Administration Guide
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Quick Links

The Administration page includes many tools and features to help you configure the program and manage processes. Several administration tools are addressed in this guide while others are explained elsewhere. Use these links to find the information you need.

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Configuration Tasks

Countries and States

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There are several tasks you can perform from Administration, under Configuration.

Note: Some configuration tasks are only available to users with certain security rights.

Countries and States

You can add country and state information to the program and include address block format information. In addition, you can edit and delete any existing country and state information. From the Countries and States page in Administration, you can view a list of all country and state entries and the address formats configured for your organization. To access the Countries and States page from Administration, click Countries and states under Configuration.

Manage Country Information

On the Countries tab, you can view a list of all country entries configured for your organization. For each country, you can view its abbreviation and address format. You can also view whether a country entry is active and which is the default country entry for your organization. To view the states, provinces, or territories configured for a country, click the name of the country.
Add Countries

When you add new countries to the program, you can select a default address format and phone format for each country. You can also customize the field labels that appear for address information for a country. Each time you add a new address, the country you select determines how the address components appear, how phone numbers are formatted, and what text appears in the address field labels. For information about how to manage default address formats, see Add Address Formats for Countries on page 12.

Add a country entry

1. From Administration, click Countries and states under Configuration. The Countries and States page appears.

2. On the Countries tab, click Add. The Add a country screen appears.

3. In the Description field, enter the name of the country. When users enter address information in the program, this name appears in the list of available entries for the Country field.

4. In the Abbreviation field, enter the abbreviation for the country, such as UK for the United Kingdom or USA for the United States of America.

5. In the ISO 3166 two-letter code field, enter the international, standardized two-letter code for the country as set by the International Organization for Standardization (ISO), such as GB for the United Kingdom or US for the United States of America.

   Note: This field is primarily used with the Blackbaud Payment Service. To successfully process credit card information, the Blackbaud Payment Service requires the international, standardized two-letter code for the country to be those set by ISO. For more information, see http://www.iso.org/iso/country_codes.html.

6. To set up the country entry but not allow users to select it, select Inactive.

7. In the Address format field, select the default address format to use with the country. For information about how to add an address format for a country, see Add Address Formats for Countries on page 12.
8. In the **Phone format** field, select the default phone number format to use with the country. The program uses this selection to automatically format phone numbers that users enter in the program. The phone format does not include country codes. For example, if you select “###-####”, when users enter a phone number as “5550199,” the program automatically formats this number as “555-0199.” To display the phone number exactly as users enter it, select "Unformatted."

**Note:** If a phone number does not include a country code but a user enters a "+" with the other phone number digits, the "+" is removed when the phone number is saved, even when the phone format is set to "Unformatted."

9. In the **Phone country code** field, enter the international country calling code required with phone numbers for the country when called from the default country of your organization. When users enter phone numbers for the country, the program automatically adds the country code as a prefix to the selected phone format.

10. Under **Address input field labels**, enter the captions to appear in the program for address fields for the country. For example, in the **State label** field, enter Province for Canada or Region for the United Kingdom.

11. Click **Save**. You return to the Countries and States page. Unless you select **Inactive**, the new country appears for users the next time they log in.

### Set a Country as Default

You must set a country as the default for your organization. When users enter address information, the program automatically displays the default country and uses the address and phone format selected for the default country. To set a country as the default, select it on the Countries tab on the Countries and States page and click **Mark as default**. You cannot mark an inactive country as the default.

### Manage State Information

On the States page, you can view the states, provinces, or territories configured for the country and the abbreviation for each. When users enter address information for the country in the program, these states appear as options for the user.

### Add States

When users enter address information in the program, they select the state, province, or territory of the address based on the selected country. You can add states to appear as options for a country. When you add a state, you can include an abbreviation for the state.

#### Add a state

1. From **Administration**, click **Countries and states** under **Configuration**. The Countries and States page appears.

2. On the Countries tab, select the country for the state and click **Go to state list**. The States page for the country appears.
3. Click Add. The Add a state screen appears.

![Add a state screen](image)

4. In the Description field, enter the name of the state.
5. Enter an abbreviation for the state.
6. To set up the state but not make it available as an option for users, select Inactive.
7. Click Save. You return to the States page for the country. Unless you select Inactive, the new state is available to users the next time they log in.

### Manage International Address Formats

To automatically format addresses you enter in the program, you must assign a default address format for each country. The preferred address format for mailing and communication varies between countries. For example, some countries may require the post code come before the city, while some may require it to come after the state or province. To view and manage the address formats configured for your organization, select the Address Formats tab.

Under Address formats, you can view the countries for which address formats are configured. To view the format configured for a country, select the country in the grid and click Show details. The Format string window appears and displays how addresses for the country appear.

Although the program includes the proper address format for many countries, you can add new formats or edit formats as necessary from the grid.

### Add Address Formats for Countries

When you enter an address in the program, the format assigned to the country you select determines how the address components appear on the constituent record, mailings, or any other area that displays address information for the constituent.

**Add an address format for a country**

1. From Administration, click Countries and states under Configuration. The Countries and States page appears.
2. On the Address Formats tab, click Add. The Add a country address format screen appears.
3. Enter a name for the address format.

**Note:** If you enter the name of a country, the program does not automatically associate the format with the country. You select the default address format for each country on the Countries tab. If multiple countries use the same address format, you can associate the format with each country that applies. For information about how to link a country with a default address format, see Add Countries on page 10.

4. To base the address format on an existing format, in the **Copy from** field, select the existing address format.

5. Address format displays the address format selected in the **Copy from** field or the address components and punctuation selected at the bottom of the screen. You can remove components from the format as necessary. To remove the last component of an address line, select the line and click **Delete**. To remove an entire address line, select the line and click **Delete line**. To remove all components from the address format, click **Clear all**.

6. To create or add address components to a format, at the bottom of the screen, click the components and punctuation to appear on the first line of the format. The selected components appear under **Address Format**. For example, if you click **Address**, “[Address]” appears.

   To enter a new address line to the format, click **New line** and select the components and punctuation to use.

7. Click **Save**. You return to the Address Formats tab.
Organization Information

One of the initial system configuration tasks you should complete is to enter your organization name and contact information, which includes your address, phone number, and website. After this information is entered, it is displayed in various reports and documents generated by the system. To complete this task, you edit the generic organization information provided with the system.

**Warning:** If you do not enter the specific name and contact information for your organization, the generic information that is provided with the system will be used in applicable reports and documents.

**Edit organization information**

1. From Administration, click **organization information** under **Configuration**. The Manage organization Information page appears.
2. Click **Edit**. The Edit organization information screen appears.
3. Enter your organization name as it should appear on reports and documents. Also enter your organization's address, phone number, and website.
4. Click **Save**. You return to the Manage organization Information page and the updated information is displayed in the grid. If your organization name or contact information should change, you should edit this information as needed.

Reason Codes

With reason codes, your organization can standardize the reasons users change information and restrict the use of records, such as when they mark a constituent as inactive or write off unpaid pledges. When users make the change, they can select this code to consistently explain the reason for the change. On the Reason Codes page, you can view and manage the reason codes your organization uses. To access the Reason Codes page from Administration, click **Reason codes** under **Configuration**.

 Depending on your system role, multiple tabs may appear on this page so you can manage reason codes by functional area.

**Note:** You can also configure reason codes from the Configuration section of **Constituents**, **Revenue**, and **Memberships**.

**Constituents**

On the Constituents tab, you can view the reason codes your organization uses to designate a constituent “inactive” and to rollback constituent record changes. By default, all active reason codes display in both the **Mark inactive** and **Constituent data review rollback** grids.

**Revenue**

On the Revenue tab, you can view the reason codes your organization uses to write off pledge
balances and installments, change recurring gift statuses, skip recurring gift installments, and adjust revenue that has posted to the general ledger. If your organization enables gift fees, you can also view the reason codes your organization uses to waive gift fees automatically applied to payments. For rejected direct debit transactions you receive from your financial institution, you can select which adjustment code to automatically apply to the corresponding entry in a Direct Debit Return batch file. In the Adjustment section, select Default for direct debit return batch rejections on the Add a reason code screen. For information about the Direct Debit Return batch rejections, see the Batch and Import Guide.

**Note:** On the Revenue tab, under Recurring gift status change, any reason code you configure for the "Held" status is available for skipped installments.

For auction import adjustments, you can select which adjustment code to automatically apply as the default. On the Add a reason code screen, select Default for auction import adjustments.

▶ Receipts

On the Receipts tab, you can view the reason codes your organization uses to designate a re-receipt payment. By default, all active reason codes display under Re-receipt payments. To view all reason codes, including those marked "inactive," click Filter, select Include inactive, and click Apply. For each reason code, you can view its description and whether it is active. To update the information that appears in the grid, click Refresh List.

▶ Membership

On the Membership tab, you can view the reason codes your organization uses for canceled memberships. When a membership is canceled, you select a reason code. By default, all active reason codes display under Cancellation. To view all reason codes, including those marked "inactive," click Filter, select Include inactive, and click Apply.

On the Membership tab, you can view the reason codes your organization uses for canceled memberships. When a membership is canceled, you select a reason code. By default, all active reason codes display under Cancellation.

Add Reason Codes

With reason codes, your organization can standardize the reasons users make changes to information and records. Before users can select a reason code, you must add it to your database. Reason codes can be up to 10 characters in length.

▶ Add a reason code

1. From Administration, click Reason codes under Configuration. The Reason Codes page appears.
2. On the applicable tab, click Add. The Add a reason code screen appears.
3. In the **Reason code** field, enter an alphanumeric code to identify the reason for the change. For example, for a change to correct a data entry error, enter ERR.

4. In the **Description** field, enter an explanation of when to select the reason code.

5. Click **Save**. You return to the Reason Codes page.

### Self-service Password Reset

When you request to turn on forms authentication, the **Self-service password reset** task appears under **Configuration**. You can configure this task to provide a way for users to change passwords.

**Note:** Forms authentication includes other login enhancements such as invalid login messages to help clarify how to successfully log in to the application. To request to turn on forms authentication, create a case on Case Central.

When you click **Self-service password reset**, the Edit self-service password reset options screen appears. Select **Enable self-service password reset** so users can change passwords. If you have your own website for users to change passwords, enter the URL for that site in the **Custom password reset URL** field. Otherwise, leave this blank.

When you select **Enable self-service password reset**, an Update your email address screen appears the next time a user logs in to your application.
When a user clicks **Forgot your user name or password** on the login screen, an email sends to the email address that includes the user name and a link to reset the password. When the user clicks the link, a screen appears to enter a new password and confirm it. By default, the link expires after the user clicks it or after 24 hours.

**Tip:** To change the email address for the user, select the user name at the top of the page. From the menu that appears, click **Update email address.** You cannot associate an email address with more than one user.
Attributes provide flexibility to your record keeping. With attributes, you can define and store special information about a wide variety of record types. You can identify a category for the attribute and then store an entry specific to that category.

From **Administration**, you create the attribute categories available to users in the program. Users can assign any necessary values to these categories. For example, if a constituent is a gourmet cook and a cyclist, a user can enter each activity in the constituent’s record with an attribute category of Hobbies. This helps keep attributes neatly organized and helps with reports and queries.

To enable users to enter attributes when they add or edit information throughout the program, you can use form extensions. With form extensions, you can add a tab or section for users to enter attribute information on applicable forms and pages that otherwise do not include fields for attributes.

To view and manage the attributes available to users, go to **Administration** and click **Attribute categories**. The Attribute Categories page appears.

**Manage Attribute Categories**

On the Attribute categories tab, you can view the categories available to users. For each category, you can view its name, record type, and data type.

From the grid, you can add and manage categories as needed.

**Add Attribute Categories**

To help better manage the attributes your organization uses, you can add attribute categories. You can use these categories to store information. For example, to track seating preferences for an event, you can create a Seating Preference attribute category so users know where to find this information on constituent records.

You can assign attributes to a category and then assign the category to a group. For example, you can create a Hobbies attribute category and assign the category to constituent records. The next time you open a constituent record and want to record the fact that this constituent’s favorite hobby is golf,
“Hobbies” appears as an option in the **Category** field of the constituent attribute screen accessed from the Attributes tab. Under **Code tables** in *Administration*, you can also create an attribute group called Outside Interests. In this group, you might have categories for hobbies and for arts.

**Add an attribute category**

1. From *Administration*, click **Attribute categories**. The Attribute Categories page appears. Any existing attribute categories appear on this page.

2. On the Attribute categories tab, click **Add**. The Add attribute category screen appears.

3. Enter a unique name to help identify the category. The name appears in the **Category** field drop-down menu when you add or edit attribute information on a record. If no attribute categories exist for a record type, the Attributes tab does not appear.

4. In the **Record type** field, select a record type for the attribute. For example, to use the attribute to track the interests of constituents, select “Constituent.” This attribute appears as an option for constituent records only.

5. To assign the attribute to a group, select the attribute group code table in the **Attribute group** field. For example, you can create an attribute group called Outside Interests that includes attribute categories of Athletics and Arts. You add and manage attribute groups as code tables in *Administration*.

6. In the **Data type** field, select the type of data for users to provide in the attribute category. For example, to allow users to enter text to describe constituent interests, select “Text.” For a detailed explanation of the available data types, see [Data Types on page 20](#).

   - If you select “Code table,” users select attribute values from a defined list. In the **Code table** field, select the code table for users to select from. To create a code table, see [Create Code Tables on page 21](#).

   - If you select “Constituent record,” users can search for and select constituents as the attribute values. In the **Search list** field, select a search screen for users to find constituents. For example, to allow users to select individual constituents only, select “Individual Search.” Once you add the attribute category, you can change which search list is used.

7. To limit the category to one per record, select **Allow only one per record**.

8. To make the category available as a list column, select **Make available in lists**. After the program executes a nightly business process which adds the categories and attribute values to lists, the category appears as an option when you click **Columns** from list pages.
**Note:** For Friends Asking Friends lists and reports that refresh data from the Data Warehouse, the program also executes a business process to refresh the data after the process to add the categories is complete.

**Tip:** We recommend you only select categories you need for lists. If you include a large number, the categories will slow list performance.

9. Click **Save**. You return to the Attribute Categories page.

**Note:** If you add a query view after you create an attribute category, the program does not automatically add the attribute category to the new query view. For information about how to add an attribute category to a query view, see [Update Attribute Query Relationship on page 21](#).

### Data Types

Data types determine the values that users can enter when they add attributes. When users add attributes, they select attribute categories in the **Category** field. The data types you select for the attribute categories determine the type of data that the users can enter in the **Value** field. For example, if you create an attribute category for constituent records and select “Currency” as the data type, users who add attributes and select this attribute category can enter only monetary values.

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<tr>
<td>Text</td>
<td>Letters, numerals, and nonalphanumeric characters such as “!,” “@,” and “#.”</td>
</tr>
<tr>
<td>Number</td>
<td>Numerals. If users enter anything else, including decimals, an error message appears.</td>
</tr>
<tr>
<td>Date</td>
<td>Complete dates in the correct format. Users can select dates from a calendar.</td>
</tr>
<tr>
<td>Currency</td>
<td>Numerals and decimals. Automatically formats the monetary values to includes symbols such as dollar signs or pound signs.</td>
</tr>
<tr>
<td>Yes/No</td>
<td>“Yes” or “No.”</td>
</tr>
<tr>
<td>Code table</td>
<td>Code table entries. You select a code table with this data type, and users select from the code table’s entries when they add attributes.</td>
</tr>
<tr>
<td>Constituent record</td>
<td>Constituent names. You select a search screen with this data type to allow users to search for constituents. The search screen restricts the types of constituents that users can select. Once you add the attribute category, you can change which search list is used.</td>
</tr>
<tr>
<td>Fuzzy date</td>
<td>Partial dates such as a year or a month and year. Partial dates must use an abbreviated version of the date format. For example, if the date format is “mm/dd/yyyy,” users must enter a fuzzy date such as January 2011 as “1/2011,” not “January 2011.” Users also can select dates from a calendar.</td>
</tr>
<tr>
<td>Time</td>
<td>Time entries, such as 2:00 p.m. or 1:15 a.m.</td>
</tr>
<tr>
<td>Memo</td>
<td>Letters, numerals, and nonalphanumeric characters such as “!,” “@,” and “#.” The field expands for this data type.</td>
</tr>
</tbody>
</table>
Create Code Tables

When you create an attribute category and select “Code table” as the data type, you must select a code table to use as the source of the attribute. If a code table with the desired attributes does not exist in the program, you can create a code table from the Add attribute category screen.

Create a code table

1. On the Add attribute category screen, select “Code table” in the Data type field. The program enables the Code table field.
2. In the Code table field, click New. The Add a code table screen appears.
3. In the Name field, enter a name for the code table in the program. This is the name that appears on the Code Tables page in Administration.
4. In the DB table name field, enter a name for the code table in the database schema. This is the name you use to reference the code table in SQL.
5. In the Category field, select a category for the code table. The Code Tables page in Administration organizes code tables by category for easier viewing. If the category does not exist, click Add a code table category and you can create the new category.
6. In the Sort type field, select how to organize the entries in the code table.
7. In the Description field, enter a description of the code table.
8. Click Save. You return to the Add attribute category screen.

Update Attribute Query Relationship

If you add a query view after you create an attribute category, the program does not automatically add the attribute category to the query view. To add the attribute category to the query view, go to the Attribute Categories page and click Update attribute query relationship under Tasks.
Notifications

Add Notifications to a Group of Records ................................................................. 22
Update Notification Query Relationships ............................................................ 23

Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you may want all users to receive a notification when they open the record of a board member.

Notifications appear on the information bar of a record or on the Daily Sales page.

Note: The Daily Sales notification feature is intended to be used sparingly with selections based on simple, ad-hoc queries. We recommend you avoid using more than 10 notifications, smart queries, or complex criteria for you may notice performance degradation.

Notifications for constituents also appear in the Constituent Window of a revenue batch.

You can also set notifications to appear on a separate screen when a record is accessed. The notification screen appears the first time a record is accessed during a session. If you leave the record and return within 60 minutes, the notification screen does not appear again. However, if you return after more than 60 minutes, the notification screen appears again.

You can create notifications for groups of records in Administration. You can also create notifications for a specific record from the Documentation tab of the record.

Add Notifications to a Group of Records

You can create notifications for groups of records in Administration. You determine whether all users should receive the notification or only a targeted group of users.

Add a notification to a group of records

1. From Administration, click Notifications under Tools. The Notifications page appears.
2. Click Add. The Add notification screen appears.
3. In the **Message** field, enter the name of the notification (such as “Board Member Alert”) as well the message or text to display in the actual notification.

4. If this notification will expire or is temporary, in the **End date** field, select a date after which the notification expires.

5. To display the notification in a separate window in addition to the information bar, select **Display in notification window**.

6. To have the notification appear on the Daily Sales page when a patron with the matching criteria is entered, select **Display in Daily Sales**.

7. Under **Notification records**, select the record type and a selection of records to use. The notification displays for records included in the selection.

8. Under **Notification users**, select whether this notification displays for all users or only selected users. If you select “Selected users,” choose the selection of users to receive the notification.

9. Click **Save**. You return to the Notifications page. The notification is available for the users you selected when they access the records you selected.

**Update Notification Query Relationships**

If through a customization process, you add a new query view after a notification is created, the new query view does not automatically add the notification. To add the notification to the new query view, click **Update notification query relationship**.
Email Management
From Administration, your organization can configure and manage the delivery of email messages to its constituents and application users.
Email Services

From Administration, you can manage the processes used to send email through the program such as for communications and notifications. From the Email Services page, you can configure the connection to the Shared Services server, hosted by Blackbaud, used to send email messages through the program. You can also prioritize the order in which the program submits general purpose email jobs for messages such as email blasts and newsletters to the server. You can use key performance indicators (KPIs) to determine the health and duration of your email processes.

Configure Email Service Settings

To send email messages through the program, you must first configure the connection to the Shared Services server hosted by Blackbaud. You can also prioritize the order in which the program sends each type of general purpose email job to the server. From the Email Services Configuration page, you can configure these settings. To access this page from the Email Services page, click Email service settings under Configuration.

To send email messages through the program, you must configure the connection to the Shared Services server hosted by Blackbaud. Under Connection health, you can view whether the program can connect to this server. Under Email services external server settings, you can view the network address and credentials used to connect to the server. For information about how to edit this information, see Edit the External Server Settings on page 26.

When you run a general purpose email process, the program submits jobs for email messages such as newsletters, blasts, and notifications to the Shared Services server. Under Email category processing order, you can view the order in which the program submits each type of email message. You can prioritize each category as necessary. For example, to submit email blasts before newsletters, you can give email blasts a higher priority. To adjust the priority of an email category, select it in the grid and click the up or down arrow.

Edit the External Server Settings

To send email messages through the program, you must first configure the connection to the Shared Services server hosted by Blackbaud.

Warning: If you do not configure the connection to the Shared Services server, or if you enter the incorrect credentials for the server, the program automatically disables all email job processes.

Configure the email services server

1. From Administration, click Email services under Configuration. The Email Services page appears.

2. Under Configuration, click Email service settings. The Email Services Configuration page appears.

3. Under Email services external server settings, click Edit. The settings screen appears.
4. In the **Host URL** field, enter the network address for the Shared Services server.

5. In the **User name** field, enter the user name your organization uses to connect to the server.

6. In the **Password** and **Confirm Password** fields, enter the password used to connect to the server.

7. To use Secure Sockets Layer (SSL) to connect to the server, select **Use SSL**.

8. Click **Save**. The program verifies and saves the connection information. You return to the Email Services Configuration page.

**Manage Email Services**

On the Email Services page, you can manage the processes used to generate and send email messages, the status of email processes and their jobs, and any invalid email addresses encountered by the processes. To access the Email Services page, from **Administration**, click **Email services** under **Configuration**.

To help you navigate through this information, the Email Services page contains multiple tabs.

**Email Processes**

On the Email Processes tab of the Email Services page, you can view and manage the processes used to generate and send email messages through the program. You can manage multiple email processes.

- The email status process updates the status of an email job or invalid email addresses list based on information received from the Shared Services server.
- The general purpose process generates email messages for general communications such as newsletters, blasts, and notifications.
- The transactional process generates email messages for communications based on revenue transactions such as revenue acknowledgements and receipts.

Under **Scheduled email processing**, you can view whether a schedule is enabled for the email processes.
Under **Email processing jobs**, the processes used for email messages appear. For each process, you can view the date and status of its most recent instance, the dates the process most recently started and stopped, and any message about its status. You can enable or disable an email process as necessary.

To view additional information about a process, click its row under **Email processing jobs**. Beneath the row, information about the most recent instance of the process appears.

When an email process runs, the program generates a record of the instance of the process. To view the Job History page of a process, click its name under **Email processing jobs**. For information about the Job History page, see [Email Process History on page 29](#).

From the Email Processes tab, you can manage the email processes as necessary.

**Disable an Email Process**

From the Email Services page, you can quickly disable an email process, such as to help troubleshoot problems with email jobs. On the Email Processes tab, select the email process under **Email processing jobs** and click **Disable**. When the confirmation message appears, click **Yes**.

**Enable an Email Process**

From the Email Services page, you can quickly enable an email process, such as if you previously disabled it. On the Email Processes tab, select the email process under **Email processing jobs** and click **Enable**. When the confirmation message appears, click **Yes**.

**Warning:** If you enable either the transactional or general purpose email job process, we strongly recommend you also enable the email status job process to help track its status.

**Run an Email Process**

To generate email messages, you can run an email processing job to submit the messages to the Shared Services server hosted by Blackbaud. You can run separate job processes for general purpose email messages such as newsletters and transactional email messages such as revenue acknowledgements. You can also run a process to update the status of general purpose and transactional email jobs and any invalid email recipients. On the Email Services page, select the process to run on the Email Processes tab and click **Run email process**.

**Reset the Last Run On Date for an Email Process**

To undo the most recent instance of an email process, you can reset its last run on date. When you reset the last run on date, the program resets the sent status of any email messages generated by the process during the most recent instance. On the Email Services page, select the process to reset on the Email Processes tab and click **Reset last run on date**. When the confirmation message appears, click **Yes**.
Email Process History

When an email process runs, the program generates a record of the instance of the process. On the Job History page of a process, you can view the records of the process instances.

To access the Job History page of a process, click the name of the process on the Email Processes tab of the Email Services page.

Under **Scheduled Job History**, select the status of the instances to view, such as Completed or Did not finish, and click **Apply**. The previously run instances of the process with the selected status appear. For each instance, you can view its status, run date and time details, and the number of records included in the process. To remove the filter and view all instances regardless of status, click **Reset**.

You can delete the record of an instance if necessary. To delete a record of an instance, select the instance under **Scheduled Job History** and click **Delete**.

Email Jobs

To view and manage previously run email processes, select the Email Jobs tab on the Email Services page.

Under **Email status processing**, you can view the date and time of the most recent instance of the Email status process, such as to verify the process is up-to-date. To run the Email Status Poll process, click **Get latest status**.

Under **Email jobs**, you can view the general purpose email processes and transactional email processes. For each process, you can view its status, the number of retries, the number of messages requested and sent, and its date and time.

To view additional information about a process, select its row under **Email jobs**. Beneath the row, information about the process, such as the subject of the email, its sent from email address and display name, and field name, appear.

To view detail information about an email process on its own page, click its name under **Email jobs**. The Email Job Details page appears.

To help reduce the number of processes in the grid, filter the grid by process type or status. Select the criteria of the process to view, and click **Apply**. To remove the filters and display all processes, click **Reset**.

To use additional criteria to search for an email job, such as by description and email subject, click **Search jobs** to search for the email job and view its Email Job Details page.

From the grid, you can delete a general purpose email process job that has been submitted to the Shared Services server but has not yet been processed. For example, if you submit a process to generate newsletters for a future date and then need to revise the content, you can delete the job from the server.

Email Process Job Details

On the Email Jobs tab of the Email Services page, you can view information about general purpose email process and transactional email process jobs. To view additional detail about a process job,
access its Email Job Details page. On this page, you can view the subject of the email, its sent from email address and display name, and field name information.

To access this page from the Email Jobs tab on the Email Services page, search for the email job, or click the name of the job under Email jobs.

For a general purpose email process, you can delete a job that has been submitted to the Shared Services server but has not yet been processed. For example, if you submit a process to generate newsletters for a future date and then need to revise the newsletter content, you can delete the process from the server. For information about how to delete an email process, see **Delete a Submitted General Purpose Email Process Job on page 30.**

To return to the Email Services page, click **Go back to Email Services** under Email Services.

### Search Email Jobs

On the Email Jobs tab of the Email Services page, you can view information about your general purpose email processes and transactional email processes, such as status, the number of retries, the number of messages requested and sent, and its date and time. To view additional information about a specific email job, you can search for the job to access its Email Job Details page. When you search for an email job, you can use criteria such as description, email subject, status, and job type.

On the Email Jobs tab, click **Search jobs** under Email jobs. On the Email Services Email Job Search screen, enter the criteria of the email job to view and click Search. Under **Results**, the email jobs that meet the criteria appear.

To view the Email Job Details of a job, click its name under Results. For information about the Email Job Details page, see **Email Process Job Details on page 29.**

### Delete a Submitted General Purpose Email Process Job

From the Email Services page or an Email Job Details page, you can delete a general purpose email process that has been submitted to the Shared Services server but has not yet been processed. For example, if you submit a process to generate newsletters for a future date and then need to revise the newsletter content, you can delete the process from the server.

- On the Email Services page, under Email jobs on the Email Jobs tab, select the process to delete and click **Delete.**
- On the Email Job Details page, click **Delete.**

When the confirmation message appears, click **Yes.**

### Email Job Statuses

As the Email Services process an email job, activity through the program or on the Shared Services server hosted by Blackbaud determine the current status of the job. The table below explains the statuses of an email job.
<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canceled</td>
<td>The email job was canceled or manually stopped on the Shared Services server.</td>
</tr>
<tr>
<td>Completed</td>
<td>The Shared Services server finished processing the email job and messages have been sent.</td>
</tr>
<tr>
<td>Deleted</td>
<td>A user deleted the email job from the queue.</td>
</tr>
<tr>
<td>Exception occurred</td>
<td>The Shared Services server encountered an exception while processing the email job.</td>
</tr>
<tr>
<td>Local chunking</td>
<td>The program is sending the data required for the Shared Services server to process the email job, but not all data has yet been sent.</td>
</tr>
<tr>
<td>Maximum number of retries exceeded</td>
<td>The email job has been removed from the queue because the program exceeded the maximum number of attempts allowed to send it to the Shared Services server.</td>
</tr>
<tr>
<td>Processing</td>
<td>A complete email job has been submitted to the Shared Services server, which is actively processing the job.</td>
</tr>
<tr>
<td>Queued</td>
<td>The email job is scheduled to be sent to the Shared Services server, but no data has yet been sent.</td>
</tr>
<tr>
<td>Server chunking</td>
<td>The Shared Services server is adding the email job to a group of email jobs to be processed.</td>
</tr>
<tr>
<td>Server chunking paused</td>
<td>The Shared Services server paused while adding the email job to a group of email jobs to be processed.</td>
</tr>
<tr>
<td>Status unknown</td>
<td>The Shared Services server reports an unknown job status.</td>
</tr>
</tbody>
</table>

Blacklisted Email Addresses

On the Blacklisted Email Addresses tab of the Email Services page, you can manage the list of email addresses that have been blacklisted to prevent the program from sending email to them.

When you run the email status process, the program records any email addresses that return hard bounces and adds them to the blacklist. A hard bounce indicates a permanent delivery failure such as when the Internet Service Provider reports that an address is canceled or nonexistent. The program does not blacklist soft bounces that indicate temporary delivery failures such as network issues or full mailboxes.

You can also manually add email addresses to the blacklist to prevent the program from sending email. For example, you can blacklist email addresses that you associate with malicious or fraudulent activity.

You cannot remove email addresses from the Blacklisted Email Addresses tab, but you can update the status of email addresses to allow the program to resume sending email.

The **Blacklisted email addresses** grid the blacklist status of email addresses, the number of failed delivery attempts, and the most recent notification message. To filter the grid by blacklist status, click **Filter**, select a status, and click **Apply**. To remove the filter and view all addresses, click **Reset**.
To search for a blacklisted address, click **Search addresses** On the Email Services Invalid Account Search screen, enter your criteria and click **Search**. Under **Results**, the email addresses that meet the criteria appear. For each address, you can view information such as its blacklist status and number of failed attempts. To return to the Blacklisted Email Addresses tab, select the address to view.

**Change the Blacklisted Status of an Email Address**

You cannot remove blacklisted email addresses from the Blacklisted Email Addresses tab. To resume sending email to a blacklisted email address, you can toggle its status. For example, if the Internet Service Provider incorrectly reports an email address as invalid and you want to change its status to "Not blacklisted," select the address under **Blacklisted email addresses** and click **Toggle blacklisted status**. On the confirmation message, click **Yes**. You return to the Blacklisted Email Addresses tab.

**Add a Blacklisted Address**

From the Email Services page, you can manually add an email address to the blacklist. For example, you can blacklist email addresses that you associate with malicious or fraudulent activity.

- **Add an email address to the blacklist**
  1. From **Administration**, click **Email services** under **Configuration**. The Email Services page appears.
  2. Select the Blacklisted Email Addresses tab.
  3. Under **Blacklisted email addresses**, click **Add blacklisted address**. The Add an email address to the blacklist screen appears.
  4. Enter the email address to add to the blacklist.
  5. In the **Reason** field, enter an explanation for the blacklisted status.
  6. Click **Save**. You return to the Blacklisted Email Addresses tab. The program no longer sends email to this address.

**Email Services Reports**

From **Administration**, you can generate multiple reports to analyze activity with your general purpose and transactional email job processes.

**Transactional Email Job Status Report**

With the Transactional Email Job Status report, you can view the status of your transactional email jobs for a specific date or period of time. For example, you can run the report to verify all email job processes completed successfully. When you generate the report, you can select to include only email that meets specific criteria, such as status, recipient, or subject.

For each status, the report displays each job that meets the selected criteria with that status during the selected time period. For each job, you can view information such as its description, subject, and the
dates added and changed. Under **Summary**, you can view a breakdown, by grid and pie chart, of the total emails that meet the selected criteria for each status.

![Transactional Email Job Status Report](image)

**View the Transactional Email Job Status report**

1. From *Administration*, click **Email services**. The Email Services page appears.
2. Under **Reports**, click **Transactional Email Job Status**. The Transactional Email Job Status report page appears.
3. In the **Date range** field, select the time period of the transactional email jobs to analyze.
4. By default, the report includes all transactional email from the selected time period. To include only specific email, specify the criteria of the email to include, such as by status, recipient, or subject.
5. Click **View report**. The report generates. From the report menu bar, you can print or export the report as necessary.

**General Purpose Email Job Status Report**

With the General Purpose Email Job Status report, you can view the status of your general purpose email jobs for a specific date or period of time. For example, you can run the report to verify all email job processes completed successfully. When you generate the report, you can select to include only email that meets specific criteria, such as status or subject.

For each status, the report displays each job that meets the selected criteria with that status during the selected time period. For each job, you can view information such as its description, subject, and the dates added and changed. Under **Summary**, you can view a breakdown of the total emails that meet the selected criteria for each status.
View the General Purpose Email Job Status report

1. From Administration, click Email services. The Email Services page appears.

2. Under Reports, click General Purpose Email Job Status. The General Purpose Email Job Status report page appears.

3. In the Date range field, select the time period of the general purpose email jobs to analyze.

4. By default, the report includes all general purpose email from the selected time period. To include only specific email, specify the criteria of the email to include, such as by status or subject.

5. Click View report. The report generates. From the report menu bar, you can print or export the report as necessary.

Transactional Email Jobs Processed Report

With the Transactional Email Jobs Processed report, you can view information about the transactional email jobs processed during a specific date or period of time. For example, you can run the report to view how many email jobs processed for the time period. When you generate the report, you select whether to group the results by every two hours or on a daily or monthly interval. You can also select to include only email that meets specific criteria, such as recipient or subject.

For each interval, the report displays each transactional email job that meets the selected criteria processed during the selected time period. For each job, you can view information such as its description, subject, and the dates added and changed. You can also view a bar chart of the total emails that meet the selected criteria processed for each interval.
View the Transactional Email Jobs Processed report
1. From Administration, click Email services. The Email Services page appears.
2. Under Reports, click Transactional Email Jobs Processed. The Transactional Email Jobs Processed report page appears.
3. In the Date range field, select the time period of the transactional email jobs to analyze.
4. In the Grouping field, select whether to group the results by every two hours or on a daily or monthly interval.
5. By default, the report includes all transactional email from the selected time period. To include only specific email, specify the criteria of the email to include, such as by recipient or subject.
6. Click View report. The report generates. From the report menu bar, you can print or export the report as necessary.

General Purpose Email Jobs Processed Report
With the General Purpose Email Jobs Processed report, you can view information about the general purpose email jobs processed during a specific date or period of time. For example, you can run the report to view how many email jobs processed for the time period. When you generate the report, you select whether to group the results by every two hours or on a daily or monthly interval. You can also select to include only email that meets specific criteria, such as subject.

For each interval, the report displays each general purpose email job that meets the selected criteria processed during the selected time period. For each job, you can view information such as its description, subject, and the dates added and changed. You can also view a bar chart of the total emails that meet the selected criteria processed for each interval.

View the General Purpose Email Jobs Processed report
1. From Administration, click Email services. The Email Services page appears.
2. Under Reports, click General Purpose Email Jobs Processed. The General Purpose Email Jobs Processed report page appears.
3. In the Date range field, select the time period of the general purpose email jobs to analyze.
4. In the Grouping field, select whether to group the results by every two hours or on a daily or monthly interval.
5. By default, the report includes all general purpose email from the selected time period. To include only specific email, specify the criteria of the email to include, such as by subject.
6. Click View report. The report generates. From the report menu bar, you can print or export the report as necessary.
Undelivered Email

On the Undelivered Email page, you can monitor undelivered email jobs to ensure that your email is working properly. The page displays undelivered email jobs within an hour of the time you send, and it removes any email jobs that are subsequently delivered. To open the page, from Administration, click Undelivered email.

The page summary lists the current statuses for those undelivered email jobs that were sent during the past month, along with the number of email jobs for each status and a description of the status. The grid below the summary displays details for the undelivered email jobs. By default, email jobs remain in the grid for a month, but you can filter the grid to display a different time frame. To do this, click Filter, select a cutoff date in the Jobs created since field, and click Apply. The grid displays all email jobs during the time frame you select, but the summary still only displays numbers for undelivered email jobs during the past month.

To receive alerts when the program adds undelivered email jobs to the list, you can click View RSS Feed to open a web browser and subscribe to an RSS feed.

Note: To receive email alerts about changes on the Undelivered Email page, you can create a custom email alert for the Undelivered Email Data List. However, when you select create the content for the body of the email alert, keep in mind that the EMAILADDRESS and RECIPIENTNAME merge fields are not applicable to all job types and statuses. This means that if you include these merge fields and they are not applicable to an email job, the merge fields will be blank in the body of the email alert. For information about how to create email alerts, see Email Alerts on page 36.

Email Alerts

With email alerts, you can configure the program to automatically notify application users by email when changes in the database impact them. For example, you can set up alerts to inform users in Batch entry when ownership of batches transfer to them as the result of a batch status update.
To generate email alerts, you must configure information about the database mail settings in Administration. You can then generate standard email alerts to inform users of changes in batch ownership or prospect management or custom email alerts to meet the specific needs of your organization.

Edit Email Alert Settings

You can use email alerts to automatically email reminders or notifications to application users such as when event tasks are assigned to them. To enable email alerts, you must enter information about your profile of Database Mail set up in SQL Server. If Blackbaud does not host your organization's database, you must also enter information about the database to use email alerts.

**Note:** When you enable email alerts for your organization, the Email preferences tab appears on application user records. From this tab, users can select whether to receive specific types of email alerts and enter the email address at which to receive the alerts. For information about the Email preferences tab, see Configure Email Preferences for Users on page 1.

**Note:** Only administrators with access to the API can edit email alert settings.

### Enable email alerts and configure database mail settings for alerts

To generate email alerts, the program requires that you first set up a profile of Database Mail in your supported installation of Microsoft SQL Server. For information about how to configure Database Mail in SQL Server, visit the Microsoft Developer Network (MSDN) at http://msdn.microsoft.com/en-us/library/ms175951.aspx.

1. From Administration, click Email alerts. The Email alerts page appears.
3. To enable email alerts for your organization, select **Enabled**.
4. Under **Database Mail settings**, enter the name of your Database Mail profile set up in Microsoft SQL Server.
5. If Blackbaud does not host your organization’s database, the **Application URL parts** frame appears. To include links to pages in the program in email alerts, enter the root URL to the program and the name of the database to use with the alerts. This is the virtual directory for the web application. Generally, the format is “http://[Server name]/[Virtual directory name].”
6. If Blackbaud does not host your database, the **Selected database** field appears. Enter the name of the database to use with the email alerts.
7. Click **Save**. You return to the Email alerts page.

**Standard Email Alert Types**

On the Email alert types tab, you can view the types of standard email alerts your organization uses. To update the information in the grid, click **Refresh List**.

To view additional information about an email alert, such as the users who receive the alert and the email message they receive, click its name under **Email alert types**. The record of the email alert type appears. For information about the items on this record, see Email Alert Record on page 39.

**Custom Email Alert Types**

To meet the needs of your organization, you can create custom email alerts, such as to inform users when a specific constituent makes a large donation. To manage the custom email alerts for your organization, select the Custom email alert types tab.

Under **Custom email alert types**, you can view the types of custom email alerts your organization uses. To update the information in the grid, click **Refresh List**.

To view additional information about an email alert, such as the users who receive the alert and the email message they receive, click its name under **Custom email alert types**. The record of the email alert type appears. For information about the items on this record, see Email Alert Record on page 39.

From the grid, you can add and manage the custom email alert types for your organization.

**Add Custom Email Alert Types**

To meet the needs of your organization, you can create custom email alerts based on the activity of a data list. For example, you can create an email alert to inform users when a specific constituent makes a large donation. After you add a custom email alert type, you can configure its content and manage instances of the alert. You can also edit and delete custom email alert types as necessary.

**Note:** Only administrators with access to the API can add custom email alert types.

**Add custom email alert types**

1. From **Administration**, click **Email alerts**. The Email alerts page appears.
2. Select the Custom email alert types tab.
3. Under **Custom email alert types**, click **Add**. The Add a custom email alert type screen appears.
4. Enter a unique name to help identify the alert type.
5. In the **Data list** field, search for and select the data list on which to base the email alert.
6. Click **Save**. You return to the Email alerts page. Under **Custom email alert types**, the new alert type appears.
7. To configure the email content and design of the email alert, click its name under **Custom email alert types**. The record of the alert appears.

### Email Alert Record

The program automatically creates a record of each type of email alert your organization uses.

To view the record of an email alert from the Email alerts page, click its name on the Email alert types or Custom email alert types tab.

For a custom email alert or a task reminder email alert, you can view and manage the instances of the alert, the email message sent with the alert, and the process that sends the alert to its users.

For a standard email alert other than a task reminder alert, you can view and manage the application users who receive the alert and the email message they receive from the record.

Under **Email content**, the subject and body of the email message that application users receive with the alert appears. To edit the email message users receive, click **Edit**. For information about how to edit the email message of an alert, see [Edit Content of an Email Alert on page 40](#).

**Note:** The program automatically includes a link to the area of the application related to the email alert. For example, an email alert that notifies the user of a batch assignment automatically includes a link to the batch in **Batch entry**.

Under **Users**, the names of the application users who receive the email alert appear. To update the information in the grid, click **Refresh List**. From the grid, you can also assign the alert to users or disable the alert for a selected user.

From the record of a custom email alert or task reminder email alert, you can manage the process to send the email alert to remind users to complete their tasks.

### Manage Alert Definition

For a custom email alert or a task reminder email alert, the Manage alert definition tab appears. From this tab, you can configure the email content sent with the alert and view and manage the instances of the alert.

Under **Email content**, the subject and body of the email message that application users receive with the alert appears. To edit the email message users receive, click **Edit**. For information about how to edit the email message of an alert, see [Edit Content of an Email Alert on page 40](#).

For a task reminder email alert, under **Users**, the names of the application users who receive the email alert appear. To update the information in the grid, click **Refresh List**. From the grid, you can also assign the alert to users or disable the alert for a selected user.
For a custom email alert, under **Instances**, you can view information about the alert, such as whether it has a context record or parameters and how many users to which it is assigned. The **Enabled** column indicates whether the alert is enabled. To update the information in the grid, click **Refresh List**.

To view or manage the users assigned to an instance of a custom email alert, click its name under **Instances**. The record of the alert instance appears. For information about the items on this record, see [Custom Email Alert Instance Record on page 44](#).

Under **Instances**, you can also add and manage instances of the alert.

### Edit Content of an Email Alert

When application users receive an email alert, they receive an email message to notify them of changes in the database that affect them. You can edit the subject or body of the email message to better fit the needs of your organization.

**Note:** The program automatically includes a link to the area of the application related to the email alert. For example, an email alert that notifies the user of a batch assignment automatically includes a link to the batch in *Batch entry*.

**Edit email content**

1. From *Administration*, click **Email alerts**. The Email alerts page appears.
2. On the Email alerts page, select the alert with the email content to edit and click **Go to alert type**. The record of the email alert appears.
3. For a custom email alert or a task reminder email alert, select the Manage alert definition tab.
4. Under **Email content**, click **Edit**. The Edit email content screen appears.
5. In the **Email subject** field, edit the subject line of the email message as necessary.

6. Under **Email body**, compose the email message users receive with the alert.

   Under **Available merge fields**, a list of merge fields available for the type of email alert appears. To personalize the message, use merge fields to include information specific to the recipient or the change that causes the email alert. To add a merge field in the body, select it under **Available merge fields** and click the right arrow. For example, for an email alert about a change in the ownership of a batch, use merge fields to include information about the number, type, and status of the batch.

7. Click **Save**. You return to the email alert record.

### Assign an Email Alert to Application Users

When you assign an email alert to application users, they receive an email message to notify them of changes in the database that affect them. You can assign email alerts to specific users or a selection of users.

**Assign an email alert to application users**

1. From **Administration**, click **Email alerts**. The Email alerts page appears.
2. Select the Email alert types tab.
3. Under **Email alert types**, click the name of the alert to assign to users. The record of the alert
4. For a task reminder email alert, select the Manage alert definition tab.

5. Under Users, click Assign to users. The Assign to users screen appears.

6. In the Assign to field, select whether to assign the email alert to selected users or a specific user.

7. If you select Selected users, in the Selection field, search for and select the selection of application users to receive the email alert.
   
   If you select Specific user, in the User field, search for and select the application user to receive the email alert.

8. Click Save. You return to the email alert record.

Disable an Email Alert for an Application User

After you assign an email alert to an application user, you can disable the alert for the user, such as if the user requests to no longer receive the alert. To disable an email alert for an application user from the record of the alert, select the user under Users and click Disable alert. The program disables the email alert for the user and removes the user from the Users grid.

Add Instances of a Custom Email Alert

After you add a custom email alert type, you can add instances of the alert. When you add an instance of an alert, you configure the parameters of when the program sends the alert to user. The parameters depend on the data list on which you base the alert. For example, if you create an alert to notify users when a constituent makes a large donation, you can configure the constituent and minimum donation amount for each instance of the alert.

Add instances of an email alert

1. On the record of the email alert, select the Manage alert definitions tab.

2. Under Instances, click Add. The Add a custom email alert instance screen appears.

3. Enter a unique name to help identify the alert instance.

4. Enter the parameters of when to send the alert. For example, to send an alert to notify users when a constituent makes a large donation, select the constituent and enter the minimum donation amount for which to send an alert.

5. Click Save. You return to the email alert record.

After you add an instance of an alert, you can then assign users to the instance so they can receive alerts when you run the send process. For information about how to assign users to the instance, see Assign Users to a Custom Email Alert Instance on page 44.
Process Details

To send alerts for a custom email alert type or a task reminder email alert, you must run a send process. When you run the send process, the program determines whether changes to the selected data list match the parameters of the alert type. If the changes match the parameters, the program then automatically send alerts to the assigned users to inform them of the change. From the record of the email alert, you can start the send process. For information about how to start the send process, see Start the Send Process for an Email Alert on page 44.

To view the status of the most recent instance of the send process or information about previous instances of the process, select the Process Details tab. From this tab, you can also add and manage job schedules to run the process automatically.

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

Under History, you can view records of the previous instances the process was run. For each instance, you can view its status, the status message generated for it, the user who ran it, its start and end dates, its duration, the total number of records processed, and which server handled the process. To view all process instances of a specific status, click Filter to display the Status field and Apply and Reset buttons. In the Status field, select the status of the processes to display such as Did not finish, and click Apply.

From the History grid, you can also delete records of previous instances of the process. For information about how to delete an instance of the process, see Delete an Instance of the Send Process on page 43.

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

Delete an Instance of the Send Process

When you run the send process, the program automatically saves a status record of the instance. On the Process Details tab of the email alert record, the History grid displays the previous instances of the process. You can delete the status record of an instance of the process as necessary.

> Delete a status record for the Send process

1. On the record of the email alert type from which to delete the instance, select the Process Details tab.
2. Under History, select the status record to delete.
3. On the action bar, click Delete. A message appears to ask whether to delete the status record.
4. Click **Yes**. You return to the Process Details tab. Under **History**, the status record no longer appears.

### Add a Job Schedule for the Send Process

To automate the send process, you can create job schedule for the process. When you create a job schedule, you define when the job runs, such as weekly or nightly.

### Start the Send Process for an Email Alert

To send alerts for a custom email alert type or a task reminder alert, you must run a send process.

- When you run the send process for a custom email alert, the program determines whether changes to the selected data list match the parameters of the alert type. If the changes match the parameters, the program then automatically sends alerts to the assigned users to inform them of the change.
- When you run the send process for a task reminder alert, the program determines whether users assigned to the alert have active tasks with a due date set for the current date or a future date. If assigned users have active tasks, the program then automatically sends alerts to the users who have not already received a reminder for the task.

To start the send process from the record of the email alert, click **Start send process** under **Tasks**. The status of the process appears on the Process Details tab of the email alert record.

For information about the Process Details tab, see **Process Details on page 43**.

### Custom Email Alert Instance Record

After you add an instance of a custom email alert, you can assign users to the instance so they can receive alerts when you run the send process. To view and manage the users assigned to the instance of an alert, access the record of the instance. To access the record of an instance from the record of its email alert type, click its name under **Instances**.

Under **Assigned users**, you can view the application users assigned to receive alerts for the instance. You can view the display and user names and the email address at which each user receives the alert. To view additional information about a user, click the user’s name. The record of the user appears.

From the grid, you can manage the assignment of users as necessary.

### Assign Users to a Custom Email Alert Instance

When you assign application users to an instance of a custom email alert, they receive an email message to notify them of changes in the database that match the parameters of the alert instance. You can assign a single user or a selection of users to an email alert instance.
Assign a single user to an email alert instance
1. On the record of the custom email alert type with the instance to which to assign the user, select the Manage alert definition tab.
2. Under Instances, click the name of the instance to assign the user. The record of the instance appears.
3. Under Assigned users, click Assign and select User. The Add user to custom email alert instance screen appears.
4. In the Application user field, search for and select the user to assign to the instance.
5. Click Save. You return to the record of the instance.

Assign a selection of users to an email alert instance
1. On the record of the custom email alert type with the instance to which to assign the users, select the Manage alert definition tab.
2. Under Instances, click the name of the instance to assign the user. The record of the instance appears.
3. Under Assigned users, click Assign and select Bulk. The Assign users to a custom email alert instance screen appears.
4. In the Assign users from selection field, search for and select the selection of application users to assign to the instance.
5. Click Save. You return to the record of the instance.

Unassign Users from a Custom Email Alert Instance
You can unassign users from an instance of a custom email alert instance, such as if they request to no longer receive the alert. You can unassign a single user or multiple users from an email alert instance.

Unassign a single user from an email alert instance
1. On the record of the custom email alert type with the instance from which to unassign the user, select the Manage alert definition tab.
2. Under Instances, click the name of the instance to remove from the user. The record of the instance appears.
3. Under Assigned users, select the user to remove from the instance.
4. On the action bar, click Unassign and select User. A confirmation message appears.
5. Click Yes. You return to the record of the alert instance.

Unassign multiple users from an email alert instance
1. On the record of the custom email alert type with the instance from which to unassign the users, select the Manage alert definition tab.
2. Under **Instances**, click the name of the instance to remove from the users. The record of the instance appears.

3. Under **Assigned users**, click **Unassign** and select **Bulk**. The Unassign users from a custom email alert screen appears.

4. Select whether to unassign all currently subscribed users or only a selection of users.
   - If you select **Unassign selected users**, search for and select the selection of application users to remove from the alert instance.

5. Click **Yes**. You return to the record of the instance.

### Subscribe to Email Alerts

Throughout the program, you can select to receive email alerts as notification for various changes to the database. When you subscribe to an email alert, you can enter the email address at which you receive the alert.

### Configure Appeal Mailing Task Email Alerts

From the record of an appeal mailing, you can select to receive email alerts as notifications when the ownership of an appeal mailing task transfers to you. You can also select to receive alerts as reminders of tasks to complete for the appeal mailing.

#### Configure settings for email alerts for appeal mailing tasks

To generate email alerts in *Marketing and Communications*, the system administrator must first configure your database mail settings. For information about how to configure these settings, see *Edit Email Alert Settings on page 37*.

1. Open the record of the appeal mailing for which to receive email alerts.
2. Under **Tasks**, click **Email alerts**. The Configure appeal mailing task email alerts screen appears.
3. Select whether to receive email alerts when the ownership of a task for the mailing transfers to you.
4. To receive email alerts to remind you of tasks pending for the mailing, select **Send me an alert for task reminders**.
5. If you select to receive an alert, in the **Send email alerts to** field, enter the email address to receive alerts.
6. Click **Save**. You return to the appeal mailing record.

### Configure Batch Email Alerts

In *Batch entry*, you can select to receive email alerts as notification when the ownership of batches transfer to you as the result of a batch status update, the addition of a new batch, or an edit of a batch’s properties.
Configure settings for email alerts for batches

To generate email alerts in Batch entry, the system administrator must first configure your database mail settings. For information about how to configure these settings, see Edit Email Alert Settings on page 37.

1. On the Batch Entry page, click Email alerts under Tasks. The Configure batch email alerts screen appears.
2. Select whether to receive email alerts when the ownership of a batch transfers to you in Batch entry.
3. If you select to receive an alert, in the Send email alerts to field, enter the email address to receive alerts.
4. Click Save. You return to the Batch Entry page.

Configure Event Task Email Alerts

From the record of an event, you can select to receive email alerts as reminders of tasks to complete for the event.

Configure settings for email alerts for event tasks

To generate email alerts in Events, the system administrator must first configure your database mail settings. For information about how to configure these settings, see Edit Email Alert Settings on page 37.

1. Open the record of the event for which to receive email alerts.
2. Under Tasks, click Configure email alerts. The Configure event task email alerts screen appears.
3. To receive email alerts to remind you of tasks pending for the event, select Send me an alert for task reminders.
4. If you select to receive an alert, in the Send email alerts to field, enter the email address to receive alerts.
5. Click Save. You return to the event record.
Smart Fields

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Smart fields provide quick access to specific information that otherwise might take hours or days to compile. For example, you create a query of all donors in your database who gave $10,000, along with their first gift date. You routinely run this query, which takes a considerable amount of time to execute due to the size of your database and the complexity of the query—the server must calculate the total for every record in your database. As the number of records in your database increases, the time necessary to run the query also increases. When you replace the summary fields in the query with smart fields, you improve the time it takes to run the query considerably. The program automatically generates and caches the smart field values at intervals set by your system administrator. In addition, smart field updates consider only records added to the database since the last run date and do not reconsider records already included in the value.

You can use smart fields in a variety of ways throughout the program:

- To build queries and selections.
- To quickly view details about a constituent’s giving history on the Smart Fields tab of their record.
- To calculate the entry amount for ask ladders on marketing effort reply devices.
- To calculate for renewal notices when memberships are set to expire.
Smart Field Workflow

The smart field workflow typically involves multiple people, including a smart field administrator and consumers who use the data generated by the smart field.

- Smart Field administrator: The administrator creates smart fields based on management’s requests. For example, at the beginning of each quarter, a user in your organization generates a query to track constituents who gave $1,000 or more in the previous quarter. Management makes its request to the administrator and details what the smart field values should represent. The administrator creates and processes the smart fields to make them available to users for queries, reports, and related records. To satisfy this user, the smart field administrator creates two smart fields: one with constituent revenue amounts and another with constituent revenue dates.

- Smart Field data consumer: The consumer is the individual who views and uses the data generated by the smart field. Continuing with the smart field administrator example, the query user includes the “Value” field of the revenue amount smart field, assigning it a value Greater than or equal to $1,000, and the “Value” field of the revenue dates smart field, assigning it a value Equal to last quarter.

Add a Smart Field

When you add a smart field, you define parameters for the information the smart field returns. These parameters vary based on the type of smart field type.

For example, if you select the “Constituent appeal count” definition, the smart field requires parameters specific to appeals such as the business units and categories to include in its value. If you select “Constituent revenue amounts”, the smart fields requires parameters specific to revenue such as calculation type and the revenue types to include in its value.

This section provides scenarios that demonstrate how to build a few commonly used smart fields. For more information about how to create other smart field definitions, see Smart Field Definitions on page 64

Note: If you need smart field definitions beyond those included in the program, contact your in-house developer or implementation consultant.

Add a constituent revenue amounts smart field

Scenario: A prospector in your organization begins each quarter by querying constituent records for donors who gave a total of $1,000 or more the previous quarter. He has requested that the system administrator create smart fields to quickly calculate total giving for constituents. The gift smart field should also group constituents based on this his rating information: Fair = $1,000; Good = $3,000; and Excellent = $5,000. Finally, he asked that all gift types be included but not soft credits. The administrator will create two smart fields: one to determine gift amounts and another for gift dates. This procedure shows you how to create the revenue amount smart field.

1. From Administration, click Smart fields. The Smart Fields page appears.
2. Click **Add**. The Select a smart field definition screen appears. Definitions specify how to calculate a smart field.
   
   For this scenario, select “Constituent revenue amounts.”

3. Click **OK**. The Add constituent revenue amounts smart field screen appears.

4. On the General tab, enter a name for your smart field. For this scenario, because the prospector refers to revenue as gifts, enter “Gift Amounts.”

5. In the **Description** field, enter a description for the field, such as how it should be used.

6. Select a category for your smart field. Categories are helpful to sort and filter smart fields in the Smart Fields screen.

7. Under **Value groups**, add designations based on values as necessary. In this scenario, the prospector wants three value groups: “Fair” for $1,000 donors; “Good” for $3,000 donors; and “Excellent” for $5,000 donors. For information about how to add value groups, see Add Value Groups to a Smart Field on page 58.
8. Select the Parameters tab.

9. In the **Value to return** field, select the calculation type for the smart field. For this scenario, select "Total gift amount" because the prospector wants each constituent’s total gift for the previous quarter.

10. If necessary, select whether to base the smart field on specific dates or recent dates, and enter the time period for the smart field.

   For this scenario, the revenue date smart field and the values selected by the prospector in **Query** determine the time period for the smart field, so leave the fields blank.
11. Under Revenue types and designations, select the revenue types to include in the smart field value. For this scenario, the prospector requested all types of revenue, so select all the checkboxes.

**Note:** If you do not select any revenue types, the smart field will include all types.

12. You can filter revenue included in the smart field value based on the designation associated with the revenue. Under Designations, search for and select the designations to use in your smart field value. If you do not select a designation, the value includes revenue from all designations. No designations were requested for this smart field.

13. You can filter revenue included in the smart field value based on the campaign associated with the revenue. Under Campaigns, search for and select the campaigns to use in your smart field value. If you do not select a campaign, the value includes revenue from all campaigns. No campaigns were requested for this smart field.
14. Click Save. The smart field is added to the system, and you return to the Smart Fields page. You now must process the smart field. This makes the smart field value available for queries, reports, and in related records. For more information about how to process a smart field, see Process a Smart Field on page 61.

Add a constituent revenue date smart field

This procedure is a continuation of the scenario outlined in the Add a constituent revenue amounts smart field on page 49.
1. On the Smart Fields page, click **Add**. The Select a smart field definition screen appears. Definitions specify how to calculate a smart field. For this scenario, select “Constituent revenue dates.”

2. Click **OK**. The Add constituent revenue dates smart field screen appears.

3. On the General tab, enter a name for your smart field. For this scenario, because the prospector refers to revenue as gifts, enter “Gift Dates.”

4. In the **Description** field, enter a description for the field, such as how it should be used.

5. Select a category for your smart field. Categories are helpful to sort and filter smart fields in the Smart Fields screen.

6. Under **Value groups**, add designations based on values as necessary. In this scenario, value groups are not needed for the gift date smart field.

7. Select the Parameters tab.

8. In the **Value to return** field, select the calculation type for this smart field. For this scenario, select “Latest date.”

9. If necessary, in the **Start date** and **End date** fields, select the time period for the smart field. For this scenario, the values selected by the prospector in Query determine the time period, so leave the fields blank.
10. Under **Revenue types and designations**, select the revenue types to include in the smart field value. For this scenario, the prospector requested all types of revenue, so select all the checkboxes.

**Note:** If you do not select any revenue types, the smart field will include all types.

11. You can filter dates included in the smart field value based on the designation. Under **Designations**, search for and select the designations to use in your smart field value. If you do not select a designation, the value includes revenue from all designations. No designations were requested for this smart field scenario.

12. You can filter dates included in the smart field value based on the campaign. Under **Campaigns**, search for and select the campaigns to use in your smart field value. If you do not select a campaign, the value includes revenue from all campaigns. No campaigns were requested for this smart field scenario.

13. Click **Save**. The smart field is added to the system, and you return to the Smart Fields page. You now must process the smart field. This makes the smart field value available for queries, reports, and in related records. For more information about how to process a smart field, see **Process a Smart Field on page 61**.
Add a constituent revenue application amounts smart field

**Scenario:** Your organization’s Direct Response Manager needs a smart field that calculates an individual constituent’s total giving amount for the last 24 months. This value will provide the monetary component of her "RFM" (recency, frequency, monetary) direct response segmentation schema. Using the "Constituent revenue application amounts" smart field definition, we will build a smart field that includes all basic gift payments (payments applied to Donations, Pledges, and Recurring Gifts) within the last 24 months and excludes soft credits and all other types of applications. We will create three value groups to group constituents based on these ranges of total giving: under $1k, $1k - $5k, and over $5k.

1. From Administration, click **Smart fields.** The Smart Fields page appears.
2. Click **Add.** The Select a smart field definition screen appears. Definitions specify how to calculate a smart field.
   For this scenario, select “Constituent revenue application amounts.”
3. Click **OK.** The Add constituent revenue application amounts smart field screen appears.
4. On the General tab, enter a name for your smart field. For this scenario, enter "Total giving 0-24 months."
5. In the **Description** field, enter a description for the field, such as its intended use.
6. Select a category for your smart field. Categories are helpful to sort and filter smart fields in the Smart Fields screen.
7. Under **Value groups,** add values as necessary. In this scenario, we add three value groups: "Under $1k," "$1k - $5k," and "Over $5k." For information about how to add value groups, see Add Value Groups to a Smart Field on page 58.
8. Select the Parameters tab.

9. In the **Value to return** field, select the calculation type for the smart field. For this scenario, select “Total application amount” because we want to sum all payments applied to donations, pledges, and recurring gifts.

10. In the **For** field, select “Constituent revenue” because we want to calculate the total giving for the individual constituent and exclude soft credits they may receive as part of a household. Alternately, you can select “Constituent revenue recognition” if your organization uses recognition programs.

11. Under **Revenue types**, select the revenue types to include in the smart field value. For this scenario we want to include only basic gifts so we select the **Donation** checkbox.

12. Under **Transaction type/Application**, select the application types to include in the smart field value. For this scenario we want to include only gift payments and no other commitments in the total. Under **Payment**, select the **Donation**, **Pledge**, and **Recurring gift** checkboxes.
13. You can filter revenue included in the smart field value based on a selection. In the **Application selection** field, search for and select the selection to use in your smart field value. For example, you can choose a selection that contains gifts to specific designations. For this scenario, leave the field blank.

14. We need to narrow the range of gifts to those within the last 24 months. Under **Timeframe**, in the **Date range** field, select "Relative dates." In the **Time period** field, select "Months." In the **Months** field, enter "24." Because you selected "Relative dates," the date range used is the 24 month period before the date the smart field was last refreshed.

![Screenshot of the Add constituent revenue application amounts smart field interface](image)

15. Click **Save**. The smart field is added to the system and you return to the Smart Fields page. To generate values for the smart field you now must process the smart field. This makes the smart field value available for queries, reports, and in related records. For more information about how to process a smart field, see [Process a Smart Field on page 61](#).

**Add Value Groups to a Smart Field**

A smart field uses value groups to consolidate records into groups based on ranges of values. For example, using the scenario provided for the **Constituent revenue application amount smart field**, we can create groups of constituents based on their total giving amounts: Under $1k, $1k - $5k, and Over $5k.

When you use a smart field to create a query, you can choose to filter and output based on value groups. For example, you can build a marketing segment for each value group produced by the total
giving smart field (Under $1k, $1k - $5k, and Over $5k). Using value groups can save you from having to define the criteria for value ranges on the query itself.

Value groups appear as output fields in queries:

Query results are grouped as defined by the value groups.
Add value groups to a smart field

1. On the Add smart field or Edit smart field screen, select the General tab.
2. Select **Use value groups**.
3. Click **Add**. The Add value group screen appears.

```
Add value group

Value group name: ________________________________
Valid for values greater than or equal to _______0_____

Save   Cancel
```

4. In the **Values greater than or equal to** column, enter the minimum value of the range included in the group. For example, enter __________

5. In the **Value group name** column, enter a unique name to help describe values included in the group.

**Note:** For smart fields that generate a date value, such as Constituent largest revenue date, in the **Time period** field, you can select the measure of time from the current date (days, weeks, years, etc.) to use for the calculation.

6. Click **Save**. You return to the previous screen.

Manage Smart Fields

You can create and manage your organization’s smart fields on the Smart Fields page. To access this page, from Administration, under Data, click **Smart fields**.

In the Smart Fields list, you can view information about the smart fields your organization uses, such as when the field was last processed and who ran it. You can choose which columns of information appear in the list.
You can also complete tasks for a smart field from the Smart Fields page. To access task buttons, click the double arrows next to a smart field to expand the row.

- To generate values for a smart field, click Process smart field. For more information, see Process a Smart Field on page 61.
- To reset the last run date so the calculation includes information entered during all dates that satisfy the date range entered for the smart field and not just information entered since the previous update, click Clear results. For more information, see Clear the Results from the Last Run of a Smart Field on page 63.
- To open the process record for a smart field and view information about recent updates, process history, and job schedules, click the smart field’s name. For information about the items on the record, see Smart Field Process Record on page 62.

**Process a Smart Field**

After you add or edit a smart field, you must process it to calculate values. Processed smart fields are automatically available for use in queries, reports, and records in the program. For example, processed constituent smart fields appear under Constituent nodes in queries and on the Smart Fields tab of constituent records.

**Tip:** You can schedule the process to automatically update the values of a smart field to run at set intervals. For information about how to schedule a smart field process, see Add a Job Schedule on page 63.

**Process values for a smart field**

1. On the Administration page, click Smart fields. The Smart Fields page appears.
2. Click the double arrows next to the smart field to expand the row. Then click Process smart field. The program generates the values for the smart field. When the process is complete, the process record appears.

Note: You can also process a smart field from its process record. Under Tasks, click Start process.

Smart Field Process Record

When you process a smart field, the program automatically generates a process record. From the process record, you can use the tabs to view information about recent updates, process history, and job schedules. To access the process record, click the smart field’s name.

Recent Status

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

History

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

To filter the process instances that appear in the list, click Filters. To download an output file that contains all records from the last process run, click More and select the file type.
Job Schedules

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

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

Add a Job Schedule

You can create a job schedule to automatically run the smart field update business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight. During periods of increased gift entry, you may want to schedule the process to run even more frequently. To create a job schedule, click Add on the Job schedules tab of the process status page. The Create job screen appears.

Note: To create a job schedule from any tab of the process status page, click Create job schedule under Tasks.

To automate a process, you can create a job schedule for the process. When you create a job schedule, you define when the job begins to run. After you add the schedule, you can use SQL Server Agent jobs to automatically process smart field values and run the task on a recurring basis. To schedule the job, you must define the conditions that cause the job to begin.

Clear the Results from the Last Run of a Smart Field

When you process a smart field, the program updates its values based on the information added to the database since the last time it was processed. To include information from all dates in the specified date range rather than just information entered since the previous update, you can reset the last run date for the smart field. On the Smart Fields page, the last run date appears in the Last run on column.

From the Smart Fields page, click the double arrows next to the smart field to expand the row. Then click Clear results. The date in the Last run on column is removed to reflect the change.

Reset the last run date for a smart field

1. On the Administration page, click Smart fields. The Smart Fields page appears.
2. Select the smart field and click Clear results. A confirmation message appears.
3. Click Yes. You return to the Smart Fields page.
Update Smart Field Query Relationships

If you add a new queryview, such as through a customization process, after you create a smart field, the new queryview does not automatically add the smart field. To add the smart field to the new queryview, you must update the relationships between your smart fields and queries.

From the Smart Fields page in Administration, click **Update smart field query relationships** under Tasks.

Smart Field Definitions

This section describes the values returned by smart field definitions.

**Note:** Smart fields do not exclude inactive records.

Constituent Smart Fields

These are descriptions of each smart field definition you can create for constituent data.

<table>
<thead>
<tr>
<th>Smart Field Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituent age</td>
<td>Provides the constituent’s current age.</td>
</tr>
<tr>
<td>Constituent exists in selection</td>
<td>Provides whether the constituent is included in the specified selection.</td>
</tr>
<tr>
<td></td>
<td>Returns Yes/No values.</td>
</tr>
<tr>
<td>Constituent appeal count</td>
<td>Provides the number of appeals made to the constituent during the specified time period.</td>
</tr>
<tr>
<td></td>
<td>You can filter the appeals included by business units, categories, and report codes.</td>
</tr>
<tr>
<td>Constituent appeal years</td>
<td>Provides the number of years between the first and last appeal made to the constituent during the specified time period.</td>
</tr>
<tr>
<td></td>
<td>You can filter the appeals included by business units, categories, and report codes.</td>
</tr>
<tr>
<td>Last constituent appeal name</td>
<td>Provides the name of the most recent appeal made to the constituent during the specified time period.</td>
</tr>
<tr>
<td></td>
<td>You can filter the appeals included by business units, categories, and report codes.</td>
</tr>
<tr>
<td>Smart Field Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Constituent contact information</strong></td>
<td>Provides whether the constituent has contact information (address, phone, and/or email) entered on their record. Returns Yes/No values.</td>
</tr>
<tr>
<td><strong>Constituent recognition credit amounts</strong></td>
<td>Provides a constituent’s smallest, total, average, or largest recognition credit amount for the specified time period. You can filter the revenue included by revenue type, designations, and campaigns.                                                                                              NOTE: If you do not select revenue types, all types are used.</td>
</tr>
<tr>
<td><strong>Constituent recognition credit dates</strong></td>
<td>Provides the constituent’s earliest or latest recognition credit date during the specified time period. You can filter the revenue included by revenue type, designations, and campaigns.                                                                                                                                                                                                                                                NOTE: If you do not select revenue types, all types are used.</td>
</tr>
<tr>
<td><strong>Constituent annual revenue renewer</strong></td>
<td>Provides whether the constituent is an annual revenue renewer during the specified time period. An annual renewer is a constituent who has given a gift every year since their first gift. Returns Yes/No values. You can filter the revenue included by revenue type, designations, and campaigns.                                                                                                                                                                                                                      NOTE: If you do not select revenue types, all types are used.</td>
</tr>
<tr>
<td><strong>Constituent largest revenue date</strong></td>
<td>Provides the date of the constituent’s largest gift during the specified time period. You can filter the revenue included by revenue type, designations, and campaigns.                                                                                                                                                                                                                                                            NOTE: If you do not select revenue types, all types are used.</td>
</tr>
<tr>
<td><strong>Constituent recurring gift last installment dates</strong></td>
<td>Provides the date of the constituent’s most recent recurring gift payment during the specified time period. You can filter the revenue included by revenue type, designations, and campaigns.                                                                                                                                                                                                                                                             NOTE: If you do not select revenue types, all types are used.</td>
</tr>
<tr>
<td>Smart Field Type</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Constituent recurring gift missed installment counts | Provides the number of recurring gift payments missed by the constituent during the specified time period.  
You can filter the revenue included by revenue type, designations, and campaigns.  
NOTE: If you do not select revenue types, all types are used. |
| Constituent revenue amounts                  | Provides the constituent’s largest, smallest, total or average gift amount during the specified time period.  
You can filter the revenue included by revenue type, designations, and campaigns.  
NOTE: If you do not select revenue types, all types are used. |
<table>
<thead>
<tr>
<th>Smart Field Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Constituent revenue application** | Provides details about the largest, smallest, first, or latest constituent or household/group revenue application for the selected revenue transition types. Use this smart field when you need information about revenue applications associated with a constituent or household rather than the calculated amounts. For example, you can set the parameters to return all first gift records. “First gifts Smart Field” then appears as a query node under Smart Fields in all constituent queries. Use this query node to drill-down and select field information associated with the first gift record, such as the appeal name or package ID. 
NOTE: If you do not select revenue types, transaction/application types, recognition credit types, or an application selection, all types are used.
NOTE: Household/group gifts include gifts from the constituent, the constituent’s household or group, and any member of the constituent’s household or group. |

| **Constituent revenue application amounts** | Provides the largest, smallest, total, average, first, or latest constituent or household/group gift amounts or recognition credits during the specified time period. Use this value when you need to consider how revenue was applied to multiple designations or commitments, or within a household or group. Unlike the Constituent revenue amounts smart field, this field allows you to choose which types of applications you want to include in the amount. For example, if you want the total gift amount to include only donations and pledge payments, you can set the parameters to exclude applications to other type of commitments, such as event registrations or other fees. When a constituent makes a payment that is split between a pledge and an event registration, their total gift amount includes only the portion of the payment applied to the pledge. 
NOTE: If you do not select revenue types, transaction/application types, or recognition credit types, all types are used.
NOTE: Household/group gifts include gifts from the constituent, the constituent’s household or group, and any member of the constituent’s household or group. |

**Total Number of Visits:** This smart field, based on the Constituent revenue application counts definition, calculates a constituent’s total number of visits and considers orders that include free items. For example, this is useful if you want to query on the total number of visits by your active members who don’t pay admission fees. Because the **$0.00 payments/orders** option is selected, the Total Number of Visits smart field pulls in orders with $0.00 tickets.
<table>
<thead>
<tr>
<th>Smart Field Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituent revenue application annual renewer</td>
<td>Provides whether the constituent or household/group is an annual revenue renewer. An annual renewer is a constituent or household/group that has given a gift every year since their first gift. Returns Yes/No values. NOTE: If you do not select revenue types, transaction/application types, or recognition credit types, all types are used. NOTE: Household/group gifts include gifts from the constituent, the constituent’s household or group, and any member of the constituent’s household or group.</td>
</tr>
<tr>
<td>Constituent revenue application counts</td>
<td>Provides the number of giving years, distinct giving years, total number of applications, or consecutive giving years for revenue applications for the constituent or household/group. Giving years = Year of most recent gift — year of earliest gift +1 Distinct giving years = Total number of years gifts were given (not necessarily consecutive) Consecutive giving years = Number of consecutive years gifts were given For example, Joe gave in the years 2002, 2003, 2007, 2008, and 2009. Giving years = 8 (2009-2002+1) Distinct giving years = 5 Consecutive giving years = 3 (2007-present) select if the data returned should represent revenue or revenue recognition credits for constituents or household members. NOTE: If you do not select revenue types, transaction/application types, or recognition credit types, all types are used. NOTE: Household/group gifts include gifts from the constituent, the constituent’s household or group, and any member of the constituent’s household or group.</td>
</tr>
<tr>
<td>Smart Field Type</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Constituent revenue application dates</td>
<td>Provides the latest, earliest, or largest gift dates for the constituent or household/group.</td>
</tr>
<tr>
<td></td>
<td>You can filter the revenue included by revenue type, designations, and campaigns.</td>
</tr>
<tr>
<td></td>
<td>NOTE: If you do not select revenue types, transaction/application types, or recognition credit types, all types are used.</td>
</tr>
<tr>
<td></td>
<td>NOTE: Household/group gifts include gifts from the constituent, the constituent’s household or group, and any member of the constituent’s household or group.</td>
</tr>
<tr>
<td>Constituent revenue counts</td>
<td>Provides the constituent’s number of gifts during the specified time period.</td>
</tr>
<tr>
<td></td>
<td>You can filter the revenue included by revenue type, designations, and campaigns.</td>
</tr>
<tr>
<td></td>
<td>NOTE: If you do not select revenue types, all types are used.</td>
</tr>
<tr>
<td>Constituent revenue dates</td>
<td>Provides the constituent’s earliest or latest gift dates during the specified time period.</td>
</tr>
<tr>
<td></td>
<td>You can filter the revenue included by revenue type, designations, and campaigns.</td>
</tr>
<tr>
<td></td>
<td>NOTE: If you do not select revenue types, all types are used.</td>
</tr>
<tr>
<td>Constituent revenue giving years</td>
<td>Provides the number of years between the constituent’s first and last gifts or the number of years the constituent gave gifts.</td>
</tr>
<tr>
<td></td>
<td>Years between first and latest gifts - Returns the number of years the constituent gave a gift, not including the first and last gifts.</td>
</tr>
<tr>
<td></td>
<td>Distinct giving years - Returns the total number of years the constituent gave a gift.</td>
</tr>
<tr>
<td></td>
<td>You can filter the revenue included by revenue type, designations, and campaigns.</td>
</tr>
<tr>
<td></td>
<td>NOTE: If you do not select revenue types, all types are used.</td>
</tr>
<tr>
<td>Smart Field Type</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Household revenue amounts</strong></td>
<td>Provides the largest, smallest, total, or average household/group gift amounts during the specified time period. You can filter the revenue included by revenue type, designations, and campaigns. NOTE: If you do not select revenue types, all types are used. NOTE: If the Revenue type is set to Event registration and you select a designation in the Designations field, the field will not process any event registration records. NOTE: Household/group gifts include gifts from the constituent, the constituent’s household or group, and any member of the constituent’s household or group.</td>
</tr>
<tr>
<td><strong>Household revenue dates</strong></td>
<td>Provides the latest or earliest household/group gift dates during the specified time period. You can filter the revenue included by revenue type, designations, and campaigns. You can also filter by the amount type: Received, Not yet received, and Deferred. NOTE: If you do not select revenue or amount types, all types are used. NOTE: Household/group gifts include gifts from the constituent, the constituent’s household or group, and any member of the constituent’s household or group.</td>
</tr>
<tr>
<td><strong>Household revenue giving years</strong></td>
<td>Provides the number of years between the household/group's first and last gifts or the number of years the household gave gifts during the specified time period. Years between first and latest gifts - Returns the number of years the household gave a gift, not including the first and last gifts. Distinct giving years - Returns the total number of years the household gave a gift. You can filter the revenue included by revenue type, designations, and campaigns. You can also filter by the amount type: Received, Not yet received, and Deferred. NOTE: If you do not select revenue or amount types, all types are used. NOTE: Household/group gifts include gifts from the constituent, the constituent’s household or group, and any member of the constituent’s household or group.</td>
</tr>
</tbody>
</table>
Marketing Smart Fields

These are descriptions of each smart field definition you can create for marketing data. These fields are provided by default in the program.

<table>
<thead>
<tr>
<th>Smart Field Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Constituent Ask Ladder                  | Provides the smallest, last, largest, or average gift value. Use this value to calculate entry amounts for ask ladders based on the constituent’s previous giving.  
  **Default value** - For the Default value field, enter the entry amount to return when a value can not be calculated.  |
| Constituent Lifetime gifts on file      | Provides the number of gifts on file for each member of a group of constituents.                                                                                                                                 |
| Constituent Lifetime giving             | Provides the sum total of all gifts for each constituent.                                                                                                                                                    |
| Constituent Loyalty                     | Determines a loyalty category based on gifts given on an annual basis.  
  Assigns these categories to constituents based on the calculation for loyalty:  
  - New  
  - Multi  
  - Lapsed  
  - Reactivated  
  - Non Donor  
  For more information, see [Calculation for Loyalty on page 72](#). |
| Constituent Single gift consecutive year donors | Determines a category for donors who gave a single gift in the last 5 consecutive years.  
  This is a variant on loyalty.  
  Applies a calculation to categorize single gifts. For more information, see [Calculation for Single Gift Consecutive Year Donors on page 73](#). |
| Constituent Years on file               | Provides the years since first donation for each member of a group of constituents.                                                                                                                            |
## Calculation for Loyalty

<table>
<thead>
<tr>
<th>Category</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Gift within 1 year of As Of Date</td>
</tr>
<tr>
<td>Multi (10+ years)</td>
<td>Gift each year within the past 10+ years, based on As Of Date</td>
</tr>
<tr>
<td>Multi (9 years)</td>
<td>Gift each year within the past 9 years, based on As Of Date</td>
</tr>
<tr>
<td>Multi (8 years)</td>
<td>Gift each year within the past 8 years, based on As Of Date</td>
</tr>
<tr>
<td>Multi (7 years)</td>
<td>Gift each year within the past 7 years, based on As Of Date</td>
</tr>
<tr>
<td>Multi (6 years)</td>
<td>Gift each year within the past 6 years, based on As Of Date</td>
</tr>
<tr>
<td>Multi (5 years)</td>
<td>Gift each year within the past 5 years, based on As Of Date</td>
</tr>
<tr>
<td>Multi (4 years)</td>
<td>Gift each year within the past 4 years, based on As Of Date</td>
</tr>
<tr>
<td>Multi (3 years)</td>
<td>Gift each year within the past 3 years, based on As Of Date</td>
</tr>
<tr>
<td>Multi (2 years)</td>
<td>Gift each year within the past 2 years, based on As Of Date</td>
</tr>
<tr>
<td>Reactivated</td>
<td>Gift in the current year, No gift in the previous year, and a gift in some prior year, based on As Of Date</td>
</tr>
<tr>
<td>Lapsed (1yr-New)</td>
<td>No gift in the current year, a gift in the previous year, and no gifts in some prior year, based on As Of Date</td>
</tr>
<tr>
<td>Lapsed (1yr)</td>
<td>No gift in the current year, a gift in the previous year, and gifts in some prior year, based on As Of Date</td>
</tr>
<tr>
<td>Lapsed (2yr)</td>
<td>No gifts in the past 2 years, based on As Of Date</td>
</tr>
<tr>
<td>Lapsed (3yr)</td>
<td>No gifts in the past 3 years, based on As Of Date</td>
</tr>
<tr>
<td>Lapsed (4yr)</td>
<td>No gifts in the past 4 years, based on As Of Date</td>
</tr>
<tr>
<td>Lapsed (5yr)</td>
<td>No gifts in the past 5 years, based on As Of Date</td>
</tr>
<tr>
<td>Lapsed (6yr)</td>
<td>No gifts in the past 6 years, based on As Of Date</td>
</tr>
<tr>
<td>Lapsed (7yr)</td>
<td>No gifts in the past 7 years, based on As Of Date</td>
</tr>
<tr>
<td>Lapsed (8yr)</td>
<td>No gifts in the past 8 years, based on As Of Date</td>
</tr>
<tr>
<td>Lapsed (9+yr)</td>
<td>No gifts in the past 9 years, based on As Of Date</td>
</tr>
<tr>
<td>Non-donor</td>
<td>No gift in the past 10+ years, based on As Of Date</td>
</tr>
</tbody>
</table>
Calculation for Single Gift Consecutive Year Donors

<table>
<thead>
<tr>
<th>Category</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Gifts</td>
<td>No gift in the past 10+ years, based on As Of Date</td>
</tr>
<tr>
<td>2 years</td>
<td>A single gift each year in the past 2 years and any or no gifts in the following years, based on As Of Date</td>
</tr>
<tr>
<td>3 years</td>
<td>A single gift each year in the past 3 years and any or no gifts in the following years, based on As Of Date</td>
</tr>
<tr>
<td>4 years</td>
<td>A single gift each year in the past 4 years and any or no gifts in the following years, based on As Of Date</td>
</tr>
<tr>
<td>5 years</td>
<td>A single gift each year in the past 5 years and any or no gifts in the following years, based on As Of Date</td>
</tr>
<tr>
<td>Other</td>
<td>Any other combination of gifts over past 10+ years, based on the As Of Date</td>
</tr>
</tbody>
</table>

Membership Smart Fields

These are the smart field definitions you can create for membership data.

<table>
<thead>
<tr>
<th>Smart Field Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership expiration</td>
<td>Provides the number of days, weeks, months, quarters, or years until a membership is set to expire.</td>
</tr>
</tbody>
</table>
Organization Calendar

View the Organization Calendar ................................................................. 74
Add Items to the Organization Calendar .................................................. 75
Export the Organization Calendar ............................................................. 76

On the Organization Calendar page, you can view scheduled items and activities related to your organization or community to help schedule and coordinate activities and processes. From the organization calendar, you can add and manage calendar items such as holidays, community events, or scheduled breaks in your organization's operation. You can also view and manage activities, such as events or communications, scheduled during a specific period of time. To access the Organization Calendar page, in Administration, click Organization calendar.

View the Organization Calendar

The Organization Calendar page displays the calendar in two views. The calendar view displays a traditional calendar grid view. Click List to view all scheduled items in a list. In both views, you can

- To view the dates on the calendar in a daily, weekly, or yearly format, click the interval to use above the calendar. Use the left and right arrows to view an earlier or later day, week, month, or year.
- To view the items and activities for a specific date, in the Jump to date field, select the date to view.
- Under Filters, you can select the types of items and activities to view on the calendar. To hide a type of item of activity, clear its checkbox. To help you navigate through the information on the calendar, each type of calendar item or activity is color-coded. To adjust the color of an item type, click Customize style.
• After you select the types of activities to view, you can apply filters to further define which activities appear. Click the down arrow next to the activity type and select the criteria of the items to view. The calendar updates to display the activities that meet the selected criteria.

• To view more information about an event, appeal mailing, marketing effort, or plan activity, right-click and select Go to [record type]. In the calendar view, you can also hover your mouse over a calendar item to view a brief description.

• To receive notifications as a Really Simple Syndication (RSS) feed through your browser or reader such as Microsoft Outlook, click View RSS feed. You can select to receive notifications when new events, program events, group sales, and calendar items are added.

• When events, appeal mailings, marketing efforts, or plan activities are scheduled in the program, they appear automatically on the organization calendar. You can also add new activities directly from the calendar, as well as other calendar items. For more information, see Add Items to the Organization Calendar on page 75.

• After you add items and activities to the organization calendar, you can export the calendar, such as for use with a calendar on a mobile device. For information about how to export the calendar, see Export the Organization Calendar on page 76.

Add Items to the Organization Calendar

From the Organization Calendar page, you can add and manage items to keep track of important dates or occasions such as holidays and community events.

When events, appeal mailings, marketing efforts, or plan activities are scheduled in the program, they appear automatically on the organization calendar. You can also add new activities directly from the calendar page.

Add a calendar item

1. From Administration, click Organization calendar. The Organization Calendar page appears.
2. Click Add and select Calendar item. The Add a calendar item screen appears.
3. Enter a name for the item, such as St. Patrick’s Day or Downtown Arts Expo.
4. In the **Start date** and **End date** fields, select the duration of the item. When you add the item from the calendar view, the date range selected on the calendar automatically appears.

5. Click **Save**. You return to the Organization Calendar page. On the selected dates, the new item appears.

## Export the Organization Calendar

After you add items and activities to the organization calendar, you can export the calendar to an iCalendar (*.ics) or a vCalendar (*.vcs) file. With the export file, you can view and manage the items or activities in a calendar outside of the program, such as in Microsoft **Outlook** or on a mobile device. When you export the calendar, you select the date range of the items and activities to export.

> **Export the organization calendar**

1. From **Administration**, click **Organization calendar**. The Organization Calendar page appears.

2. On the Calendar tab, click **Export calendar**. The Export calendar screen appears.

3. In the **Save as** field, click the ellipsis, and browse to the location to save the export file.

4. Specify the name and format to use to save the export file. You can save the export file as either an iCalendar (*.ics) or a vCalendar (*.vcs) file.

5. Click **OK**. When the program saves the export file at the designated location, a message appears.

6. Click **OK**. You return to the Organization Calendar page.
Access Code Tables .................................................................................................................. 77
Manage Code Table Entries ..................................................................................................... 78
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Establish User Permissions for Code Tables ............................................................................ 80

Code tables increase data entry speed and accuracy throughout the program. When users enter information into a field with a code table, they can quickly access a list of possible entries for that field to select an entry rather than type it manually.

Code tables also help maintain consistency in your data entry. For example, when users add a new constituent phone number, one may enter “Cell Phone” as a phone type, another may enter “Mobile,” and yet another may enter “Cell.” All three designate the same phone type. To prevent inconsistency and ease the interpretation and retrieval of information from your database in queries and reports, you can enter your organization's accepted phone types in Code Tables and limit the rights of your users to add and edit table entries.

Access Code Tables

To view and manage your organization's code tables, from Administration, click Code tables. The Code Tables page appears.

**Warning:** To ensure the validity of your database and consistency of your data entry, we recommend you limit rights to manage code table entries to only a few key users. This also increases the accuracy of your records and reports. For information about how to limit rights, see Establish User Permissions for Code Tables on page 80.

In the program, users access code table entries (along with value list fields and simple data list fields) from the drop-down arrow at the end of a field. Depending on permission settings, users can enter text directly in the field. If the program does not recognize the text as an existing code table entry, it asks whether to add the text as a new entry. To access a screen to view code table entries, users can also press **F7** on their keyboard when the cursor is in the table field. Depending on permission settings, users can also add and manage entries from this screen.
Manage Code Table Entries

From the Code Tables page, you can add and manage code table entries. To view the entries for a code table, in the **Category** field, select the type of code table to view. To open a code table, click the name of a code table in the list. The Table Entries page for the code table appears.

From the grid, you can add and manage the entries for the code table.

Add New Table Entries

You can add entries for code tables. When you add a code table entry, you enter its description to appear as a selection for the table throughout the program.

**Warning:** To ensure the validity of your database and consistency of your data entry, we recommend you limit rights to add code table entries to only a few key users. This also increases the accuracy of your records and reports. For information about how to limit rights, see Establish User Permissions for Code Tables on page 80.

**Add a new table entry**

1. From Administration, click **Code tables**. The Code Tables page appears.
2. Under **Code tables**, in the **Category** field, select the type of code table. In the list, click the name of the code table to open. The Table Entries page appears.

**Note:** You can also add entries from the lookup screen for the code table. For information about the lookup screen, see Show Lookup Screen on page 78.

3. Click **Add**. The New Table Entry screen appears.

4. Enter a description to help identify the new table entry.
5. Under **Filtering**, select whether to make the entry available to all sites at your organization or only selected sites. If you select "Selected sites," choose which sites can use the entry.
6. Click **Save**. You return to the Table Entries page. The next time a user accesses the code table through a field, the new entry appears as an option.

Show Lookup Screen

To view all available entries for a code table, select the table on the Code Tables page and click **Show lookup**. The lookup screen for the code table appears and displays all entries for the code table.
From the lookup screen, you can view and manage the entries for the code table. For a code table with a user-defined sort method, you can also arrange the order of the entries as necessary.

**Note:** For information about sort methods, see [Edit the Sort Method of Code Table Entries on page 79](#).

- To add an entry to the code table, click **Add**. The New Table Entry screen appears so you can enter the description of the entry.
  
  If you use the alphabetical sort method, the new entry appears in alphabetical order. If you use the user-defined sort method, select whether to add the new entry to the bottom of the list or above the selected entry.

- To edit an entry, select it and click **Edit**. The Edit Table Entry screen appears so you can edit the entry as necessary.

- To permanently remove an entry from your database, select it and click **Delete**. When a message appears to ask whether to delete the entry, click **Yes**.

- To arrange the order of the entries for a table with a user-defined sort method, select the entry to move and click the up or down arrow as necessary.

### Edit the Sort Method of Code Table Entries

You can select whether to display code table entries alphabetically or in a user-defined method. For example, you may select to sort entries so more commonly selected entries appear first in the code table. In the program, the entries appear for code table fields in the same order as you arrange in Administration.

> **Edit sort method of entries for a code table**

1. From Administration, click **Code tables**. The Code Tables page appears.
2. Under **Code tables**, select a table and click **Edit sort method**. The Edit code table entry list sort method screen appears.

![Edit code table entry list sort method](image)

3. Select whether to sort the entries of the table alphabetically or in a user-defined method.
4. Click **Save**. You return to the Code Tables page.

### Establish User Permissions for Code Tables

You can grant or deny your users permission to add, edit, and delete code table entries. Code tables provide entry options in various fields in the program. If you grant rights to change a code table, users can press **F7** on the keyboard when the cursor is in its table field to manage its entry list from its lookup screen. To limit your table entries to a reasonable number and protect the consistency of your database, we recommend you limit code table permissions.

**Note:** Any user can click **F7** to access the code table lookup screen, regardless of the permission settings. Permissions control only a user’s ability to add, edit, and delete entries.

> **Establish user permissions to add, edit, and delete code table entries**

1. From **Administration**, click **Code tables**. The Code Tables page appears.
2. Under **Code tables**, select the table for which to establish permissions.
3. Click **Assign permissions**. The Edit Code Table Permissions screen appears.
4. In the **System Role** column, locate the system role for which to establish permission settings.

5. Assign the selected system role permissions:

   - To establish an **Add** permission to determine whether users can add new entries to the code table, in the **Add** column, select whether to grant or deny the system role permission. If you grant permission, users who log in under the system role can press **F7** while in the table field to add an entry.

   **Note:** If you do not grant or deny a role permission, but leave the setting blank, the following occurs: if a user belongs to no other roles, the user is not granted rights; if the user belongs to another role to which permissions are granted, the user has the rights assigned that role. In addition, Deny trumps Grant, and Grant trumps no entry.

   - To establish an **Edit** permission to determine whether users can edit the entries of a code table, in the **Edit** column, select whether to grant or deny the system role permission. If you grant permission, users who log in under the system role can press **F7** while in the table field to edit an entry.

   - To establish a **Delete** permission to determine whether user can delete entries from the code table, in the **Delete** column, select whether to grant or deny the system role permission. If you grant permission, users who log in under the system role can press **F7** while in the table field to delete an entry.

   - To grant all system roles permission to manage the code table, click **Grant All**.

   - To deny all system roles permission to manage the code table, click **Deny All**.
• To clear all boxes in the grid and start over, click **Clear All**.

6. Click **Save**. Your return to the Code Tables page.
# Global Change

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<th>Page</th>
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</thead>
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</table>

The **Global changes** functionality allows you to make select changes to a specific group of records in your system. For example, trustees for your organization are rotated annually, so every year you have to
remove the “Trustee” constituency from all previous year trustees. Using a selection of your previous year trustees, you can use the “Delete user-defined constituency” definition included in Global changes and remove the “Trustee” constituency from all expired trustees’ records.

To access Global changes, from Administration, click Global changes under Data.

**Add a Global Change Instance**

A global change instance defines what you want changed where. Once you create an instance, it is saved in the Global changes grid on the Global Changes page. You can process and reprocess the instance at anytime and even open the existing instance and make any necessary changes.

➢ **Add a global change instance**

1. From the Global Changes page, click Add. The Select a global change definition screen appears.
2. Select the global change definition that meets your needs. For example, if you want to delete a constituency from selected records, select “Delete user-defined constituency”; if you want to add a constituent attribute to selected records, select “Add constituent attributes”.
3. Click OK. The Add global change screen appears. The fields and options included on this screen vary, based on the global change definition you selected in step 2.

4. Complete the Add global change screen. In this section all definitions are explained and information is included about the fields and options included on the specific definition add screen.
5. Click Save. The new global change instance appears in the Global Changes grid.

**Assign Global Change Permissions**

You can control system role permissions granted to each individual global change instance. Using the Assign Permissions functionality, you can control who has access to change, execute, and delete your global change instance.

When a user assigned the specific role opens the program, only instances for which they are granted permission appear.

➢ **Set user permissions for global change instances**

1. From the Administration page, click Global changes. The Global Changes page appears displaying any existing global change instances.
2. Select a global change instance and click Assign Permissions. The Assign Permissions screen appears.
3. To grant permission to all roles in your system, select All roles.
To select the individual roles to which you want to “Grant” or “Deny” permission, select **Selected roles**.

- The **System Roles** box is activated, and you can select a role.
- To grant the selected role access, click **Grant**; to deny the selected role access, click **Deny**; to clear assignments, click **Clear**.

4. Click **Save** to save your assignments and close the Assign Permissions screen.

---

**Process Global Changes**

Once you create or edit a global change instance, defining specifically what you want changed and where, you must process the instance. This executes the change, updating all selected records.

The global change process record displays status and history information about the selected global change instance. You can also schedule a global change processing job.

> **Process a global change instance**

1. From the Global Changes page, select the instance you want to process.
2. Click **Process global change**. The selected records are changed, and the process screen appears.

---

**Global Change Process Record**

The global change process record displays status and history information about the selected global change instance. You can also schedule a global change processing job.

**Note:** For information about executing a global change, see [Process Global Changes on page 85](#).

**View a Global Change Process Record**

Whenever you process a global change, the selected global change process record automatically opens after the process generates. When not processing changes, you can open process records from the Global Changes page.
Open an existing global change process record

1. From the Global Changes page, click the name of the global change process you want to view. The selected process record appears.
2. Also from this screen, the following Tasks are available:
   - **Start process**: Processes the global change.
   - **Edit global change**: Accesses the Edit global change screen.
   - **Create job schedule**: Accesses the Create Job screen.
   - **Delete global change**: Removes the global change instance from the system.

Recent Status

The Recent status tab displays information about the most recent global change process. For example, if the process “Completed”, the tab displays dates and times of the last change, the number of records processed, the number of exceptions, and much more.

History

The History tab lists all global changes executed for the selected global change instance. It includes information about dates, status, duration, and more. You can also delete archived processing records from this tab.

Delete Archived Global Change Process Record

You can permanently delete any archived global change process record stored on the History tab.

Delete a global change process record from the History tab

1. From the global change process record, select the History tab.
2. Select the archived record you want to delete.
3. Click **Delete**. A confirmation message appears.
4. Click **Yes**. The record is deleted, and you return to the History tab.

Job Schedule

You can arrange to process global changes automatically, even during off-hours, from the Job Schedule tab available in the global change process record.

Using SQL Server Agent jobs, the program automatically processes global changes, and it executes the changes on a recurring basis, following the instructions you set. Scheduling jobs involves defining the condition or conditions that cause the job to begin running.
Reset Last Run Date

Whenever you execute a selected global change, the program process the change based on any new data entered in the database since the Last run on date. This date displays in the Global Changes grid on the Global Changes page.

If for some reason, you want the program to process the change for all selected records, regardless of if the records were included in the last execution of the global change, you can reset the Last run on date by selecting the instance in the Global Changes grid and clicking Reset last run on date. A confirmation screen appears. Click Yes to reset the Last run on date.

Global Change Definitions

Depending upon the global change that you process, there are parameters specific to that change. This section contains definitions and procedures for each global change.

Delete Audit Table Data

Over time your database can accumulate numerous audit tables you no longer need. Use the Delete Audit Table definition to permanently remove audit data from these tables. When you add or edit profile pictures for constituents, each instance of the image is saved to the constituent audit tables, which can take up an unexpected and unwanted amount of space in the database. Now when you run the "Delete audit data" global change, you can specify to also delete constituent images from the audit tables. The images are not deleted from the constituent records, just from the audit tables. After you create the definition, you can execute the global change process to remove the data.

For more information about processing a global change, see Process Global Change on page 1.

> Delete audit table data globally

1. From the Administration page, click Global changes. The Global Changes page appears.
2. Click Add. The Select a global change definition screen appears.
3. Under Audit Tables, select Delete audit data.
4. Click OK. The Add global change screen appears.
5. In the Name field, enter a name to identify your global change process.
6. To delete all audit tables, select All audit tables.
7. To delete a specific group of audit tables from Query, select Selected audit tables. Click the binoculars at the end of the field to access a search screen and locate the selection to use.
8. You can mark Constituent images to delete constituent images from the audit tables. The images are not deleted from the constituent records, just from the audit tables.
9. Under **Delete audit information older than**, filter the audit tables to delete by entering a time frame. For example, to delete audit tables older than three years, enter “3” in the first field and select “Year(s)” in the second field.

**Tip:** The maximum number you can enter in the first field is 100. In the second field, you can select to delete by days, weeks, months, or years.

10. Click **Save**. The global change process appears on the Global Changes page.

11. When you are ready to execute the global change, select it and click **Process global change**.

### Enable or Disable Audit Tables

Over time your database can accumulate numerous audit tables you no longer need. You can disable an audit table rather than permanently delete it. If you decide later to use it again, you can enable it.

#### Enable or disable audit tables

1. From the **Administration** page, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Audit Tables**, select **Enable or disable audit tables**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify your global change process.
6. To disable all audit tables, select All audit tables.
7. To disable a specific group of audit tables, select **Selected audit tables**. Click the binoculars at the end of the field to access a search screen and locate the selection to use.
8. If you want to enable, rather than disable, audit tables, select **Enable**.
9. Click **Save**. The global change process appears on the Global Changes page.
10. When you are ready to execute the global change, select it and click **Process global change**.

### Delete Batch Control and Exception Reports

Over time your database can accumulate numerous batch control and exception reports you no longer need. To remove these from the database, create a batch control and exception report global change definition. After you create the definition, you can execute the global change process to remove the batch reports.

For more information about processing a global change, see Process Global Change on page 1.

#### Delete batch control and exception reports globally

1. From the **Administration** page, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Batch Reports**, select **Batch control and exception report delete**.
4. Click OK. The Add global change screen appears.
5. In the Name field, enter a name to identify your global change process.
6. To delete all batch control and exception reports for committed batches, select All committed batches.
7. To delete a specific group of batch control and exception reports from Query, select Selected batches. Click the binoculars at the end of the field to access a search screen and locate the selection to use.
8. Under Delete batch control and exception reports older than, filter the reports to delete by entering a time frame. For example, to delete batch control and exception reports older than three years, enter “3” in the first field and select “Year(s)” in the second field.

**Tip:** The maximum number you can enter in the first field is 100. In the second field, you can select to delete by days, weeks, months, or years.

9. Click Save. The global change process appears on the Global Changes page.
10. When you are ready to execute the global change, select it and click Process global change.

## Delete Business Process Outputs

Over time your database can accumulate business process output files you no longer need. For example, in Export, the export generates output files in SQL tables that are available to download to a .csv file. To remove unneeded output files from the database, use the Delete business process outputs global change process. This process completely removes the SQL table(s) that hold output for the selected business processes.

**Note:** Not all business processes generate output files, but of those that do, only a few are addressed by this global change. This definition deletes outputs for these types of business processes: list segment imports; finder file imports; segmented house file imports; correspondence exports; marketing effort, acknowledgement, and tribute acknowledgement exports; and exports run using the Export feature in Administration.

For more information about processing a global change, see Process Global Change on page 1.

**Delete business process outputs globally**

1. From the Administration page, click Global changes. The Global Changes page appears.
2. Click Add. The Select a global change definition screen appears.
4. Click OK. The Add global change screen appears.
5. In the Name field, enter a name to identify your global change process.
6. To delete all process outputs, select All business processes.

**Note:** Not all business processes generate output files, but of those that do, only a few are addressed by this global change. This definition deletes outputs for these types of business processes: finder file imports, segmented house file imports, correspondence exports, marketing effort exports, and exports run using the Export feature in Administration.
7. To delete a specific group of process outputs, select **Selected business processes** and choose a selection of processes. To specify which types of output processes to include in the selection, on the Select filter and output fields tab of the query screen, set the **Name** field to equal the type(s) of output processes to include. For example, **Name** equals Finder File Import Process AND Marketing Effort Export Process will include only finder files and marketing efforts export files.

8. Under **Delete output tables generated by business processes older than**, enter a time frame. For example, to delete outputs older than three years, enter “3” in the first field and select “Year(s)” in the second field.

**Tip:** The maximum number you can enter in the first field is 100. In the second field, you can select to delete by days, weeks, months, or years.

9. Click **Save**. The global change process appears on the Global Changes page.

10. When you are ready to execute the global change, select it and click **Process global change**.

### Add Constituent Attribute

Attributes add flexibility to your record keeping by giving you the ability to define and store special information about a wide variety of record types. If after entering an attribute value in a number of records in your system you find you need to change the value, you can change all values at once with **Global Change** and a selection of the affected records. For example, if you have the attribute category “Athletics” and a value of “Soccer” but you need to change all “Soccer” values to “Football,” you can use **Global Change** to make the change. You can also use the process to add new information to records. For example, if a constituent in the selection does not have an “Athletics” category included on his record but he is included in the record selection, the new data is added to the Attribute tab on his record.

**Change attribute values globally**

1. From **Administration**, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Constituent, select **Add constituent attribute**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. If you want to globally change attribute information on a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
7. In the **Category** field, select the attribute category that contains the value you want to change. All constituent attribute categories created in **Manage attribute categories** are available in this field.
8. In the **Value** field, enter the new value you want entered for the selected attribute **Category**.
9. In the **Comments** field, enter any note information you want to add to the constituent attribute. This information displays in the **Comment** column of the constituent’s Attributes tab.

10. Select **Overwrite existing value** if you want the new value to replace the existing value. If you do not mark this checkbox, the new value is added to records with no existing value for the attribute category, but if the constituent does have a value entered for the selected attribute category, no new data is entered.

11. Select **Remove value from unqualified records** if you want the attribute value removed from records not qualified to receive the data.

12. Click **Save**.

13. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.

### Add Constituent Mail Preference

Constituent mail preferences let you track, based on mail type, whether to send mail to constituents. You can also track how to send that type of mail. You can add a mail preference to a selection of constituents or all constituents at once with **Global Change**. For example, if you have the mail type “Pledge Reminders,” you can use **Global Change** to add a preference to send pledge reminders by email to a selection of constituents.

#### Add constituent mail preference globally

1. From **Administration**, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Constituent, select **Add constituent mail preference**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. If you want to globally add a constituent mail preference for a specific group of records included in a selection created in Query, select **Selection**. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
7. In the **Mail type** field, select the mail type preference that you want to add. For example, you can select “Appeals.”
8. Select **Send** or **Do not send**.
9. If you select **Send**,
   - In **Send by**, select the method. For example, you can select “Mail” or “Email.”
   - If you select “Mail,” select **Send to seasonal address when valid** to change the address when there is a seasonal address and the mailing occurs in the date range for that season.
10. In the **Comments** field, enter any note information you want to add to the constituent mail preferences. You can view comments in the **Mail Preferences** frame in the **Comments** column. The frame is on the constituent’s Communications page on the Preferences tab.

11. Click **Save**.

12. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.

**Add Constituent Solicit Code**

Solicit codes allow you to keep track of special considerations for contacting constituents. Solicit codes may include, “Do not solicit” or “Spring mailing only.” If after entering a solicit code in a number of records in your system you find you need to change dates or comments, you can change all dates or comments at once with **Global Change** and a selection of the affected records. For example, if you have the solicit code “Do not solicit” and the start date for the solicit code needs to be “July 14, 2010,” you can use **Global Change** to make the change. You can also use the process to add new information to records. For example, if a constituent in the selection does not have an solicit code included on his record but he is included in the record selection, the new solicit code is added to the his record.

**Add or change solicit codes globally**

1. From **Administration**, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under **Constituent**, select **Add constituent solicit code**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.
6. If you want to globally add solicit codes for a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
7. In the **Solicit Code** field, select the solicit code that you want to add. All solicit codes created in **Manage solicit codes** are available in this field.
8. In the **Start date** field, enter the new start date.
9. In the **End date** field, enter the new end date.
10. In the **Comments** field, enter any note information you want to add to the solicit code. This information displays in the **Comment** column of the solicit code.
11. Click **Save**.

12. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.
Add Relationship Manager

Your organization may assign a fundraiser to maintain your organization’s relationship with a constituent. You can view these in the Constituent relationship manager section of the Constituencies tab of a Constituent record. You can add a relationship manager to a selection of constituents or all constituents at once with Global Change. For example, you can use Global Change to assign a fundraiser, “John Doe,” as a relationship manager for every constituent.

Add relationship manager globally

1. From Administration, click Global changes. The Global Changes page appears.
2. Click Add. The Select a global change definition screen appears.
3. Under Constituent, select Add relationship manager.
4. Click OK.
5. In the Name field, enter a name to identify this global change process. The name displays in the Global changes grid on the Global Changes page.
6. If you want to globally add the relationship manager to a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
7. In the Manager field, select a fundraiser. You can use the binoculars icon to look up fundraisers.
8. Select Remove value from unqualified records to remove the relationship manager from constituent records not included in the Selection.
9. Click Save.
10. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click Start process to run the process now.

Add User-defined Constituency

User-defined constituencies are defined by your organization. You can add a user-defined constituency to a selection of constituents or all constituents at once with Global Change. For example, if you have a user-defined constituency, “Online friend,” you can use Global Change to add this constituency to a selection of constituents.

Add user-defined constituency globally

1. From Administration, click Global changes. The Global Changes page appears.
2. Click Add. The Select a global change definition screen appears.
3. Under Constituent, select Add user-defined constituency.
4. Click **OK**.

5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.

6. If you want to globally add a user-defined constituency to a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.

7. In the **Constituency** field, select the type of constituency to assign to the constituent. The constituency defines why the constituent is in your database and the affiliation with your organization.

8. Enter the date the constituency begins.

9. Enter the date the constituency ends. If the duration of the constituency is undetermined, leave this field blank.

10. Select **Overwrite existing value** to change the duration of the constituency to match your new global entries where the constituency already exists.

11. Select **Remove value from unqualified records** to remove the constituency from records not included in the **Selection**.

12. Click **Save**.

13. When you are ready to execute the changes, open the process. On the process status page, select the Job Schedules tab to schedule the process or click **Start process** to run the process now.

**Change Relationship Manager**

Your organization may assign a fundraiser to maintain your organization's relationship with a constituent. You can view these in the **Constituent relationship manager** section of the Constituencies tab of a Constituent record. You can change or remove a relationship manager from a selection of constituents or all constituents at once with **Global Change**. For example, you can use **Global Change** to change the relationship manager for a selection of constituents to "John Doe."

➤ **Change relationship manager globally**

1. From **Administration**, click **Global changes**. The Global Changes page appears.

2. Click **Add**. The Select a global change definition screen appears.

3. Under **Constituent**, select **Change relationship manager**.

4. Click **OK**.

5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.

6. If you want to globally change the relationship manager for a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
7. In the **Manager** field, select a fundraiser. You can use the binoculars icon to look up fundraisers.

8. Select **Remove fundraiser** or **Change Fundraiser. Remove fundraiser** will remove the fundraiser as a relationship manager from all constituents or from the constituents in your selection.

9. If you select **Change Fundraiser**, select a new fundraiser in the **Manager** field for that option. You can use the binoculars icon to look up fundraisers. **Change fundraiser** will change the relationship manager for all constituents or constituents in your selection that have the relationship manager in the first **Manager** field to the fundraiser in the second **Manager** field.

10. Click **Save**.

11. When you are ready to execute the changes, click **Process global change**.

**Delete Constituent Attribute**

Attributes add flexibility to your record keeping by giving you the ability to define and store special information about a wide variety of record types. If after adding an attribute to a number of records in your system you find you need to delete it, you can do so all at once with **Global Change** and a selection of the affected records. For example, if you have the attribute category “Athletics” and you need to delete it from all constituents, you can use **Global Change** to make the deletion.

> **Delete constituent attribute globally**

1. From **Administration**, click **Global changes**. The Global Changes page appears.

2. Click **Add**. The Select a global change definition screen appears.

3. Under ** Constituent**, select **Delete constituent attribute**.

4. Click **OK**.

5. In the **Name** field, enter a name to identify this global change process. The name displays in the **Global changes** grid on the Global Changes page.

6. If you want to globally delete an attribute from a specific group of constituent records included in a selection created in Query, select **Selection**. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.

7. In the **Category** field, select the attribute category to delete. All constituent attribute categories created in **Manage attribute categories** are available in this field.

8. Click **Save**.

9. When you are ready to execute the deletions, click **Process global change**.

**Delete Constituent Mail Preference**

Constituent mail preferences let you track, based on mail type, whether to send mail to constituents. You can also track how to send that type of mail. You can delete a mail preference from a selection of constituents or all constituents at once with **Global Change**. For example, if you have the mail type
“Pledge Reminders,” you can use Global Change to delete a preference to send pledge reminders by email from a selection of constituents.

**Delete constituent mail preference globally**

1. From Administration, click Global changes. The Global Changes page appears.
2. Click Add. The Select a global change definition screen appears.
3. Under Constituent, select Delete constituent mail preference.
4. Click OK.
5. In the Name field, enter a name to identify this global change process. The name displays in the Global changes grid on the Global Changes page.
6. If you want to globally delete a constituent mail preference from a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
7. In the Mail type field, select the mail type preference that you want to delete. For example, you can select “Appeals.”
8. Click Save.
9. When you are ready to execute the deletions, click Process global change.

**Standardize Constituent Names and Addresses**

*Warning:* This feature is not available in Altru. If you run this global change process, records will not be updated.

**Delete Constituent Solicit Code**

Solicit codes allow you to keep track of special considerations for contacting constituents. Solicit codes may include, “Do not solicit” or “Spring mailing only.” You can delete solicit codes from a selection of constituents or all constituents at once with Global Change. For example, if you have added the solicit code “Do not solicit” to many constituent records, you can use Global Change to delete it from all records that have that code.

**Delete constituent solicit codes globally**

1. From Administration, click Global changes. The Global Changes page appears.
2. Click Add. The Select a global change definition screen appears.
3. Under Constituent, select Delete constituent solicit code.
4. Click OK.
5. In the Name field, enter a name to identify this global change process. The name displays in the Global changes grid on the Global Changes page.
6. If you want to globally delete solicit codes from a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.

7. In the Solicit Code field, select the solicit code that you want to delete. All solicit codes created in Manage solicit codes are available in this field.

8. Click Save.

9. When you are ready to execute the deletions, click Process global change.

Delete User-defined Constituency

User-defined constituencies are defined by your organization. You can delete a user-defined constituency from a selection of constituents or all constituents at once with Global Change. For example, if you have a user-defined constituency, “Online friend,” you can use Global Change to delete this constituency from a selection of constituents.

> Delete user-defined constituency globally

1. From Administration, click Global changes. The Global Changes page appears.

2. Click Add. The Select a global change definition screen appears.

3. Under Constituent, select Delete user-defined constituency.

4. Click OK.

5. In the Name field, enter a name to identify this global change process. The name displays in the Global changes grid on the Global Changes page.

6. If you want to globally delete a user-defined constituency from a specific group of constituent records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.

7. In the Constituency field, select the type of constituency to delete from the selected constituents. The constituency defines why the constituent is in your database and the affiliation with your organization.

8. Click Save.

9. When you are ready to execute the deletions, click Process global change.

Set All Constituent Mail Preferences

Constituent mail preferences let you track, based on mail type, whether to send mail to constituents. You can also track how to send that type of mail. You can set all mail preferences for a selection of constituents or all constituents at once with Global Change. For example, if you have the mail type “Pledge Reminders,” you can use Global Change to add a preference to send pledge reminders by email to a selection of constituents.
Set all constituent mail preferences globally

1. From Administration, click Global changes. The Global Changes page appears.
2. Click Add. The Select a global change definition screen appears.
3. Under Constituent, select Set all constituent mail preferences.
4. Click OK.
5. In the Name field, enter a name to identify this global change process. The name displays in the Global changes grid on the Global Changes page.
6. If you want to globally set all constituent mail preferences for a specific group of records included in a selection created in Query, select Selection. Click the binoculars at the end of the field to access a search screen and locate the specific selection you want to use. If you do not select a selection, all records are changed.
7. Select Overwrite existing mail preferences to replace the constituent mail preferences with these new preferences. If you do not select this, the new preferences will be added to the existing ones.
8. Select Send or Do not send.
9. If you select Send,
   • In Send by, select the method. For example, you can select “Mail” or “Email.”
   • If you select “Mail,” select Send to seasonal address when valid to change the address when there is a seasonal address and the mailing occurs in the date range for that season.
10. In the Comments field, enter any note information you want to add to the constituent mail preferences. You can view comments in the Mail Preferences frame in the Comments column. The frame is on the constituent’s Communications page on the Preferences tab.
11. Click Save.
12. When you are ready to execute the changes, click Process global change.

Update Membership Status

When you set up membership programs, you determine how and when the membership status of a member should change once the membership has expired, based on the rules for the membership renewal window. For example, a member’s status might change to lapsed once the membership expires. You can run the Update Membership Status global change to go through your membership programs and update the members’ statuses automatically based on the rules for the renewal window for the programs.

To update membership statuses, go to Administration and click Global changes. On the Global Changes page, click Add and select the Update Membership Status global change definition. You can use a selection to specify the membership programs to include.