16

CONTACTS

In this chapter, we will show you how PastPerfect can help you manage your contacts, patrons, donors, membership, and fund-raising campaigns. PastPerfect's contact management features can be used to track current and prospective museum members, employees, volunteers, and docents. As a contact management system, it can produce mailing labels, e-mails, and mail-merge letters, and schedule appointments and phone calls.

The Campaigns section allows you to create, manage, and track capital campaigns and fund raising events for your organization. PastPerfect will help you manage pledges and donations, making it fast and easy to generate thank you letters, and pledge reminders.

Spend your development time more productively than ever with a fully integrated fund raising package at the heart of your data management system.
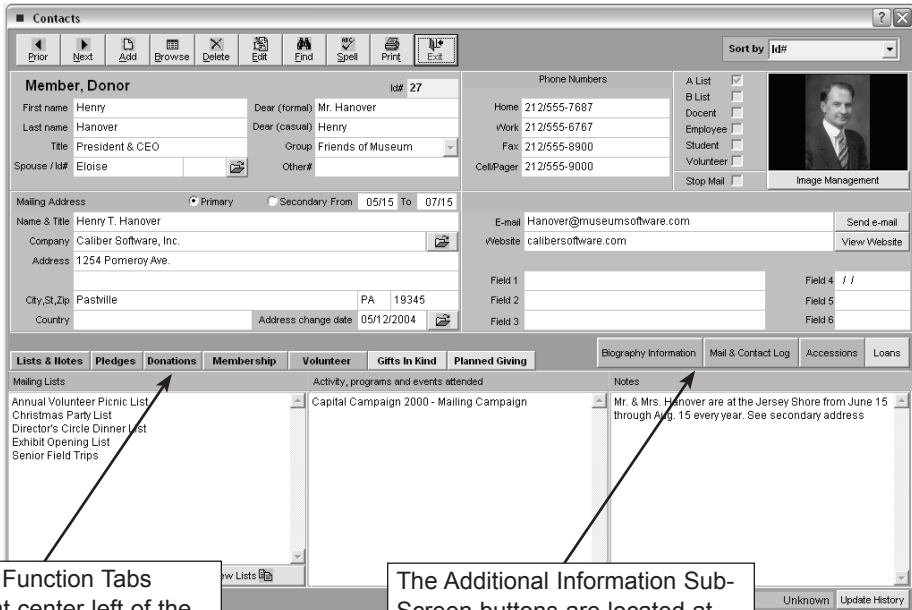
CONTACTS SCREEN

Contacts has four components: **Contacts, Lists & Labels, Campaigns,** and **Pledges/Receipts.** In this chapter we will explore every aspect of contact and campaign management. To begin, select Contacts from the main menu.

Figure 16-1
Contacts &
Campaign
main menu
buttons

From the PastPerfect main menu, select the Contacts button to begin.
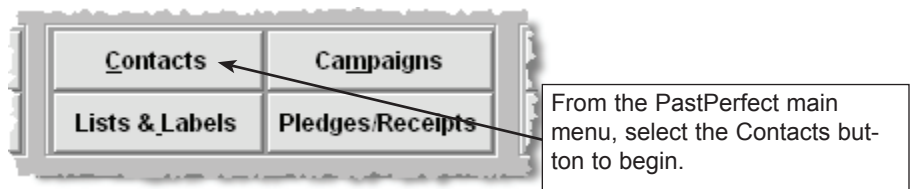
As you can see, Contacts is like an electronic Rolodex geared specifically for museums. So not only does it give you a place to store names, addresses, phone numbers and e-mail addresses, but it lets you record campaign pledges, donations, membership dues, and volunteer hours. It also allows you to view that

Figure 16.2
Contacts
Screen

The Contact Function Tabs are located at center left of the screen.

The Additional Information Sub-Screen buttons are located at center right of the screen.

person's accessions and loan history.

You should already be familiar with the command buttons at the top of the screen. They operate in much the same manner as the other catalogs. The command buttons are discussed in detail in *Chapter 2, The Basics*.

In the middle left of the screen you will notice seven tabs that provide access to the functions associated with contacts. These are: Lists & Notes, Pledges, Donations, Membership, Volunteer, Gifts in Kind, and Planned Giving. Each of these functions will be discussed in detail in this chapter.

In the middle right of the screen there are four buttons that give you Additional Information Sub-Screens. These are: Biography Information, Mail & Contact Log, Accessions, and Loans.

Throughout the program, when fields within Additional Information Screens are populated, the button will appear green. When there is no additional data, the button will remain gray. For more information about Additional Information Screens, see page 273.

CONTACTS SETUP

It is recommended that you perform Contacts Setup before beginning to enter data in the Contacts screen. This is where you will define your membership types and sub-types, compose mail-merge and e-mail letters, setup pledge thank you and reminder letters, and name and define volunteer projects.

To access the Setup Contacts screen, press **Setup** on the main menu. Choose **Contacts** from the Setup Fly-up menu.

Figure 16-3
Contacts
Setup Screen
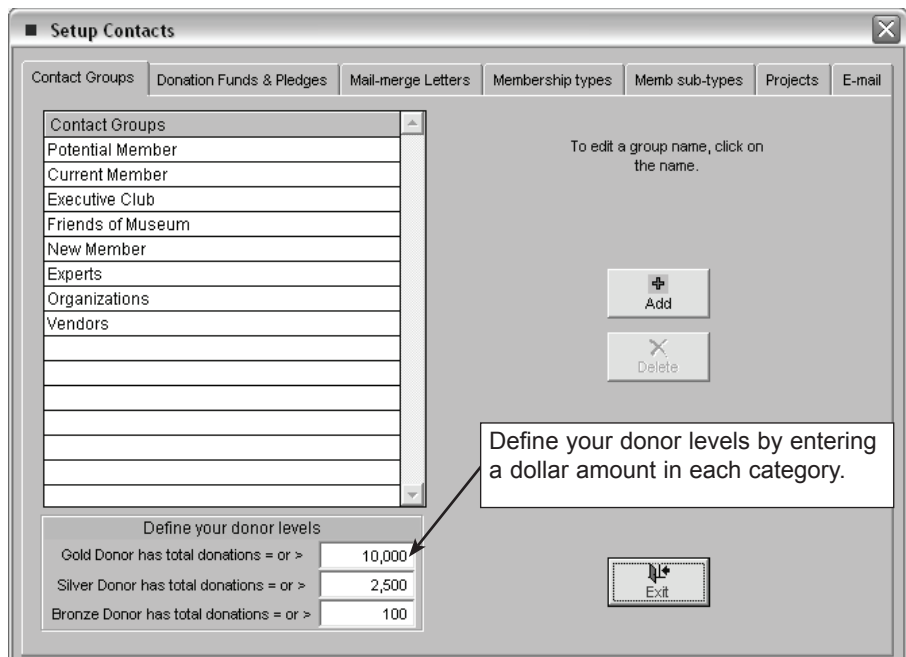
There are seven tabs at the top of the screen: Contact Groups, Donation Funds & Pledges, Mail-merge Letters, Membership types, Membership sub-types, Projects, and E-mail. Each one is used to define or create data that you will use throughout Contact and Campaign Management.

Contact Groups

Use this tab to create or delete contact groups, which are then available in the Group pull-down menu on the contacts screen. Contact Groups may be used to define the relationship between your organization and the contact.

To add a contact group, click **Add,** then type a group name in the Add box. Click **Ok**. To Delete an existing contact group, click a group name to select it. Click **Delete** and **Yes**.

Donation Funds & Pledges

This tab has two functions. The first is to create the names of the various funds for pledges and donations. The donation funds created here will then be available in the Fund pull-down menus when entering a pledge or donation receipt. This is also where you set up default letters for Donation Funds, the Pledge Thank You Letter, and the Pledge Reminder Letter.

Figure 16-4
Donation
Funds &
Pledges

To create a new fund, click **Add**. Type your text in the Add dialogue box and click **OK**. To create a code for the fund, simply click in the code field to the right of the fund and enter a code.

Fund codes are optional and can be used to group multiple funds for accounting purposes.

For each fund you can compose a thank you letter that can be mailed to donors who contribute to that fund. You should compose a default donation fund letter that can be used as a template for creating each of these fund letters. To compose this default letter, click on the **Setup Default Donation Fund Letter** command and compose the letter in the WordRite word processor. For more information about WordRite, see *Chapter 17*. Once you have a default letter and fund names added to your list, select a fund and press **Compose Donation Fund Letter**. Your default letter will appear and can then be modified to better suit the selected fund.

To compose a default letter for either the Pledge Thank you Letter or the Pledge Payment Reminder Letter, click on the appropriate command button. Compose your letter in the WordRite word processor. These letters will be discussed later in this chapter.

Mail-merge Letters

Use this tab to compose mail-merge letters to be sent to various lists selected from your contacts database. To compose a new letter, click on the **Add** command. Type the letter's name in the box and press **Ok**. The letter name will be

Figure 16-5
Mail-merge
Letters

Setup Contacts

Contact Groups | Donation Funds & Pledges | Mail-merge Letters | Membership types | Memb sub-types | Projects | E-mail

Letters
Annual Meeting Announcement Letter
Become a member
Membership Renewal Letter
Inactive Member Renewal Letter
Thanks for Membership Payment

To edit a letter name, click on the name.

Compose Letter

Add

Delete

Setup Default Letter

When adding a new letter, use the default letter to prefill mail-merge fields, such as date, name, address, and dear field.

Exit

added to the list.

To save time composing each letter you may want to create a default letter by pressing **Setup Default Letter**. Now when you compose each mail-merge letter it will start with the default letter template.

Press the **Compose Letter** command button and the WordRite word processor will appear. Compose your letter in the WordRite word processor. Mail-merge fields, that will be replaced with information from each contact's record when printed, can be added with the **Insert field** command.

Figure 16-6
WordRite
screen
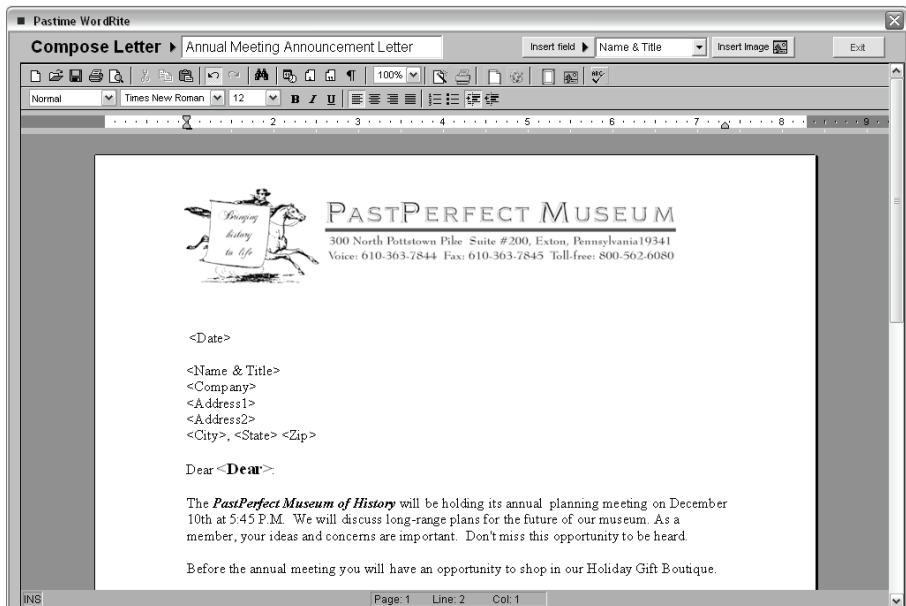
Membership Types/Membership Sub-Types

Use these tabs to create membership types and sub-types, that are then available in the corresponding fields on the membership tab on the Contacts screen. Adding and deleting membership types and sub-types is identical to creating and adding contact groups and funds.

Each type and sub-type can be assigned a code. By assigning multiple types and sub-types to a single code you can group them together for accounting purposes.

It is recommended that you set up membership types and sub-types before assigning contacts to memberships through the Contacts screen.

Figure 16-7 Membership types and sub-types

Membership types and sub-types should be defined before beginning to assign contacts to memberships through the Contacts screen.

Projects

Use this tab to create volunteer project names, which are then available in the Project pull-down menu when entering volunteer hours. Adding and deleting Projects is identical to creating Contact Groups and Funds. There is no limit to the number of projects that you may create.

To add a Project, click **Add,** then type a project name and project code and click **Ok**. Each project must be assigned a project code. Multiple projects may be assigned to a single code for accounting purposes.

To Delete an existing project, click a project name to select it. Click **Delete** and **Yes**.

Figure 16-8
Volunteer
Projects

Project name	Code
Parks & Statue Cleanup	100
Museum Garden Club	200
Parking Lot Improvement	100
Food & Beverage Servers	500
Elementary School Tours	300
Junior High School Tours	300
High School Tours	300
Director's Pet Project	400
Computer Education	400
Ethnobotanical Garden	200
Old-timers Talks	300

■ Setup Contacts

Contact Groups | Donation Funds & Pledges | Mail-merge Letters | Membership types | Memb sub-types | Projects | E-mail

To edit a project name or code, click on the name or code. Similar projects should be assigned the same code for reporting summaries.

Add

Delete

A project code must be entered for each project.

Exit

E-mail

Use this tab to compose e-mail letters that can be sent to a single contact or group of contacts on mailing lists. To compose an e-mail letter, press the **Add**

Figure 16-9
E-mail Screen

■ Setup Contacts

Contact Groups | Donation Funds & Pledges | Mail-merge Letters | Membership types | Memb sub-types | Projects | E-mail

E-mail Letters
Email - Become a Member
Email - Membership Renewal #1
E-mail - Membership Renew #2
E-mail - Thanks for Membership Payment
E-mail - Annual Meeting Announcement

Compose E-mail

Click here to enter or edit the text of an e-mail

Add

Delete

Click here to setup your e-mail account

E-mail Setup

Exit

command button. Enter a name for the e-mail letter and press **Ok.** The new e-mail letter will be added to the list. Press the **Compose E-mail** command and the e-mail editor screen will appear.

To send e-mails, you must have an active account with an SMTP/POP e-mail server. Information about your account must be entered on the Setup E-mail screen. To access this screen press the command **E-mail Setup** at the bottom of the screen. This will open the E-mail Setup screen shown below.

Figure 16-10
Setup E-mail
Screen

Each PastPerfect user may have different setup information which includes; the host name of your SMTP server, your return e-mail address, and your return name for replies. For most e-mail servers that is all the information required to send e-mails. For others you may need to enter a user name, password and port number. If you have questions about these entries, your e-mail service provider can help.

On the left of the screen is a box where you can enter an e-mail signature. Text entered there will be appended to the bottom of each e-mail you send.
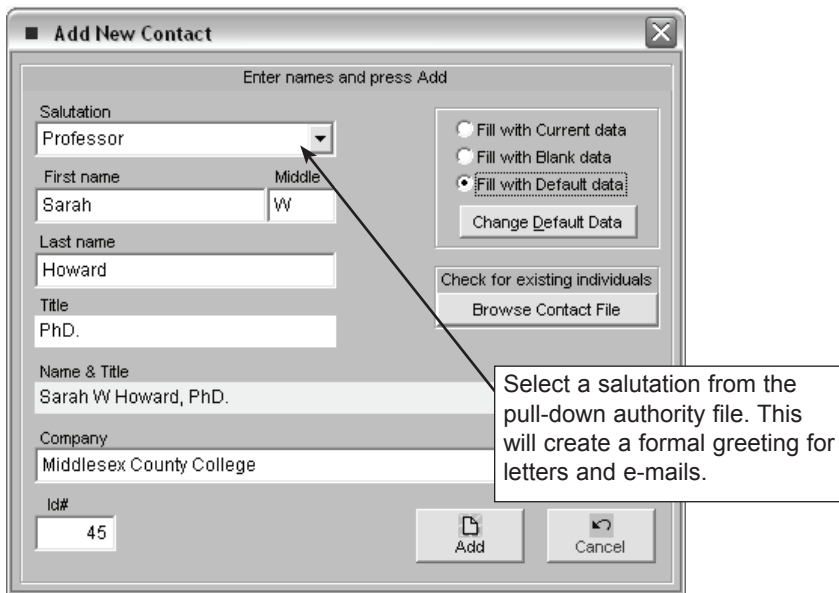
WORKING WITH CONTACTS

Once you have completed the Contacts setup screens you are ready to start entering your contacts. Return to the main menu and press **Contacts**.

ADD NEW CONTACT

Let's begin by adding a new contact. Press **Add** at the top of the Contacts screen. The Add New Contact screen shown below will appear.

Figure 16-11
Add New Con-
tact screen

Default Data

PastPerfect allows you to create "Default Data" to simplify data-entry. This is especially helpful if you have many contacts with similar information. Default Data fields include: mailing lists, primary and secondary addresses, phone numbers, fax numbers, and groups.

To alter default data, click **Change Default Data** in the Add New Contact Window. Click in the field you want to change and type your text. If you have already created user-defined mailing lists as described on page 277, the list names will appear at the bottom of the screen. Click on the box for one or more list names, to have newly adding contacts appear on those lists.

Once default data has been created, you can apply it when adding any contact by selecting the **Fill With Default Data** option.

Browse Contact File

This feature is helpful when you are not sure if a Contact has already been entered into PastPerfect. Simply click the **Browse Contact File** button and scroll through the list of contacts. You may change the browse sort order by clicking on the column heading. This will sort the list alphabetically according to the column that you select.

After completing the screen press the **Add** command. The new contact will be appended and you will be returned to the main Contacts screen.

THE TOP OF THE CONTACTS SCREEN EXAMINED

Figure 16-12
Contacts
Screen - Top

Spouse/Id# - You may want to create a separate record for each individual, then link them by typing their unique spouse contact Id# in this field. If a record has already been created for the spouse, you can select it from the list of Contacts by clicking the folder icon. Once a link has been established, you can click the folder icon to view the spouse's record.

Primary and Secondary Address - For contacts with summer and winter addresses, you may enter a primary address and secondary address. Enter the month/day range when the contact wishes to receive his or her mail at the secondary address.

Address Change Date/Address History - This field is automatically filled when you change the address for the contact. Click the associated file folder Icon to view the contact's address history.

Image Management - Use this feature to display a picture of the contact. If your PastPerfect system is equipped with the optional Multi-media Upgrade you may attach and display an image through Image Management.

Company - Note the file folder icon next to the Company Name field. This indicates that there is additional information about the company. Click on the file folder icon to enter or view the information.

Custom Fields - You may create custom fields for Contacts. There are three character fields, one date field, and two numeric fields. To create your own field names for these fields, go to the Main Menu. Select Setup | Custom Fields | Contacts.

Send E-Mail - Be sure your E-Mail parameters are set up as described earlier before trying to send e-mail. An e-mail address must be provided in the E-Mail field to send e-mail. To send the contact an e-mail:

1. Click **Send E-Mail**. The recipient's address will be entered automatically in the Sent To field, and the salutation will be provided from the information in the Dear (Formal) field from the contact screen.
2. Click anywhere inside the Subject box to type a subject.
3. Click inside the Message field to type your message.
4. If you would like to include a personal signature, make sure the **Include Signature** box is checked. If you do not want to include a signature, click the box to uncheck it.
5. Click **Send**. (Note that you must be connected to the internet before pressing Send)

View Web site - You must be connected to the internet to view web pages. Use this field to record the web address of the contact's web page. To view a contact's personal web page, click **View Web site.**

CONTACT MANAGEMENT TAB FUNCTIONS

In the middle left of the screen you will notice seven tabs that provide access to the functions described below.

Lists & Notes

Lists & Notes is the default tab that is showing when you first enter a contact. Use these fields to add the contact to a mailing list, view the activities, programs, and events the contact has attended, and record any miscellaneous notes.

The Lists & Notes Tab is divided into three sections:

Figure 16-13
Lists & Notes
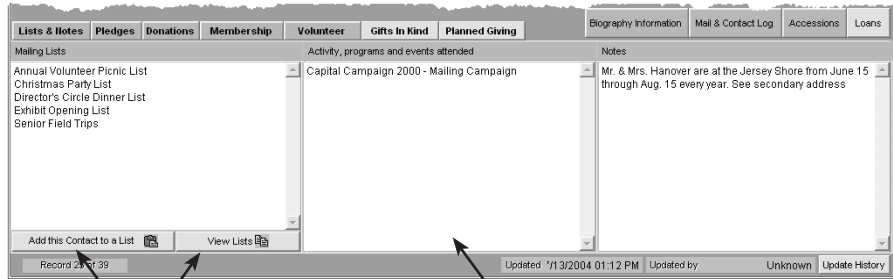
Use the **Add this Contact to a List** and **View Lists** commands to place the contact on a mailing list.

Campaign Activities and Events will be entered automatically when a pledge or donation is attributed to a Campaign.

Mailing Lists - The first section is Mailing Lists. Placing the contact on your various mailing lists will be important when you are ready to create and send letters and e-mails to your contacts and members through the Lists & Labels Section of Contact Management. There are two command buttons at the bottom of the Mailing Lists field. These are **Add This Contact To A List,** and **View Lists**.

To add the contact to a list:
1. Click **Add This Contact To A List**
2. Click the box to the left of the list name to select it.
3. Click **Save**.

View List Command - This function allows you to view only those contacts that belong to a particular mailing list or fixed list. This is helpful when you have a large database. (For more information on creating and modifying lists, see section on Lists & Labels later in this chapter.)

To view only those contacts that belong to a particular list, click **View Lists.** Select the list you wish to view by clicking the button to the left of the list name. When viewing select records, a yellow information box will be visible in the upper right-hand corner of the contacts screen. The box will tell you which records you are viewing, and how many records meet the criteria.

To view all records: Click **Return To Viewing All Contacts** in the upper right-hand corner of the contact screen.

Activities, Programs, and Events Attended - Information will be automatically placed in this field when a pledge or donation is attributed to a campaign fundraising activity. This will be explained later in this chapter under Campaigns. You may also enter information manually, by clicking the **Edit** command button at the top of the screen and placing the cursor in the field.

Notes - Enter additional information about this contact.

Pledges

Use this tab to record a contact's pledges and prospect information. To Edit the fields under Pledge Information:

1. Click **Edit** at the top of the Contacts screen.

2. Enter information in the appropriate fields.

3. Click **Save** in the top left-hand corner of the Contacts screen.

Figure 16-14
Pledges Tab

Enter information about the contact's potential for donations, as well as the name of the person in your organization responsible for making solicitations to this contact.

A list of the pledges made by the contact will appear in this grid. They are organized from most recent to least recent with the latest pledge on the top line.

To enter a pledge:

1. Click **Enter New Pledge**

2. Select a Campaign, Fund, Activity and Solicitor from the pull-down menus. (For more information on creating Campaigns and Campaign Activities, see Campaigns Pages 274-276 later in this chapter.)

3. Enter a Pledge Date. Today's date is entered automatically, but you may enter any date you like.

4. Enter pledge amount and the date the first payment is expected. A value must be entered into these fields for the pledge to be posted. You may also enter the number of payments that can be expected, as well as the expected payment interval.

5. If you do not wish to send a reminder letter, select the **Don't Send Reminder** box. Otherwise, leave it empty.

6. Click **Post**.

Figure 16-15
Enter New
Pledge

After a pledge has been posted, the Thank you letter and Reminder letter options become activated.

The Evolution of Pledge Letters

The Pledge Thank you letter should be sent to the donor thanking them for the pledge. Reminder letters can be of a different form and text and function much like an invoice or gentle reminder that a pledge was made and is due on a specific date. For each pledge there is only one Thank you letter, but there could be multiple Reminder letters, one for each payment.

To better understand how pledge letters are created, let's start at their beginning.

Pledge Thank you Letter - This letter evolves over three steps.

1. It begins on the Setup Contacts screen. Press **Setup** on the main menu and then select **Contacts**. Under the Donation Funds and Pledges tab, click **Default Pledge Thank you Letter** to compose a generic template letter.

2. Next on the Campaign screen (which will be discussed later in this chapter) there is a command **Setup Pledge Thank you Letter**. Clicking here will reveal the default letter from step 1 which you can modify with language for the specific Campaign. Use mail-merge fields for text about a specific pledge that will be replaced later with data.

3. Now when you add a new pledge, the modified Thank you letter for the Campaign will be attached to that pledge record. Mail-merge fields that you setup on the campaign screen for <pledge date>, <pledge amount>, <name & title>, <address1>, etc. will be replaced with the exact text for the new pledge. Once a pledge is posted the Thank you letter can be reviewed, modified further if necessary and printed. You can reprint thank you letters from the Contacts screen, the Pledges/Receipts screen or the Reports screen.

Pledge Payment Reminder Letters - these letters evolve over four steps:

1. They begin on the Contacts Setup screen. Under the Donation Funds and Pledges tab, click **Default Pledge Payment Reminder Letter** to compose a generic template letter.

2. Next on the Campaign screen there is a command **Setup Pledge Payment Reminder Letter**. Clicking here will reveal the default letter from step 1 which you can modify with language for the specific Campaign. Use mail-merge fields for text about a specific pledge that will be replaced later.

3. Now when you add a new pledge the modified Reminder letter for the Campaign will be attached to that pledge record. Mail-merge fields that you setup on the campaign screen for <pledge date>, <pledge amount>, <name & title>, <address1>, etc. will be replaced with the exact text for the new pledge. Once a pledge is posted the Reminder letter can be reviewed. Some merge fields such as <Payment amount> and <Payment date> still appear in brackets. They will be replaced in the next step.

4. The final step is to preview and print letters for each payment. Since a pledge may be for multiple payments over time, a separate reminder letter is created for each payment. To view these reminder letters from the Contacts screen select the Pledges Tab. If a pledge has been recorded it will appear on the

list at the bottom right of the screen. Double-click on the pledge to open the Pledge Details screen.

Figure 16-16
Pledge Details

From the Pledge Details screen select a pledge payment from the list on the right and then press the command **Selected Payment Reminder Letter**. The letter will display in WordRite where it can be printed.

You can also print all pledge payment reminder letters for any pledges due within a specified date range from the Reports menu. From the main menu click on **Reports**|**Dues & Donation**s|**Pledge Reminder Letter**s|and **Run Report**.

Pledge Detail - In addition to printing letters, the Pledge Detail screen also gives you access to every detail associated with a single pledge, including: the contact's name, company, campaign, solicitor, schedule of payments, etc. To view or edit the details of a pledge, double click on it from the Contacts screen Pledge Tab.

On the right side of the Pledge Detail screen, is a spreadsheet with the Schedule Of Payments where you can view the amount promised, the date the payment is due, the amount paid, and the remaining balance. PastPerfect automatically calculates the totals at the foot of each column.

To add a payment:
1. Click **Add Payment**
2. In the Add Pledge Payment window, click on a field to type your text.
3. Click **Add This Payment To Schedule.**

Donations

Donations are any payments made to your museum or organization that are not membership dues. Donations may be the result of solicitations by your staff as part of a Campaign Activity. Donations may also be unsolicited gifts to your organization. Use the Donations Tab of the Contacts screen to enter and edit donations, and view a contact's donation history, including a ten-year summary.

Figure 16-17
Donations Tab

When you press the **Enter a donation receipt** command the following prompt screen may appear. Answer **Yes** or **No** to apply the donation to a particular pledge.

Notice that a 10 year history of donations is maintained.

To Enter a donation receipt:
1. Click **Enter a Donation Receipt.**
2. Click a field to enter text. Today's date is entered automatically, but you can type any date you choose.
3. Select a payment type from the pull-down menu, and enter an amount and reference number. A date, amount, and reference number must be provided to enter a receipt.
4. Click on the **Post** command button to finish the transaction. Press **Exit** to return to the Contact screen.

Figure 16-18
Enter Dona-
tion Receipt

After the donation receipt has been posted, the T**hank you Letter** command button will be activated.

If a donation is entered for a contact who has made a pledge, you will be asked in step 1 if you want to apply the donation to the outstanding pledge.

After a donation has been posted, the Thank You Letter command button becomes active. To send a thank you letter, click **Thank You Letter** to open the letter in WordRite. For more information on printing and composing letters, see Chapter 17, WordRite.

Preview donation history and print donation history command buttons - There are two additional command buttons on the Donations Tab screen. They allow you to preview and print a report that details the donation history for this contact.

Membership

Offering membership in your museum or history organization gives the people of your community an opportunity to participate in the preservation of history through programs, events, and activities. Membership also provides a source of revenue for the museum.

Use this tab to create, view, and edit membership information, including membership name, type, billing information, dues receipts, past-due reminder letters, and more.

Figure 16-19
Membership

To **Become a new member** or to **Join an existing member-ship**, press one of these command buttons
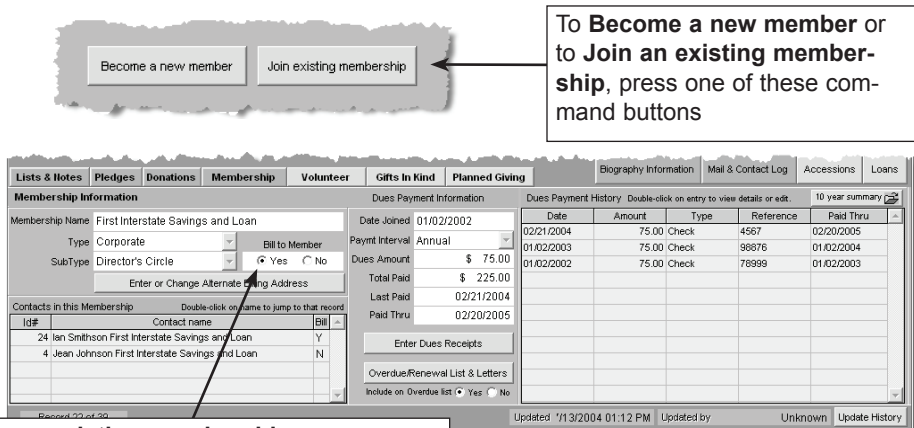
When you **Join an existing membership,** you may be designated as the Billing Member. Only the Billing Member receives a membership invoice.

Become New Member/Join Existing Membership - These buttons are only available if the contact is not already associated with a membership. To create a new membership for the contact:

1. Click **Become a New Member**.

2. Enter information into the appropriate fields by clicking in the field and typing your text, and by selecting the information from the pull-down menus.

3. Choose whether you wish to prefill the membership name with Contact's name or with the contact's company's name.

4. Click **Create New Membership**.

When you assign a contact to an existing membership, you may be asked to designate the Billing Member. Only one contact can be designated as the Billing Member and receive membership invoices. To change the Billing Member to a selected contact, click **Yes** under "Bill to Member". Other contacts' status will be changed to **No** (non-billing).

If you would like to add the contact to an existing membership:

1. Click **Join Existing Membership**

2. Select a membership from the Membership List.

3. Click **Assign**.

4. Click **Yes**.

Once the membership has been created, you can enter an alternate billing address, view overdue lists and letters and dues history.

Alternate Billing Address - Occasionally, a membership may be given as a gift. In this case you will want to have an alternate billing address. The Gift membership is entered through the Contact Membership Tab as outlined above.

Figure 16-20
Alternate Bill-
ing Address
screen

To create an alternate billing address:
1. Click **Enter Or Change Alternate Billing Address**.
2. Check the box at the top of the Alternate Membership Billing Address win-
   dow.
3. Click anywhere inside the Primary or Secondary Address fields to enter the
   address.
4. Select Primary-Alternate Address For Billing Information button or Second-
   ary-Alternate Address button.
5. Enter Alternate Billing Contact information.
6. Click **Save & Exit**.

Enter Dues Receipts

To enter Membership Dues receipt:
1. Click **Enter Dues Receipts** on the Membership Tab of the Contacts screen.
2. Enter date, amount, type of payment, reference number, etc.
3. Click **Post**.

Figure 16-21
Enter Mem-
bership Dues
receipt

Overdue/Renewal List & Letters

Click **Overdue/Renewal List & Letters** to see a list of everyone whose dues are outstanding. From this screen you can also print overdue letters and mailing labels or make a hard copy of the entire list. PastPerfect automatically updates the overdue list according to the Paid Thru field on the Membership tab.

When a membership payment is overdue, an orange information box will be visible to the left of Dues Payment History in the Membership tab to alert you to their overdue status. To include a contact on the overdue list, select the **Yes** button to the right of Include on Overdue List.

To renew a membership, click on the **Overdue Renewal List and Letters** command button, select a membership name and press **Renewal**. Enter the dues payment date, amount, payment type, and check number and press **Post**.

You may also preview and print the member's dues history by clicking **History**. Double-click on any dues receipt in the History window to view, edit, or delete its

details. You may also view the details of any dues payment by double-clicking on it under Dues Payment History.

Volunteer Information

Almost all museums, no matter how many paid staff they have, will also use volunteers to perform valuable, and often essential functions. Candidates for volunteer positions should be interviewed concerning experience, abilities, and interests. It is important to know the days and hours when a volunteer is available.

Figure 16-22
Volunteer
Tracking

Enter information about the contact's interests, hours of availability, and emergency contact.

Use this command button to **Enter New Hours**. Enter information about the volunteer activity and click **OK**.

You can use the Volunteer tab to record a contact's volunteer status, skills and work preferences, and availability. You may also track hours worked and emergency contact information.

To view or print a report that details volunteer hours for this contact, press the **Preview** or **Print** command buttons.

Gifts-In-Kind

Some donors are in a position to give goods and services that can be used for charitable purposes in lieu of cash, securities, or personal property. Examples are free printing of invitations and programs by a professional printer, decorations and flowers from a florist, or food from a caterer. Gifts-in-kind can help reduce the cost of staging events for your organization.

Figure 16-23 Gifts-In-Kind screen

Use this tab to record any donations that are not monetary, such as baked goods for a summer barbecue, building materials, legal services, or textbooks. You can also enter the approximate or estimated value of these goods.

Planned Giving

Planned giving, sometimes called deferred giving, is a method of making a charitable contribution in which some or all components of the gift are only distributed, or have their ownership finally resolved, after some event or some period has passed. A wisely established planned giving mechanism will allow charitable gifts to avoid estate taxes; that may apply if the gift is instead included in the donor's estate. Planned giving mechanisms can also provide benefits for the donor during his or her lifetime, including tax deductions.

Obviously, planned giving involves complex legal documents that are outside the scope of PastPerfect. The Planned Giving Tab should be used to write a brief description of the planned giving mechanism for the contact, if any.

ADDITIONAL INFORMATION SCREENS

In addition to the Contacts Management Tabs, the contact screen has four additional information screens available. Use these screens to record Biography Information, Mail & Contact Log, Accessions, and Loans.

Biography Information

Use this button to record detailed biographical information for the contact. Entries can include: birth date, marital status, maiden name, places of birth and death, number of children and their names, etc.

Figure 16-24
Biography
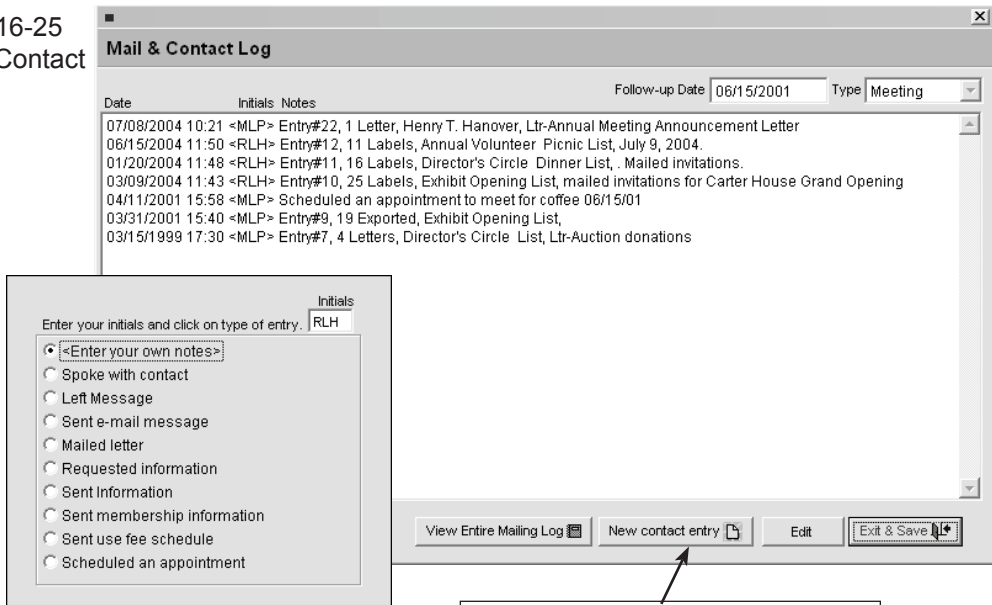Information
screen

Mail & Contact Log

Use this button to view the contact history for the selected contact. The log is automatically updated whenever a letter or mailing label is printed for the contact. Also, you may make a new entry from this screen.

To make a new entry:
1. Click on the **New Contact Entry** command button.
2. Enter your initials in the Initials field. (Note: Initials are required to post an entry.)
3. Select an entry from the list by clicking on the radio button on the left.
4. Hit the Enter key on your computer's keyboard.

If you selected <Enter Your Own Notes> a cursor will be active after your initials in the mailing log. Simply type your notes, and click **Exit & Save**.

Figure 16-25
Mail & Contact
Log

Press the **New Contact Entry** command. Once you select a mode of contact from the list or press Enter Your Own Notes, the entry will be made on the Contact Log.

If you'd like to view the mailing log for all of your contacts, click the **View Entire Mailing Lo**g command button. Here you can delete entries according to date, with the **Mass Delete** button.

To delete entries:
1. Enter a date in the Delete All Mailing Log Entries Older Than field.
2. Click **Ok**.
3. Click **Yes**.

To delete an individual entry:
1. Highlight that entry by clicking on it.
2. Click **Delete**.
3. Click **Yes**.

Accessions

Use the **Accessions** button to view any accessions donated by the contact. Contacts are linked to an accession when the accession record is added, or by entering the Contact's Id# on the Accession screen. To view a linked accession record from the Contacts screen, double-click on the accession#.

If you have made any modification to the contact's address, phone number, e-mail and web site addresses, you can easily update this information in the Accession records by clicking **Update Accession Addresses.**

Loans

Use this to quickly locate any objects a contact has loaned to your museum. To view the loan information, double-click on a loan. To return to the Contacts screen, press the **Exit** command.

Update History - Every time you add or edit a contact, an entry is automatically entered into the Update History log located at the bottom right-hand corner of the Contacts screen. The window records the username of the individual who modified the record and the date it was modified.

Printing

The print command at the top of the Contacts screen allows you to print letters and mailing labels for the selected contact.

To print a label:
1. Choose the location of the label on a sheet. Your selection will be highlighted.
2. Select one of the six label styles.
3. Click **Preview Labe**l to verify the address and label's location on the page.
4. Click **Print Label**.
5. Follow the prompts for your particular printer.

To print a letter:
1. Select a letter from the Letters on File list. Your selection will be highlighted.

2. Select Formal for a formal salutation, or Casual for a casual salutation. (These are taken from the Formal and Casual fields on the Contacts screen.)

3. Click **Print Letter** to view the letter.

4. Click **Print this Letter.**

To e-mail a letter:

1. Select **E-mail Letter** from the Print screen.

2. Select a letter from the E-mail Letters list.

3. Click **E-mail Letter** to view the letter.

4. Click **Send.** (You must be connected to the internet before pressing send).

Add Entry To Mailing Log

After printing letters or labels, a dialog box will appear asking you if you'd like to add an entry into the contact's mailing log. The date and time, type of mailing, recipient's name and description fields are filled in automatically.

If you would like to add the entry to the mailing log:

1. Enter your initials in the By (Your Initials) box.

2. If you would like to add any additional notes, click anywhere in the Notes field and begin typing and select the Include Notes In The Contact Log Entry box.

3. Click **Yes**.

Sending letters to couples - You may have created a separate contact for each spouse but don't want to send two letters to the same household. To prevent this from happening, select the Stop Mail option on one of the couple's contact records.

CREATING AND MANAGING CAMPAIGNS

Planning and executing fund raising campaigns is important to the survival of most museums and history organizations. Once you have created your databases of contacts, you have gathered all the necessary information that can help you identify your key supporters and turn your contacts and membership base into

prospective donors. To access the Campaign Management screen, click **Campaigns** on PastPerfect's main menu.

Figure 16-26
Campaign
screen

Enter up to ten activities for each campaign. Click on the File Folder Icon next to the activity to enter, edit, or view details about the activity.

Information in the Pledged and Received columns is entered automatically from the Pledges and Donations sections of the Contacts screen.

The top of the Campaign screen has fields to record the campaign name, campaign manager, the associated fund, the purpose of the campaign, and the start and end date. The are two more fields for last receipt and last new member that will be filled in automatically when donations are received or new memberships are added as a result of the campaign.

At the bottom of the screen is information about campaign activities.

Campaign Activities

After creating the Campaign, you will need to generate a list of solicitation activities for your fund-raising campaign. You can enter an activity name (usually a brief description), how much the activity will cost and how much you hope to earn (Goal). The Pledged and Received fields are updated automatically

when you enter a pledge or donation payment from either the Contacts screen or the Pledges & Receipts screen. You may view or enter additional details for any activity by clicking the file folder icon to the left of the activity name.

Set up Pledge Thank you Letter and Pledge Reminder Letter - To modify these letters for the campaign, click on the appropriate command button. The letter will open in WordRite. The use of these letters was discussed earlier in the chapter.

Excel Spreadsheet - If your PastPerfect system is equipped with the optional Multi-media Upgrade and you have MS-Excel, you will have access to an Excel spreadsheet that you can customize to track accounting and other information about each activity. Click on the **Excel Spreadsheet For Costs** command button.

Figure 16-27 Excel Spreadsheet for campaign

You may create an MS-Excel spreadsheet that tracks accounting information for your campaign activities. The spreadsheet can have a separate page for each activity.

Print - The print function in Campaign Management allows you to select specific campaigns to print. The choices include: This Campaign, All Campaigns, Current Campaigns, and Past Campaigns. You can also print the details for each activity by selecting the Include Details box.

LISTS & LABELS

The Lists & Labels button on the main menu gives you access to a screen where you may create, modify, or delete up to eighty user-defined lists and access the twenty-three system defined fixed lists. You can also print letters and mailing labels for each contact on the lists.

Figure 16-28
Lists & Labels
Screen

You may create up to eighty user-defined lists to create targeted mailings for your contacts database.

You may also use the system-defined fixed lists to create targeted mailings for your contacts database.

To create a new user defined list:

1. Click in an empty list under User Defined Lists to select it.

2. Click **Create or Modify User Defined List**.

3. Type a list name.

4. Type a Boolean statement for adding records. (See note on Boolean Statements below.) Then click **Add Matching Records To List Now.**

5. You may also append records from another list by clicking **Append Records From Another List**, then double-clicking the list from which you would like to append the records.

6. Use the **Delete Non-Matching Records** button to check the current list against another and delete any records that do not match, thus creating a list of only contacts that appear on both lists. Double-click on the list you'd like to compare the current list to.

View List - Use this feature to view a list of all the contacts assigned to the list.

Boolean Statements

You may dynamically add a selected group of individuals to the list by entering a Boolean statement in the Filter Statement window and then clicking **Add Matching Records To List.**

Creating a Filter Statement - A filter statement consists of a field name, a relational operator, and a comparison value, such as (Zip = "96740"). Available field names are: Idno, Memno, Firstname, Lastname, Company, Address1, City, State, Zip, PhoneW, PhoneH, Faxno, E-mail, and Donations.

Available relational operators are: =, #, <, >, >=, <=

All comparison values, except those for Donations, must be enclosed in quotes. Multiple statements may be joined with words AND or OR.

Filter Statement Example:
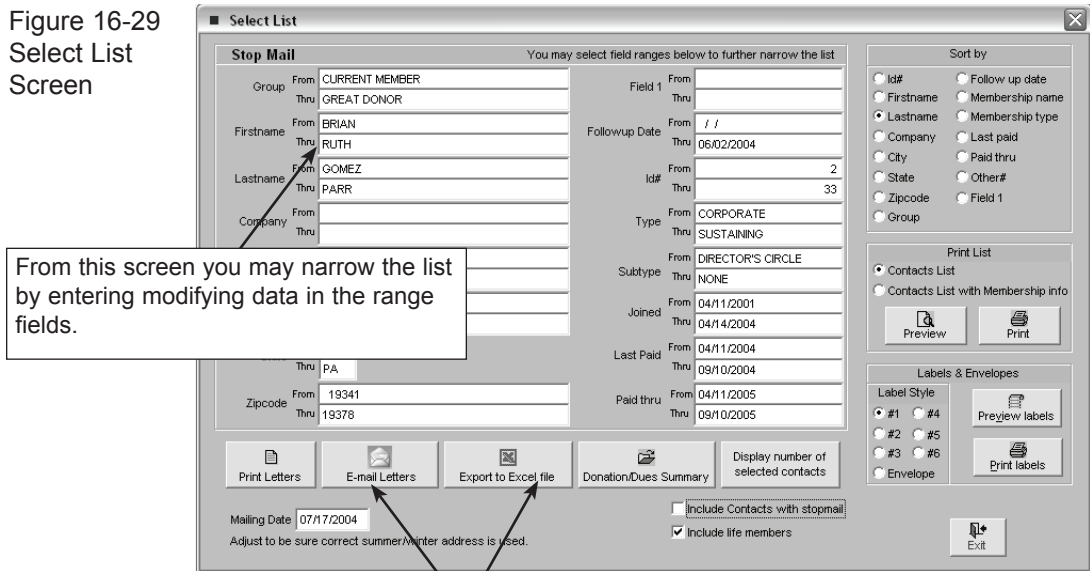
Zip = "98026" and Donations>100

Adding contacts manually - Once a list has been created you may also add contacts to the list manually. This is done from the main Contacts screen by first locating the record for the contact that you want to add and then pressing **Add this Contact to a List.** Place a check mark next to the list name to complete the process.

Print, View, or E-mail Lists, Labels, Letters, or Envelopes

Click on a list and press **Continue** on the Lists & Labels screen to print letters and mailing labels for everyone on a selected list. The list itself can also be

printed or exported to an Excel file.

Figure 16-29
Select List
Screen

From this screen you may narrow the list by entering modifying data in the range fields.

From this screen you may choose to **Print Letters**, **E-mail letters**, **Export to Excel file**, display a **Donations/Dues Summary**, or **Display number of selected contacts.**

To print letters:

1. Select a list by clicking on it. This can be either a fixed list or a user-defined list.

2. Click on the big **Continue** command button at the bottom of the screen.

3. The displayed field ranges automatically have the widest possible ranges. You may narrow the list further by modifying the field ranges.

4. Click **Print Letters** which will open the WordRite screen.

5. At the top of the WordRite screen select a letter from the pull down list.

6. Choose either a formal salutation or casual salutation by clicking the appropriate button.

7. Click **Print all letters** to print a letter for everyone on the list. Or press **Print selected letters** which will allow you to choose which letters to print.

8. An entry will be automatically made in the mailing log for each contact that has a letter printed.

To E-mail a letter:
1. Select a list by clicking on it. This can be either a fixed list or a user-defined list.
2. Click on the big **Continue** command button at the bottom of the screen.
3. You may narrow the list further by modifying the field ranges.
4. Click **E-mail Letters.**
5. Select the letter you'd like to e-mail by clicking on it.
6. Click **E-Mail Letter**
7. You will then have the option to e-mail the letter to only one person, to send one e-mail to everyone, or to send multiple e-mails to everyone. Select one.
8. If you would like to include a signature, make sure the Include Signature box is checked. (See Creating A Signature earlier in this chapter for details on creating a custom signature.)

Export To Excel File - Use this feature to export the selected list to an Excel file.

Donations/Dues Summary - Use this button to print a ten-year summary of dues and donations for the selected list.

Display Number of Selected Individuals - Click this button to see how many people are associated with the selected list.

Print List - Use the print lists feature to print a list of everyone on the selected list. If the Contacts List button is selected, only first name, last name, company, addresses and phone numbers will be printed.

If you would like to print membership information as well, select Contact List With Membership Info.

Labels & Envelopes - To print labels or envelopes for everyone on the selected list:
1. Select a label style, or Envelope.
2. Click Print Labels.
3. If you would like to add an entry into the mailing log, enter your initials in the Add Entry To Mailing Log window, and any notes, and click **Yes**. Otherwise, click **No**.

Include Contacts with stop mail - Generally you will not want to print letters or labels for contacts with stop mail checked on their contact screen. To override this setting, place a check mark in this box before printing letters or labels.

Include life members - Contacts with a membership payment interval set to Life are not required to make membership payments. Place a check in this box to include these members when printing letters and labels.

View Mailing Log - This option on the Lists & Labels screen is identical to the View Mailing Log function found in the Contact screen. Click on any entry to edit its details. (See View Mailing Log earlier in this chapter for more information.)

Update Summer/Winter Addresses - This List & Labels screen option allows you to update any addresses according to the dates entered into the Secondary Address date range in the Contacts screen. If you have contacts with seasonal addresses, you should always perform this function before printing labels and letters. The addesses will be selected based on the date range setting and the date on your computer.

PLEDGES/RECEIPTS

This main menu command allows you to view pledges and receipts for an entire year. The Pledges & Receipts screen is divided into three sections: Pledges, Donations, and Membership Dues. PastPerfect allows you to view an entire year or view data month by month.

You can view receipts for any given month or for the entire year by selecting the tabs at the top of the Pledges/Receipts screen.

To select the year you would like to view, click **Year** in the bottom right-hand corner of the Pledges/Receipts screen. Select a year by typing it or clicking the up and down arrows. When the appropriate year is showing in the window, click **Ok**.

You can view the details of a pledge, donation, or dues payment by double-clicking it. (See Pledge Detail earlier in this chapter for more information on editing pledge details and printing thank you letters.)

Figure 16-30
Pledges &
Receipts
Screen

Click on the month tab at the top of the screen to view information by month.

To view a different year, click on the **Year** command button.

Each section has command buttons below the column that perform functions for that section. Use the command buttons to enter receipts, view, edit or print.

Enter and print pledges, dues and donation receipts

Enter Pledge - To enter a new pledge:
1. Click **Enter Pledge**
2. Double-click a contact on the list to select that person.
3. Choose a campaign, activity, etc., from the pull-down menus.
4. Enter an amount and date of first payment (Note: A value must be entered into these fields before a pledge can be posted.)
5. Click **Post**.

You can also create or print a reminder letter after a pledge has been posted. (See Enter A New Pledge earlier in this chapter for information on printing a reminder letter.)

Enter Donation Receipt - To enter a donation receipt:
1. Click **Enter Donation Receipt.**

2. Double-click a contact to select that person.

3. Select a campaign, activity, fund, etc. from the pull-down menus.

4.   Enter an amount, payment type, and a reference number. (Note: These fields must be entered before a receipt can be posted.)

5. Click **Post.**

After a contact has been selected, you can view their donation history by clicking the **History** button.

Print Pledge/Print Donations - You can print pledges and donations by campaign or date range. To do so:

1. Select a year.

2. Select a month or entire year by clicking its tab at the top of the Pledges/ Receipts screen.

3. Click **Print Pledge** or **Print Donations**.

4. Select a campaign or All.

5. The date range will be filled in automatically according to the year and month you selected prior to clicking Print. But you can fine-tune the date range by clicking in date fields and typing a different date.

6. Select the Sub-total by campaign box to have PastPerfect automatically insert the sub-total.

7. Pledges or donations can be sorted numerically by date, id#, and amount, or alphabetically by name. Select the appropriate box.

8. Click **Print**.

Print Dues Receipts - To print membership dues receipts:

1. Click **Print Dues Receipts**

2. Select membership type and sub-type (or all, if you would like to print by date range.)

3. Choose whether you would like to sort dues by date, name, amount, or membership type by clicking the appropriate button.

4. The date range is entered automatically according to the month and year selected before clicking **Print Dues Receipts**, but you can fine-tune the date range by clicking the date fields and amending it.

5. Select the Sub-total by membership type box if you'd like PastPerfect to provide the sub-total automatically.

6. Click **Print.**

Print Lists - Use the **Print Lists** command button to print the donations and dues receipts for a selected year and month, or for an entire year.

1. Choose the month or year you'd like to print by clicking its tab.

2. Choose how you would like the list sorted (i.e. Date, ID#, Name, Amount, etc.)

3. Click **Print** under Donations to print donations receipts, or under Dues for membership dues receipts.

4. Click **Exit** to return to the Pledges/Receipts screen