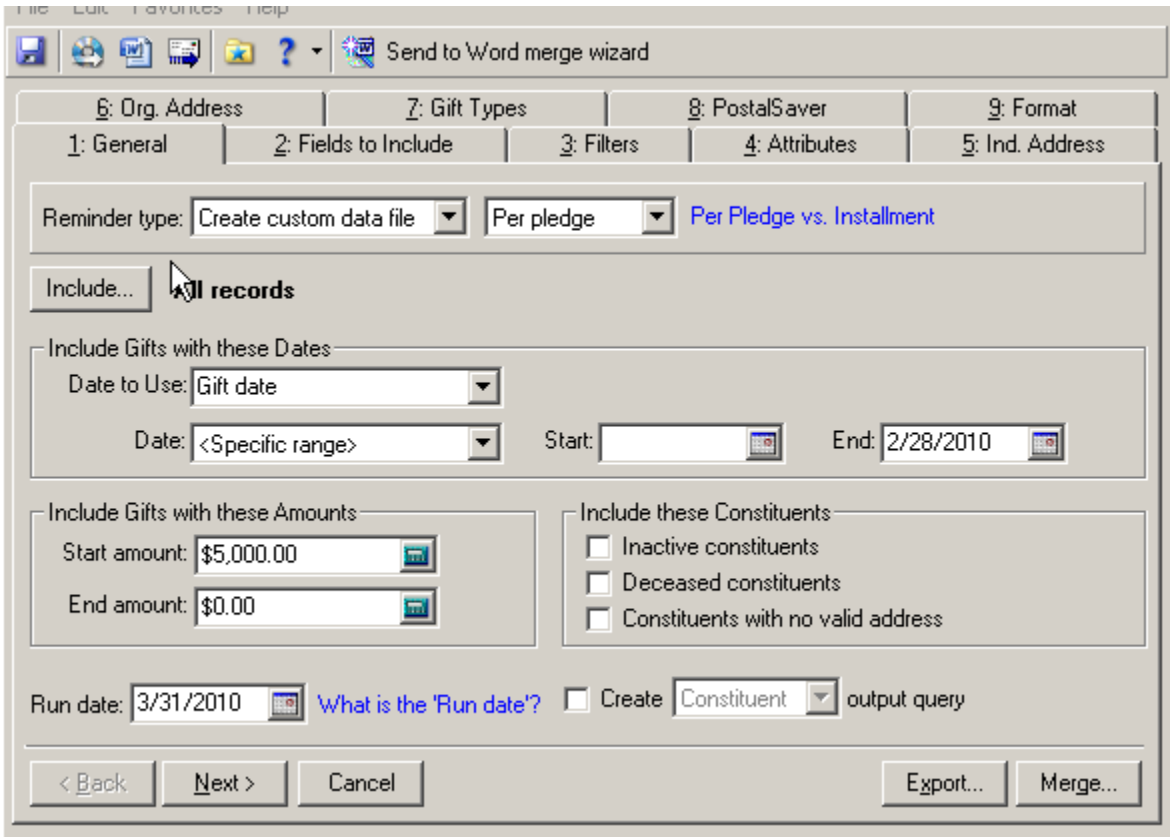
How to Set Up Reminders

Go to Mail – Reminders – New



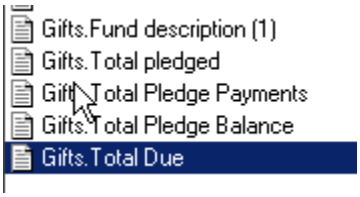
1: General

- Reminder type: Create custom data file & Per pledge
- Include: All records (this means all pledges with a balance greater than $0.00 and that are marked - check box in gift record - for Send pledge reminders) – a gift or constituent query can be added here to narrow your pledge reminder group
- Include Gifts for these Dates
    - Date to Use: Gift date
    - Date: select a range that you would like to run the reminders. ***Ex.*** You may not want to send a reminder to someone that that just made a pledge last week or you may want to put a start date to just run reminders for pledges that came in on a particular month)
- Include Gifts for these Amounts
    - Start amount: $0.00 (set amount you want to generate reminders for)
    - End amount: $0.00 (set end amount)

- Include these constituents – uncheck these boxes if mailing reminders – check no valid address if generating reminders for email
- Run date: the payment date that should be included in this set of reminders. ***Ex.*** If you want to send reminders at the beginning of the month for pledges that have due date at the end of the month, select the run date as the end of the month.
- Create output query – toggle on if you want to create a list of the reminder records so you can look at each constituent

2: Fields to Include

- Constituent ID
- Addressee (click on options to select Addressee format you want to use)
- Salutation (click on options to select Salutation format)
- Organization Name
- Address line 1
- Address line 2
- Address line 3
- City
- State
- ZIP Code
    - Also include the following fields which will be used in your merge letter.



3: Filters

- Funds: Include All
- Constituent Codes: Include All
- Appeals: Include All
- Campaigns: Include All
- Solicit Codes: Include All (if a donor does not want to receive a reminder, the "Send reminders" option will be unchecked when a gift is entered)

4: Attributes - This tab is left blank.

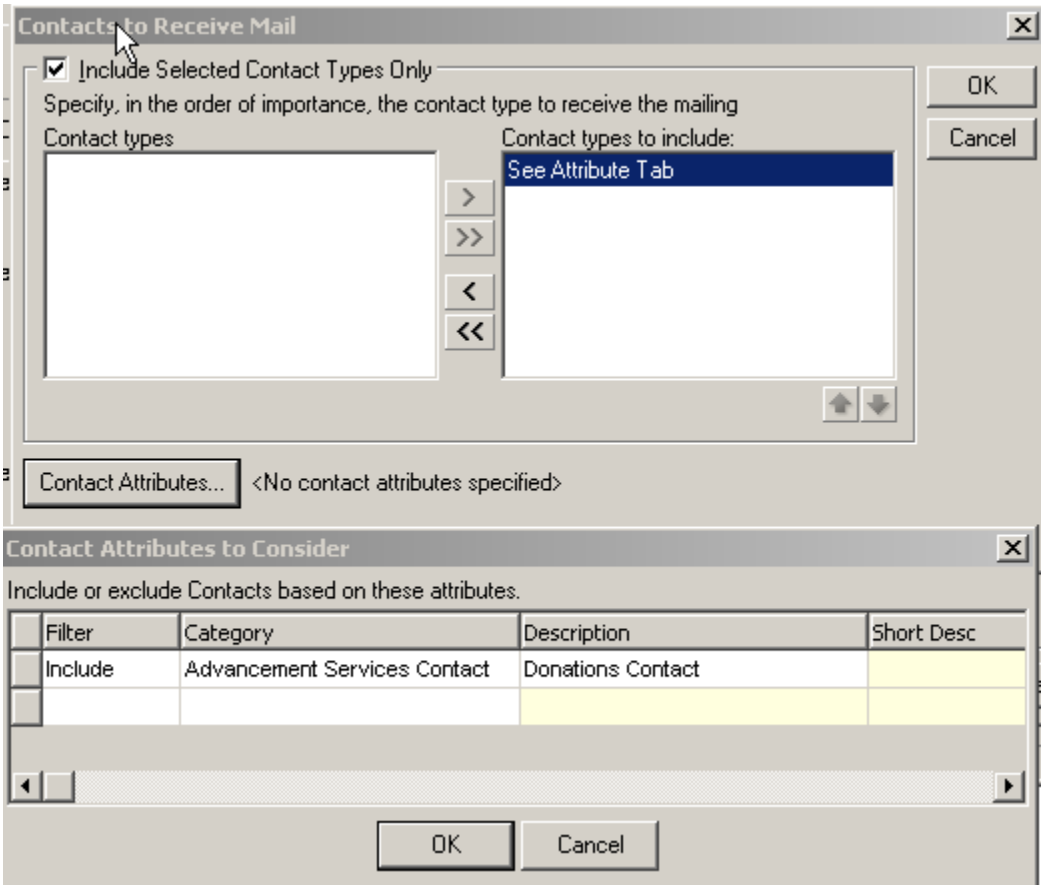
5: Ind. Address

- Step 1: Consider addresses with seasonal dates with a checkmark as of Last day of next week.
- Step 2: Addresses to use: Preferred address
- Step 3: Address Attributes: <No address attributes specified>

- Step 4: Specify what happens if no address if found: Print with no address. (This will give you an indication if there is a problem with an address.)

6: Org Address

- Step 1: select Mail to contacts.
- Step 2:
  - Contact Information
    - Check Include Selected Contact Types Only
    - Contact types to include – move See Attribute Tab to right
  - Select Contact Attributes and then filter by type of contact to be included



- Step 3: Specify what happens if no contact is found: Print specific address
  - Address to print: Preferred address
  - Remove record if no valid organization address is found without a checkmark

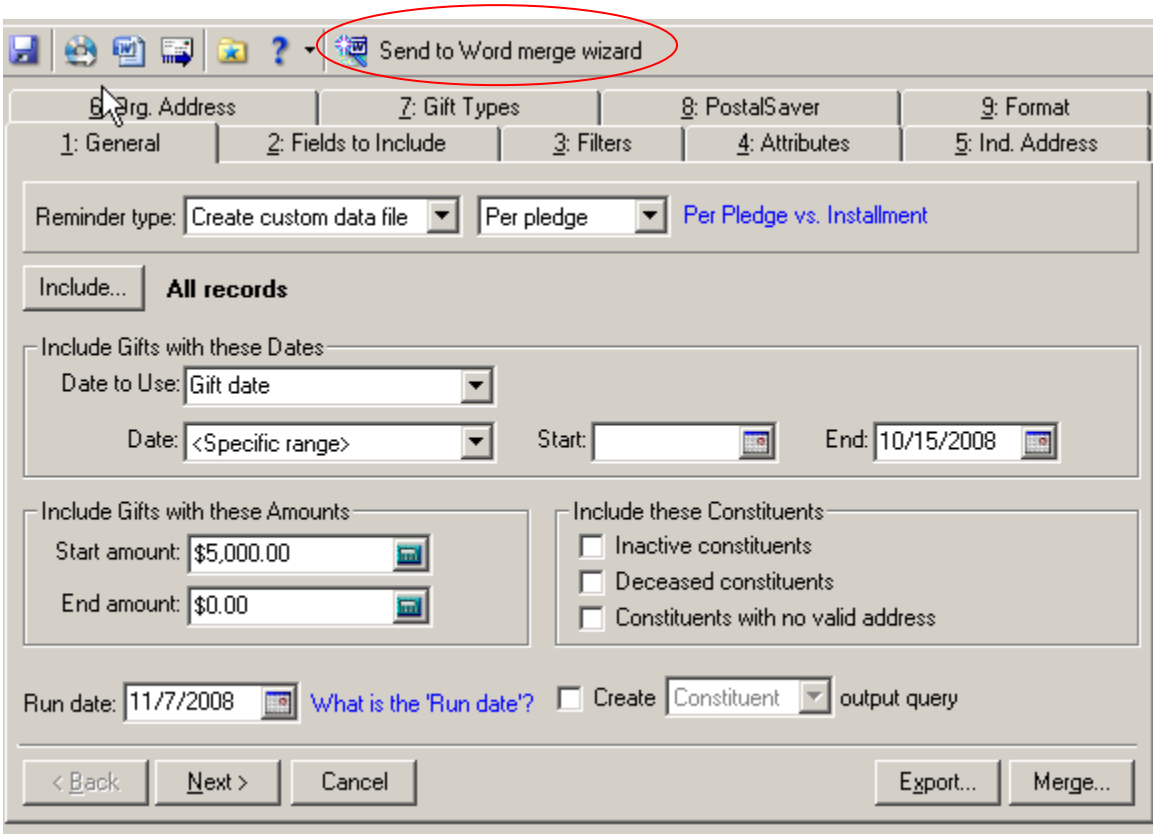
7: Gift Types

  - Select Pledge and move to right
- Check Exclude zero amount gifts

8: Format

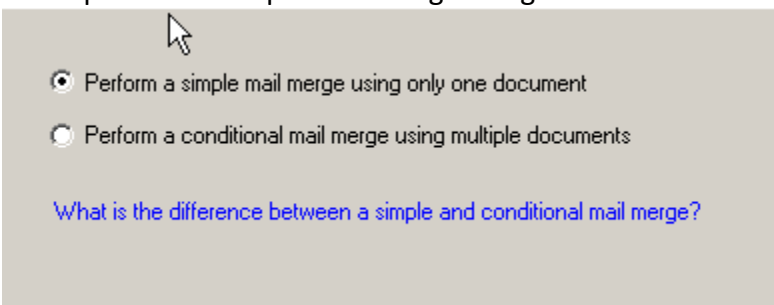
- Miscellaneous
  - Show currency character = TRUE
  - Show 1000's separator = TRUE
  - Show decimals = TRUE
  - Show percent sign = TRUE (not really applicable here, but a standard formatting option)
  - Show blanks instead of zero amounts = **FALSE** (you need to know it is actually zero)
  - Negative amount format: (1234.56)
- Output options
  - Print zero balance reminders = **FALSE**
  - Omit punctuation from export = **FALSE** (looks better)
  - Export address in ALL CAPS = **FALSE** (looks better)
- Sort
  - Can select sort format

The last step is to go back to the General tab and select

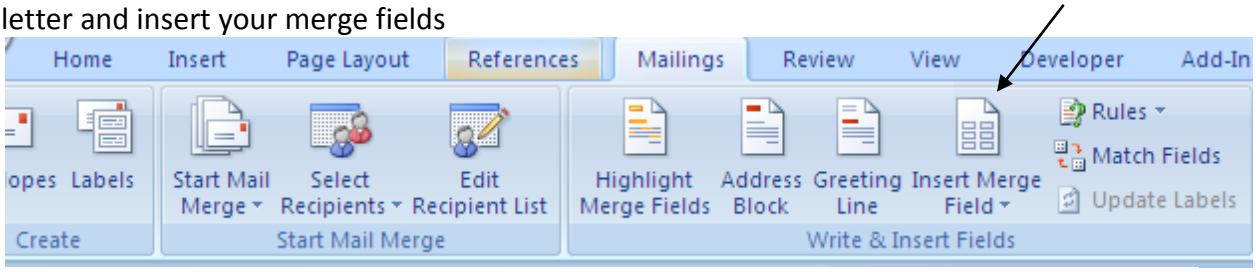


Select "send to Word Merge" and click next.

Select perform a simple mail merge using one document and then select “next”



Click on “edit merge document”- You will now be in Word and this is where you will write your letter and insert your merge fields



March 5, 2010

«Addressee»
«Organization_Name»
«Address_line_1»
«Address_line_2»
«City», «State» «ZIP_Code»

Dear «Salutation»:

Thank you for your ongoing support of Seattle University. This is a payment reminder for your pledge of «Total_pledged» to the **«Fund_description_1»**. Please find a balance statement below for your review.

The university gratefully acknowledges your pledge of «Total_pledged» to the «Fund_description_1».

Contribution to date…….. «Total_Pledge_Payments»
Balance …… «Total_Pledge_Balance»
Amount due…….. «Total_Due»
Amount enclosed $_____

«Constituent_ID»
«Addressee»
«Address_line_1»
«Address_line_2»
«City», «State» «ZIP_Code»

□ Check (payable to Seattle University)
□ Bill my: □ VISA □ MasterCard □ Discover □ American Express for $_____
Name on card:_____
Signature: _____
Card #: _____ Exp. date: _____

□ Yes, my matching gift form is enclosed.

□ Go Green with an e-receipt, email:_____

When finished with your letter – go to "Add Ins" at the menu bar on top and click save to Raiser's Edge.

How to Run Reminders

Once you have set up your reminders, they can easily be run every month or whenever you want to send pledge reminders.

To create your pledge reminders each time, do the following steps:

1. Go to MAIL – Reminders – select the file you created. You can set up several different files segmented by $ range.

2. Click on the "send to Word merge" at the top of the screen

3. When asked, "Would you like to record this mailing in each gift's reminder history?" answer Yes. This will record the run date in the reminder history.

4. If necessary, you can edit you letter during this process (see above for directions).

5. Select Finish and name and save your file. Your merged file will open in Word. Scan through the reminders to see if there are any donors with two reminders (might have two different pledges) – you will have to edit these manually to include both pledges on one letter. Select Print. Once they have all printed successfully, close Word without saving.

6. Mail letters in Window Envelopes or if you want printed envelopes, make sure you create a query before running this process so you can merge the names and addresses within Word for envelopes. Make sure to include a return envelope with your mailing.

Some Notes:

- If you would like a report of who received reminders, use the Reminder Report which can be found on the Mail page as well. Hint: On the Filter tab, choose Selected for Reminder Sent and specify the date the reminders were generated. This will only work if you answered Yes to record the pledge reminder mailing.

- To stay on top of pledges and make sure donors are not getting behind, the best report to use is the Pledge Status Report which can be found under Reports – Pledge and Recurring Gift Reports.