

Contacts Field Descriptions

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A list	The A list can be used by your institution to organize your contacts into useful categories for mailings. To add a contact to the A List, click in the A List box. This will produce a check mark in the box and add the contact to the list.[alist:n(1)]
Activity#	The default campaign activity number for this contact.[activityno:n(2)]
Activity, programs & events attended	Lists activities, programs and events that the person attended. Also when a pledge is made to a campaign as a result of a specific campaign activity, that activity is automatically entered here.[activity:memo]
Address History	Click on the open file folder icon next to the Address Change field to view the address history for this contact.[addrhist:memo]
Address change date	Enter the date on which the contact's address was manually updated. Press F8 to fill in today's date automatically. Your system may be set to enter dates in the following formats: American - MM/DD/YYYY British - DD/MM/YYYY German - DD.MM.YYYY Italian - DD-MM-YYYY Japan - YYYY/MM/DD US - MM/DD/YYYY [addrchg1:date]
Address type primary	The primary address may have a type assigned to it such as Home, Work, Summer, Winter, etc.[addtype1:c(10)]
Address type secondary	The secondary address may have a type assigned to it such as Home, Work, Summer, Winter, etc.[addtype2:c(10)]
Address1	Individual's, membership's, or institution's mailing address.[address1:c(50)]
Address2	An additional line for recording an individual's, membership's, or institution's mailing address.[address2:c(50)]
Affiliations	Use this field to enter any associates or group affiliations for the contact.[affiliate:memo]
Alternate billing address	Enter the alternate address as you would like it to appear on the envelope or mailing label.[billadd1:memo]
Alternate billing email	Enter the alternate billing recipient's email address.[billemail:c(50)]
Alternate billing maildate 1	Enter the beginning date for the alternate billing. Press F8 to fill in today's date automatically. Your system may be set to enter dates in the following formats: American - MM/DD/YYYY British - DD/MM/YYYY German - DD.MM.YYYY Italian - DD-MM-YYYY Japan - YYYY/MM/DD US - MM/DD/YYYY[bmaildate1:c(5)]
Alternate billing	Enter the ending date for the alternate billing. Press F8 to fill in today's date

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maildate 1	automatically. Your system may be set to enter dates in the following formats: American - MM/DD/YYYY British - DD/MM/YYYY German - DD.MM.YYYY Italian - DD-MM-YYYY Japan - YYYY/MM/DD US - MM/DD/YYYY[bmaildate2:c(5)]
Alternate billing phone	Enter the phone number of the individual or organization that will receive the renewal notice and billing for the membership.[billphone:c(25)]
Available Saturday	Put a check mark in the box next to the word "Saturday" if the volunteer is available to work on Saturday.[volsat:logical]
Available Thursday	Put a check mark in the box next to the word "Thursday" if the volunteer is available to work on Thursday.[volthur:logical]
Available Tuesday	Put a check mark in the box next to the word "Tuesday" if the volunteer is available to work on Tuesday.[voltue:logical]
Available Wednesday	Put a check mark in the box next to the word "Wednesday" if the volunteer is available to work on Wednesday.[volwed:logical]
B List	The B list can be used by your institution to organize your contacts into useful categories for mailings. To add a contact to the B List, click in the B List box. This will produce a check mark in the box and add the contact to the list.[blist:n(1)]
Bill to Member	Click either Yes or No to indicate if the contact is to be billed for the Membership.[billmember:n(1)]
Billing Address (selectable)	This is not a real field in the database. It is used on mailmerge letters to print the correct billing address.[billadd1:memo]
Birthday	Enter the contact's birth date.[birthday:date]
Campaign#	The default campaign number for this contact.[campaigno:n(6)]
Cell Phone	Use this field to record the cellular phone number for this contact or institution.[phonecell:c(25)]
Children & other relationships	List the names of the contact's children or other important relationships in his or her life.[relations:memo]
City	City portion of the address.[city:c(30)]
Company	Company, corporation, or organization name. This field can be left blank for individuals or memberships whose mailing address does not include a company.[company:c(50)]
Complimentary dues	This logical field is flagged if the last dues renewal was complimentary.[duescomped:logical]
Country	Country portion of the contact's address.[country:c(30)]

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County	U.K. Setup Option. Enter the county.[county:c(30)]
Current Solicitor	Record the name of the person who is currently assigned to be responsible for soliciting donations from a contact.[solicitor2:c(30)]
Date Joined	<p>Displayed as "Date joined", the date that this membership was established. Press F8 to fill in today's date automatically.</p> <p>Your system may be set to enter dates in the following formats: American - MM/DD/YYYY British - DD/MM/YYYY German - DD.MM.YYYY Italian - DD-MM-YYYY Japan - YYYY/MM/DD US - MM/DD/YYYY [started:date]</p>
Dates & places of birth and death	Contacts-Biography Information: Use this unlimited notes field to record the dates of birth and death as well as information about where a contact was born. For example: b. 05/15/1938 Pittsburgh, PA d. 03/24/1989 Exton, PA[dates:memo]
Dear (casual)	The Dear Field is used to indicate the name you wish to appear in a letter after the word "Dear" in casual letters. For example you may enter "Smitty" in this field and whenever a letter is generated for this individual the greeting will read "Dear Smitty".[dear2:c(60)]
Dear (formal)	The Dear Field is used to indicate the name you wish to appear in a letter after the word "Dear" in formal letters. For example you may enter "Mr. Smith" in this field and whenever a letter is generated for this individual the greeting will read "Dear Mr. Smith".[dear:c(60)]
Dear (selectable)	This is not a real field in the database. It is used on mailmerge letters to print either the dear formal, dear casual or the alternate billing dear name.[billname:c(60)]
Deceased	A check box in this field indicates the person is deceased.[deceased:logical]
Deceased date	The date the person died.[decdate:c(15)]
Docent	A docent is a lecturer or tour guide in a museum. To add an individual to the docent list, click in the Docent box at the top of the Contact screen. This will produce a check mark in the box and add the individual to the Docent list.[docent:n(1)]
Donation Matching Policy	Many employers sponsor matching gift programs and will match charitable contributions made by their employees. Use the Donation Matching Policy field to describe the company's policy on gift matching.[matchnotes:memo]
Donations	Do not enter data in this field, it is automatically maintained by the program.[donations:n(10,2)]
Donations in 2009	Total donations for the year 2009.[donate2009:n(9,2)]
Donations in 2010	Total donations for the year 2010.[donate2010:n(9,2)]

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Donations in 2011	Total donations for the year 2011.[donate2011:n(9,2)]
Donations in 2012	Total donations for the year 2012.[donate2012:n(9,2)]
Donations in 2013	Total donations for the year 2013.[donate2013:n(9,2)]
Donations in 2014	Total donations for the year 2014.[donate2014:n(9,2)]
Donations in 2015	Total donations for the year 2015.[donate2015:n(9,2)]
Donations in 2016	Total donations for the year 2016.[donate2016:n(9,2)]
Donations in 2017	Total donations for the year 2017.[donate2017:n(9,2)]
Donations in 2018	Total donations for the year 2018.[donate2018:n(9,2)]
Dues Amount	Enter the amount of dues paid by this type of membership.[dues:n(9,2)]
Dues Paid	The total amount of dues paid.[duespaid:n(12,2)]
Dues amount change date	Records the date that a dues payment was received that was more or less than the prior dues payment amount.[duesupdate:date]
Dues paid in 2009	Total membership dues for the year 2009.[dues2009:n(9,2)]
Dues paid in 2010	Total membership dues for the year 2010.[dues2010:n(9,2)]
Dues paid in 2011	Total membership dues for the year 2011.[dues2011:n(9,2)]
Dues paid in 2012	Total membership dues for the year 2012[dues2012:n(9,2)]
Dues paid in 2013	Total membership dues for the year 2013.[dues2013:n(9,2)]
Dues paid in 2014	Total membership dues for the year 2014.[dues2014:n(9,2)]
Dues paid in 2015	Total membership dues for the year 2015.[dues2015:n(9,2)]
Dues paid in 2016	Total membership dues for the year 2016.[dues2016:n(9,2)]
Dues paid in 2017	Total membership dues for the year 2017.[dues2017:n(9,2)]
Dues paid in 2018	Total membership dues for the year 2018.[dues2018:n(9,2)]
Education	This is an unlimited notes field in which you may record information about the educational background of a contact.[education:memo]
Email	Record the contact's E-mail address.[email:c(50)]
Emergency contact	Enter the name of the person the contact would like to have notified in case of emergency.[volcontact:memo]
Employee	To add a contact to the Employee List, click in the Employee box at the top of the Individual screen. This will produce a check mark in the box and add the contact to the Employee List.[employee:n(1)]
Employer, Occupation	Enter the name of the contact's employer or list occupations held by the contact in the past.[occupation:memo]

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Fax#	Telephone number of the Contact's fax machine.[faxno:c(25)]
Field 1	Custom Character Field 1 is a user defined field. You may create your own field name by going to Setup/Custom Fields from the main menu. This is an alphabetical field limited to 75 characters.[udf1:c(75)]
Field 2	Custom Character Field 2 is a user defined field. You may create your own field name by going to Setup/Custom Fields from the main menu. This is an alphabetical field limited to 75 characters.[udf2:c(75)]
Field 3	Custom Character Field 3 is a user defined field. You may create your own field name by going to Setup/Custom Fields from the main menu. This is an alphabetical field limited to 75 characters.[udf3:c(85)]
Field 4	Custom Date Field 4 is a user defined field. You may create your own field name by going to Setup/Custom Fields from the main menu. This is a date only field. [udf4:date]
Field 5	Custom Numeric Field 5 is a user defined field. You may create your own field name by going to Setup/Custom Fields from the main menu. This is a numeric field with a maximum length of 12 characters including the decimal point and two characters to the right. This field is best used for currency.[udf5:n(10,2)]
Field 6	Custom Numeric Field 6 is a user defined field. You may create your own field name by going to Setup/Custom Fields from the main menu. This is a numeric field with a maximum length of 12 characters including the decimal point and two characters to the right. This field is best used for currency.[udf6:n(10,2)]
Firstname	First name of the contact.[firstname:c(30)]
Follow-up-date	Follow-up-date for scheduling future appointments or phone call to a contact.[fudate:date]
Follow-up-type	Follow-up Type - If a follow-up date is entered, enter the type of follow-up; Call, E-mail, Fax, Letter, Meeting, Visit, or Other.[futype:c(10)]
Group	Each contact may be assigned to a group. You can define your own group names.[group:c(30)]
Home Phone	Contact's home telephone number.[phoneh:c(25)]
Hours and availability details	Enter information about the number of hours and availability for volunteer hours for the contact.[volavail:memo]
Id#	Each contact must be assigned a unique id#. When adding a new contact, PastPerfect will alert you of the last number used and invite you to assign the next number in the sequence. You may use the suggested number or assign any other unique number to the Contact. Use this id# to link a contact to accessions by entering the id# on the accession screen. Contacts may also be linked in this manner to the Incoming Loans and Temporary Custody Screens.[idno:n(6)]
Imagefile	Name of associated image file (must include image subdirectory, example:

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"001\mypic.jpg")[imagefile:c(40)]

In Kind Donation This field stores a description of the last In-kind donation. In-kind donations include goods, services, commodities, stocks, bonds or real property.[inkind:memo]

In Kind Donation date This field stores the date of the last In-kind donation.[inkinddate:date]

In Kind Donation type This field store the type of the last In-kind donation.[inkindtype:c(30)]

In Kind Donation value This field store the value of the last In-Kind donation.[inkindval:n(13,2)]

In Kind total Total value of In Kind donations.[inkindtot:n(13,2)]

Include on overdue list Select Yes or No if you want this contact's membership to appear on the overdue list when scheduled dues payments are not made.[active:n(1)]

Income Level Enter the approximate income level for the contact. This field is controlled by a pull down authority file. To access the authority file, click on the down arrow to the right of the field. Click on your highlighted choice.

To add, edit, or delete entries in this authority file, choose Setup on the main menu. Choose Authority Files. Highlight "Authority File Name" and press the Next> Button at the top of the screen. You will then have the option to ADD, EDIT, or DELETE entries on the list.

[income:c(18)]

Industry Click on the file folder icon to the right of the Company field. This takes you to a sub-screen of information that can be collected about the company. Use the Industry field to record the type of business. This field is controlled by an authority file. To access the file press F7 or the right mouse key. To add, edit, or delete entries in the authority file use the buttons at the top of the screen.

You may also go to Setup, Authority Files. Highlight "Industry" on the left hand list and press Next> at the top of the screen. You may then use the ADD, EDIT, and DELETE buttons to populate the authority file.

[industry:c(30)]

Interests Contacts - Biography: List the contact's hobbies, interests, or preferred activities in the Interests field.[interests:memo]

Interval Interval for dues payment may be Annual, Semi-annual, Quarter, Month, Week, or Other.[interval:c(20)]

Largest donation This field stores the largest donation made by the contact.[maxdonate:n(12,2)]

Largest donation date The date that the largest donation was received.[maxdate:date]

Largest dues payment This field stores the largest membership dues payment made by the contact.[maxdues:n(10,2)]

Last Donated Last date that the last donation was made.[lastdonate:date]

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Last donation amount	The amount of the last donation entered for this contact.[lastdonamt:n(10,2)]
Last donation tax deductible amount	This field stores the amount designated as tax deductible for the last donation made.[lastdonded:n(10,2)]
Last dues paid amount	The amount of the last dues payment entered for this contact.[lastdueamt:n(10,2)]
Last dues tax deductible amount	This field stores the amount designated as tax deductible for the last dues payment made.[lastdueded:n(10,2)]
Last mailing	Each time a letter or label is printed for a contact, the date is automatically entered here.[lastmailed:datetime]
Last paid	This field is automatically filled with the date of the last dues payment for this membership when entering dues receipts. You may enter this date manually if required.[lastpaid:date]
Lastname	Last name of the individual. This field is only for search and display purposes. It is not printed on mailing labels.[lastname:c(40)]
Maiden name	Enter the contact's maiden name, if any, in this field.[maidenname:c(50)]
Mail & Contact Log	This unlimited notes field is for notes about mailings and other contacts.[contact:memo]
Maildate1	<p>This field is used to indicate the starting date for changing over to the contact's secondary address. . Press F8 to fill in today's date automatically.</p> <p>Your system may be set to enter dates in the following formats: American - MM/DD/YYYY British - DD/MM/YYYY German - DD.MM.YYYY Italian - DD-MM-YYYY Japan - YYYY/MM/DD US - MM/DD/YYYY</p> <p>[maildate1:c(5)]</p>
Maildate2	<p>This field is used to indicate the ending date or the last day that mail will be sent to the contact's secondary address. . Press F8 to fill in today's date automatically.</p> <p>Your system may be set to enter dates in the following formats: American - MM/DD/YYYY British - DD/MM/YYYY German - DD.MM.YYYY Italian - DD-MM-YYYY Japan - YYYY/MM/DD US - MM/DD/YYYY</p> <p>[maildate2:c(5)]</p>
Mailing Lists	This field displays the name or names of mailing lists on which the individual is included. Do not enter data in this field, it is automatically maintained by the program.[lists:memo]

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Marital Status	Select a marital status for the contact from the pull down menu.[marstatus:c(12)]
Membership Name	Name of the membership. This can be an individual's name, a family name, a company name, corporation, or organization.[membername:c(50)]
Membership#	Although this number does not appear on the screen, the Membership# is the unique identifying number that PastPerfect uses to link the membership to dues and donations.[memno:n(6)]
Membership# (old)	Membership# transferred from PastPerfect version 3.5. This field is not used in version 4.0.[memberno:c(10)]
Name & Title	Enter the name and title of the contact in the order you wish it to appear on mailing labels. First Middle Initial, Last, and Title. For example: "Dr. Paul T. Smith, Executive Director". This field will be printed on letters and mailing labels.[greeting:c(50)]
Nick names or alias	Enter any other names by which the contact has been known, including nicknames, maiden name, married names, or aliases.[othername:memo]
Notes	The Notes field may be used to record any additional information. There is no limit to the number of lines or the type of information recorded in this field.[notes:memo]
Number of Employees	Clicking on the file folder icon to the right of the Company Name field opens a screen in which you may enter some information about the company. Enter the number of employees at the company, if known.[noemployee:n(6)]
Original Solicitor	Record the name of the person who was originally assigned to be responsible for soliciting donations from a contact.[solicitor1:c(30)]
Other#	Other number may be used to record any number which may have been given to a contact other than the number assigned by your museum. This is useful for contact databases that have been converted to PastPerfect from other computer systems.[otherno:c(10)]
Paid thru	This field displays the date that the membership expires. When membership dues payments are received, this date is automatically recalculated to be the current paid thru date plus the interval.[nextdue:date]
Places/areas of residence	List places associated with the contact and/or places where the contact has lived.[residence:memo]
Planned Giving Information	<p>Use this field to briefly describe any planned giving for this contact. Planned giving usually requires legal documents which should be managed by the organization directors.</p> <p>Planned giving or charitable gift planning refers to the process of making a charitable gift of estate assets to a nonprofit organization.</p> <p>Planned gifts are usually deferred, meaning they are arranged now and fulfilled later. For example, a person could include a provision in his or her will to make a bequest to a charitable organization. That arrangement would be a "planned" gift. Some types of planned giving are; charitable trust, charitable lead trust, charitable gift annuity, or charitable remainder trust.</p>

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[pgiving:memo]

Pledge amount

Pledge amount is a dollar amount pledged to your organization by a contact.[pledge:n(10,2)]

Potential Pledge Amount

Use this field to estimate the total potential pledges for this contact.[potential:n(12,2)]

Prior dues amount

Records the prior dues amount that was more or less than the last dues payment.[duesupdown:n(9,2)]

Prospect rating

Use this field to indicate whether the contact is a good prospect for making gifts and donations to your institution. This field is controlled by a pull down authority file. To access the authority file, click on the down arrow to the right of the field. Click on your highlighted choice.

To add, edit, or delete entries in this authority file, choose Setup on the main menu. Choose Authority Files. Highlight "Prospect rating" on the right hand list and press the Next> Button at the top of the screen. You will then have the option to ADD, EDIT, or DELETE entries on the list.

[rating:c(25)]

Publications

Contacts - Biography: List any publications by or about the contact or publications in which images or information about the contact are published. For example; Webster's Biographical Dictionary. 1976. p.1148.[published:memo]

Secondary Address change date

Enter the date on which the contact's secondary address was manually updated. Press F8 to fill in today's date automatically. Your system may be set to enter dates in the following formats:

American - MM/DD/YYYY

British - DD/MM/YYYY

German - DD.MM.YYYY

Italian - DD-MM-YYYY

Japan - YYYY/MM/DD

US - MM/DD/YYYY[addrchg2:date]

Secondary Address1

Use this field record the secondary address for the contact.[xaddress1:c(50)]

Secondary Address2

Use this field record the secondary address for the contact.[xaddress2:c(50)]

Secondary Cell/Pager

Record the cell phone of pager number for the contact.[xphonecell:c(25)]

Secondary City

Use this field record the city for the secondary address for this contact.[xcity:c(30)]

Secondary Country

Record the country for the contact's secondary address.[xcountry:c(30)]

Secondary County

Record the country for the contact's secondary address.[xcounty:c(30)]

Secondary Fax#

Record the fax number for the contact's secondary address.[xfaxno:c(25)]

Secondary Home Phone

Record the cell phone of pager number for the contact.[xphoneh:c(25)]

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Secondary State	Record the 2 digit State code for the contact's secondary address.[xstate:c(20)]
Secondary Work Phone	Record the home phone number for the contact's secondary address.[xphonenumber:c(25)]
Secondary Zip	Record the zip code for the contact's secondary address.[xzip:c(13)]
Secondary billing address	Enter the alternate secondary address as you would like it to appear on the envelope or mailing label.[billadd2:memo]
Sex	Indicate whether the contact is male or female.[sex:c(6)]
Skills & work preferences	Enter information about any special skills, talents, education, or expertise that the contact brings to his/her volunteer work.[volskills:memo]
Spouse	Use the spouse field to record the name of the husband or wife of the contact. Enter the spouse's Contact Id# to link the two contacts.[spouse:c(30)]
Spouse Id#	Enter the spouse's Contact Id# to link the two contact records.[spouseidno:n(6)]
State	Enter the two character state code.[state:c(2)]
Stopmail	Place a check mark in the "Stop Mail" box and no mailing label will be printed for this contact.[stopmail:n(1)]
Student	Put a check mark next to the word "Student" if the contact is a student.[student:n(1)]
Subtype	In addition to Membership types, your organization may also have sub-types. To create sub-types click on the Setup. Choose Contacts. You will see a number of tabs across the top. Choose "Memb Sub-types". You may enter your membership sub-types and sub-types codes on this list.[subtype:c(20)]
Title	Title is a formal appellation attached to the name of a person by virtue of office, rank, hereditary privilege, noble birth, education, or attainment or used as a mark of respect. Common titles include, Mr., Mrs., Ms., Dr., Curator, Director, President, Reverend, etc.[title:c(40)]
Titles and honors	Enter any titles or honors bestowed upon the contact. Title is a formal appellation attached to the name of a person by virtue of office, rank, hereditary privilege, noble birth, education, or attainment or used as a mark of respect. List the title or honor and the group, institution or entity that bestowed the title or honor.[titles:memo]
Type	Your organization probably has a number of Membership types. To create Membership types click on Setup on the main menu. Choose Contacts. You will see a number of tabs across the top of the screen. Choose Membership Types. Press the "Add" button to add a new membership type. To edit an existing type, highlight the one you wish to edit and begin typing.[type:c(20)]
Updated	The last date and time the record was changed is automatically entered in this field.[updated:datetime]
Updatedby	If you are using Password Security, the name of the last person to edit the record is automatically entered.[updatedby:c(25)]

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Use alternate billing address	To send the Membership renewal notice or billing to an address other than the Contact, press the "Use alternate billing address" button and follow the instructions on the sub-screen.[altbilling:logical]
Volunteer	<p>A volunteer is a person who performs services for your museum or institution without pay. To add an individual to the volunteer list, click in the Volunteer box. This will produce a check mark in the box and add the individual to the Volunteer list.</p> <p>Click on the Volunteer tab to enter more information about the volunteer.[volunteer:n(1)]</p>
Volunteer available Friday	Put a check mark in the box next to the word "Friday" if the volunteer is available to work on Friday.[volfri:logical]
Volunteer available Monday	Put a check mark in the box next to the word "Monday" if the volunteer is available to work on Monday.[volmon:logical]
Volunteer available Sunday	Put a check mark in the box next to the word "Sunday" if the volunteer is available to work on Sunday.[volsun:logical]
Volunteer available from	Enter the beginning date that the volunteer is available.[volstart:date]
Volunteer available until	Enter the ending date of availability for volunteer hours for the contact.[volend:date]
Volunteer status	Enter the status of the volunteer. Choices are; "Active", "Inactive" and "In-training".[volstatus:c(12)]
Website	Type in the website name for this organization, institution, or individual.[website:c(60)]
Work Phone	Contact's work telephone number.[phonew:c(25)]
Zip	Zip code or postal code[zip:c(13)]