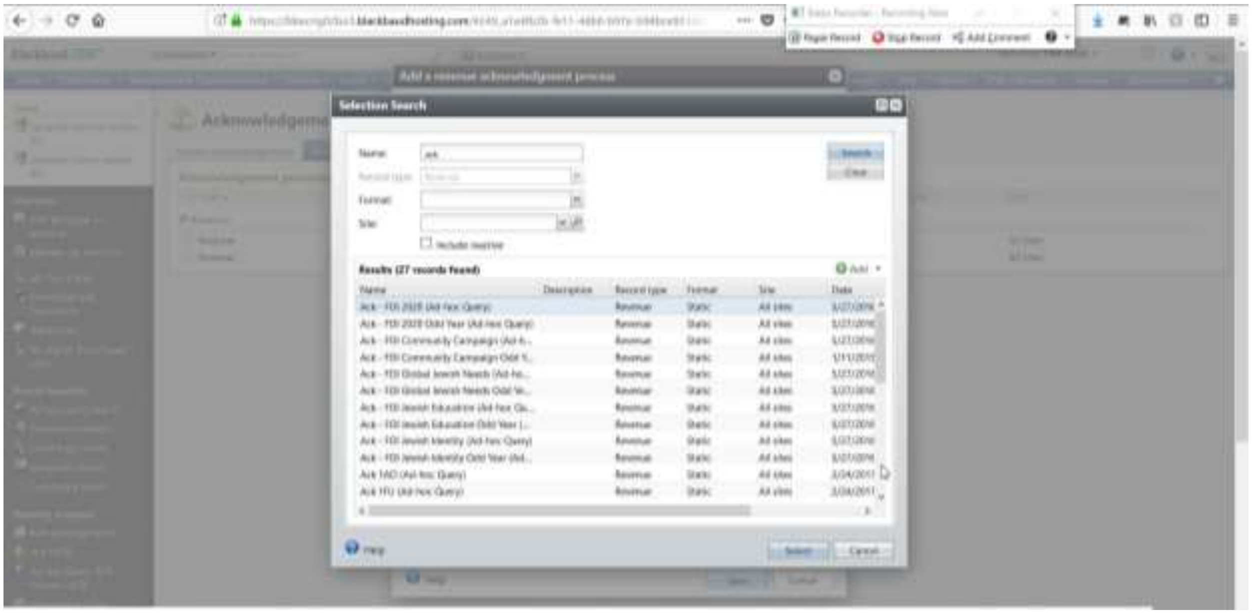
Step 6: Select the letter you created in Section 4.



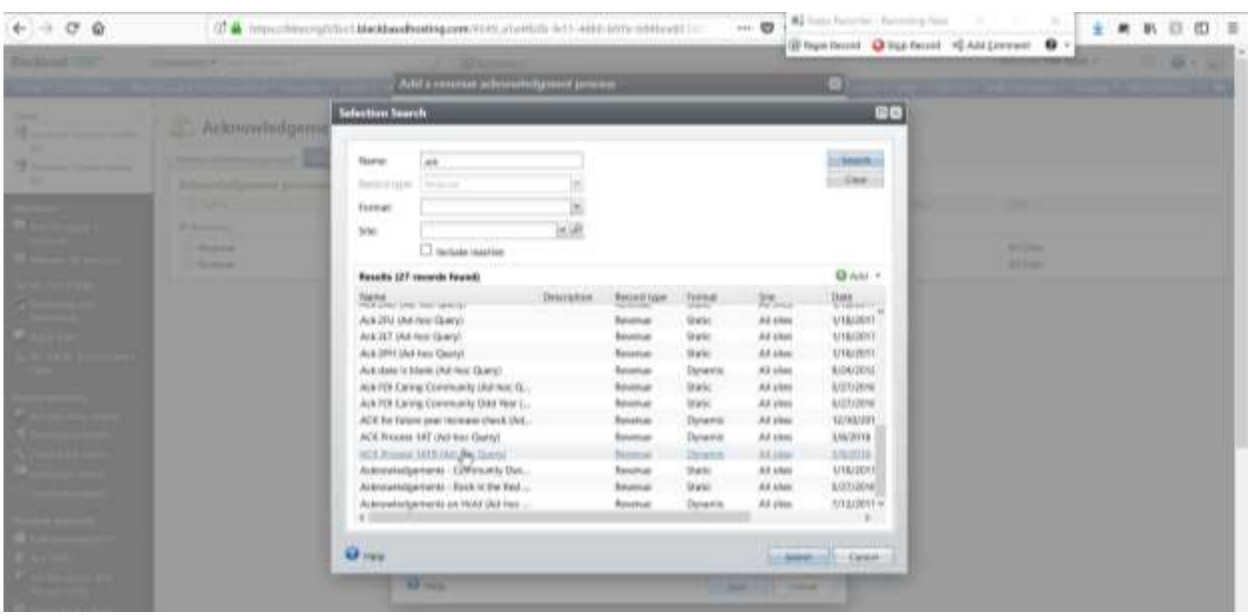
Step 7: Choose "Selected Revenue".



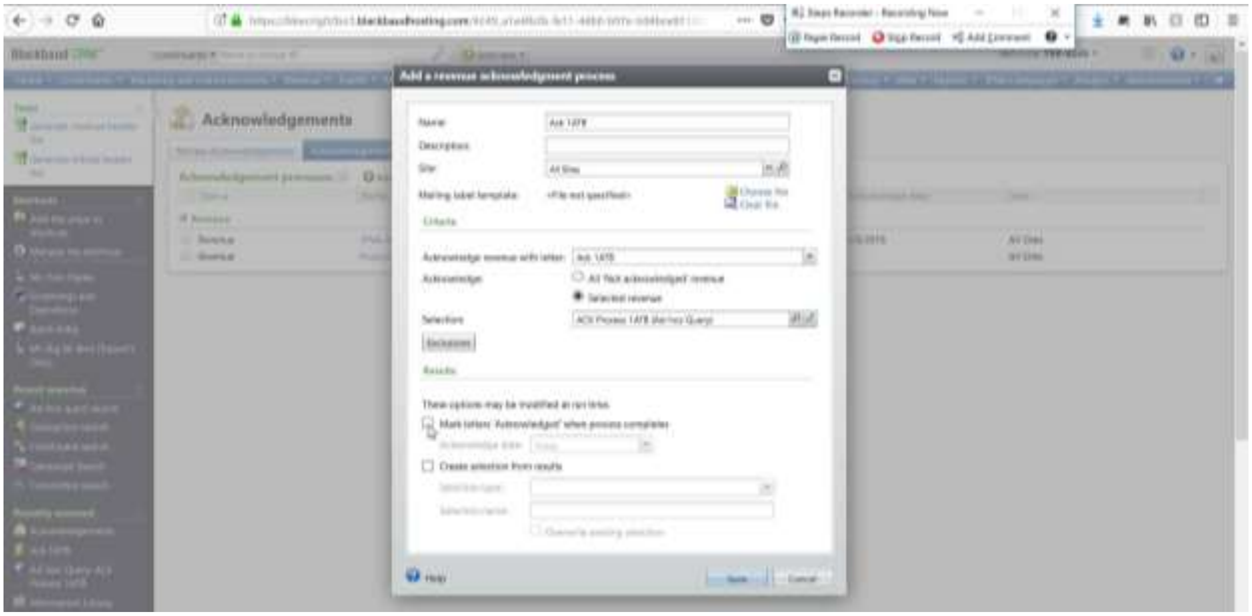
Step 8: Search for the selection you created in Section 1.



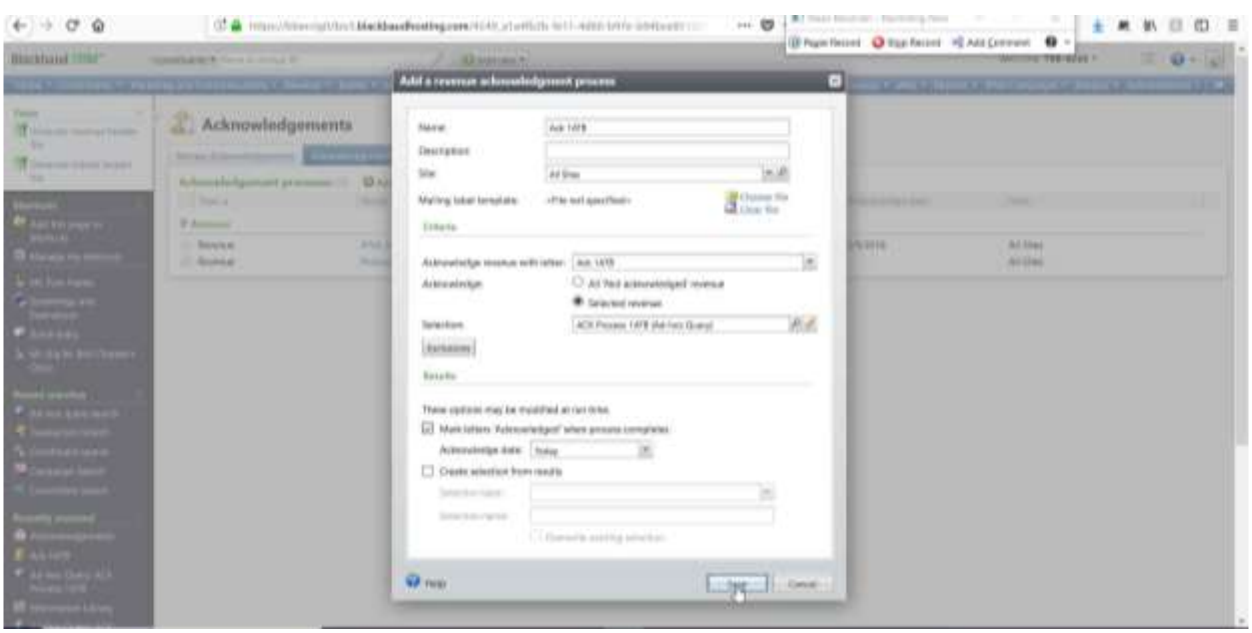
Step 9: Select the Selection you created in Section 1.



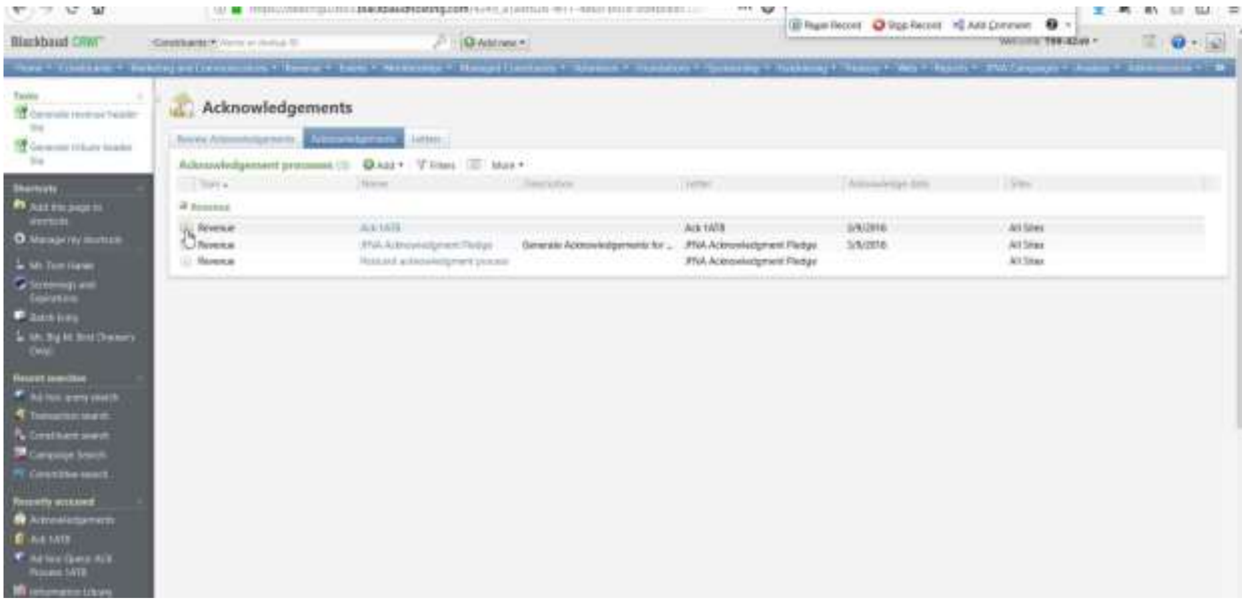
Step 10: Select "Mark letters 'Acknowledged' when process completes." (Note: If there is an error this is not a final marking, it is possible to remove the marking and correct. Blackbaud has recommended we always mark this box.)



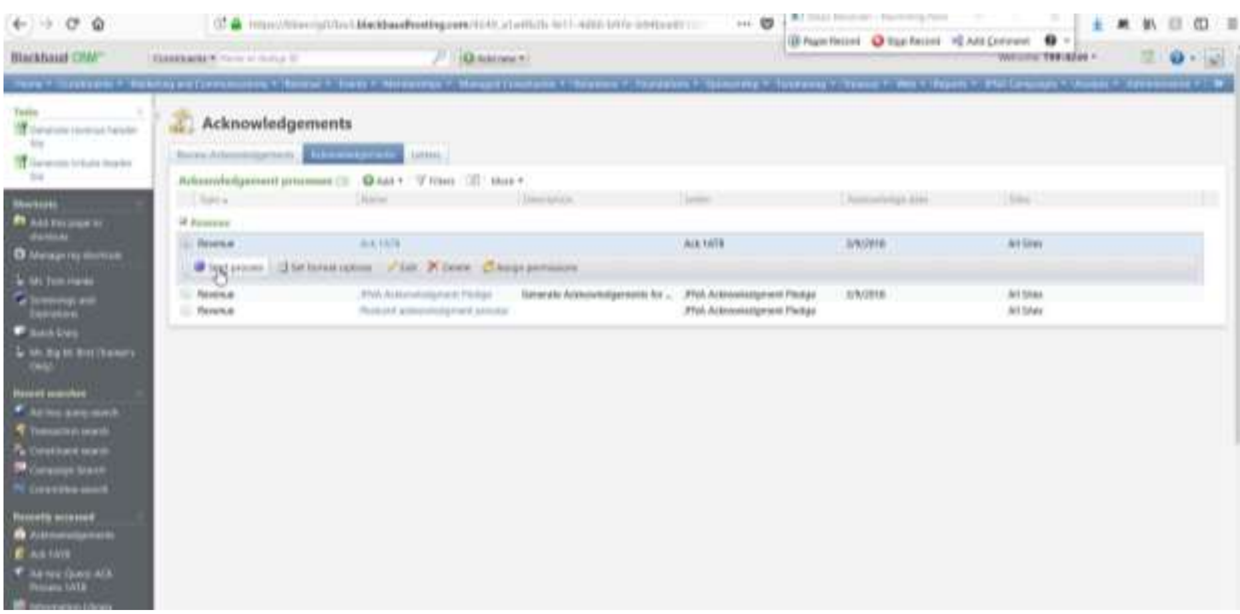
Step 11: Select Save to complete the set-up of the Acknowledgement process.



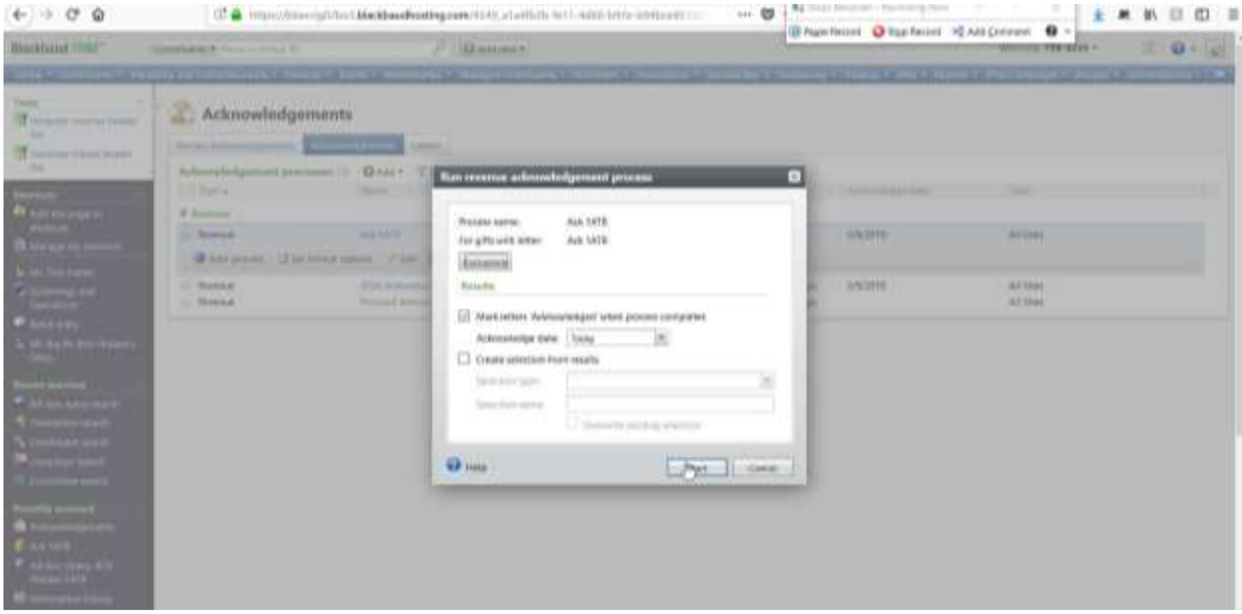
Step 12: Select the double arrow next to the acknowledgement process you created in the previous step.



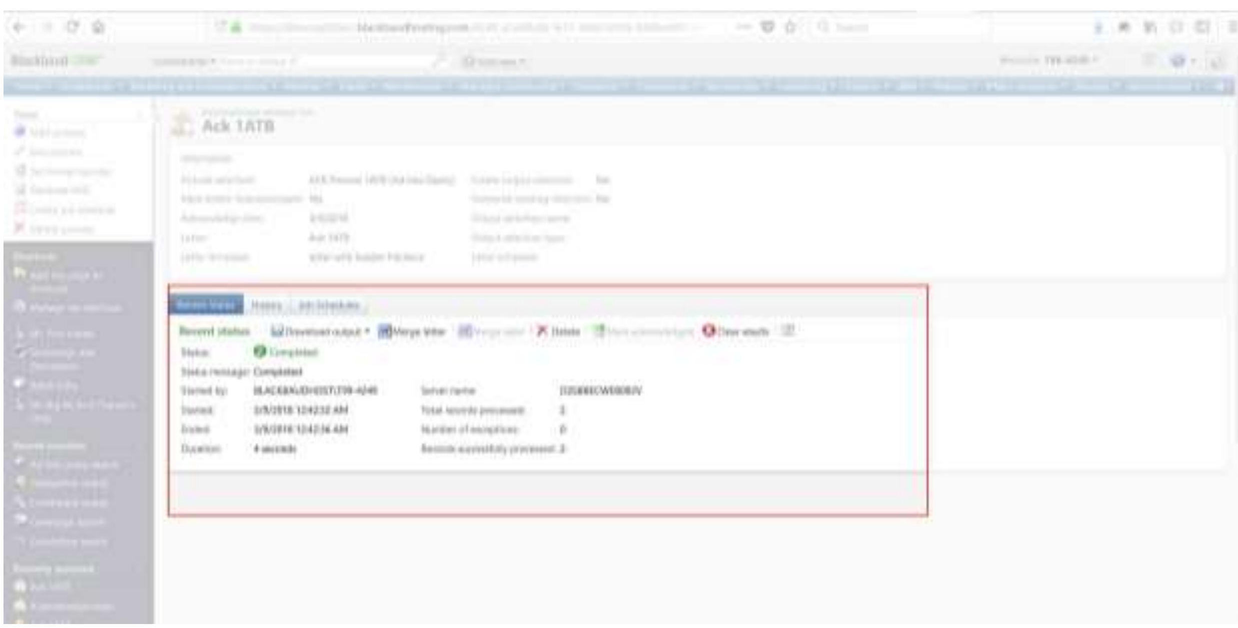
Step 13: Select “Start Process”.



Step 14: Review the settings and select start**.**



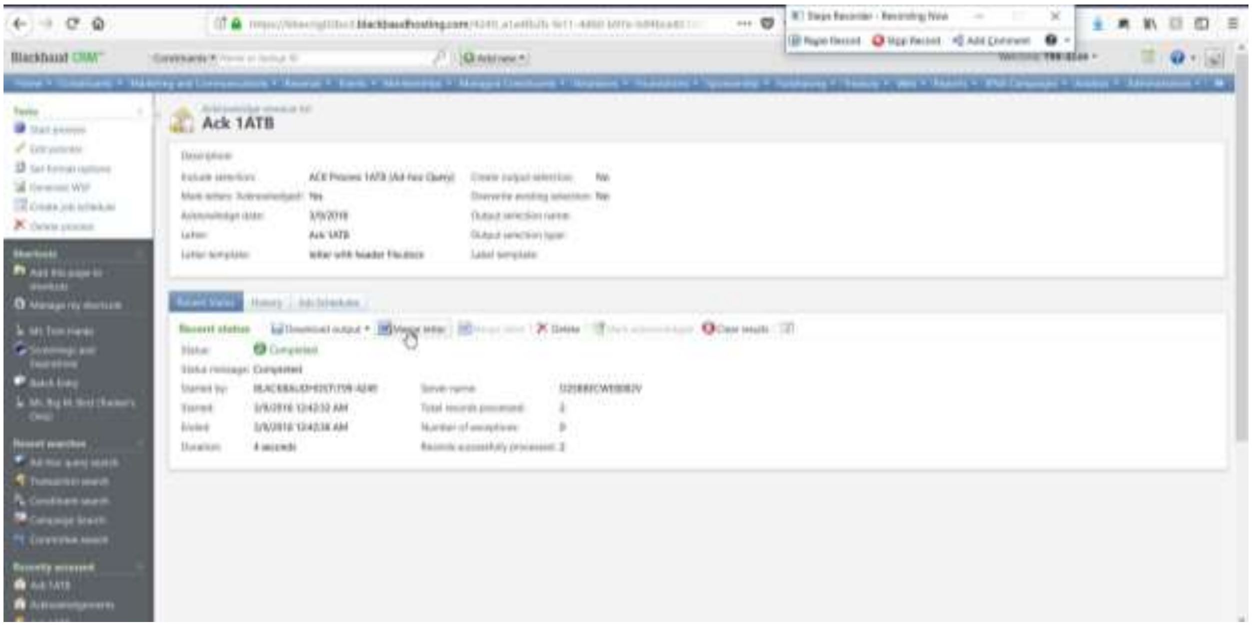
Step 15: Depending on the size of your selection and letter, the time to process will vary. Once you process you will receive a "Complete" Status. Verify the results are what you expected (typically matching the results of your selection). If the results are not correct, do not proceed to the next step. Review each step for accuracy and visit the troubleshooting section of this document. Pay attention to details such as exclusions that you may not have accounted for.



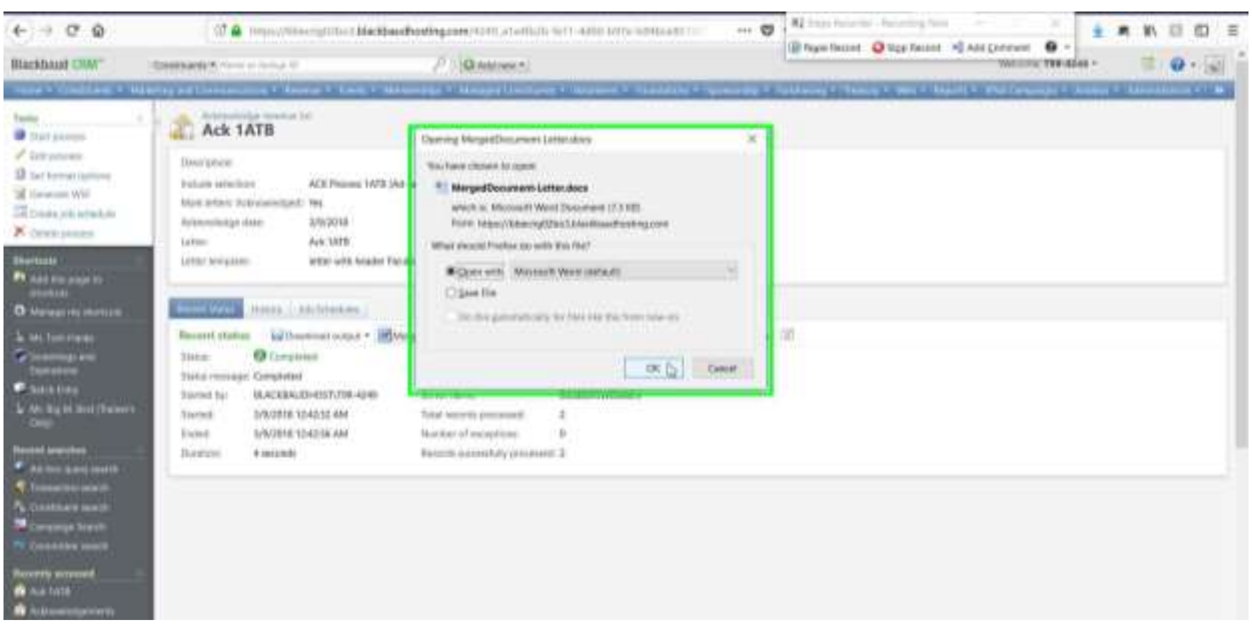
Section 7: Viewing the Merged Documents

The letters will be produced in this step with the merge fields included.

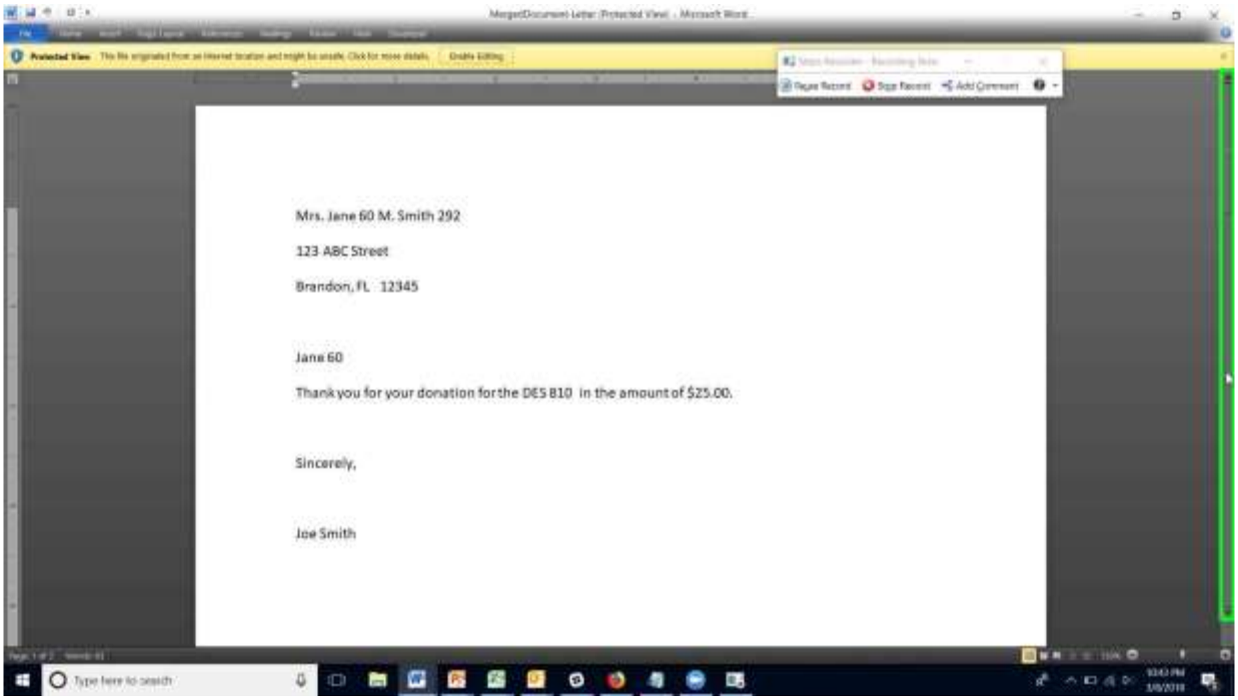
Step 1: Once your letters have processed with adequate number of results select “Merge Letters” to view the letters.



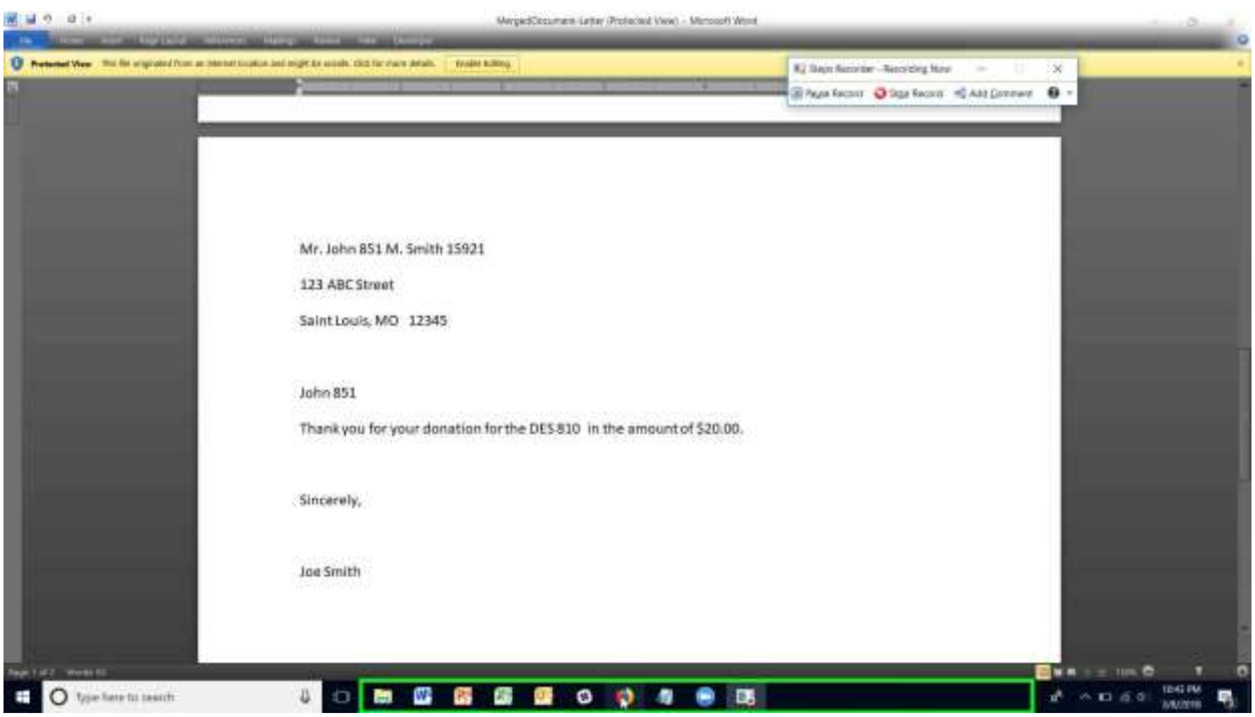
Step 2: Select “Open with Microsoft Word”.



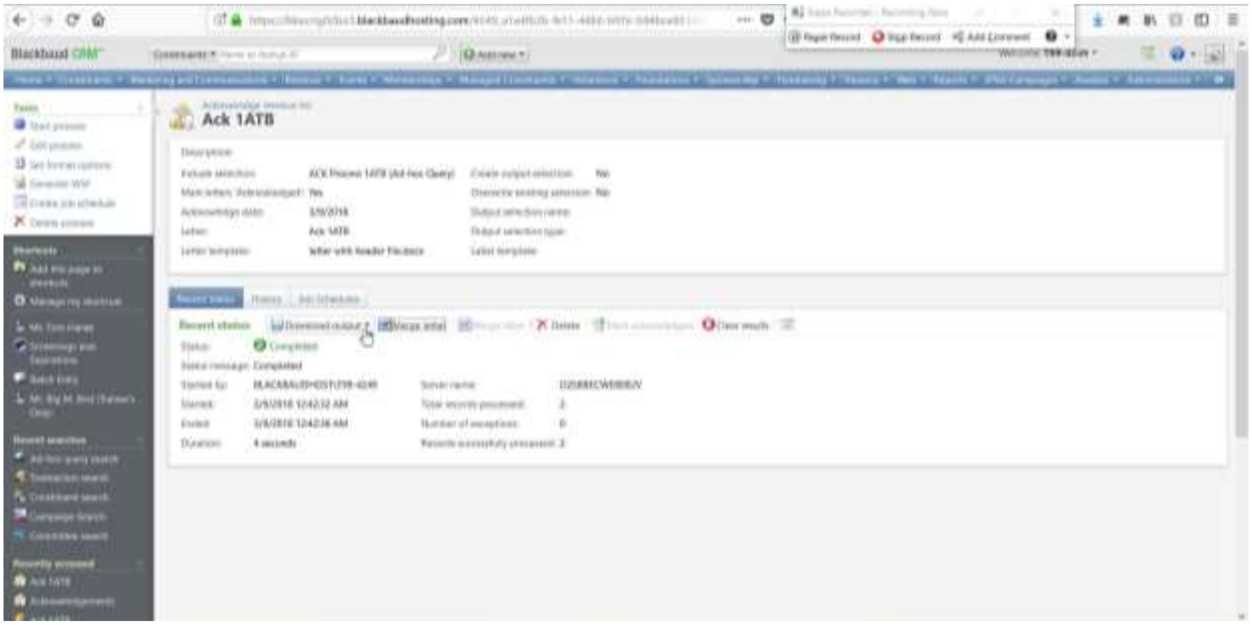
Step 3: Review the letters confirming the fields merged correctly. If the letters are correct, print and mail them. The records have already been marked. If changes need to be made, revisit your header file to make changes. See the troubleshooting section to reprocess the letters.



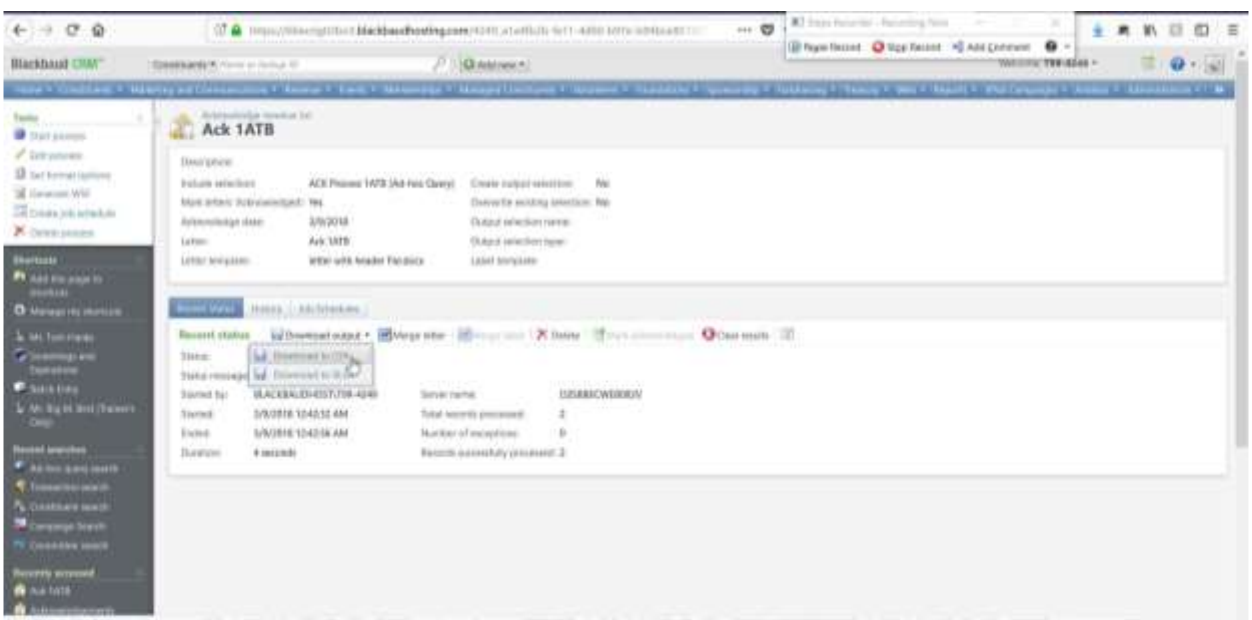
Step 4: Close your Microsoft Word program.



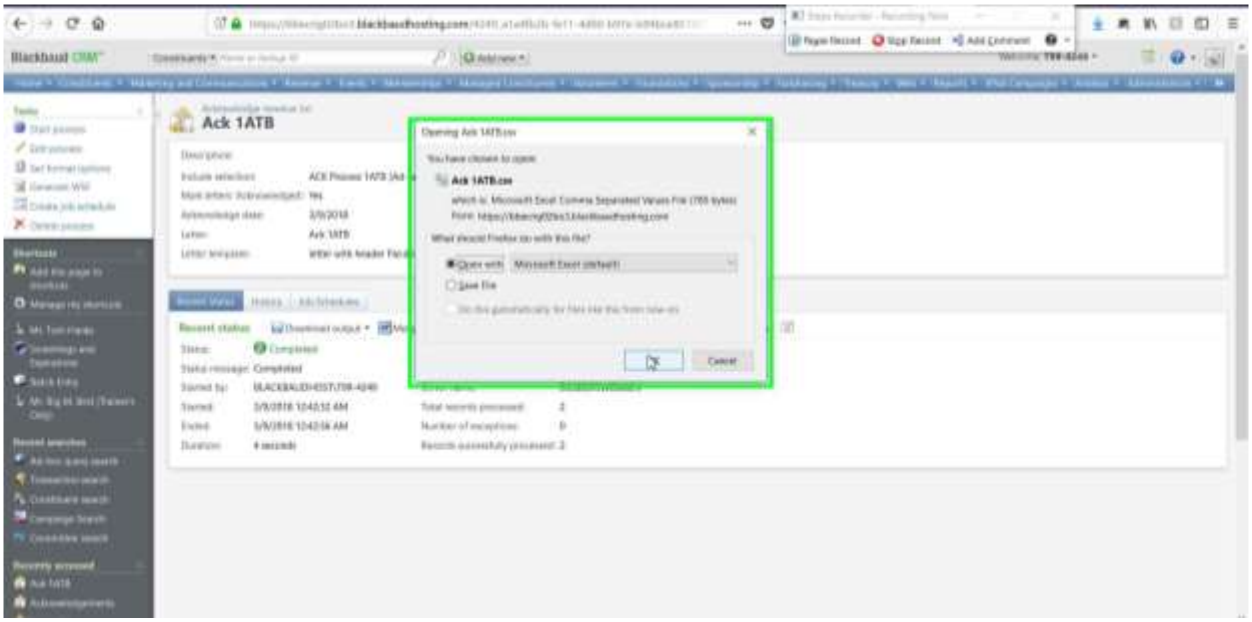
Step 5: Select "Download Output".



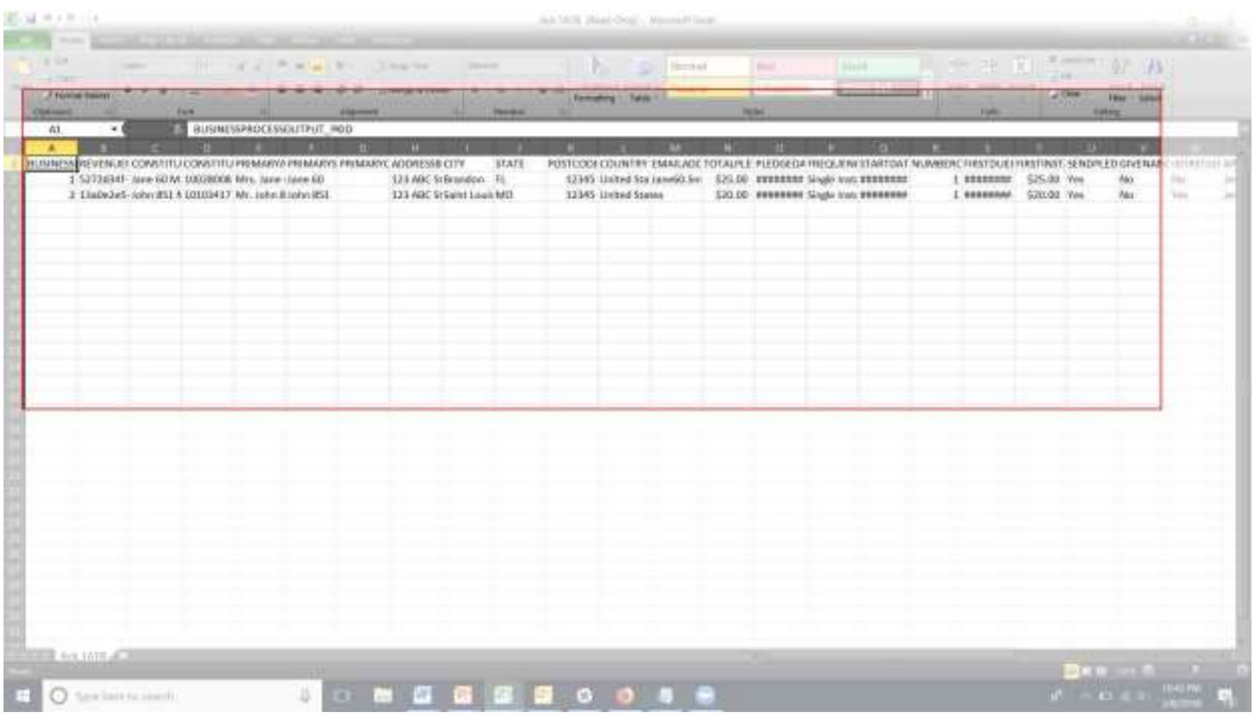
Step 6: Select "Download to CSV".



Step 7: Select Open with “Microsoft Excel ”.



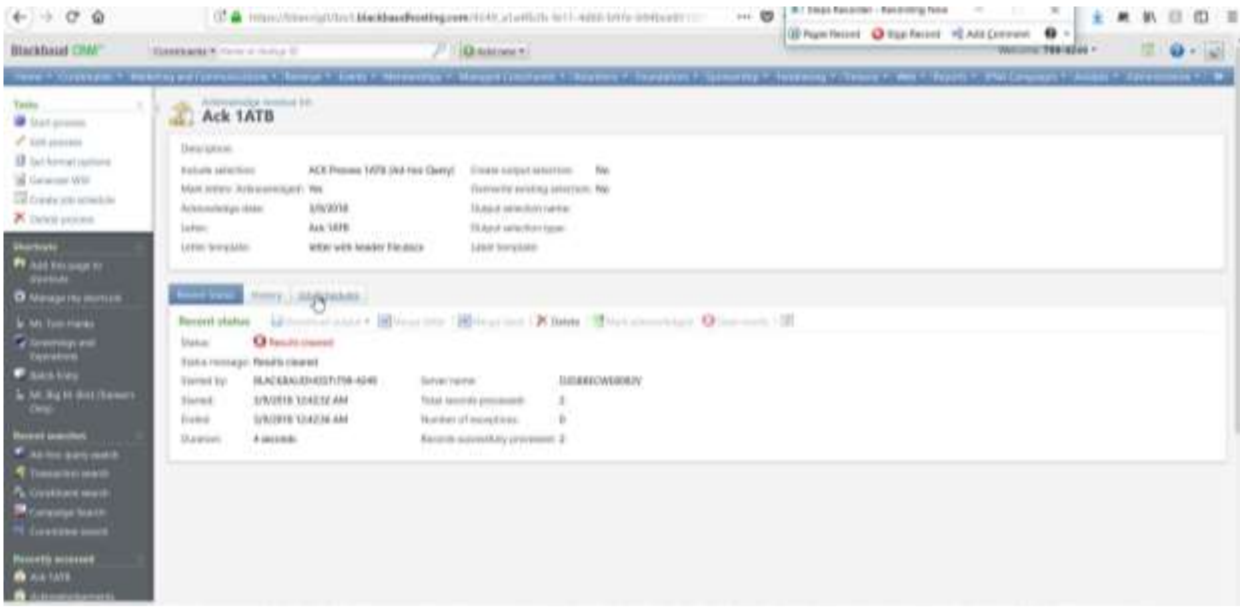
Step 8: View your export. Save the file, print, or merge to labels etc. as desired.



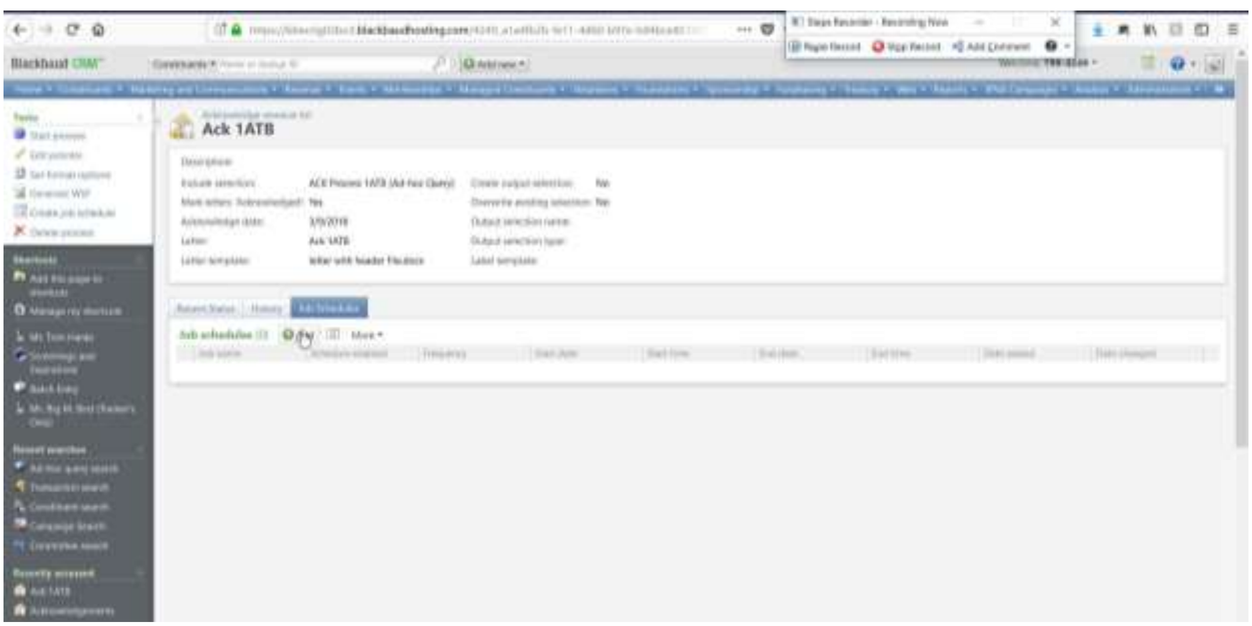
Section 8: Job Schedules

This section will provide instruction of how to set up a job schedule so the system will process the letters at a specific date and time. The user will only be responsible for pulling the merged letter and printing. This is an optional step as letters can be merged and processed manually if preferred by a Federation.

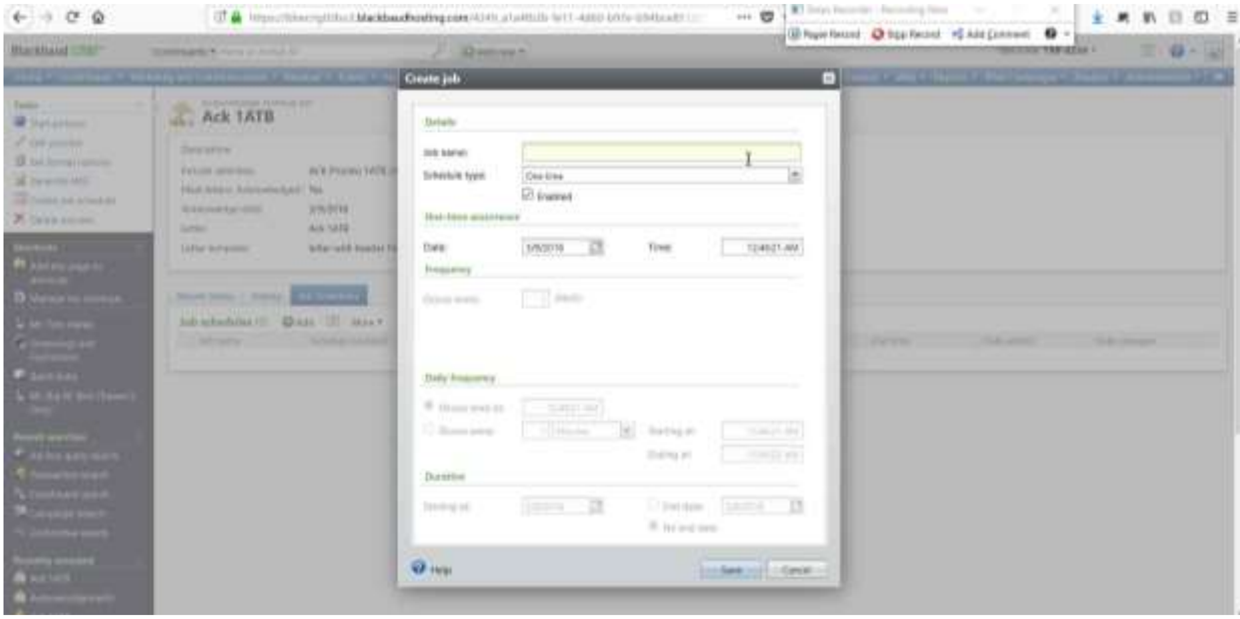
Step 1: Select the "Job Schedules" Tab from within the process you'd like to set up.



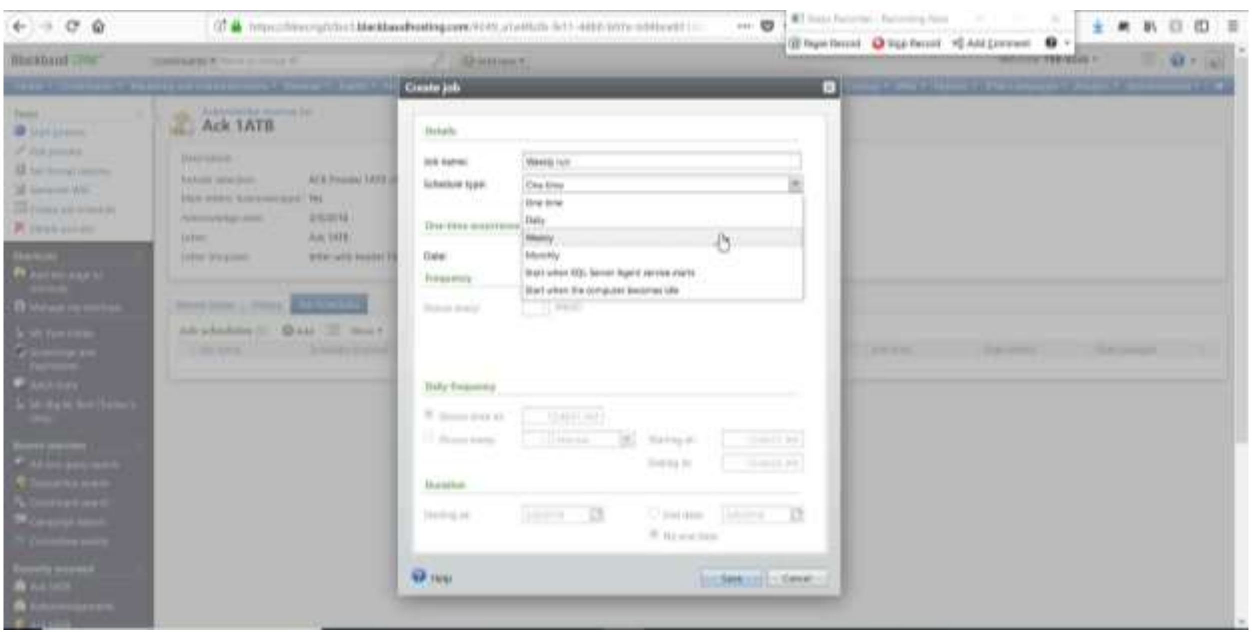
Step 2: Select "Add" within the Job Schedules Tab.



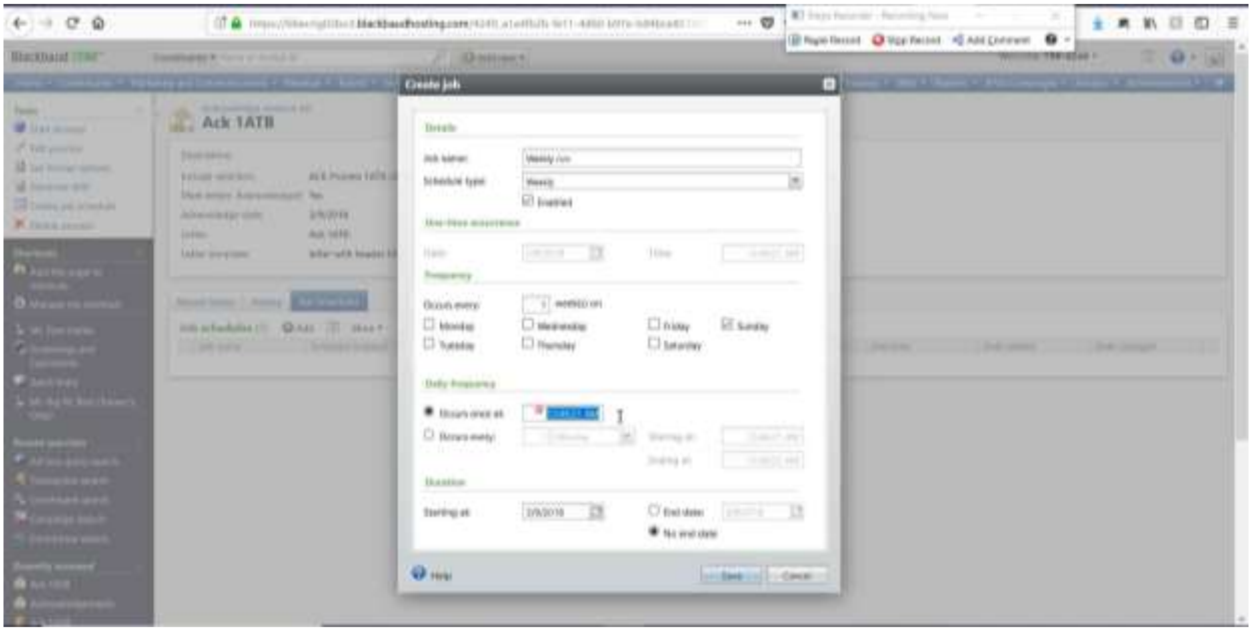
Step 3: Name the Job, such as Weekly run of the tribute/donor acknowledgements.



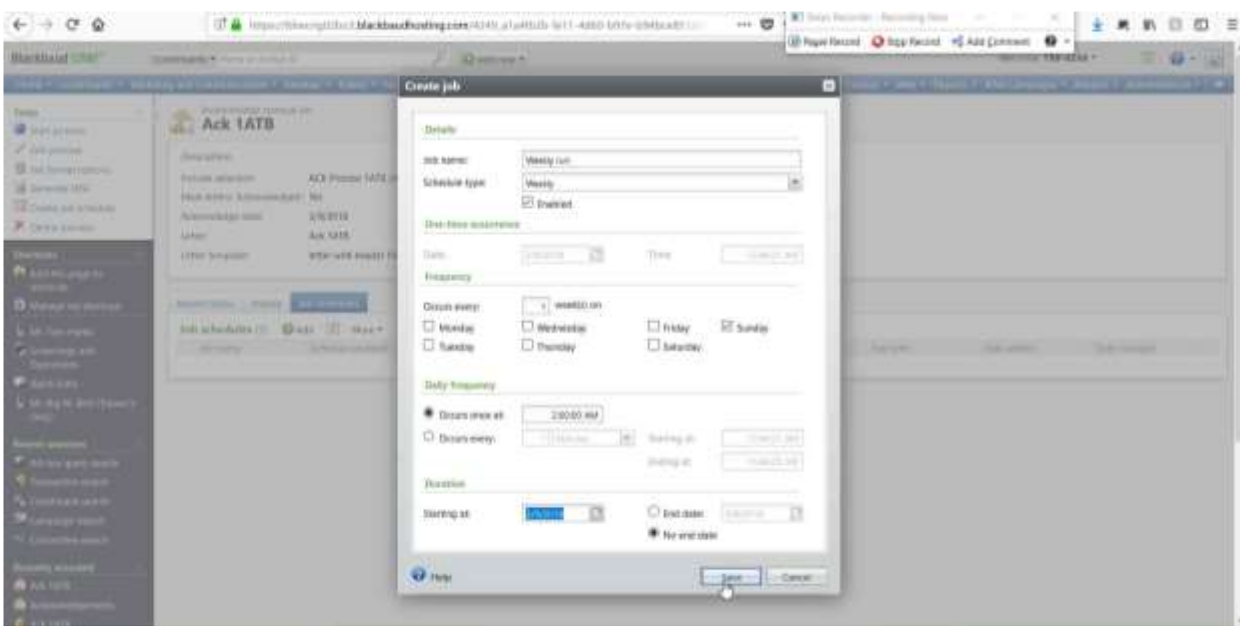
Step 4: Choose from the Schedule type drop down if you'd like the process to run "one time", "daily" "weekly," etc.



Step 5: Select the frequencies



Step 6: Select the time and Duration the system should run the process and Save.



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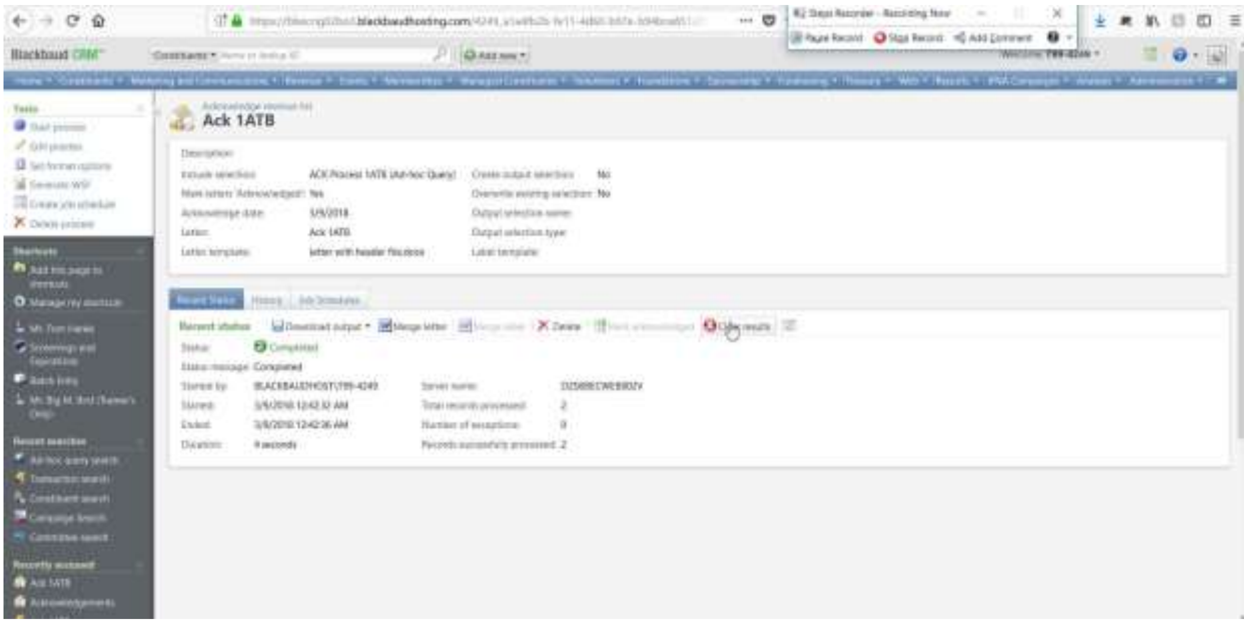
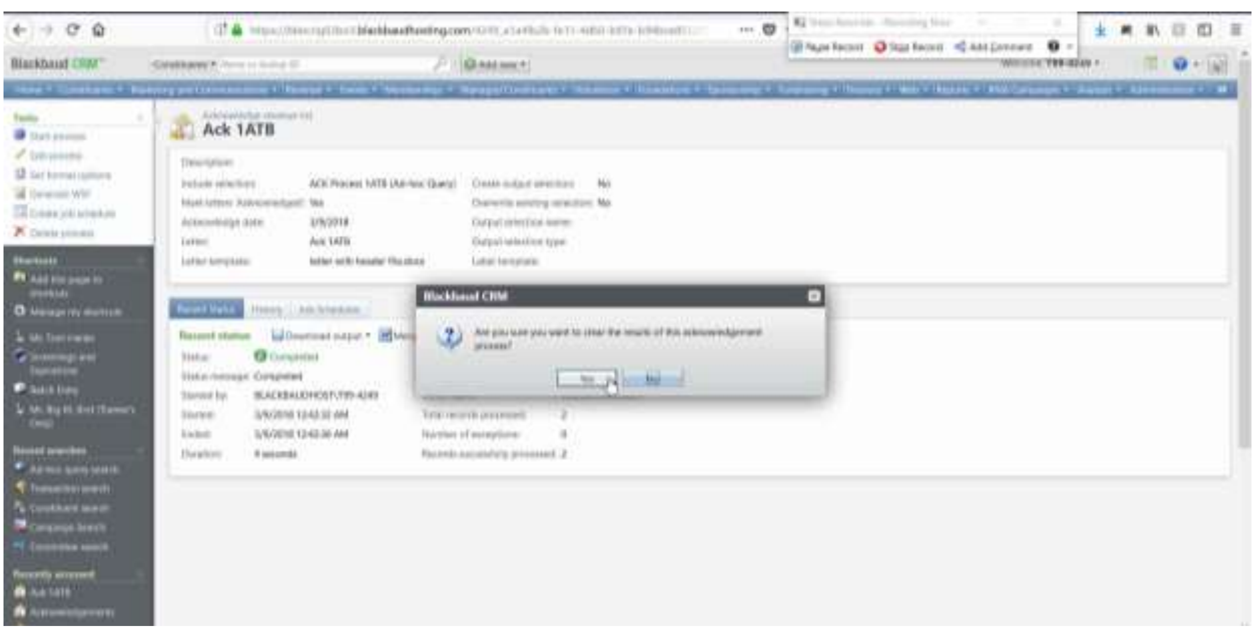
Section 9: Troubleshooting

Step 1: If corrections to the letter need to be made, the first important step is the "Clear results". This will remove the processed run from the database and allow you to make corrections before processing again. IMPORTANT: Under NO CIRCUMSTANCES should anyone ever use the DELETE option. It is recommended that Federation administrative users remove this functionality from all users view using the design mode feature.



Step 2: Select "Yes" to finalize the clearing of the results.



Step 3: After correcting the error, be sure to reprocess in the “Assign letters processes” section of the “Letters” setup tab. This must be done BEFORE reprocessing the effort in the “Acknowledgements” tab. Examples of common errors are listed below.

Common Errors

Possible Error 1- Incorrect Merge Fields: If the letter did not include the correct fields, edit your export definition if needed within CRM, and rerun and save the new header file. Merge the corrected fields into the Microsoft Word letter as previously done and resave the letter. In CRM, use the expand arrows to view the options available for your letter in the “Letters” section of the “Letters” tab. From the available options select “Update template” (Diagram 1a), then upload and save the new file (Diagram 1b). Finally, expand your “Assign letters processes” and select “Start process” (Diagram 1c) to relink the letter. If you receive 0 results, you may still continue to the “Acknowledgements” tab for final processing. Just be sure you previously cleared the results.

Diagram 9a:

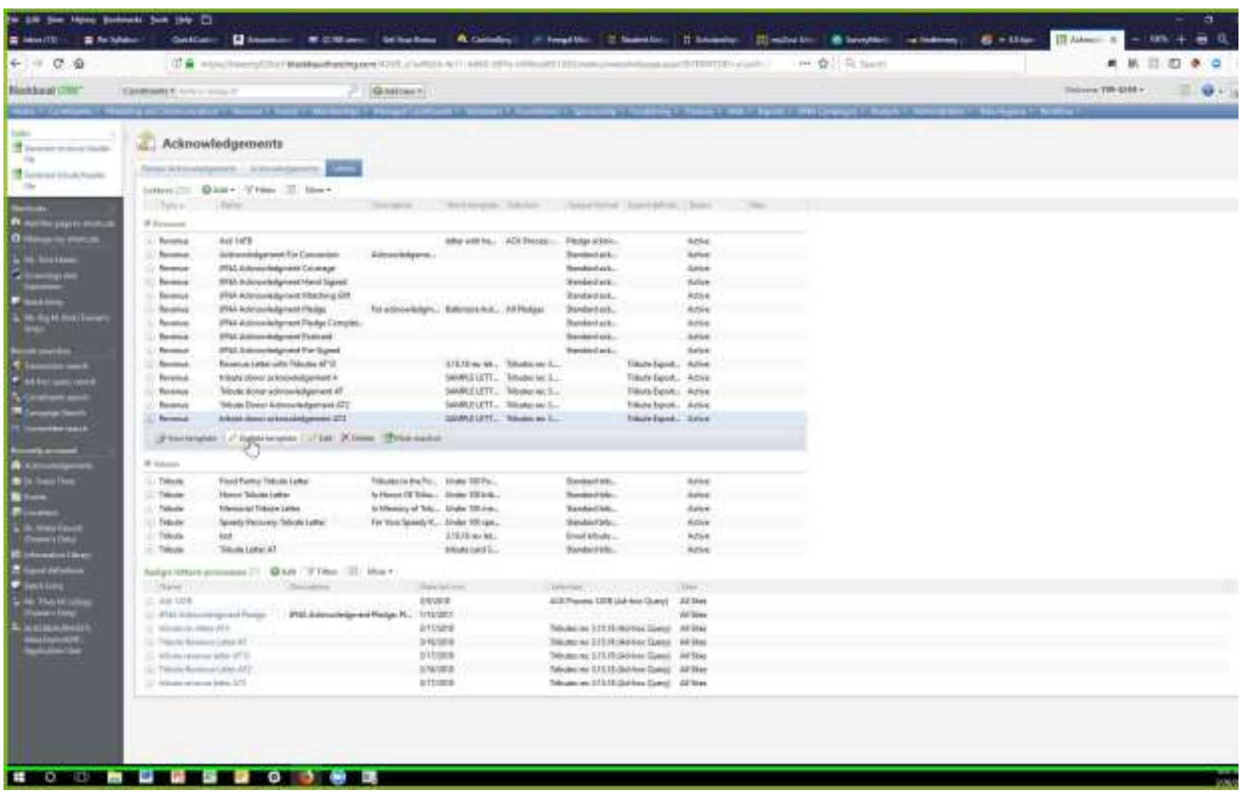


Diagram 9b:

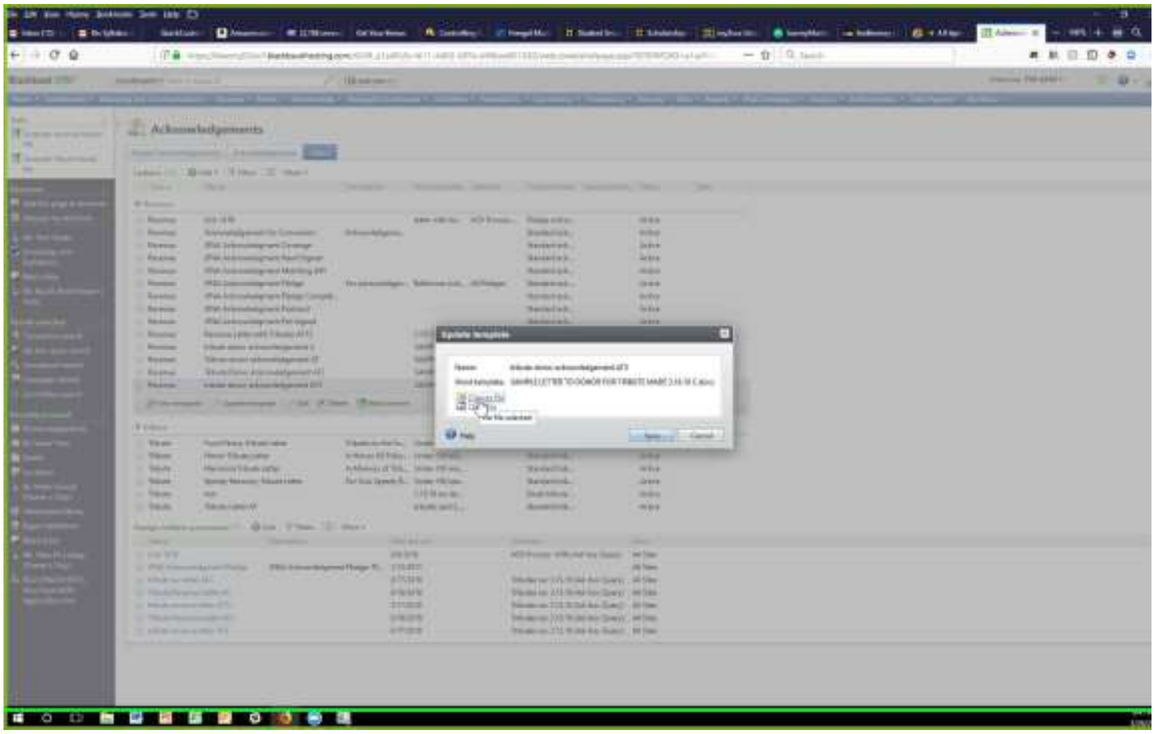
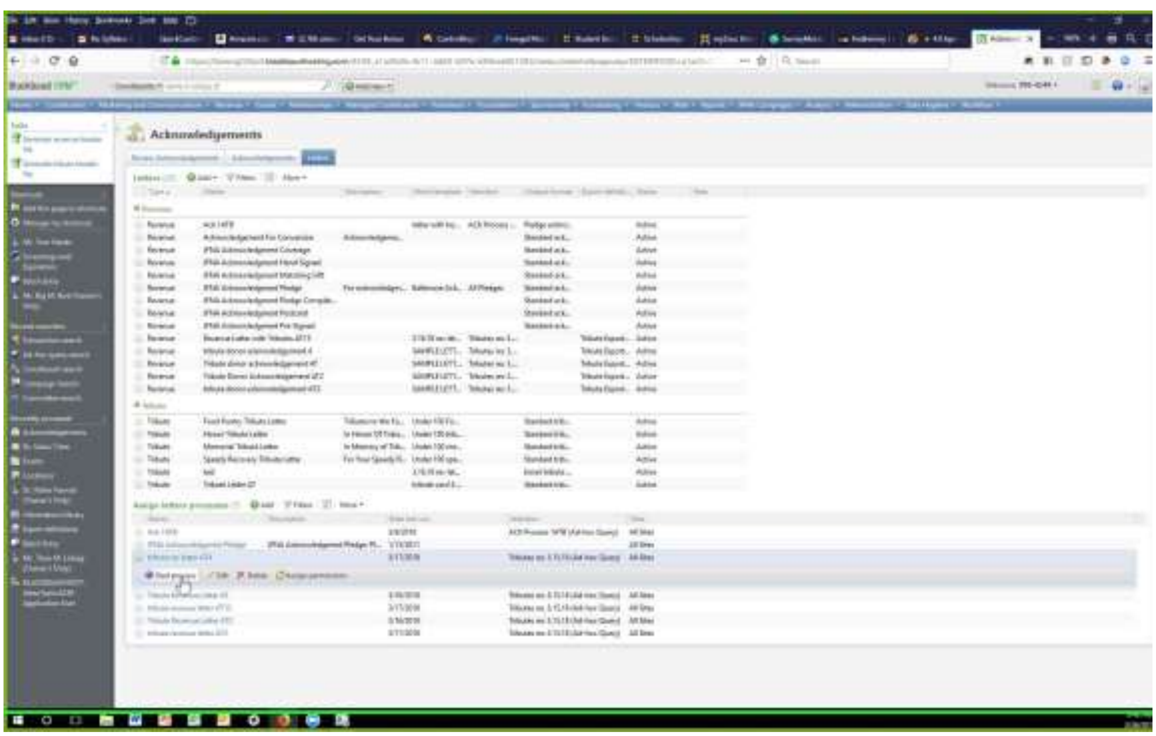
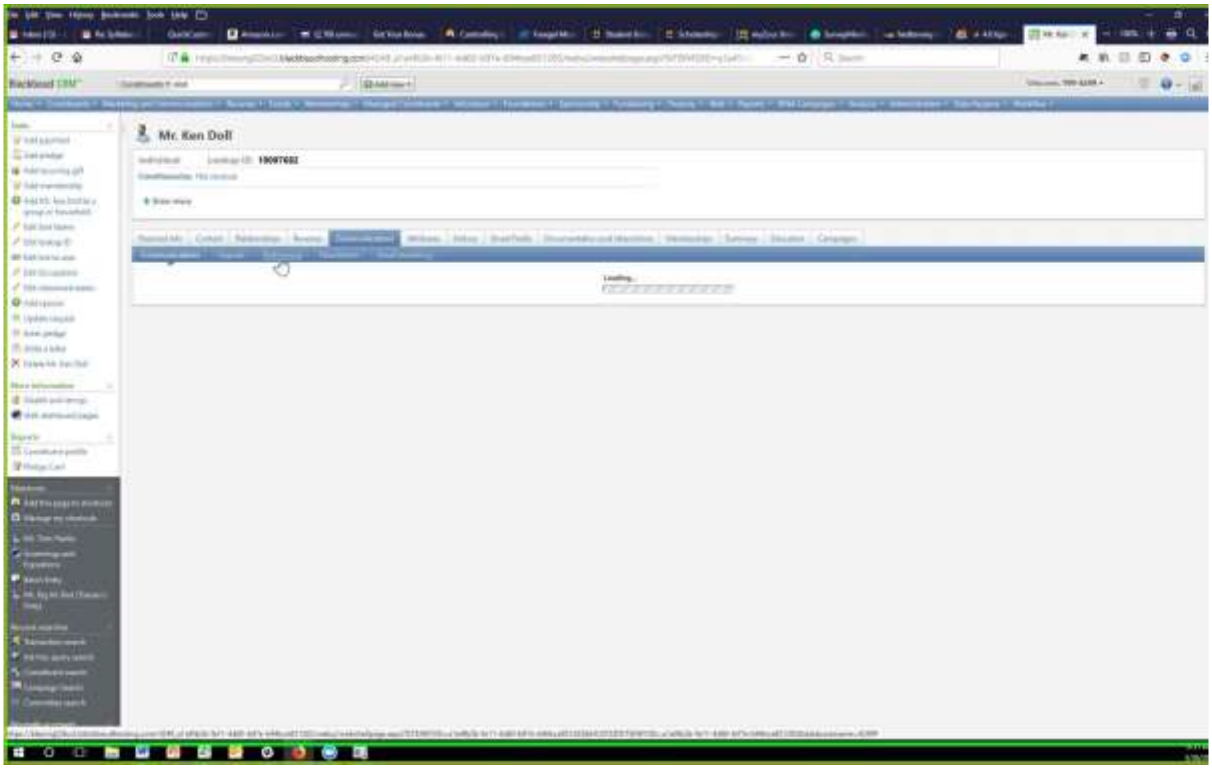


Diagram 9c:



Possible Error 2- Constituent Records improperly marked: If you received zero results, first confirm that you have results in your selection and that the selection is the appropriate revenue tribute letter or revenue letter type. Next confirm the constituent records are NOT marked "Do not acknowledge" or "Do Not Mail", etc.

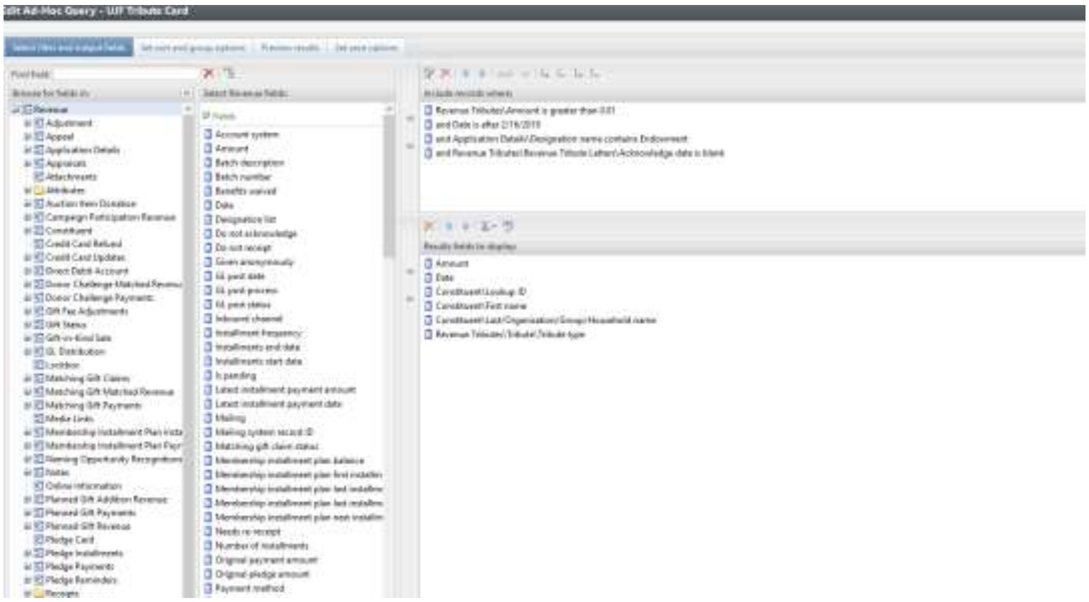


Possible Error 3- Revenue posting process: Confirm with your finance team the correct process is performed when entering the tributes and payments.

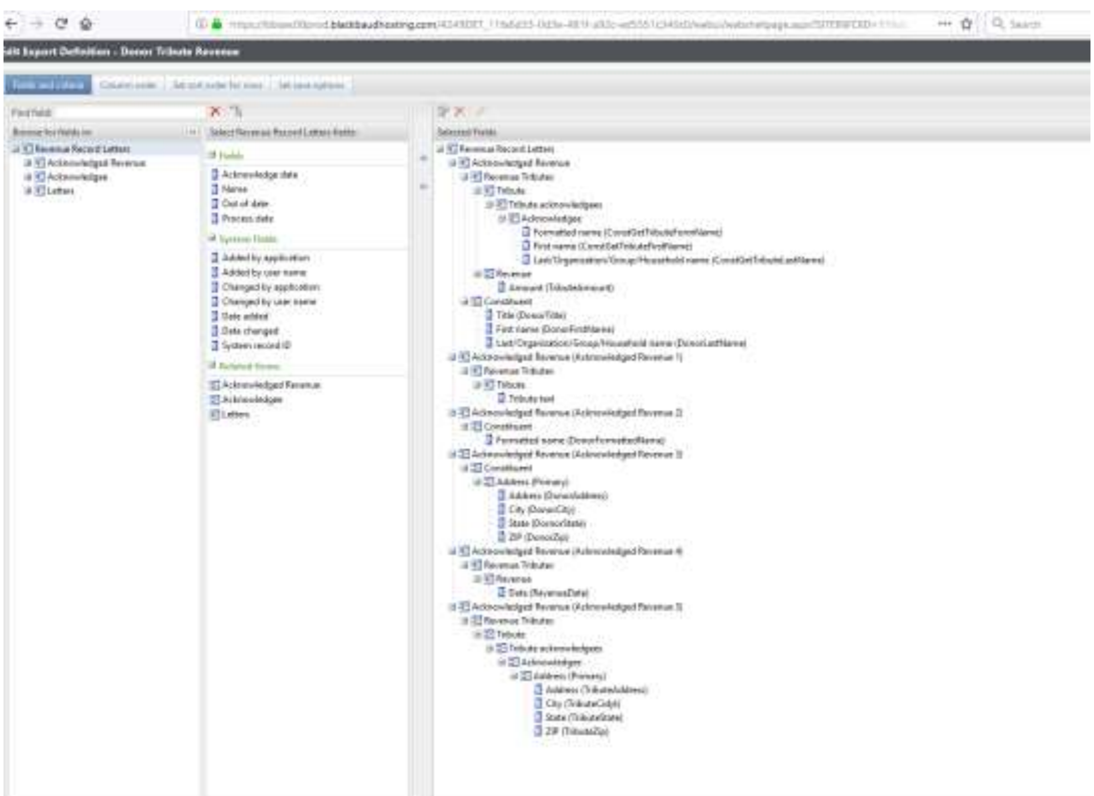
Possible Error 4- Header file: Make sure the "header file" type matches the "output type" set up in the Letters tab.

Section 10: Examples from other Federations.

Example 1: Selection of Revenue Letter Export Definition



Example 2: Tribute Export Definition



Operating System: 16299.15.amd64fre.rs3_release.170928-1534 10.0.0.0.2.48

Recording Session: 3/8/2018 10:47:52 PM - 10:48:23 PM