# 20

CONTACTS

In this chapter, we will show you how PastPerfect can help you manage your patrons and memberships. PastPerfect's contact management features automate tracking donors, potential donors, current and prospective members, employees, volunteers, and docents. As a contact management system, it can produce mailing labels, emails, and mail merge letters. It can also help you track mailings, phone calls and appointments.

Chapter 21 - Contact Lists will show you how to group your contacts into lists, so you can send mail merge letters and emails to your contacts. *Chapter 22 - Letters, Labels & Email* will cover creating mail merge letters, printing labels and envelopes, and emailing your contacts. *Chapter 23 - Campaigns and Pledges* shows you how to create, manage, and track capital campaigns and fundraising activities for your organization, as well as track pledges towards those campaigns. *Chapter 24 - Processing Receipts* will cover quick ways to enter pledges, donations, and dues receipts, as well as use Batch Processing to print thank you letters, receipts and labels. 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 fundraising package at the heart of your collections data management system.

THE CONTACTS SCREEN

The PastPerfect Development section has four components: **Contacts, Contact Lists, Pledges & Receipts**, and **Campaigns**. In this chapter we will explore contacts management. To begin, click **Contacts** on the Main Menu.
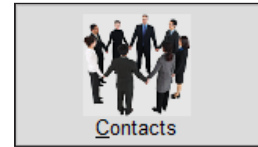
Contacts is a relational database that gives you a place to store names, addresses, phone numbers and email addresses, and enables you to record campaign pledges, donations, membership dues, volunteer hours, and biographical information. It also allows you to view that person's accessions and loan history.

Figure 20-1 Contacts screen

The Navigation Bar at the top of the screen has tools to help you work in Contacts. They operate in much the same manner as the other catalogs. These buttons are discussed in detail in *Chapter 2 - The Basics*.

In the Sidebar you will notice buttons under **Screen View** that provide views to the areas associated with contacts. These are: Mailing Address, Membership, Pledges, Donations, Volunteer, In-kind Gifts, Activities, Notes and Planned Giving, Accessions and Loans, Giving Summary, Biography Information, and Mail & Contact Log. Each of these areas will be discussed in detail in this chapter, with the exception of Pledges, which will be discussed in *Chapter 23 - Campaigns and Pledges*.

When data appears in a field in one of the Screen Views, you will see a green data light on the button, indicating there is data within that Screen View. To see or edit data in a Screen View, click the desired Screen View button.

Depending on your current Screen View, you may have buttons under **Actions** that allow you to perform functions related to the Screen View. Actions will be discussed for each Screen View.

Familiarize yourself with the views and fields, and the various aspects that the Contacts section covers. Before entering data, it is best to do some basic setup functions in the Setup Contacts screens.

CONTACTS SETUP

It is recommended that you set up your Contacts database parameters before beginning to enter data in the Contacts screen. This is where you will define your membership types and subtypes; compose mail merge and email letters; create donation funds and thank you letters; set up default pledge thank you and reminder letters; and define volunteer projects.

To access the **Setup Contacts** screen, seen in Figure 20-2, click **Setup** on the Main Menu, then click **Contacts** on the drop-down menu.

There are nine buttons on the left side of the screen: General Information, Donation Funds & Thank You Letters, Mail Merge Letters, Membership Types, Membership Subtypes, Campaigns & Pledges, In-kind Gifts, Volunteer Projects, and Email. Each section is used to define or create data that you will use throughout Contacts and Campaign Management.

Figure 20-2
Setup
Contacts
General
Information
screen
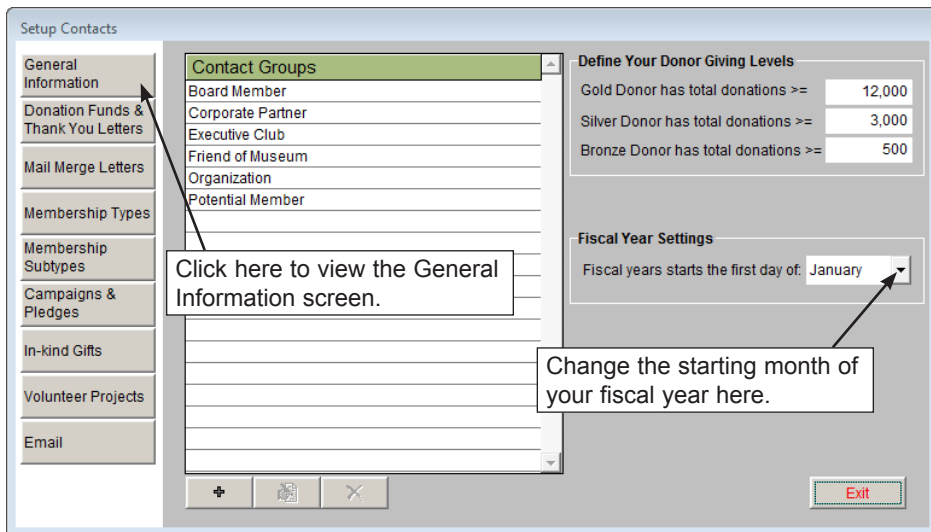
General Information

Contact Groups - Contact groups may be used to define the relationship between your organization and the contact. A contact can only be in one group at a time, so your groups should be mutually exclusive. On this screen you may create or delete contact groups, which are then available in the Group drop-down menu on the Contacts screen.

To add a contact group, click the **plus sign** button**,** then type a group name in the **New Entry** field. Click **Add** to add it to the list. To edit an existing contact group, click on the group to select it. Then click the **edit** button.   On the **Modify Entry** screen, change the name and click **Save** to make the change. To delete an existing contact group, click a group name to select it. Click on the **red X** button, then click **Yes**. This group will no longer show up on any Contact records and it will not be listed in the Group drop-down menu.

Define Your Donor Giving Levels - PastPerfect will automatically place your contacts in a donor group, Gold, Silver, or Bronze, based on the total amount of donations to your institution. You may change the total donation amounts by typing the number in the box next to each giving level.

Fiscal Year Settings - You may select the month when your fiscal year begins. For example, use January if your fiscal year runs January 1 through December 31; use July if your fiscal year runs July 1 through June 30. This setting affects how your

Pledges & Receipts screen displays pledges, donations, and dues payments, how the reports print from the Pledges & Receipts screen, and how the Giving Summaries appear on the Contact screen.

Donation Funds & Thank You Letters

When Contacts donate monetary gifts to your institution, each gift is made toward a specific fund. The Donation Funds & Thank You Letters screen allows you to create the names of various funds used in entering donations. The donation funds created here will then be available in the Fund drop-down menus when entering a donation or pledge.

This is also where you set up the default letter for Donation Fund Thank You Letters and compose Donation Fund Thank You Letters.

Figure 20-3
Setup
Contacts
Donation
Funds &
Thank You
Letters
screen
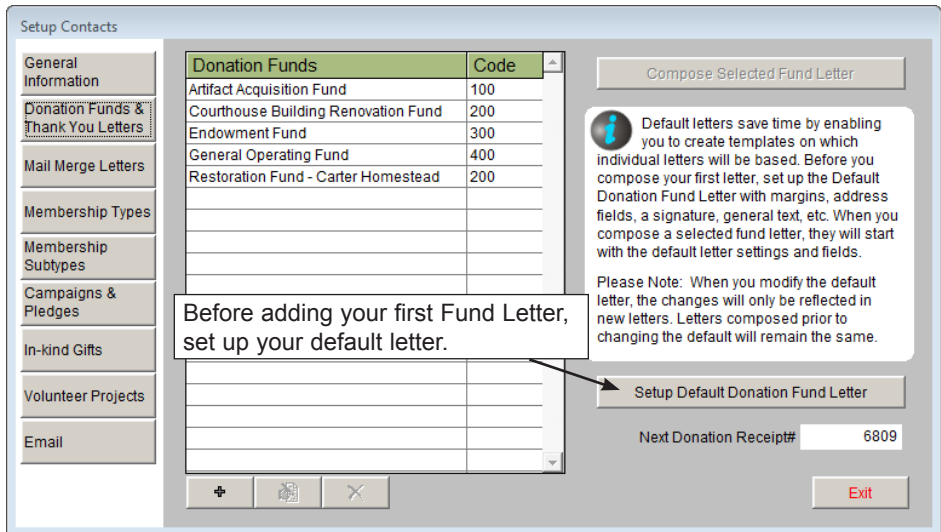
Default Donation Fund Letter - For each fund added to PastPerfect, you can compose a thank you letter to mail to donors who contribute to that fund. However, before funds are created, it is recommended that you create a default donation fund letter. This default letter will be used as a template for creating each new fund's thank you letter. To compose this default letter, click on the **Setup Default Donation Fund Letter** button and compose the letter in MS-Word. For more information about using MS-Word in PastPerfect, see *Chapter 22 - Letters, Labels & Email*. Once you have a default letter and fund names added to your list, select a fund and click **Compose Selected Fund Letter**. Your default letter

will appear and can then be modified to better suit the selected fund.

TIP   Before creating your first fund, set up the Default Letters first to include the text and graphics that you want on all letters, like your letterhead, mail merge name and address fields, and your signature lines. The Default Letters help to save you time, so you don't have to add these things with each new letter that you create.

Donation Funds - To create a new fund, click the **plus sign** button. Type the name of your fund in the **New Entry** field of the **Add New Entry** screen. You may also enter a **Code** number. Fund codes are optional and can be used to group multiple funds for accounting purposes. Then click **Add** to add the new fund to the list of Donation Funds.

Each donation that you enter in PastPerfect must be assigned to a fund. You may add funds as often as needed.

To edit a fund name, select the fund and click the **edit** button.　　　　On the **Modify Entry** screen, change the name and click **Save** to make the change. Please note that if you need to edit a fund name for a fund to which donations have been posted, you will need to go to each donation and pick the new name from the drop-down menu. Otherwise the fund name will not show up on the Donation Details screen, and you will not be able to run reports by the old fund name.

We do not suggest deleting a fund once you have posted donations to it, as you will no longer have the ability to run reports by the deleted fund name. If you need to delete a fund, click on the fund name, then click the **red X** button, then click **Yes** to delete the fund.

Compose Selected Fund Letter - Once you have set up your default donation fund letter and added a fund, you can compose the thank you letter for donations to that fund. Select the fund, then click **Compose Selected Fund Letter**. This will open MS-Word, and your default letter settings will appear. Compose the rest of your letter, tailored to thanking contacts for donating to this specific fund. You may insert mail merge fields to fill in information such as the donation fund name, the donation amount, and donation date. Please see *Chapter 22 - Letters, Labels & Email* for more information about writing the letter. These letters are available to be printed after posting a donation payment on the Donation Detail screen.
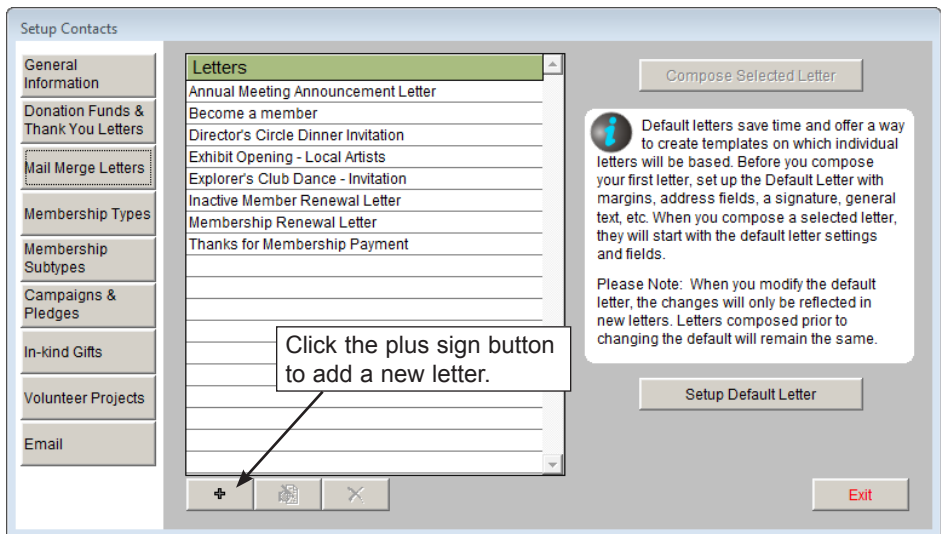
Mail Merge Letters

Mail Merge letters are general mailings to your members, potential members, and other contacts. These letters encompass most mailings you may send, except for donation and pledge thank you letters or pledge reminder letters. Mail Merge letters may be printed for an individual contact by clicking the Print button in the Navigation Bar at the top of a contact record. They can also be printed for groups of people from the Contact Lists screen. Use this screen to compose these mail merge letters.

Setup Default Letter - To help save time when adding new mail merge letters, you should first create a default letter by clicking **Setup Default Letter**. This will open MS-Word, where you can enter your template letter information. When you create a new mail merge letter, it will start with the default letter template.

Compose Selected Letter - To create a new letter, click on the **plus sign** button. Type the name of the letter in the **New Entry** field and click **Add**. The letter name will be added to the list of letters.

Figure 20-4
Setup
Contacts
Mail Merge
Letters
screen

Highlight the letter name, then click the **Compose Selected Letter** button and MS-Word will appear, seen in Figure 20-5. If you have set up a default letter, you will see that text here. Compose your letter on this screen. Mail merge fields, which will be replaced with information from each contact's record when printed, can be added with the **Insert Selected Field** command. These fields include membership

types, dues amounts, membership expiration dates, donation and dues summary data, pledge and prospect information and biographical information. For more details about composing your Mail Merge letters, please see *Chapter 22 - Letters, Labels & Email.*
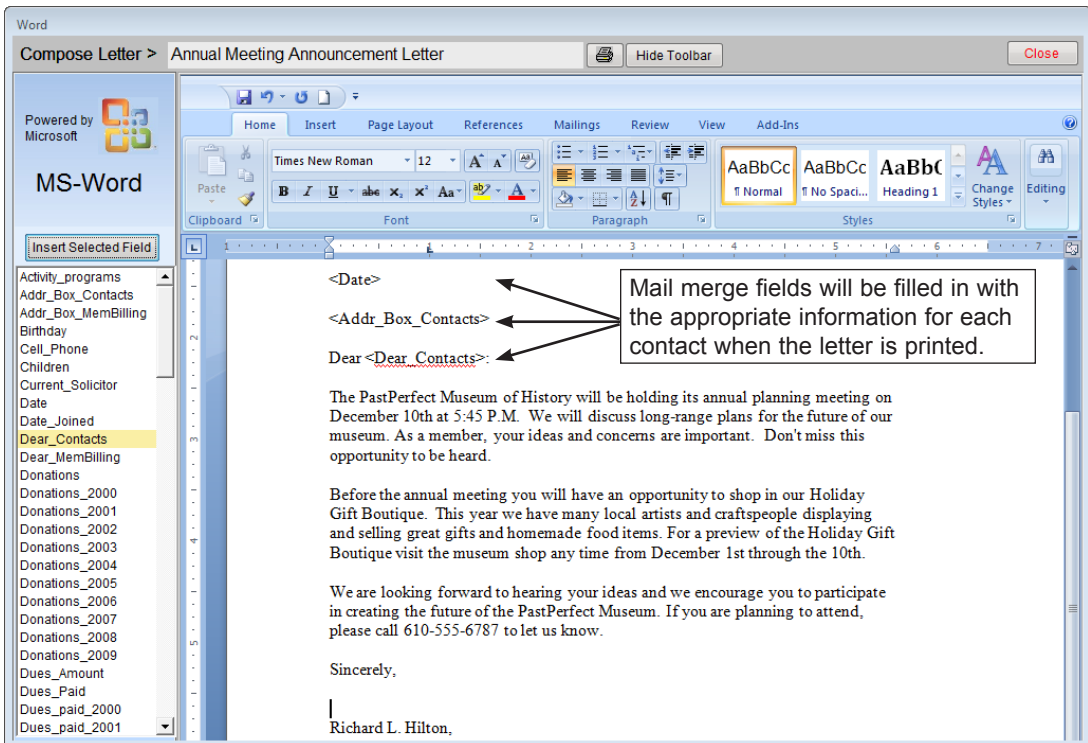

Figure 20-5 Word screen for a Mail Merge letter

To edit an existing letter name, click on the name in the Letters list to select it. Then click the **edit** button.   On the Modify Entry screen, change the name and click **Save** to make the change. To delete an existing letter, click on the letter to select it. Click on the **red X** button, and then click **Yes** to confirm the deletion of the letter.

Membership Types and Membership Subtypes

Most museums and collecting organizations have memberships with varying levels of support. The Membership Type and Membership Subtype screens allow you to create the types and subtypes used for your memberships. These options

will then be available in the corresponding fields on the Membership Screen View of the Contacts screen. It is recommended that you set up membership types and subtypes before creating memberships on the Contacts screen.

Figure 20-6
Setup
Contacts
Membership
Types and
Subtypes

Membership types and subtypes should be defined before beginning to create memberships on the Contacts screen.
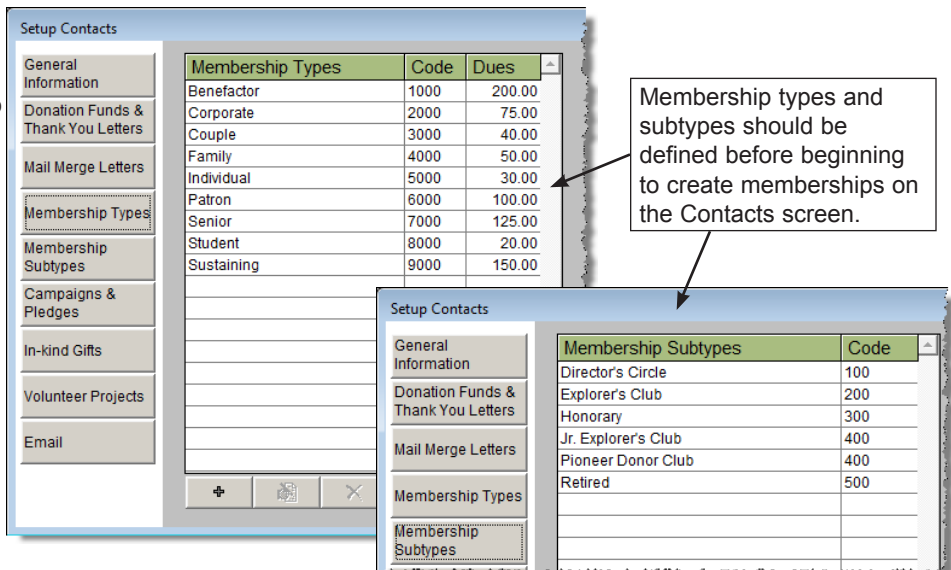
To add a new membership type or subtype, click the **plus sign** button. Enter the name of a type (or membership level) in the **New Entry** field of the **Add New Entry** screen. Each type and subtype may be assigned a **Code**. By assigning multiple types and subtypes to a single code you can group them together for accounting purposes. Next, enter the dues amount for the membership type in the **Dues** field. Then click **Add** to add the new membership type or subtype to the list.

To edit a membership type or subtype name, code, or dues amount, select the name and click the **edit** button. On the **Modify Entry** screen, make your changes, then click **Save**.

Please note that if you need to edit a type or subtype name that has already been used for memberships, you will need to do a global change for all members who currently have that type or subtype. If you have posted dues for members with that type or subtype, you will also need to change the type on the Dues Receipt Detail screen for each dues payment that was posted at the old membership type. Otherwise the name will not show up on the Membership screen or Dues Receipt

Detail screen, and it will be more difficult to run reports by that membership type or subtype.

We suggest that you avoid deleting a membership type or subtype once you have created memberships using the type or subtype. You will not see that type or subtype on the Membership and Dues Receipt Detail screens, and you will not easily be able to run reports to find members with that type or subtype. If you need to delete a type or subtype, click on the name, then click the **red X** button, then click **Yes** to delete the name.

If your organization's membership types have changed, we recommend that you add the new types and keep the old ones. This way you will be able to track member levels over time in both the old and new systems.

Campaigns & Pledges

PastPerfect includes the option to keep track of fundraising campaigns and pledges that contacts make toward those campaigns. On this screen, you can compose the Default Pledge Thank You Letter and the Default Pledge Payment Reminder Letter. These default letters will be used as the templates for when you compose new letters on the Campaign Management screen. You may also set up a default Excel spreadsheet for your campaign costs if you have the MultiMedia Upgrade and MS-Excel installed on your computer.

Pledge Default Letters - To compose a default letter for either the **Pledge Thank You Letter** or the **Pledge Payment Reminder Letter**, click on the appropriate button. Compose your default letter in the MS-Word screen. Composing the Thank You Letter and the Payment Reminder Letter on the Campaign Management screen will be discussed further in *Chapter 23 - Campaigns and Pledges*.

Default Excel Spreadsheet for Costs - This Excel spreadsheet should be set up with actions, due dates, names of people involved, and costs for managing your campaign. This spreadsheet will be the template used when accessing the Excel Spreadsheet for Costs on the Campaign Management screen.

In-kind Gifts

In addition to recording monetary donations and dues payments, PastPerfect also tracks in-kind gifts. You may set up different types of in-kind gifts to standardize

how they are recorded. You may also create a default thank you letter for in-kind gifts. This default letter applies to all types of in-kind gifts. Once you have posted the in-kind gift for a contact, you will be able personalize the letter.

Click the **plus sign** button to add a new in-kind gift type. Enter the name of the gift type in the **New Entry** field. Each type can be assigned a **Code**. Codes are optional and can be used to group multiple types for accounting purposes. Then click **Add** to add the new type to the list.

To edit a type or code, click once on the name and click the **edit** button. Make your changes on the **Modify Entry** screen, then click **Save**. Please note that if you need to edit a type for which you have already posted a gift, you will need to go to each of those In-kind Gift Detail screens and change the type manually. Otherwise the type will not show up on the In-kind Gift Detail screen, and you will not be able to run reports easily by that gift type.

Once you have posted a gift with a specific type, we suggest that you avoid deleting that type. You will not see that type on the In-kind Gift Detail screen, and you will not be able to run reports easily on that In-kind Gift type. If you need to delete a type, click on the name, then click the **red X** button, then click **Yes** to delete it.

Volunteer Projects

When managing volunteers, it is important to keep track of the different types of activities or projects that each volunteer takes part in at your organization. This information can be helpful when reporting total volunteer hours at the end of the year, seeing where most volunteer hours are utilized at your organization, or when applying for grants. The Volunteer Projects screen will enable you to add new volunteer project names, which are then available in the Project drop-down menu when entering volunteer hours. There is no limit to the number of projects that you may create.

To add a Project, click the **plus sign** button, then type a project name and project code and click **Add**. Each project must be assigned a project code. Multiple projects may be assigned to a single code for reporting purposes.

Projects may be edited and deleted; however, the same warnings apply as for editing and deleting Membership Types and Subtypes. To edit a project name or code,

click on the name and click the **edit** button. Make your changes, then click **Save**. To delete an existing project, click a project name to select it. Click the **red X** button, and then click Yes to confirm the deletion of the project from the list.

Figure 20-7
Setup
Contacts
Volunteer
Projects

Email

You may send emails from PastPerfect to individual contacts or to groups of contacts on a list. To send emails, you must have an active account with an SMTP email server. Information about your account must be entered on the Setup Email screen. To access this screen click the **Email Setup** button. This will open the Setup Email screen shown in Figure 20-8.

With Security enabled, each PastPerfect user will have different setup information which includes the host name of your SMTP server, your return email address, and your return name for replies. For some email servers, that is all the information required to send emails. For others, you may need to enter a user name, password and port number. If you have questions about these entries, your internet service provider or email administrator can help.

On the left of the screen is a box where you can enter an email signature. Text entered there will be appended to the bottom of each email you send. Once your settings are entered, you may test them by clicking the **Send Test Email** button at the bottom of the screen. You will need to enter an email address in the **To Address** field. This should be your email address, or an address of an email

account to which you have access, so you can verify the email was received. After successfully sending the email and clicking **Cancel** to close the test email screen, click **Exit** to close the **Setup Email** screen.
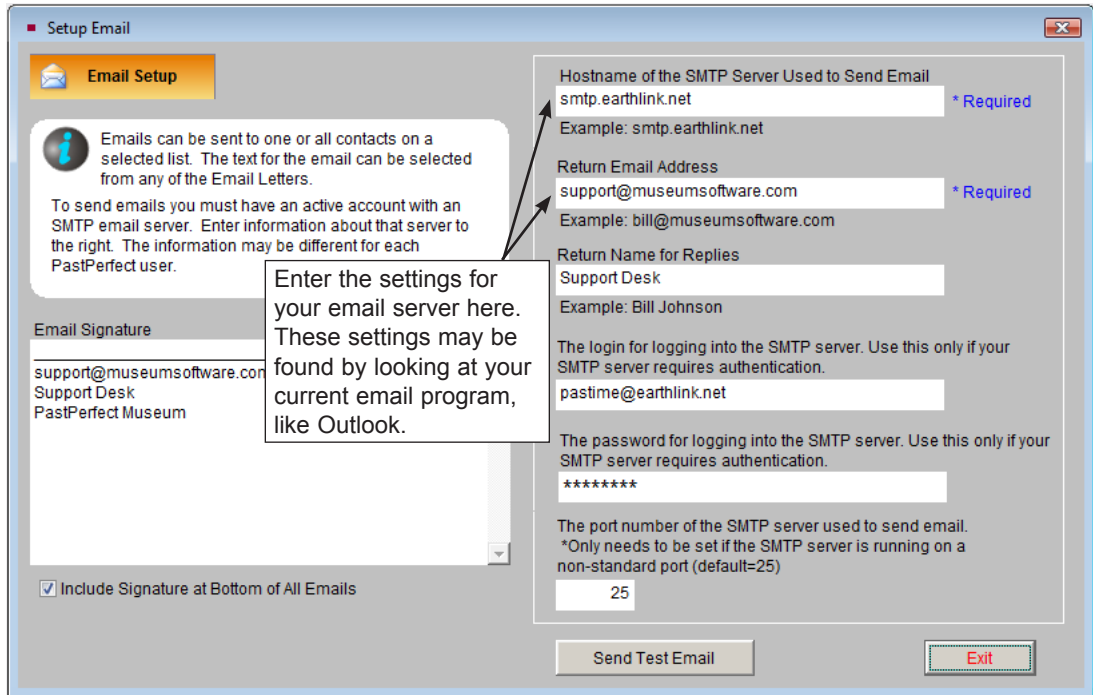

Figure 20-8 Setup Email screen

The Email screen is also used to compose your email letters. To compose an email letter, click the **plus sign** button. Enter a name for the email letter and click **Add.** The new email letter will be added to the list. Highlight the letter, then click the **Compose Selected Email** button and the **Compose Email Text** screen will appear. Please see *Chapter 22 - Letters, Labels & Email* for more information about composing and sending emails.

The Contacts section has its own Authority Files, Custom Fields, Browse screen setup, and Query and Report Maker field selections. It is recommended that you take a look at these sections under **Setup** on the Main Menu, before beginning your data entry.

WORKING WITH CONTACTS

Once you have completed setting up your Contacts section, you are ready to start entering patrons, donors, members, volunteers, etc. Return to the Main Menu and click on **Contacts**.

ADD A NEW CONTACT

Let's begin by adding a new contact. Click **Add** at the top of the Contacts screen. The **Add New Contact** screen in Figure 20-9 will appear.

Figure 20-9
Add New
Contact
screen

The **Add New Contact** screen includes the following fields:

Salutation - This field is controlled by a drop-down menu. Click the down arrow next to the field and click on the appropriate title. This authority file can be added to and edited by going to the Main Menu | Setup | Authority Files | Contacts. If you check the box next to **Include Salutation in Name & Title**, the salutation will automatically be added to the **Name & Title** field farther down on the screen.

First Name - Enter the first name of the new contact. This name will automati-

cally be added to the **Name & Title** field, as well as the **Dear Casual** field.

Middle Name - Enter the middle name or middle initial of the new contact. This name or initial will automatically be added to the **Name & Title** field. It will not appear as a separate field on the contact record.

Last Name - Enter the last name of the new contact. This name will automatically be added to the **Name & Title** field, as well as the **Dear Formal** field along with the Salutation.

Title - Enter the contact's position within a company, military title, or honorable title. This title will automatically be added to the **Name & Title** field, separated from the name with a comma.

Name & Title - This is the formal title of the contact. It will be printed on mailing labels and letters. If the field does not display the name as you want it to appear on mailings, you may manually change the name here.

Company - If the contact you are adding does not represent a company or organization, you should leave this field blank. However, if the contact is representing a company or organization you may add the company name here. This company name will appear on your mailing labels and letters printed from PastPerfect.

If you do not have a primary contact for a company or organization, but still wish to have a contact record for the company in your database, you may leave the First Name, Middle Initial, and Last Name fields blank, and only enter in the name of the Company in the Company field. However, it is recommended to include a primary contact and the company's name on the contact record if possible.

ID# - Each contact must have a unique ID#. PastPerfect will automatically assign the next available number in this field. You may change the number if needed, but you will be prompted to enter a different number if the number you entered is already assigned to a contact. The ID# may be up to 6 digits. It cannot include punctuation or letters.

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: other number, group, primary and secondary addresses, phone numbers, fax numbers, website, and lists.

Figure 20-10
Contacts
Default Data
screen

To add new contacts to lists automatically, check the boxes next to the lists.

To add or alter default data, click **Change Default Data** in the **Add New Contact** screen. Click in the field you want to add to or change and type your text. To add contacts to one of the mailing lists, check the box next to the list name. Click **Close** to save your changes.

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

Fill with Current Data

Another option to help speed data entry is to use **Fill with Current Data**. By selecting this option, the new contact record that you add will be filled in with

the same data as appears on the contact record showing behind the **Add New Contact** screen. This can be particularly helpful if you are adding family members with the same address and phone numbers.

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. If the contact is listed, you do not need to add them again.

Once the fields are completed, click the **Add New Contact** button to create the new contact record.

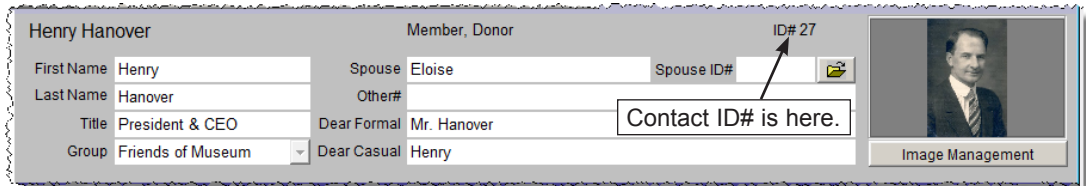## FIELDS AT THE TOP OF THE CONTACT SCREEN

Figure 20-11 Top portion of the Contacts screen

The **First Name**, **Last Name**, and **Title** fields are filled in with the data you entered on the **Add New Contact** screen. The **Dear Formal** field is filled in with the Salutation plus the Last Name, and the **Dear Casual** field is filled in with the First Name. These Dear fields are used when printing mail merge letters. If the names in any of these fields are not as you would like them, you may edit them.

Group - Groups may be used to define the relationship between your organization and the contact. A contact can only be in one group at a time, so your groups should be mutually exclusive. Chose a group from the drop-down menu. You do not need to assign every contact to a group. Groups are defined by going to the Main Menu | Setup | Contacts | General Information.

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

Other # - If you have another numbering system you currently use, or a numbering system from a previous software, enter the contact's number here.

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

MAILING ADDRESS SCREEN VIEW

Figure 20-12 Contacts Mailing Address Screen View

Primary and Secondary Address - For contacts with summer and winter addresses, you may enter a primary address and secondary address. Enter the MM/DD range when the contact wishes to receive his or her mail at the secondary address. PastPerfect will automatically switch to displaying and printing the sec-

ondary address during the specified date range. You may select a type of primary and secondary address, such as Summer, Winter, Home, or Work.

For example, if you have a contact who is at his primary address in Missoula, MT between May 1 and October 31, but then goes to Tampa, FL between November 1 and April 30 each year, here is how you would enter the addresses:

In the primary address, enter the address in Missoula, MT, but do not enter any dates. Choose "Summer" as the type.

In the secondary address, enter the address in Tampa, FL and enter the dates From "11/01" Thru "04/30" then choose "Winter" as the type.

If you do not enter a date range, PastPerfect will always use the primary address for mailings. This can be useful if you want to use a home address as the primary address, but you also want to store a work address in the record but not mail to it.

The address that you enter when the Primary radio button is selected is the primary address; the address that you enter when the Secondary radio button is select is the secondary address. Once the addresses are both entered and saved, you may view and edit the other address by clicking the **View Other Address** button under Actions on the Sidebar. The primary and secondary addresses also include the phone number and fax number fields.

Company - Note the file folder icon next to the Company field. This indicates that there may be additional information about the company. Click on the **file folder** icon to edit or view the information.

Pushpin Icon - You may map the address contained in the primary or secondary address fields by clicking the **pushpin icon**. The address may also be mapped by clicking on the **Map this Contact** button under Actions in the Sidebar. You must have mapping software installed to use this feature. Mapping software can be set up by going to the Main Menu | Setup | Mapping.

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 change history, or click the **View Address History** button on the Sidebar under Actions.

Email - Enter one email address for the contact. This can be used to send an email directly to the contact from this record, or for mass emails from Contact Lists.

Send Email - The **letter icon** next to the email address will allow you to compose and send an email to this contact. Be sure your email parameters are set up as described in the Setup Contacts section of this chapter before trying to send email. An email address must be provided in the Email field to send email. To send an email to a contact from the contact screen:

1. Click the letter icon. The recipient's name will be entered automatically in the To Name field, and the email address in the To Address field. You may enter another email address in the CC (carbon copy) field, so the email is sent to both addresses.

2. Click anywhere inside the **Subject** box to type a subject.

3. You may attach a file by clicking the **paper clip icon** at the end of the **Attachment** field. Find the file, click on it, and click **OK** to attach it.

4. Select whether this email will be composed in Plain Text or HTML by selecting the radio button at the bottom of the screen. Then click inside the large white space to type your message.

5. If you would like to include your signature, make sure the **Include Signature** box is checked. If you do not want to include a signature, click the box to uncheck it. You may change the signature by clicking the **Change Signature** button.

6. Click **Send**. (You must be connected to the Internet before clicking Send.)

7. Click **Yes** to add the entry to the mailing log, so you can track that it was sent.

Website - Enter a website associated with this contact. You may view the website by clicking the **Internet Explorer icon** to the right of the Website field. You must be connected to the Internet to view Web pages.

Contact Lists

This section of the screen displays the names of the Contact Lists to which this person has been added. You may also add the contact to lists, remove the contact from lists, view more information about lists and administer lists from this screen. Placing the contact on appropriate Contact Lists will be important when you are ready to send letters and emails to your contacts and members through the Contact Lists section under Development on the Main Menu. For more information about creating Contact Lists, please see *Chapter 21 - Contact Lists*.

Figure 20-13
Contact Lists
section
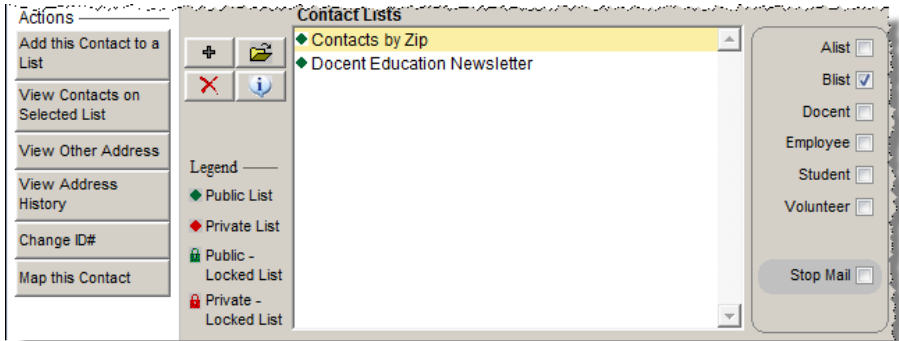
There are four buttons to the left of the Contact Lists field. These are the plus sign button, the file folder icon, the red X button, and the info button.

To add a contact to a list:
1. Click the **plus sign** button, or click the **Add this Contact to a List** button under Actions on the Sidebar. This will open the **Add Contact Record to a List** screen.

Figure 20-14
Add Contact
Record to a
List screen
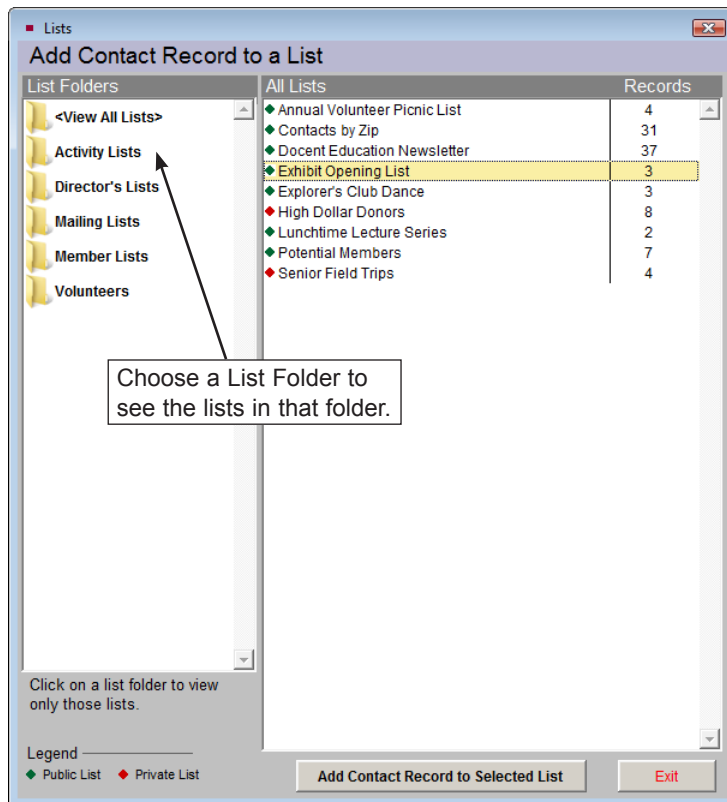
2. Click on a **List Folder** to view lists in that folder in the screen on the right.

3. Click on the list you want to add the contact to, then click **Add Contact Record to Selected List** at the bottom.

4. A message will tell you the contact has been added to the list, click **OK**.

5. You will return to the contact's screen. The new list will appear in the Contact Lists field.

To view all contacts on a list, or perform actions on a list:

1. Click once on the list that you want to view.

2. Click the **file folder** icon, or double click on the list name.

3. This will open the **View Contact List** screen in Figure 20-15. You can see all the contacts on this list in the grid in the middle of the screen.

ID#	Name and Title	Address1	City	State	Zip	Donations
1	Richard Hilton, Chief Software Architect	300 N. Pottstown Pike	Exton	PA	19341	1550.00
2	Mary Parr, President	300 North Pottstown Pike	Exton	PA	19341	3575.00
3	Melissa Potter	1234 North Main Street	Perfectown	HI	96345	975.00
4	Jean Anne Johnson	56433 Newgrove Avenu	Westgrove	PA	19345	3150.00
6	Dr. Karen E. Slater	5678 Penney Lane	Cheltenham	PA	19544	1250.00
8	Mr. and Mrs. Bernard Blaine	3456 3rd Avenue	Tamaqua	PA	10334	22500.00
9	George M. Kittridge	68000 State Route 11	Perfectown	PA	19588	38000.00
11	Mr. & Mrs. Earl L. Hilton	125 Main Street	Tamaqua	PA	19833	500.00
12	Juanita Estevez	5596 Hyde Park	Philadelphia	PA	19576	3700.00
13	Eric J. Jenkins	4532 South Hill Street	Cheltenham	PA	19654	5500.00
14	Ms. Laura Jenkins, Director	4532 South Hill Street	Cheltenham	PA	19654	2295.00
16	Millicent Carter, CEO	3456 South Parsable Driv	Perfectown	PA	19876	16400.00

Figure 20-15 View Contact List screen

4. If you want to view the contact records for the people on this list, click the button for **View Records**. You can edit these records and perform actions while viewing this subset of the selected records. To view all records, click **Return To Viewing All Contacts** in the top right corner of the contact screen. For more information about the other options available on the View Contact List screen, please see *Chapter 21 - Contact Lists*.

To remove a contact from a list:

1. Click once on the list from which you want to remove the contact.

2. Click the **red X** button.

3. You will be asked if you want to remove the contact from the selected list. Click **Yes**.

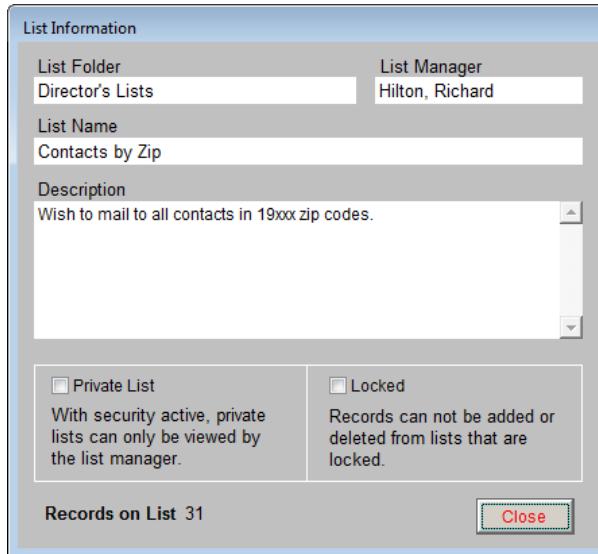**To view more information about a selected list:**

1. Click once on the list for which you want more information.

2. Click the **info** button.

3. This will open the **List Information** screen. You can see the **List Folder**, **List Manager**, **List Name**, and **Description**, as well as see whether the list is **Private** or **Locked**. At the bottom of the screen you will see the number of contacts on the list. This information can be changed by going to the Main Menu | Contact Lists | [select list] | Change List Name or Parameters.

Figure 20-16
List Information
screen

Fixed Lists on the Contact Screen

In addition to the Contact Lists that you create, PastPerfect has several pre-defined lists to which you may add your contacts. One contact may be on any combination of the User Defined Contact Lists and Fixed Lists. The Fixed Lists can be used for sending letters and emails. The lists to which you may add contacts are: A List, B List, Docent, Employee, Student, Volunteer, and Stop Mail. You may view these lists by clicking on Contact Lists on the Main Menu. See Figure 20-17.

Figure 20-17
Fixed Lists on
Contact screen
and Contact
Lists screen

Fixed Lists	
List Name	Records
All Contacts	37
Alist	5
Blist	8
Docents	2
Employees	0
Students	0
Volunteers	0
Gold Donors	5
Silver Donors	8
Bronze Donors	16
Donated	32
Never Donated	5
Contacts that have Pledged	31
Contacts that have Never Pledged	6
Contacts with Membership	30
Contacts without Membership	7
Billing Members	25
Non-billing Members	5
Memberships Overdue	13
Memberships Inactive or not Overdue	12
Life Members	1
Active Memberships	23
Inactive Memberships	2
Current Memberships	10
Stop Mail	0

If a contact has a Fixed List box checked on his or her Contact screen, then that contact will be on the Fixed List that appears on the Contacts List screen.

A List and **B List** - These are lists that you may define for groups at your institution, such as Board Members or Special Guests. You may rename the lists by going to the Main Menu | Setup | Custom Fields | Contacts.

Docent, Employee, Student, and Volunteer - Use these lists to track your institution's docents, employees, students and volunteers. These lists are especially helpful when you need to contact these people as a group, and for keeping track of contacts' roles at your institution.

Stop Mail - Use this to tell PastPerfect not to include this person in mailings. If you check Stop Mail on a contact record, the contact will still be counted in Contact Lists and Fixed Lists, but no letter, label, envelope, or email will be produced for them when you create a mailing. This is helpful if a contact has requested that you not contact them, or for contacts who are deceased.

To add a contact to a Fixed List:
1. Click **Edit** at the top of the Contact screen.
2. Click in the box next to the list to which you want the contact added. You may choose as many as apply.
3. Click **Save** at the top of the screen to save your changes.
4. If you want to remove a contact from a fixed list, click **Edit**, click in the box next to the list to remove the check mark, then click **Save**.

PastPerfect automatically maintains additional fixed lists based on donation and membership criteria. You may view these fixed lists using the **View Contacts on Selected List** button in the Actions section of the Sidebar or by going to Contact Lists from the Main Menu.

Custom Fields - You may create custom fields for Contacts. There are seven character fields with authority files (UDF 1-3 and UDF 10-13), one date field (UDF 4), and five numeric fields (UDF 5-9). To create your own field names for these fields, go to the Main Menu | Setup | Custom Fields | Contacts. You may also rename the A List and B List on the Custom Fields Setup screen.

Change ID# - This button appears in the Sidebar under Actions when viewing the Mailing Address. If you need to change the contact's ID#, click this button. On the screen that appears, enter the new number and click **OK**. If the new number is already assigned to another contact, you will be asked to use a different number. If the contact has a membership, this will not change the Membership#.

MEMBERSHIP SCREEN VIEW

Offering membership in your museum or organization gives the people of your community an opportunity to support and participate through programs, events, and activities. Membership can also provide an important source of revenue for the museum.

Use this screen, seen in Figure 20-18, to create, view, and edit membership information, including membership name, type, billing information, dues receipts, past-due reminder letters, and more.

Figure 20-18 Membership Screen View
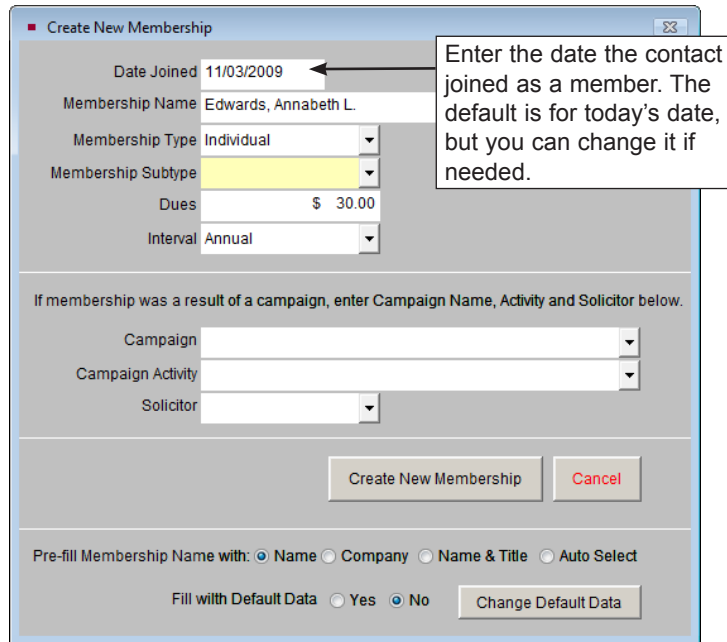
Creating Memberships

There are two ways to create memberships in PastPerfect. One is to create a new membership for a contact. Use the **Become a New Member** button for a contact who has decided to join your institution as a new member, or when entering backlogs of old memberships.

A contact may also be added to an existing membership. Use **Join an Existing Membership** when the contact is not getting his or her own membership, but has become part of another contact's membership. If you have family memberships, this can be used to join people within the household who have their own contact records to one membership record. We will walk through the steps of creating both types of memberships here.

To create a new membership for a contact:
1. Create a contact record for the member. Click **Save** at the top to save your new record.
2. Click the **Membership** button under Screen View.
3. Click **Become a New Member** under Actions in the Sidebar.
4. Fill in the fields on the **Create New Membership** screen:

Figure 20-19
Create New
Membership
screen

Date Joined - This field will be pre-filled with today's date. If this member joined before today, for example if you are entering a backlog of memberships, you may change this date to reflect the date the member joined.

Membership Name - This field will be pre-filled with either the Name, Company, or Name & Title field from the contact record. You may change which field pre-fills the Membership Name by changing the option at the bottom of the screen for **Pre-fill Membership Name**. If you choose **Auto Select**, PastPerfect will use the Company name if there is one, or the name in Last name, First name format if there is no company. If there is no Last Name and First Name, it will use the Name & Title field. It is suggested that you format the Membership Name in Last Name, First Name format to be able to sort memberships alphabetically.

Membership Type - Use the drop-down menu to choose the membership type for the member. The **Dues** field will be filled in with the dues amount for that membership type. The membership types and dues amounts are set up by going to the Main Menu | Setup | Contacts | Membership Types.

Membership Subtype - If your institution uses subtypes, choose the subtype from the drop-down menu. This field is not required. The membership subtypes are set up by going to the Main Menu | Setup | Contacts | Membership Subtypes.

Dues - Use this field to record the default dues amount for the chosen membership type.

Interval - Use this field to record how often the member will pay dues. If the member is a Life member, choose Life as the interval.

Campaign, Campaign Activity, and **Solicitor** - If the member joined as a result of a campaign, choose the campaign name, campaign activity, and solicitor from the drop-down menus. These fields are not required. For more information about setting up campaigns, see *Chapter 23 - Campaigns and Pledges*.

Fill with Default Data - You may set up default data to speed data entry when creating new memberships. Enter your default data by clicking **Change Default Data**. The default data will be pre-filled for each new membership. This can be helpful if many of your memberships have the same information, such as an Interval of Annual. To use the default data, click the **Yes** radio button next to **Fill with Default Data**.

Once you have filled in the fields on the **Create New Membership** screen, click the **Create New Membership** button.

To add a contact to an existing membership:
1. First, make note of the membership to which you would like to add your contact.
2. Create or navigate to the contact record for the person who will be added to the existing membership. Click the **Membership** button on the screen, then click **Join an Existing Membership** under Actions in the Sidebar.
3. Click once on the existing membership from the **Membership List**, as seen in Figure 20-20.
4. Click **Assign**.
5. Click **OK**.

Figure 20-20 Membership List for Joining Existing Membership

6. You will see the Membership screen that is shared by all contacts in this membership. This screen reflects the membership and dues history for all the contacts in the membership. The new contact will be listed under **Contacts in this Membership**.

Figure 20-21
Contacts in this
Membership
List

There are two contacts in this membership. They will share membership information and membership dues history.

You will now be able to fill in more of the membership fields and enter dues payments. Two fields should be made note of on the new member's screen:

Figure 20-22 Membership screen for a new member

This is the Bill to Member - One contact per membership is designated as the Bill to Member, meaning that contact will receive the membership invoices. By default, this is the first contact added to a membership. If you add more contacts to this membership, they will not be the Bill to Member, as only one contact can be designated as the Bill to Member. If you need to change the Bill to Member to a different contact, first go to the non-billing member's contact record and click the **Membership** button. Click **Edit** at the top of the screen, then click **Yes** next to **This is the Bill to Member**. Other contacts' status will be changed to **No** (non-billing members).

Include this Membership on the Overdue List - By default, this membership will be set to be included on the Overdue List by having **Yes** selected here. This means the membership is active, and your organization will continue mailing information and overdue notices when applicable. The membership will show up on the **Active Memberships** Fixed List. See Figure 20-23. If this is set to "No," then the membership will be inactive. An **Inactive Membership** flag will appear on the screen and the member will be on the **Inactive Memberships** Fixed List.

Figure 20-23 Membership screen and Active Memberships Contact List

You may choose to set your members to "No" to make them inactive after their memberships have expired for a certain period of time. PastPerfect does not do this automatically. It is up to your organization to decide which members become inactive and when.

Using the Alternate Billing Address

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

Alternate Billing Address - The alternate billing address is helpful if a contact receives a gift membership. The gift membership is entered as outlined above for creating a new membership. The giver's contact information may be added as the alternate billing address, as seen in Figure 20-24.

To create an alternate billing address:
1. On the Membership view, click **Alternate Billing Address** under Actions in the Sidebar. Then click **Edit** on the screen that appears.
2. Check the box at the top of the Alternate Membership Billing Address window.

3. Enter the Primary and/or Secondary address information for the person who will receive the membership bills. Be sure to enter the name of the giver as well as the address.

4. Select Primary-Alternate Address For Billing Information button or Secondary-Alternate Address button.

5. Enter Alternate Billing Contact information. The Alt-Dear field is printed on letters, so be sure to enter the giver's name as you want it to appear.

6. Click **Save**, then **Close**.

Figure 20-24
Alternate
Membership
Billing Address
screen

The alternate billing address will be used for this member when printing letters, labels, and envelopes. To make sure this alternate billing address is used when mailing to the entire membership, you will need to use the Billing Members Fixed List when mailing to members, or use billing members when creating your own lists. When printing labels, use Label Style 4, 5 or 6. Letters will need to be modified to include the "Addr_Box_MemBilling" and "Dear_MemBilling" fields. For more information about creating letters and labels using the alternate billing address, please see *Chapter 22 - Letters, Labels & Email.*

Enter Dues Receipts

To enter a Membership Dues receipt:
1. Click on the **Membership** button, then click **Enter Dues Receipts** on the Sidebar under Actions or click the **plus sign** button above the Dues Payment History.
2. Enter date, amount, payment type, reference or check number, revenue restriction, revenue source, membership type and subtype, tax deductible amount, and any notes related to this payment.

Figure 20-25
Enter Dues
Receipt screen

3. The **Paid Thru Date** (membership expiration date) will be automatically updated based on the last Paid Thru date and the Payment Interval field. For a new membership you will need to manually enter the date. You may need to change this date manually if the payment is past due, to reflect the new expiration date for the membership.
4. The **Complimentary** check box allows you to enter a dues receipt with an amount of $0.00. Checking this box will also place a Complimentary flag on the Membership screen so you know the last dues payment was complimentary.
5. Click **Post**.

If the dues amount you entered was different from the default dues amount, you will be asked if you want to change the default dues amount for this member to the new amount. Clicking **Yes** enters the new amount in the Dues Amount field in Payment Information on the Membership screen.

Once the dues amount is posted, you may preview or print the **Dues Receipt**. To modify the dues receipt form, go to the Main Menu | Reports | Dues & Donations | Dues Payment Receipt | Custom Layout 1 or 2 | Modify Report Layout. After you have printed the dues receipt, click **Close**.

TIP

If you would like to send a thank you letter to this member for joining or renewing the membership, you may do so by printing a mail merge letter. Mail merge letters are accessed by clicking Print at the top of the contact screen. The letters are set up by going to the Main Menu | Setup | Contacts | Mail Merge Letters.

The new payment will be listed under Dues Payment History. If you need to modify or delete this payment, double click on it to bring up the **Dues Receipt Detail** screen, or click once on the payment and click the **file folder** icon above the Dues Payment History. You will see the screen shown in Figure 20-26.

Figure 20-26 Dues Receipt Detail screen

To print or preview all the dues payments for this membership, click the **Print Dues Payment History** button under Actions in Sidebar, or click the **printer** icon above the Dues Payment History.

After a dues payment is posted, you will see the **Last Paid Date** and the **Paid Thru Date** under Payment Information updated to reflect the latest payment. If a membership is overdue, you will see a Membership Payment Overdue flag above the Payment Information.

Figure 20-27
Payment
Information
section of
Membership
Screen View

The Paid Thru Date determines whether a member is overdue or not.

Below the Payment Information section you will see the **Ten Year Summary** of dues payments. This summary displays the total dues payments from this member for the past ten fiscal years.

Overdue/Renewal List & Letters

Click **Overdue/Renewal List & Letters** under Actions on the Sidebar to see a list of members whose dues are outstanding for the date range at the top of the screen, shown in Figure 20-28.

NOTE   The Overdue/Renewal List shows only the Bill to Members, not all contacts assigned to a membership. It also includes only the memberships that have Yes selected for Include this Membership on the Overdue List.

From this screen you can print overdue letters and mailing labels or print a copy of the entire list. PastPerfect automatically updates the overdue list according to the Paid Thru Date field on the Membership screen.

Figure 20-28 Membership Renewal List

You may change the **Paid Thru Range** at the top of the screen to see memberships that expire in different date ranges. For example, if you want to see all members who are overdue as of a certain date, such as 09/10/2009, going all the way back to the earliest of your memberships, for the Paid Thru range enter: 01/01/1900 through 09/10/2009. If you want to see only memberships which expired in August 2009 enter the Paid Thru range: 08/01/2009 through 08/31/2009.

You may change the order of the list by clicking on the column heading by which you want the list sorted. This screen will also give you a count of memberships on the list, and a total amount of the dues payments that would be paid by these memberships. If you do not want to see memberships with Stop Mail, uncheck the box for **Include Members Marked Stop Mail**.

To print this list, click the **Print List** button at the bottom of the screen. The list will be printed as it appears on the screen, and also include Membership numbers, Types and Subtypes.

To print letters for the members on this list, click the **Print or View Letters** button. This will open MS-Word. You will be able to choose the letter you want to print, then do a mail merge printing for these members. This is an easy way to print renewal reminder letters or renewal thank you letters for your members. Letters are set up by going the Main Menu | Setup | Contacts | Mail Merge Letters. For more information about printing letters, please see *Chapter 21 - Letters, Labels & Email*.

To print labels or envelopes for the members on this list, click the **Print or View Labels & Envelopes** button at the bottom of the screen. You may set the Sort by order and choose your label style. These labels and envelopes can be printed to be used with the letters printed from this screen and for other mailings.

You may also process membership renewals from this screen by posting dues payments for the members on the list. Select a membership name and click **Renewal**. Enter the dues payment information and click **Post**. From this screen, you may also preview and print the member's dues history by clicking **History**, or preview or print the Dues Payment Receipt.

From the Membership Renewal List screen, you may also jump to a member's record by double clicking on the membership name. This can be helpful if you need to edit something on the member's record before printing or posting dues.

Other Membership Actions

Change Membership# - If you need to change the Membership#, click this button. On the screen that appears, enter the new number and click **OK**. If the new number is already assigned to another membership, you will be asked to use a different number. This will not change the Contact ID#. The Membership# will be changed for all contacts in this membership.

Delete Membership - It is rare that an organization will want to delete membership records. However, you may delete a membership without deleting the contact record. If you want to completely remove the membership and all dues payments associated with it, you must first delete all dues payments paid to this the mem-

bership. The dues payments will not be deleted when you delete the membership. If there are dues payments when you click this button, you will receive a warning message telling you to delete the dues payments first, or the dues payments will no longer be associated with any membership. Once the dues payments are deleted, you may delete the membership.

If you have joined a contact to an existing membership, and you want to remove that contact from the existing membership and leave the existing (Bill to) membership intact, you may use this Delete Membership function. You do not need to delete any dues payments. Clicking this button will remove the link from the contact to the main membership, but it will not delete the membership itself. The membership can still be viewed on the main member's screen. The contact you are removing from the membership cannot be set as the Bill to Member. If he or she is the Bill to Member, you will need to designate another contact in the membership as the Bill to Member first, then delete the membership on the non-Bill to Member's record.

PLEDGES SCREEN VIEW

The Pledges Screen View has solicitation information on the left side, and a list of current and past pledges in the grid on the right. The solicitation fields can be used for printing prospect reports. They are as follows:

Prospect Rating - This field is used to indicate whether the contact is a good prospect for making gifts and donations to your institution. The field is controlled by a drop-down menu authority file. You may edit this authority file by going to the Main Menu | Setup | Authority Files | Contacts | Prospect Rating.

Income Level - Use this field to denote the income level range of the contact. This field is controlled by a drop-down menu authority file. You may edit this authority file by going to the Main Menu | Setup | Authority Files | Contacts | Contact Income Level.

Potential Pledge Amount - This field can be used to estimate the total potential pledges for the contact.

Original Solicitor and **Current Solicitor** - Use these fields to track the original donation solicitor for the contact and the current solicitor. These fields are controlled by a drop-down menu authority file. You may edit this authority file by

going to the Main Menu | Setup | Authority Files | Contacts | Solicitors.

Follow-Up Date and **Type** - If you want to schedule a time to contact this person, enter the date in the Follow-Up Date field. Enter the method of your follow up in the Follow-Up Type field. Contacts with a Follow-Up Date and Type will appear on the **To Do List** at the top right of the Contacts screen.

Last Mailed or Contacted - This field is automatically updated with the date and time a letter, label, or email is generated for this person. You may also edit the field to enter a different date, if the person was contacted via phone or other method outside of PastPerfect.

Total Pledged - This amount is automatically calculated by totalling the amounts in the Pledge Amount field in the grid to the right.

Please see *Chapter 23 - Campaigns and Pledges* for information about posting, viewing, and editing pledges on this screen view.

DONATIONS SCREEN VIEW

Donations are payments made to your organization that are not membership dues or in-kind gifts. Donations may be the result of solicitations by your staff as part of a campaign. Donations may also be unsolicited gifts to your organization.

Donation Information

Donations Received

Date	Amount	Reference	Campaign	Fund	Solicitor
01/05/2009	250.00	8211	2009 Annual Fund Drive	General Operating Fund	Richard L. Hilton
07/01/2008	500.00	8012	Carter Homestead Restoration Project	Restoration Fund - Carter Homest	Richard L. Hilton
09/19/2007	500.00	7458	Carter Homestead Restoration Project	Restoration Fund - Carter Homest	Richard L. Hilton
09/13/2005	8000.00	78651	Capital Campaign 2004	Endowment Fund	Richard L. Hilton
06/23/2005	1000.00	xxxx	Capital Campaign 2004	Endowment Fund	Richard L. Hilton
01/23/2004	1000.00	45890	Capital Campaign 2004	Endowment Fund	Richard L. Hilton
02/22/2000	5000.00	65110	Capital Campaign 2000	Endowment Fund	Arthur A. Allen

Ten Year Summary

Year	Receipts
2000	5,000.00
2001	0.00
2002	0.00
2003	0.00
2004	1,000.00
2005	9,000.00
2006	0.00
2007	500.00
2008	500.00
2009	250.00
Total	16,250.00

Figure 20-29 Donations Screen View

If a contact has made a campaign pledge, subsequent donations may be applied to that pledge. Use the Donations Screen View of the Contacts screen to enter and edit donations, and view a contact's donation history, including a ten year summary.

To enter a Donation Receipt:

1. Navigate to the donor's Contact record.

2. Click the **Donations** button under Screen View on the Sidebar.

3. Click **Enter Donation Receipt** under Actions on the Sidebar, or click the **plus sign** button above the Ten Year Summary. If the contact has made a pledge, you will be asked if the donation should be applied to that pledge.

4. Fill in the fields on the **Enter Donation Receipt** screen.

5. Click the **Post** button to finish the transaction. After a donation has been posted, the **Thank You Letter** button becomes active.

Figure 20-30
Enter Donation
Receipt screen

To send a thank you letter, click **Thank You Letter** to open the letter in MS-Word. For more information on printing and composing letters, see *Chapter 22- Letters, Labels & Email*. You may also print an envelope from this MS-Word screen.

The following are explanations for fields in the **Enter Donation Receipt** screen.

Campaign and **Campaign Activity** - Use these fields to record the name of the campaign and campaign activity that this donation is going towards. These fields are controlled by drop-down menus built from active campaign records. Campaigns and Campaign Activities are set up by going to the Main Menu and clicking Campaigns. See *Chapter 23 - Campaigns and Pledges* for more information. These fields are not required.

Fund - Choose the fund from the drop-down menu to which this donation will be applied. By choosing the fund, you may run reports by fund and print a thank you letter specifically for donations to that fund. Funds are set up by going to the Main Menu | Setup | Contacts | Donation Funds & Pledges. This field is required.

Date - Today's date is entered automatically, but you can type any date you choose. This field is required.

Amount, Type, Reference, Tax Deduct Amt - Enter the appropriate data here. A reference or check number is required if your payment type is Check. Amount and Type are required fields.

Solicitor, Revenue Restriction, Revenue Source - Choose data from the drop-down menus. The terms in the Solicitor and Revenue Source menus may be changed by going to the Main Menu | Setup | Authority Files | Contacts. These fields are not required.

NOTE   The Revenue Restriction and Revenue Source fields are helpful for tracking donations, corporate, foundation, or government support, in-kind gifts, and memberships. The Restriction field has choices to designate funds as Permanently, Temporarily or Unrestricted. Record the contribution type in the Revenue Source field. The default choices in this drop-down menu are in compliance with Cultural Data Projects.

In Memory of, In Honor of - If the donation was made in memory of or in honor of someone, enter the name here. These fields may be included on thank you letters. They are not required.

Notes - Enter any notes specific to this donation payment. This is an appropriate area to note this is a matching gift or matched gift and list the matching company or individual.

Once the donation is posted and the thank you letter is printed, click **Exit**. The donation will appear in the **Donations Received** screen. If you need to edit or delete the payment, double click on it to bring up the **Donation Details** screen (Figure 20-31), or click once on the payment and click the **file folder** above the Ten Year Summary. You may also print the thank you letter from this screen, if you did not print it immediately after posting the payment.

Figure 20-31
Donation Detail
screen

Preview Donation History and **Print Donation History** - There are two additional buttons under Actions in the Sidebar on the Donations Screen View. They allow you to preview and print a report that details the donation history for this contact. You may also preview and print the report by clicking the **preview** or **printer** icons above the Ten Year Summary.

Ten Year Summary - On the right side of the screen is the Ten Year Summary of donation payments. This summary displays the total donation payments from this contact for the past ten fiscal years.

VOLUNTEER SCREEN VIEW

Almost all museums, no matter how many paid staff they have, rely on volunteers to perform valuable, and often essential functions. Candidates for volunteer positions are usually interviewed concerning experience, abilities and interests. For scheduling, it is important to know when a volunteer is available.

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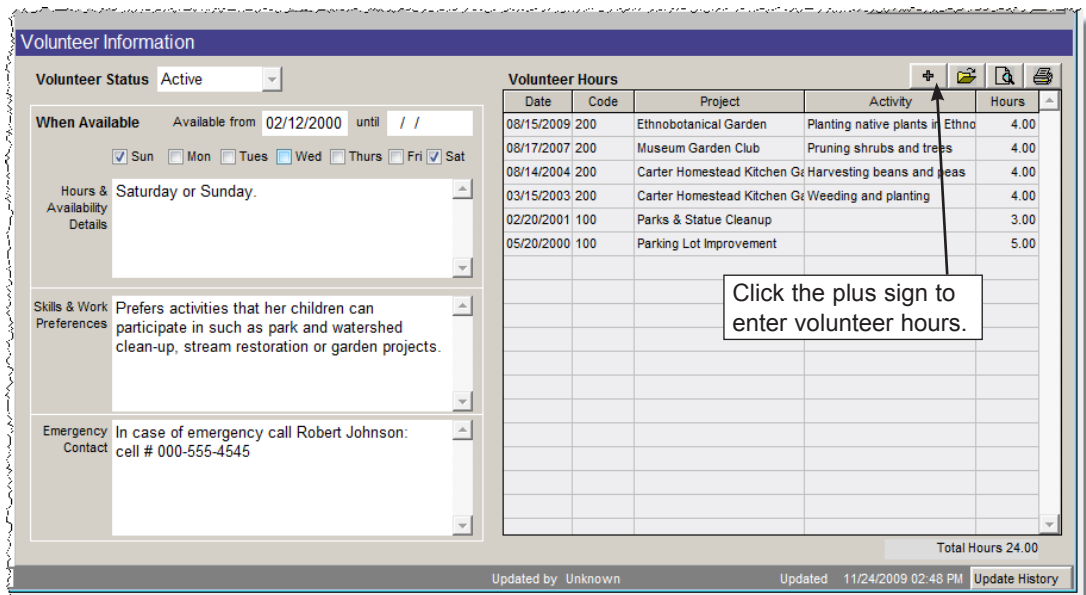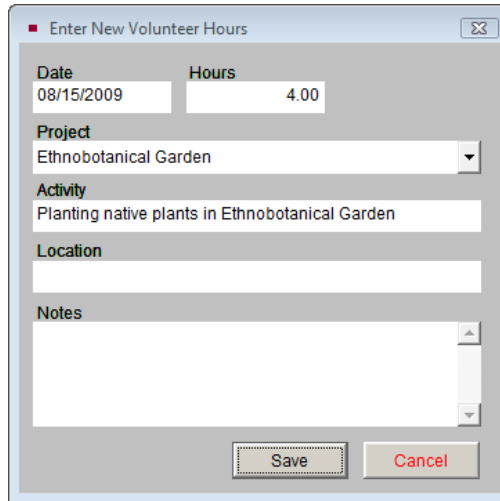

Figure 20-32 Volunteer Screen View

To enter volunteer hours:
1. Click the **Volunteer** button under Screen Views on the Sidebar.
2. Click the **Enter New Hours** button under Actions on the Sidebar, or click the **plus sign** button above the Volunteer Hours. Fill in the fields on the **Enter New Volunteer Hours** screen, seen in Figure 20-33:

Figure 20-33
Enter New
Volunteer
Hours screen

Date and **Hours** - Fill in the date the volunteer worked, and the number of hours worked. These are required fields.

Project - Use the drop-down menu to choose the project on which the volunteer worked. You may print reports based on volunteer projects. Projects are set up by going to the Main Menu | Setup | Contacts | Volunteer Projects. This field is required.

Activity - Enter the activity on which the volunteer worked. This field is controlled by the Volunteer Activities authority file. Right click or press **F7** to access the authority file. To add or edit terms, go to the Main Menu | Setup | Authority Files | Contacts | Volunteer Activity.

Location - Enter the location where the volunteer worked. This field is controlled by the Volunteer Location authority file. Right click or press **F7** to access the authority file. To add or edit terms, go to the Main Menu | Setup | Authority Files | Contacts | Volunteer Location.

Notes - Enter any notes regarding the volunteer's work.

Click **Save** to enter the volunteer hours. The entry will appear under **Volunteer Hours**. To edit or delete the entry, double click on it to bring up the **Volunteer Hours Details** screen, or click once on the entry and click the **file folder** icon above the **Volunteer Hours** listing.
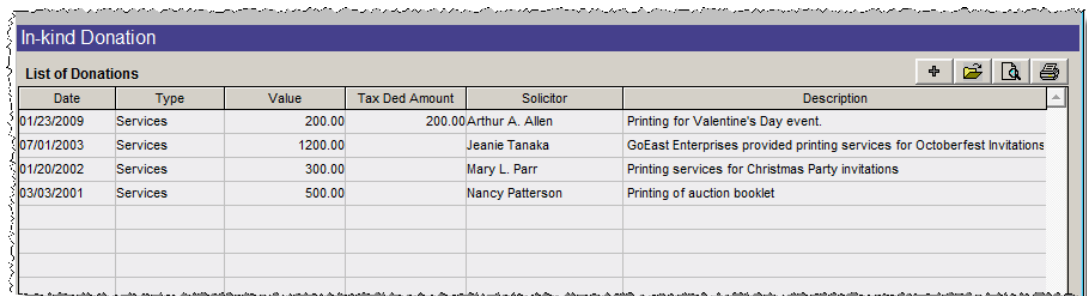
To view or print a report that details volunteer hours for this contact, press the **Preview Hours List** or **Print Hours List** buttons under Actions on the Sidebar, or click the **preview** or **printer** icons above the Volunteer Hours listing.

IN-KIND GIFTS SCREEN VIEW

Some donors are able to give goods and services that can be used for charitable purposes, instead of giving cash or securities. Examples are free printing of invitations and programs by a professional printer, decorations and flowers from a florist, or food from a caterer. In-kind gifts can help reduce the cost of planning events for your organization.

TIP   In-kind gifts include services from any professional such as document review by a lawyer, website work from a Web designer, and building repair by a carpenter. In-kind gifts may also be computers, furniture or other office equipment used by your organization.

In-kind Donation

List of Donations

Date	Type	Value	Tax Ded Amount	Solicitor	Description
01/23/2009	Services	200.00	200.00	Arthur A. Allen	Printing for Valentine's Day event.
07/01/2003	Services	1200.00		Jeanie Tanaka	GoEast Enterprises provided printing services for Octoberfest Invitations
01/20/2002	Services	300.00		Mary L. Parr	Printing services for Christmas Party invitations
03/03/2001	Services	500.00		Nancy Patterson	Printing of auction booklet

Figure 20-34 In-Kind Gifts Screen View

To enter an In-kind Donation:
1. Click the **In-Kind Gifts** button under Screen View on the Sidebar.
2. Click **Enter a New In-kind Donation** under Actions on the Sidebar, or click the **plus sign** button above the List of Donations.
3. Fill in the fields on the **Enter a New In-kind Donation** screen, seen in Figure 20-35.
4. Click on the **Post** button to finish the transaction. After the gift has been posted, the **Thank You Letter** button becomes active. Click this button to

open the letter in MS-Word. For more information on printing and composing letters, see *Chapter 22 - Letters, Labels & Email*.

Figure 20-35
Enter New
In-kind Donation
screen

Below are explanations of the fields in the **Enter a New In-Kind Donation** screen.

Campaign and **Campaign Activity** - Use these drop-down menu fields to record the name of the active campaign and campaign activity that this in-kind donation is going towards. Campaigns and Campaign Activities are set up by going to the Main Menu and clicking Campaigns. See *Chapter 23 - Campaigns and Pledges* for more information.

Date - Today's date is entered automatically, but you can type any date you choose.

Value, Type, Tax Deduct Amt - Enter the appropriate data here. Types are set up by going to the Main Menu | Setup | Contacts | In-kind Gifts.

Solicitor, Revenue Restriction, Revenue Source - Choose the data from the drop-down menus. The terms in these menus can be changed by going to the Main Menu | Setup | Authority Files | Contacts.

In Memory of, In Honor of - If the in-kind gift was made in memory of or in honor of someone, enter the name here.

Description - Enter a description of the in-kind gift.

Once the gift is posted and the thank you letter is printed, click **Exit**. The gift will appear in the **List of Donations** screen. To edit or delete the gift, double click on it to bring up the **In-kind Gift Details** screen, or click once on the gift and click the **file folder** icon above the List of Donations. You may also print the thank you letter from this screen.

Preview In-kind Donation List and **Print In-kind Donation List** - These buttons may be used to preview and print a report that lists the in-kind donations for this contact. You may also preview and print the list by clicking the **preview** or **printer** icons above the List of Donations.

ACTIVITIES, NOTES & PLANNED GIVING SCREEN VIEW
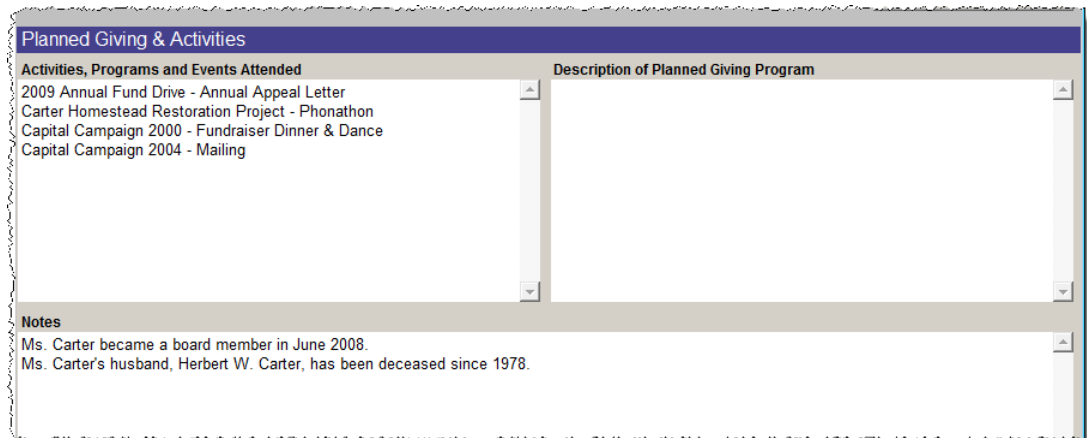
This screen is divided into three sections:

Figure 20-36 Activities, Notes & Planned Giving Screen View

Activities, Programs, and Events Attended - The name of the campaign and campaign activity will be automatically placed in this field when a pledge or donation is attributed to a campaign and activity. Campaigns will be explained in *Chapter 23 - Campaigns and Pledges*. You may also enter information manually, by clicking the

Edit button at the top of the screen and placing the cursor in the field. This field is controlled by the Activity, Programs, and Events Attended authority file. This authority file is automatically populated with the names of your campaigns and campaign activities. Right click in the field or press **F7** to access the authority file.

Description of Planned Giving Program - 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 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.

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

Notes - Enter additional information about this contact.

ACCESSIONS & LOANS SCREEN VIEW

Accessions

The **Accessions** section of this screen view displays 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 in the Contact ID# field. To view a linked Accession record from the Contacts screen, double click on the accession in the listing.
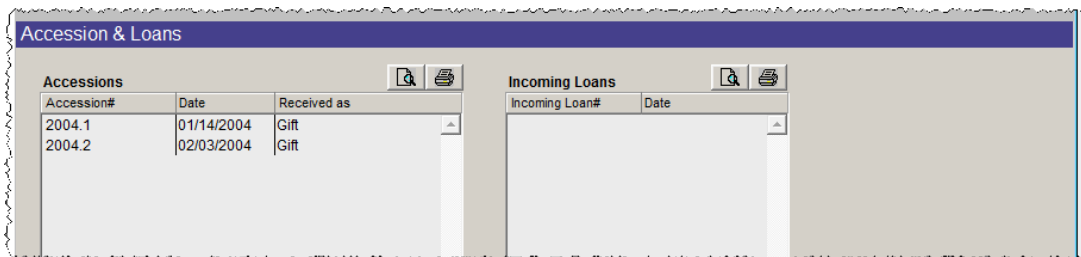

Figure 20-37 Accessions & Loans Screen View

Loans

The **Loans** section of this screen displays any Incoming Loans given by the contact. The link between the contact and the loan is made when entering the incoming loan record, or by entering the contact's ID# in the Contact ID# field on the Incoming Loan screen. To view the Incoming Loan screen, double click on a loan.

If you have made any modifications to the contact's address, phone number, email and website, you can easily update this information in the Accession or Incoming Loan records by clicking **Update Accession Addresses** or **Update Loan Addresses** buttons under Actions in the Sidebar.

To preview the list of accessions or loans given by this contact, click the **Preview Accession List** or **Preview Loan List** buttons under Actions in the Sidebar, or click the **preview** icons above the Accessions or Incoming Loans Lists. To print these lists, click the **Print Accession List** or **Print Loan List** buttons on the Sidebar, or click the **printer** icons above the lists.

GIVING SUMMARY SCREEN VIEW

To see a quick overview of a contact's giving history, click the **Giving Summary** button on the Sidebar. This screen includes both Donation and Membership Dues information.

Figure 20-38 Giving Summary Screen View

BIOGRAPHY INFORMATION SCREEN VIEW

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

This screen also includes a check box to mark when a contact is deceased. Checking this box will place a yellow flag at the top left of the contact's record indicating the contact is deceased. The contact will automatically be excluded when you print mail merge letters, print envelopes and labels, and send emails.

Figure 20-39 Biographical Information Screen View

MAIL & CONTACT LOG SCREEN VIEW

Use this screen to view the contact history for the selected contact, seen in Figure 20-40. The log is updated when a letter or mailing label is printed, an email is sent, or the contact is included in a list exported to Excel. You may also edit this field to add your own entries.
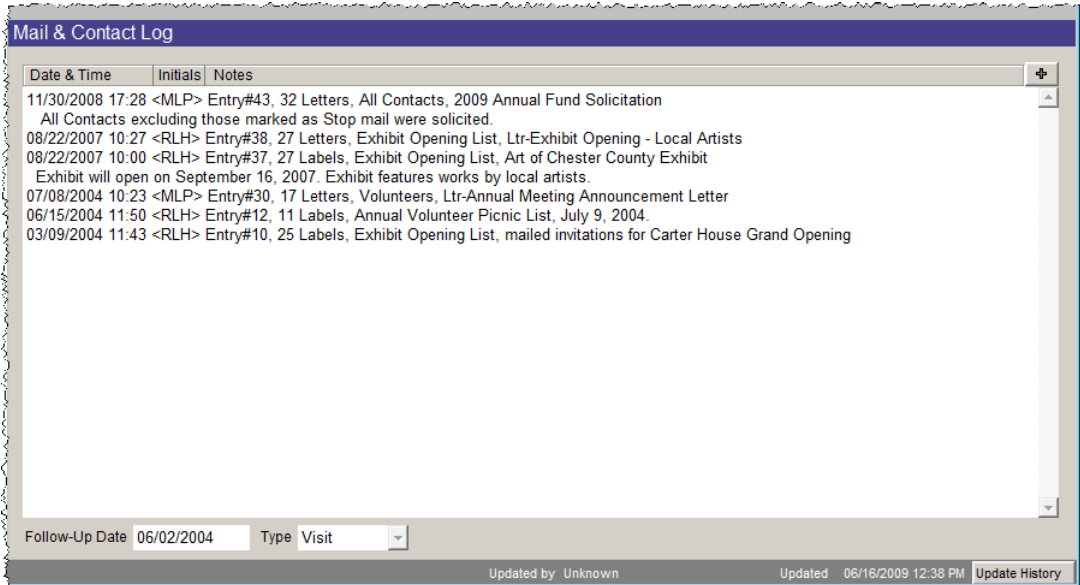
Figure 20-40 Mail & Contact Log Screen View

TIP   To make sure your mailings are included in the Mail & Contact Log, be sure to click Yes on the Add Entry to Mail & Contact Log screen which appears after you print a letter, label, or envelope, send an email, or export a list of contacts to Excel. If you do not click Yes to add the entry to the log, this screen will not be updated.

To add your own entry:

1. Click on the Mail & Contact Log button on the Sidebar.
2. Click on the **New Mail Log Entry** button under Actions, or click the **plus sign** button on the top right of the log.
3. Enter your initials in the Initials field. Initials are required to post an entry.
4. Select an type of entry from the list by clicking on the radio button on the left.
5. If you chose **<Enter your own notes>**, your cursor will be placed in the field where you can enter your own entry type or notes.
6. Click **Save** at the top of the screen.

If you want to view the mailing log for all of your contacts, click the **View Entire Mailing Log** button under Actions. Here you can delete entries according to date, with the **Mass Delete** button or delete them one at a time.

To mass delete entries:
1. Click the **Mass Delete** button. Enter a date in the **Delete all Mail & Contact Log entries older than** field.
2. Click **OK**.
3. Click **Yes**.

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

You may also print the entire log by clicking the **Print** button at the bottom of the screen. Click **Exit** to return to the **Mail & Contact Log** Screen View.

The bottom of this screen also gives you a field for **Follow-Up Date** and **Type**. If you want to schedule a time to contact this person again, enter that in the Follow-Up Date field. Enter the method of your follow up in the Type field. Contacts with a follow-up date and type will appear on the **To Do List** at the top right of the Contact screen.

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 corner of the Contacts screen. The window records the user name of the individual who modified the record and the date it was modified. The Updated by field is filled with the user name when PastPerfect Security is activated.

PRINTING

The **Print** button at the top of the Contacts screen contains **Preview Screen** and **Print Screen** buttons. These allow you to view and print a report containing fields from the Contacts screen for this individual. These fields include: contact ID#, name, address, email, website, phone and fax numbers, group, spouse, total pledged amount, total donation amount, custom fields, notes, activities, mailing lists, last mailed date, follow up date and type, and last donation date.

The **Print** button also allows you to print letters, envelopes and mailing labels for the selected contact, as well as send an email. Please see *Chapter 22 - Letters, Labels & Email* for more information.