

***Team Approach 5.0.1***  
***Managing Account Information***

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## Components of an Account

[Overall Structure](#)  
[Notes and Comments](#)  
[Display Sequence Number](#)

### Overall Structure

When you create an account TA assigns the account a unique identification number called the Account ID. Each time an account is created, TA assigns the next available Account ID.

#### Multiple Names, Addresses, etc. Associated with an Account

You can add multiple names, addresses, and telephone numbers to an account. You also can add an unlimited number of relationships, salutations, interests, and classifications to an account. On the [Account Overview](#) screen, TA displays [specific information in parentheses](#) such as if the name is a child or if the address is a work address.

#### Account Type Versus the Account Category

Each time you create an account, you select the account type for the account (e.g., Individual or Large Corporation). When you select the account type, you automatically select the assigned account category because each account type maps to only one account category.

TA contains the following account categories: Corporation, Foundation, Government, Individual/Family, and Other. The account category groups together account types. TA includes functions specific to an account's account category as noted throughout the Managing Account Information chapter.

- **Individual Account:** The term "Individual account" refers to an account whose account category is "Individual/ Family." For example, one account type is "Individual" and another is "Family." Both of these account types map to the Individual/Family account category.
- **Organization Account:** The term "Organization account" refers to an account whose account category is any account category other than the Individual/Family account category. For example, the "Local Foundation" account type maps to the Foundation account category, and the "Personal Corporation" account type maps to the Corporation account category. Therefore, any account assigned either of these two account types is considered an Organization account.

#### See Also:

[Common Account Types and Categories](#)  
[Brief Names](#)

### Common Account Types and Categories

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Account Type

Account Category

## Individual Accounts

*Are assigned to an account type that maps to the Individual/Family account category.*

{bmct IMG00009.bmp}

## Organization Accounts

*Are assigned to an account type that maps to the Corporation, Foundation, Government, or Other account category.*

{bmct IMG00010.bmp}

{bmct IMG00011.bmp}

{bmct IMG00012.bmp}

**{bmct IMG00013.bmp}**

## Brief Names

A Brief Name is a **unique** name (12 characters or fewer) that you can assign to certain accounts or names within accounts to activate specific functionality in TA such as setting up users or matching gift companies. The same brief name cannot be used more than once. In addition to activating specific functions, you can use brief names as a quick way to find your most commonly accessed accounts. The Find an Account window includes the Brief Name field so that instead of searching by Account ID or Name and Address, you can enter the shorter Brief name to find the account. Since it's a unique identifier, TA navigates you directly to the screen or field you want rather than navigating to the Find an Account: Selected Accounts screen where you have to select the account first.

- Many organizations have a business practice that includes naming conventions for Brief Names. For example, if your TA users or solicitors are spread out among different Chapters or Regions, you may have a convention where the first 2 or 3 characters represents the Chapter or Region. This convention is helpful if you want to run queries or reports using the wildcard. For example, if you needed to see this months interactions created by users in a specific region (NE for New England), then for the brief name you can enter NE%.
- Once a brief name is created, the only way you can edit the name is to run the [Change Brief Name procedure](#). If you have assigned Staff, User, or Solicitor fields with a particular brief name and you need to update certain fields with a different brief name, you must run the [Transfer Brief Name Responsibilities procedure](#).
- Since Brief Name is a unique identifier think about whether you need to assign the brief name at the account-level or the name-level. For example, if two people on the account are serving as Solicitors, then assign a different brief name to each name,

rather than one on the whole account. Likewise, if you are assigning a brief name to activate Matching Gifts, then this is usually assigned at the account-level. Use the Brief name field on the Account Overview screen to assign it to the account-level. Use the Brief name field in the Name Entry screen to assign it to a specific name on the account.

### **About Brief Name Functions: Zoom on the Brief Name**

The Brief Name Functions window displays a list of features or functions that you can activate so that the Account (or Name) is enabled with the corresponding function.

- Set fields within the Brief Name Functions window to 'A' for active for those functions that you want to be activated. For example, if you are creating a new TA user, set the User? and Employee? fields to A. If you are setting up a matching gift organization, set the MG? field to 'A.'
- In addition, to the specific TA functionality that you activate (such as user functionality where the brief name serves as the User ID for logging into TA), activating a function provides a way for TA to restrict list of values to specific Brief Names. For example, if you set the Vendor? field to "A" then if you press [F9] in the Vendor field on the Benefit Entry: Inventory View screen, you see a list of only brief names assigned as Vendors.
- You can also set a function's status to "P" for past to indicate that the account or person served the function at a previous time. When you set the function's status to past, TA removes the special functionality associated with the particular function. Set the function's status to "D" for delete if the account or person no longer serves the function and you don't want to retain the information that the account or person served the function.
- You can mark a brief name for deletion by pressing the [Shift] [F6] key combination from the Brief Name field. TA displays the message, "Do you really want to mark this brief name for deletion?" Click <Yes> to mark the brief name for deletion. Click <No> to cancel deletion and leave the brief name's status set to "A" for active. TA deletes brief names when your organization runs delete processing.

You can access the Brief Name Functions window to confirm that the brief name is marked for deletion by pressing the [F10] key or by clicking the <Zoom> button on the toolbar. TA sets the Status field to "D" for delete.

## ***Notes and Comments***

TA enables you to create an account-level note or comment to store information when there is no specific place to capture the information. Before creating a note or comment, you should be certain that TA does not have a specific field, window, or screen in which to capture the information.

### **When to Use the Notes Feature**

The notes feature is accessible from most screens where you view or enter account information. TA disables the <Notes> button on the toolbar for screens from which you cannot access the Notes window.

If a remark is applicable only for a specified amount of time or changes over time, enter the remark using the Notes feature. If the remark is applicable indefinitely, use the appropriate Comments field. You should also use the Notes feature to enter information that you want to be certain that every TA user sees when accessing the account. For further explanation, see "[Marking a Note as a Warning \(Notes Window\)](#)"

**Note:** In addition to the Notes window, you can use the Customer Service Entry and Account Diary Entry screens to create notes. Notes have an interaction category of NO and an interaction type of NOTE.

### Comments Fields

You can create a comment for most records in TA. A comment may apply to an account, a specific record within the account (e.g., a name record), or a non-account record (e.g., a benefit record). For an account, you should enter a comment in the Comments field (Additional tab). If the comment is applicable for only a certain amount of time, you should enter the comment in the Notes window.

On some screens, TA displays a Comments field into which you can enter information. On other screens, you must click the <Comments> button or Additional tab to access the Comments field.

**Note:** You cannot use the [Tab] and [Previous Item] keys to move the application cursor from a Comments field. Press the [Ctrl] [Tab] key combination to move to the next item on the screen. Press the [Ctrl] [Previous Item] key combination to move to the previous item on the screen.

### See Also:

[Accessing the Notes Window](#)  
[Creating a Note for an Account](#)

### Accessing the Notes Window

You can access the Notes window by performing one of the following actions.

- Click the <Notes> button on the toolbar.
- Press Ctrl N .

If no other notes exist for the account, TA displays the message "There are no notes for this account. Create a note or cancel?" Click <Create> to have TA display the Notes window.

If other notes exist for the account, TA displays the Notes window, and the first note added to the account appears in the Notes field.

### Creating a Note for an Account

You can view or create new notes from any account-based screen. Click on the Notes icon to display the Notes window.

- If no other notes exist for the account, the cursor appears in the Notes field immediately after you access the Notes window. Enter the note in the Notes field.
- Press the [F6] key enter the new note.
- Click on the <More> button to view or adjust the fields that default.

Notes default to having an interaction category of NO and an interaction type of NOTE. To change this, press [F9] in the Interaction Type field and select from the list according to your organization's business practices. If you want the note to display on the Volunteer Overview screen (Additional tab), you must select VOL.

Since notes are interaction records with a specific Interaction category (NO), you can also use the [Customer Service Entry](#) and [Account Diary Entry](#) screens to create notes. As long as the interaction category is set to NO, then it displays in the Notes window.

#### See Also:

[Information in the Notes Window](#)

### Information in the Notes Window

When you access the Notes window, TA displays the following:

- The Account ID and name line for the account
- The Notes field
- The Status field
- The Abstract block

Click <More> if you want to convert the note into a Warning or to view the additional fields included in the Notes window. Click <Attachments> to [attach](#) an outside file to the note.

#### See Also:

[Abstract Block \(Notes Window\)](#)

[Interaction Type \(Notes Window\)](#)

[Staff Member Field \(Notes Window\)](#)

[Marking a Note as a Warning \(Notes Window\)](#)

[Status Code for the Note \(Notes Window\)](#)

### ***Abstract Block (Notes Window)***

The Abstract block contains information about each note that exists for an account. TA displays the total number of notes that exist for the account above the Abstract block. The block includes the first line of each note, the date on which the note was created, and the status of the note. You cannot update the fields in the Abstract block; they are display-only fields.

To view the entire text for a note, highlight the abstract for that note. TA displays the note in the Note field. You can update it. You can click the <More> button to view the additional fields for the highlighted note. Click <Less> to view the Notes window without the additional fields.

**Note:** When you click the Show Warnings Only? checkbox, TA displays in the Abstract block only notes marked as warnings.

### ***Interaction Type (Notes Window)***

When you create a new note, you can select an interaction type to describe the information that the note contains. Press the [F9] key to view the interaction types (e.g., family information, financial information, occupation information). TA defaults the Interaction Type field to "NOTE" for Account Note.

**Note:** TA automatically sets the Interaction Date field to the current date when you create a note. This field is a display-only field that you cannot update.

### ***Staff Member Field (Notes Window)***

When you create a note, TA defaults the Staff Member field to the brief name set up for you in TA to indicate that you are the staff member who created the note. You may want to assign responsibility for the note to a different staff member. Press the [F9] key to select from a list of staff brief names. Brief names are covered in more detail in the Managing Account Information chapter.

**Note:** When you assign responsibility for a note to another staff member, you can create a tickler to make that person aware of his or her responsibility. For information on creating ticklers in TA, see the [Customer Service chapter](#).

### ***Marking a Note as a Warning (Notes Window)***

In some cases, you may want to be certain that any TA user who accesses an account views a note for that account. In such cases, you should mark the note as a warning by entering "Y" for yes in the Warning? field. Each time a TA user accesses the account, TA automatically displays that note in the Warnings window. You cannot update the note from the Warnings window.

When you mark a note as a warning, TA defaults the Warning Expiration Date field to one month from the current date. To change the warning expiration date, enter the appropriate date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.

**Note:** TA automatically sets the Warning? field to "N" for no when you create a note. You cannot enter a date in the Warning Expiration Date field when the Warning field is set to "N."

### ***Status Code for the Note (Notes Window)***

You can select one of the following three status codes from the Status field of the Notes window.

- "C" for completed, if no further action must be taken for the note

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- "D" for delete, to mark the note for deletion
- "O" for open, if you or another staff member must take further action with respect to the note

When you set the status of a note to "O" for open, TA enables you to store information about the action that must be taken with respect to the note. You can create a tickler to remind you or another staff member to complete the necessary action. When you set the status of a note to "O", the tickler date is defaulted to the current date, and when you set a tickler date, the status is defaulted to "O". For information on creating ticklers, refer to the Customer Service chapter.

**Note:** When you add a new note to an account, TA defaults the Status field to "C" for completed.

### ***Display Sequence Number***

The display sequence number enables you to override TA's default ordering of an account's names, addresses, telephone numbers, classifications, relationships, and interests. TA uses the default ordering for the blocks that list multiple records for an account (e.g., the Names block on the Account Overview screen), for the List Block on a screen, and for reports.

#### **See Also:**

[Assigning the Display Sequence Number](#)

### **Assigning the Display Sequence Number**

To override TA's default ordering, assign a display sequence number, beginning with the number "1," to each record you want TA to display in an order different from TA's default ordering. For example, an account has three names. You want the third name added to the account to appear first. In the Display Sequence Number field for that name, enter "1." If you want the third name added to the account to appear second, you must first decide which name should appear first. Enter "1" in the Display Sequence Number field of the name that you want to appear first. For the third name, which you want to appear second, enter "2" in its Display Sequence Number field.

**Note:** Your organization can assign a default display sequence number to a classification on the Classification Code Entry screen. When you add a classification to an account, TA sets the display sequence number for the classification to the default display sequence number if your organization assigned one. You can change it.

For each group of records (i.e., an account's names, addresses, telephone numbers, classifications, relationships, and interests), TA orders those records assigned a display sequence number first. Once TA orders the records assigned a display sequence number, TA orders the remaining records according to the default ordering of the records.

#### **See Also:**

[Default Sequences of Account Records](#)

## Default Sequences of Account Records

Record	Default Ordering
Names, Addresses, and Telephone Numbers	<p>TA orders names, addresses, telephone numbers, and e-mail addresses based on the order in which the records were added to the account. TA applies the following exceptions to the default ordering of name, address, and telephone records.</p> <ul style="list-style-type: none"> <li>• For names, TA always lists the primary contact first.</li> <li>• For addresses, TA always lists the account's preferred address first.</li> <li>• For telephone numbers and e-mail addresses, TA always lists the account's preferred telephone number or e-mail address first.</li> </ul>
Interests	<p>TA lists first, in alphabetical order, all interests assigned to the account as a whole. TA then lists the interests alphabetically within the name associated with each interest (i.e., all of the interests assigned to the first name on the account are listed first and in alphabetical order, followed by those for the second name on the account, etc.).</p>
Classifications	<p>TA orders classifications sequentially by name within an alphabetical list of the classification codes (i.e., within each classification code, TA lists first the classifications assigned to the account as a whole, and if a classification code is assigned to more than one name, these classifications are listed in the order that the names appear on the account).</p>
Relationships	<p>TA orders relationships sequentially in the order in which they were added to the account.</p>

## Common Tasks

[Finding an Account](#)

[Creating New Accounts](#)

[Merging Duplicate Accounts](#)

### ***Finding an Account***

Finding an account is a common task since you regularly need to view or update account-related information such as giving history or contact information (names, addresses, or e-mail). To switch the account you are viewing you can use the [File drop down menu](#) if you have accessed the account recently, or press [F3] or click <Find> to access the Find an Account windows.

#### **See Also:**

[Using the Find an Account Window](#)  
[Using the Find an Account: Selected Accounts Window](#)

### **Using the Find an Account Window**

You search for an account using the Find an Account window. Access the Find an Account window when:

- You need to enter an Account ID in a field on a non-account-based screen. From any Account ID field, press the [F9] key or by click <List> on the toolbar to access the Find an Account window. Normally, these keystrokes displays a list of values for the field with which you are working. Since your organization can have thousands of accounts, TA cannot display a 'list of values.'
- You need to view or enter information for a different account other than the one you are using. Access the Find an Account window by pressing the [F3] key or by clicking <Find> on the toolbar.

If your user setup includes a default for the Limit to field, then TA automatically finds these types of accounts unless you press [F9] and change the field value.

See "[Appendix 3: Searching Criteria Rules for Accounts](#)"

#### **See Also:**

[Find an Account Using the Account ID](#)  
[Find an Account Using an Alternate Account ID](#)  
[Find an Account Using the Brief Name](#)  
[Find an Account Using a Name](#)  
[Find an Account Using Address Information](#)  
[Find an Account Using Name, Street Number and Street Name](#)  
[Find an Account Using Name and State](#)  
[Find an Account Using a Telephone Number](#)  
[Finding an Account Using an E-mail Address](#)  
[Find an Account Using Query Information](#)  
[Find an Account Using "Fuzzy Logic"](#)  
[Limiting the Search by Record Type](#)  
[Recalling the Last Search](#)

### **Find an Account Using the Account ID**

You can enter the account's Account ID in the Account ID field and click <Find> to find the account. Because Account IDs are unique, TA returns to the screen from which you accessed the Find an Account window.

If you accessed the Find an Account window from an account-based screen, TA displays on the calling screen the information for the account (i.e., the account becomes the current account).

If you entered the Account ID of a merged account, TA displays the message "Account has been merged and retained account is being shown." TA returns to the screen from which you accessed the Find an Account window and displays the information for the retained account, or sets the Account ID field from which you accessed the Find an Account window with the retained account's Account ID.

### **Find an Account Using an Alternate Account ID**

Your organization may have retained an alternate Account ID when it converted to TA. You can enter an asterisk, ( \* ) followed by the alternate Account ID in the Account ID field and click <Find> to search for the account using this alternate Account ID. TA displays the Find an Account: Selected Accounts screen for all accounts that match the alternate Account ID you entered.

If your organization stores multiple alternate account IDs on an account (to handle multiple databases), you can search by using the **Alternate ID Type** and **Account** fields. That is, press [F9] in the Alternate ID Type field, select a type, then enter the number in the Account field. (If your organization does not store multiple, when you press [F9] in the Alternate ID Type field you will only see DEFAULT.)

### **Find an Account Using the Brief Name**

You can enter the account's [brief name](#), if one has been assigned to the account, in the Brief Name field and click <Find> to find the account. (Note that you can press [F9] to select a brief name rather than manually entering it ) Because brief names are unique, i.e., no two accounts have the same brief name, TA returns to the screen from which you accessed the Find an Account window.

If you accessed the Find an Account window from an Account ID, TA sets the Account ID field to the one that you selected from the Find an Account: Selected Accounts screen.

**Note:** You can also use the Brief Name field to search for an account based on a brief name assigned to a name within an account.

### **Find an Account Using a Name**

You can find an account by entering name information for the account and clicking <Find>. TA displays the [Find an Account: Selected Accounts screen](#).

For Individual accounts: use the format "Last Name, First Name" including the comma, for example, "Smith, Bob." To use the person's middle name, enter "Last Name, First Name, Middle Name" including the commas, for example, "Smith, Bob, James". To search by last name and middle name, you can enter "Last Name, , Middle Name" (use *two* commas). You can also use either part of a hyphenated last name, for example, "Jones, Bob" or "Smith, Bob" to find Bob

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Smith-Jones' account. Note that you can also enter a maiden name in the name field.

**Note:** If you customize the account's name line or alpha name on an Individual account, you cannot search using the customized name, because TA does not use these fields for searching on an Individual account.

For Organization accounts: enter the name of a contact for the account or enter the organization's name in the Name field. If you enter the contact's name, use the form "Last Name, First Name". If you enter the organization's name, do not include articles such as "The" if it is the first word of the organization's name. You do not need to enter the complete name if you do not know it, but you must enter the correct beginning of the name. For example: do not enter "Charitable Trusts" to search for "The Smith Charitable Trusts"; enter "Smith" instead.

**Note:** TA does not use the Organization account's name line to search for an account. If you enter the company name, TA searches for this name in the Alpha Name field. For example, if you are searching for The Smith Foundation account, enter "Smith Foundation." If you enter "The Smith Foundation," TA will not find any matching accounts.

**Note:** You can limit your search based on a specific type of record that is associated with the account. For more information, see [Limiting the Search by Record Type](#).

### Find an Account Using Address Information

You can find an account by entering address information for the account in the Street Number, Street Name, State and ZIP Code fields and clicking <Find>.\* You can enter the street information (i.e., both the Street Number and Street Name) with or without the State or ZIP Code. TA searches the existing accounts and displays the Find an Account: Selected Accounts screen with all possible matches.

**Note:** You can also enter information in the Apartment Number field if the address for which you are searching includes an apartment number. You do not have to enter the apartment number if the address includes one, but you may want to do so if you are searching for an account for which the address is a large apartment building.

\* You can limit your search based on the type of record for which you are searching (e.g., planned gift account, tribute account). For more information, see [Limiting the Search by Record Type](#).

### Find an Account Using Name, Street Number and Street Name

You can find an account by entering at least the complete last name in the Name field and address information in the Street Number and Street Name fields and then clicking <Find>.\* TA performs a "fuzzy logic" search. A fuzzy logic search uses a scoring mechanism to rank the likelihood of an existing account matching the search criteria. The matching accounts are listed on the Find an Account: Selected Accounts screen in order of the highest score to the lowest score. The higher the score, the more closely the account's information matches the search criteria. See "[About Fuzzy Logic Searching](#)."

**Note:** If you do not know the street name, you do not have to enter it. TA can search based only on the name and street number that you enter. In this case, TA does not perform a fuzzy logic search.

\* You can limit your search based on the type of record for which you are searching (e.g., planned gift account, tribute account). For more information, see [Limiting the Search by Record Type](#).

### **Find an Account Using Name and State**

You can find an account by entering name information in the Name field and the State in the State field and then clicking <Find>.\* For example, to find all of the B. Smiths in Texas, you can enter "Smith, B" in the Name field and "TX" in the State field. TA searches the existing accounts and displays the Find an Account: Selected Accounts screen with all possible matches.

\* You can limit your search based on the type of record for which you are searching (e.g., planned gift account, tribute account). For more information, see [Limiting the Search by Record Type](#).

### **Find an Account Using a Telephone Number**

You can find an account by entering a telephone number for the account in the Telephone field and clicking <Find>. If you do not enter the area code and your organization has specified a particular [Default Area Code](#) as the system preference, TA inserts the area code to conduct the search. TA searches the existing accounts and displays the Find an Account: Selected Accounts screen with all possible matches.

### **Find an Account Using an E-mail Address**

You can find an account by entering an e-mail address for the account in the E-mail field and clicking <Find>. TA searches the existing accounts and displays the Find an Account: Selected Accounts screen with all possible matches.

### **Find an Account Using Query Information**

TA's Query and Output facility enables you to search for records that fit certain criteria (e.g., a set of donors who attended a special event). When you create a query and schedule it to run, you can indicate that the records returned by the query should be saved. You can find an account based on these saved records by entering the name of the query in the Query field and clicking <Find>. TA selects those accounts based on the records saved for the query and displays the Find an Account: Selected Accounts screen with all possible matches.

### **Find an Account Using "Fuzzy Logic"**

You can find an account by entering complete name and address information and clicking <Find>.\* When you enter complete name and address information (i.e., you enter information in either the Name, Street Name, and ZIP Code fields or the Name, Street Number, and Street Name fields), TA performs a "fuzzy logic" search. A fuzzy logic search uses a scoring mechanism to rank the likelihood of an existing account matching the search criteria. The matching accounts are listed on the Find an Account: Selected Accounts screen in order of the highest

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score to the lowest score. The higher the score, the more closely the account's information matches the search criteria. Your organization identifies [Cutoff Score for Exact Matches](#) and [Cutoff Score for Partial Matches](#) as system preferences to determine which accounts to include in the list of possible matching accounts.

For example, if you perform a name search by typing "Smith, William" in the Name field, TA does not list Will Smythes, because the name does not include the string of text you entered. If you perform a fuzzy logic search by entering "Smith, William" in the Name field as well as the street number and street name, a fuzzy logic search also lists any Will Smythes.

**Note:** Fuzzy logic searching only works if you enter the complete last name in the Name field (e.g., "S%" or "Sm" will not work to find Smith or Smythes, even if you include other information like the street name and ZIP Code).

See "[About Fuzzy Logic Searching](#)"

\* **Note:** You can limit your search based on the type of record for which you are searching (e.g., planned gift account, tribute account). For more information, see [Limiting the Search by Record Type](#).

### Limiting the Search by Record Type

When you find an account, you can limit the search based on the type of record for which you are searching. This reduces the number of possible matching accounts that TA finds since the list includes only those of the record type for which you are searching. Your user setup includes a default value for the Limit to field.

**Note:** If you enter information in the Account, Brief Name, Phone, or Query fields, TA bypasses the record type restriction and searches for the account strictly by Account ID, brief name, telephone number, or query.

In some cases, the screen has its own default search type such as the Planned Gift Information Entry screen's default search type is Planned Giving Accounts. The screen's default search type overrides the default search type set on your user name. However, you can always override the default by pressing the [F9] key in the Limit to field and selecting from the list of values.

Limit to	TA Finds
Accounts with Recurring Tributes	Those accounts that have a tribute information record.
Corporate Accounts	Those accounts with an Account Category of C.
Foundation Accounts	Those accounts with an Account Category of F.
Matching Company Accounts	Those accounts that have the matching company brief name function activated.
Planned Giving Accounts	Those accounts that have a planned gift information record.
Service Provider Accounts	Those accounts that have a service provider record.
All Accounts	All accounts regardless of any of the above.

### Recalling the Last Search

You can execute the last search you performed by clicking <Recall> on the Find an Account window. When you click <Recall>, TA searches for accounts based on the criteria you entered the last time you accessed the Find an Account window. For example, you entered "Smith" in the Name field on the Find an Account window. From the Find an Account: Selected Accounts screen, you selected an account. You subsequently realize that you selected the wrong account. You can access the Find an Account window and click <Recall> to search again for all accounts with the name "Smith."

### Using the Find an Account: Selected Accounts Window

In the upper right corner of the Find an Account: Selected Accounts window, TA displays two blocks of information about the account. The first block contains demographic and gift information. The second block contains current activity information.

#### See Also:

[Demographic and Gift Information](#)

[Current Activity Information](#)

[The Selected Accounts List](#)

[Recalling or Entering a New Search \(from Selected Accounts Window\)](#)

[Creating a New Account \(from the Selected Accounts Window\)](#)

### Demographic and Gift Information

The Demographic and Gift Information block contains the following information.

- The account's full name
- The account's preferred address and corresponding address' type
- The account's preferred telephone number and its correspond type
- The information for the most recent gift or open pledge

If the account's status has been set to inactive or delete, the status appears in parentheses to the right of the account's name line. See "[An Account's Name Line and Alpha Name](#)"

If you searched for the account using the account's preferred address, then TA displays the first additional address for the account. If the account does not have any addresses other than the account's preferred address, TA displays "(No other addresses)."

If you searched for the account using the account's preferred telephone number, then TA displays the first additional telephone number. If the account does not have any telephone information, TA displays "(No phone number listed)."

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If the account has not given a gift and does not have an open pledge, TA displays "(No current batch or open pledge)" in this block.

### Current Activity Information

The Current Activity Information block on the Find an Account: Selected Account screen contains the account type in parentheses and the current activity information for the account. The current activity information includes the following:

- The activity's name
- The current member year amount
- The activity's expiration date
- The most recent gift amount and date

See the [Viewing Transactions, Benefits, and Interactions chapter](#) for more information on account activities.

In addition, if notes have been entered for the account using TA's Notes feature, TA displays "(There are notes for this account.)."

**Note:** You can access TA's Notes feature by clicking <Notes> on the toolbar or pressing the [Notes] key.

### The Selected Accounts List

In the Find an Account: Selected Accounts screen, the bottom half of the screen displays the list of accounts based on your search.

- TA displays multiple lines for an account if the account has multiple names or addresses and you did not restrict your search by full name or full address. For example, if you searched by Wolf,D' and there is Donna Wolf and Dino Wolf in the same account, TA returns a line for each name, for the same account. If there are multiple addresses on the account, TA displays a separate line for each address. Therefore it is common for TA to display an account multiple times.
- The upper right corner of the screen changes depending upon which line you have highlighted in the selected accounts list. TA provides phone number, another address (if it exists on the account), open pledge information (if it exists), and most recent financial summary (the account activity, current activity area) on the account.
- Once you locate the account with which you want to work, you can double-click, press [F10] or click the <Zoom> button to the left of the Account ID. TA returns you to the account-based screen from which you initiated the search and displays the information for the account you selected. If you accessed the Find an Account window from an Account ID field, TA returns you to that field, setting the field to the Account ID of the account you have selected.
- TA includes the person's maiden name in parentheses, e.g., "(née: Smith)," if the maiden name is entered for the person. Also, TA includes the name of the organization in parentheses,

e.g., "(Smith, Incorporated), if the person is a contact at an organization (i.e., a name added to the Organization account).

**See Also:**

[Results for Search by Name](#)

[Results for Accounts with Multiple Addresses](#)

[Results for Search by Telephone Number or E-mail Address](#)

**Results for Search by Name**

If you searched for the account using name information, TA lists the accounts alphabetically from the name information you entered to the end of the alphabet. For example, if you searched by entering "Smith, J," TA lists all accounts with a person whose last name is Smith and whose first name begins with the letter "J." TA lists these Smiths alphabetically by first name, e.g., "Smith, Jane," followed by "Smith, Jennifer," followed by "Smith, Jim," etc. If you searched by entering "Smith," TA lists all accounts with a person whose last name is Smith. TA lists these accounts alphabetically by the first name, e.g., "Smith, Andrea," followed by "Smith, Bob," followed by "Smith, Clark," etc.

**Note:** When searching by name, TA orders the accounts alphabetically by last name, first name, street name, and street number, but does not consider middle name, or suffix in alphabetizing the accounts.

**Results for Accounts with Multiple Addresses**

If you searched for the account using name information and the account has multiple addresses, TA displays the account in the list once for each address associated with the account. If you searched for the account using address information, and the account has multiple names, TA displays the account in the list once for each name associated with the account.

**Results for Search by Telephone Number or E-mail Address**

**Search by Telephone Number**

If you searched for the account using a telephone number, TA also includes the telephone number's type (e.g., home, fax) between the alpha name and the street address. If the telephone number you searched for is associated with an address within the account, TA displays that address in this block. See "[Associating a Telephone Number with an Address.](#)"

**Search by E-mail Address**

If you searched for the account using an e-mail address, TA includes the e-mail type (e.g., home, fax) between the alpha name and the street address.

**Recalling or Entering a New Search (from Selected Accounts Window)**

You can recall your last search on the Find an Account: Selected Accounts window by clicking <Recall>. This feature is useful if you accidentally clear a search. By clicking <Recall>, TA enters the search criteria from your previous search and lists the accounts that match that criteria.

You can enter a new search on the Find an Account: Selected Accounts window using the search fields in the upper left corner of the screen. These fields (Account ID, Brief Name, Query, Name, Street Number, Street Name, ZIP Code, Apartment Number, Telephone Number, E-mail Address, and Limit by) are the same as the ones on the Find an Account window. You can clear the list from the current search by clicking <Clear>. You can then enter the new search criteria in the appropriate fields.

### **Creating a New Account (from the Selected Accounts Window)**

You can create a new account from the Find an Account: Selected Accounts window by clicking <New>. TA displays the Create New Account window. If you searched for the account using name or address information, TA defaults that information on the Create New Account window. You can override the information.

## ***Creating New Accounts***

To create a new account from the Account Overview screen, press the [F6] key or click <New> on the toolbar. TA displays the Create New Account window. You can also access the Create New Account window from the Account ID field on selected screens in TA (e.g., the Batch Detail Entry screen) and from the Find an Account window.

### **See Also:**

[Selecting the Account Type](#)

[Entering Information for a New Account](#)

[Duplicate Detection](#)

[Finding Possible Matching Accounts](#)

[Records Automatically Created When You Create an Account](#)

### **Selecting the Account Type**

When you create a new account, you must first select the account type for the new account (e.g., Family or Large Corporation). Your organization can specify a particular account type as the [Default Account Type](#) system preference. When you create a new account, TA defaults the account type according to your system preference setting. You can overwrite the default when creating a new account. Press the [F9] key from the Account Type field to see a list of the account types.

**Note:** Do not confuse the Individual account type with the term "Individual account." The Individual account type is one of many account types assigned to the Individual/Family account category. Any account assigned an account type from the Individual/Family account category is referred to as an Individual account.

If you select an account type for an Individual account, when you press the [Tab] key, TA moves the application cursor to the Title field in the Names block.

If you select an account type for an Organization account (i.e., the account type maps to an account category other than the Individual/Family account category), when you press the [Tab] key, TA moves the application cursor to the Name Line field, labeled "Name" on this window.

See "[Common Account Types and Categories](#)"

### **Entering Information for a New Account**

When you first create a new account, you can enter up to two names for the account, one address, up to two telephone numbers, one e-mail address, and up to three classifications. (You can add unlimited names, addresses, etc. after you create the account.) During the create new process you can also enter, if applicable, a brief name for the account and a prospect source code. The prospect source code refers to the code that represents how your organization acquired the account and is usually associated with an acquisition list that your organization has purchased.

#### **See Also:**

[Entering Name Information for the New Account](#)  
[Entering Address Information for the New Account](#)  
[Entering Telephone Information for the New Account](#)

### **Entering Name Information for the New Account**

For Individual accounts, you must enter at least one name in the Names block. For Organization accounts, you must enter at least the Organization account's name in the Name field, but you are not required to enter contact names in the Names block.

**Note:** If your organization set the [Capitalize Initial Letter?](#) system preference to "Y" for yes, TA formats the first name, middle name, and last name by capitalizing the first letter and lowercasing the remaining letters. TA applies this formatting only when you first enter each name. If you return to any of these three fields to make a change, TA does not reapply the formatting.

#### **See Also:**

[How TA Builds an Account's Name Line](#)  
[How TA Builds an Account's Alpha Name](#)

### ***How TA Builds an Account's Name Line***

For Individual accounts, TA builds the account's name line from the information for the two names you enter in the Names block on the Create New Account window. You do not need to enter two names to create the account's name line. If you enter only one name and add a second one at a later time, TA updates the account's name line with the second name.

**Note:** TA references the [Salutation and Name Join](#) system preference to determine the text to use to separate two names included in the account's name line and alpha name (e.g., "&" or "and").

See "[Appendix 1: Names and Salutation Rules](#)"

For Organization accounts, you enter the account's name line when you create the account.

### ***How TA Builds an Account's Alpha Name***

For Individual and Organization accounts, TA composes the account's alpha name.

For Individual accounts, TA builds the account's alpha name from the information for the two names you enter in the Names block on the Create New Account window. You do not need to enter two names to create the account's alpha name. If you enter only one name and add a second name at a later time, TA updates the account's alpha name with the second name.

**Note:** TA references the [Salutation and Name Join](#) system preference to determine the text to use to separate two names included in the account's name line and alpha name (e.g., "&" or "and").

See "[Appendix 1: Names and Salutation Rules](#)"

For Organization accounts, TA copies the account's name line to create the account's alpha name. TA strips the word "The" from the account's alpha name if the word is included.

### **Entering Address Information for the New Account**

For Individual accounts, TA defaults the address type to "H" for home. For Organization accounts, TA defaults the address type to "W" for work.

**Note:** If your organization set the [Capitalize Initial Letter?](#) system preference to "Y" for yes, TA formats the Street Name, City Name, Address Line 1, and Address Line 2 fields by capitalizing the first letter and lowercasing the remaining letters. TA applies this formatting only when you first enter information in the fields. If you return to any of these fields to make a change, TA does not reapply the formatting.

TA identifies the first address you add to the account as the account's preferred address. You can change the account's preferred address at any time. See "[Changing an Account's Preferred Address](#)"

### **Entering Telephone Information for the New Account**

When you enter a telephone number, you do not have to enter the hyphens or, if you include the area code, the parentheses. TA formats the telephone number for you in the form "(###) ###-####," i.e., the standard telephone number format. If you enter information to which TA cannot apply the standard telephone number format, e.g., an international number, TA leaves the number as you entered it.

Your organization can specify a [Default Area Code](#) as a system preference. If your organization has specified a default area code, then you do not need to enter the area code. TA inserts for you the area code according to the system preference setting. Most of the time, however, you include the area code when you enter the telephone number.

TA identifies the first telephone number you add to the account as the account's preferred telephone number. You can change the account's preferred telephone number at any time. See [How TA Initially Identifies an Account's Preferred Telephone Number](#).

For Individual accounts, TA defaults the telephone type for the first telephone number to "H" for home and the telephone type for the second telephone number to "W" for work.

For Organization accounts, TA defaults the telephone type for both telephone numbers to "W" for work.

### Duplicate Detection

TA checks for duplicates if the Check for Duplicates? checkbox is marked. For an Individual Account, you must enter at least the following information to have TA search existing accounts for possible matches.

- Last name
- Street name
- City
- State
- ZIP Code

For an organization account, you must enter at least the following information to have TA search existing accounts for possible matches.

- Name line
- Street name
- City
- State
- ZIP Code

If TA finds one or more possible matches, TA displays the Possible Matching Accounts window. See "[Finding Possible Matching Accounts](#)". Your organization determines the scoring (or weight) that TA uses when finding possible matching accounts by setting values for the [Cutoff Score for Exact Matches](#) and [Cutoff Score for Partial Matches](#) system preferences.

If you did not enter the minimum information required for TA to perform duplicate detection and the Check for Duplicates? checkbox is marked, TA displays the message, "Insufficient data to perform duplicate detection!" Click <Create Anyway> to create the account without performing duplicate detection. Click <Cancel> to return to the Create New Account window to enter the information necessary to perform duplicate detection.

**Note:** By default, the Check for Duplicates? checkbox is marked when you access the Create New Account window.

### Finding Possible Matching Accounts

When you create an account, TA looks for a duplicate in the existing accounts if the Check for Duplicates? checkbox is marked. By default, when you access the Create New Account window, this checkbox is marked. If TA finds one or more accounts that match the information you entered for the new account, TA displays the Possible Matching Accounts window. From this window, you can

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- See the [Quick Account View window](#) for an existing account by clicking the <Zoom> button next to that account (i.e., check to see if you did enter a duplicate account);
- Create the account regardless of the matches listed by clicking <New>;
- Return to the Create New Account window to change the information for the new account by clicking <Requery>; or
- Cancel creating the new account by clicking <Cancel>.

### See Also:

[Possible Matching Accounts Window](#)  
[Scrolling Through the Matching Accounts List](#)

### Possible Matching Accounts Window

In the upper left corner of the Possible Matching Accounts window, TA displays the following four blocks of information about the account you are trying to create.

- The first block contains the name(s) you entered.
- The second block contains the address you entered.
- The third block contains the classification(s) you entered. If you did not enter any classifications, TA displays in the block "(No classification entered)."
- The fourth block contains the telephone number(s) you entered. If you did not enter a telephone number, TA displays in the block "(No telephone entered)."

In the upper right corner of the Possible Matching Accounts window, TA displays two blocks of information about the matching account. The first block contains the following information.

- The account's full name.
- The account's first additional address if the address you entered on the Create New Account window matches the account's preferred address. If the address you entered matches an additional address on the account (i.e., the address does not match the preferred address), TA displays the account's preferred address. If the account does not have any addresses other than the account's preferred address, TA displays "(No other addresses)."
- The account's first additional telephone number. If the account does not have a telephone number other than the account's preferred one, TA displays "(No other phone number listed)."
- The information for the most recent gift or open pledge. If the account has not given a gift and does not have an open pledge, TA displays "(No current Batch or Transaction)."

If the account's status has been set to inactive or delete, the status appears in parentheses next to the account's name line.

The second block contains current activity information for the matching account. This information includes the following information.

- The activity's name or "(No current activity)" if the account has no activity information
- The current member year amount
- The activity's expiration date
- The most recent gift amount and date

### **Scrolling Through the Matching Accounts List**

In the list of possible matching accounts, TA includes the following information for each account.

- The account's Account ID
- The name line for the account or a person within the account
- The address that matches the address you entered on the Create New Account window
- The account's preferred telephone number

As you scroll through the list of matching accounts, TA updates the information in the upper right corner with that for the account highlighted. You can compare the information for the account you are trying to create with that for each matching account to determine if the account already exists.

### **See Also:**

[Quick Account View Window](#)

#### ***Quick Account View Window***

TA automatically displays the Quick Account View window when you select an account from the Possible Matching Accounts list. To select an account, click the <Zoom> button next to the matching account you want to view. The Quick Account View includes the following account-level information.

- Account ID
- Name line
- Alpha name
- Account type
- Brief name, if applicable

From each block, you can press the [F10] key to view more information about that block (e.g., from the Names block, you can press the [F10] key to have TA display the Name Entry screen, or from the Telephones block, you can press the [F10] key to have TA display the Telephone Entry screen).

From the Quick Account View window, you can perform the following actions.

- Click <OK> to return to the calling screen and view the information for the account you selected.

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- Click <Re-Enter> to access the Create New Account window and change the information you entered.
- Click <List> to return to the Possible Matching Accounts window with the list of matching accounts.
- Click <Cancel> to return to the calling screen without creating a new account or selecting a matching account

### **Records Automatically Created When You Create an Account**

When you create an account, TA creates the account's default salutation and a default salutation for each name you enter in the Names block on the Create New Account window. See "[Default Salutations](#)"

TA also creates the classifications for the account based on what you entered in the Classifications block on the Create New Account window. See "[Classifications](#)"

When you create a new account, if you enter a prospect source code, i.e., the code representing how the account was acquired, TA creates an account activity record based on the activity type associated with the prospect source code. TA sets the status of this account activity record to "P" for prospect. See the [Viewing Transactions, Benefits, and Interactions chapter](#) for more information on account activities.

## ***Merging Duplicate Accounts***

The Merge Entry screen enables you to identify and merge duplicate accounts. When you merge two accounts, you identify one account as the account to be retained and the other account as the account to be deleted.

### **See Also:**

[Accessing the Merge Entry Screen](#)  
[Finding Merge Records](#)  
[Creating a New Merge Record](#)  
[Viewing Information for a Merge Record](#)  
[Default Merging Process](#)  
[Processing a Merge Record](#)

### **Accessing the Merge Entry Screen**

You can access the Merge Entry screen in one of the following ways.

- You can select the screen from the Main Menu.
- You can click <Merges> on selected screens (e.g., the Account Overview screen).

When you have a current account and you access the Merge Entry screen, TA looks for a merge record for that account. If more than one merge record exists for the account, you can see each merge record in the List Block in the lower right

corner of the screen. If the current account does not have a merge record, TA displays the Find Merge Records window.

### Finding Merge Records

The Find Merge Records window enables you to search for an account for which a merge record exists (i.e., an account that is to be merged with another account). You can search for a merge record using the following criteria.

- The Account ID of the account that is to be merged with another account (i.e., the deleted account or the retained account)
- A specific status (e.g., "P" for pending or "M" for merge accounts)

**Note:** If you do not know the Account ID of the account for which you want to find a merge record, you can press the [F9] key from the Account ID field to access the Find an Account window. The Find an Account window enables you to search for an account using information about the account (e.g., a name, address or brief name).

You can click <New> on the Find Merge Records window to create a new merge record.

### Creating a New Merge Record

To create a new merge record from the Merge Entry screen, press the [F6] key or click <New> on the toolbar. TA displays the Create New Merge Record window. You can also access the Create New Merge Record window by clicking <New> on the Find Merge Records window.

To create a new merge record, enter in the Account ID field the Account ID of the account to be retained. Enter in the Duplicate Account ID field the Account ID of the account to be deleted. Click <Create>.

#### See Also:

[Setting the Status of the Merge Record](#)  
[Finding the Account IDs for Accounts You Want to Merge](#)  
[Creating Merge Records Using the Duplicate Detection Procedure](#)

### Setting the Status of the Merge Record

When you create a new merge record, TA defaults the status to "P" for pending merge processing. The other status codes are as follows:

- "M" for merge
- "C" for completed merge
- "N" for no merge
- "D" for delete
- "E" for merge error
- "O" for possible duplicate accounts

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- "P" for pending merge process
- "RE" for review for exact duplicate
- "RP" for review for partial duplicate

You can change the status field of any merge record where the status is "M" for merge, "N" for no merge, "D" for delete, "O" for possible duplicate accounts, "P" for pending merge process. You cannot change the status for merge records that have a status of "C" for completed merge, "E" for merge error, "RE" for review for exact duplicate, or "RP" for review for partial duplicate.

TA changes the status of the merge record to "C" only after it has successfully processed the merge record. TA changes the status of the merge record to "E" for merge errors only when an Oracle® error prevents TA from successfully processing the merge record. TA changes the status of the merge record to "RE" or "RP" when the Duplicate Detection Procedure is run and possible duplicate accounts have been found.

You can set the status to "D" for delete if you create the merge record by mistake. The record is deleted when your organization runs delete processing.

### See Also:

[How the Status of a Merge Record Affects Merge Processing Information](#)

### ***How the Status of a Merge Record Affects Merge Processing Information***

When you change the status of the merge record from "P" for pending merge processing, "E" for merge errors, or "M" for merge accounts to any status other than "P" or "M," TA deletes all merge processing information (i.e., the default processing and the processing you created by overriding the default processing).

When you change the status back to "P" or "M," TA re-creates the default merge processing information (i.e., each name, telephone number, and address from the deleted account is added as a new record for the retained account and each benefit for the deleted account is marked for deletion).

### **Finding the Account IDs for Accounts You Want to Merge**

If you do not know the Account IDs of the accounts that you want to merge, you can press the [F9] key from the Account ID and Duplicate Account ID fields to access the Find an Account window. The Find an Account window enables you to search for an account using information about the account (e.g., a name, address, or brief name).

### **Creating Merge Records Using the Duplicate Detection Procedure**

Your organization can run the Duplicate Detection procedure to have TA scan the database to identify possible duplicate accounts and create a merge record for the potential duplicates.

You can run the procedure based on the following parameters:

- Account ID range

- Zip Code Range
- Activity Type
- Current Activity
- Giving Level

TA searches for account records based on the values you enter, and finds possible duplicates for each. Deleted accounts and any record combinations already stored in the Merge Account tables are excluded.

For any pair of accounts with a search "score" above the system preference [Cutoff Score for Exact Matches](#), TA creates a merge record with a status of "RE" (Review for Exact Duplicate). TA creates a merge record with a status of "RP" (Review for Partial Duplicate) for any pair of accounts with a score below the system preference Cutoff Score for Exact Matches, but above the system preference [Cutoff Score for Partial Matches](#).

**Note:** TA always makes the account with the lower Account ID the retained account.

Once you run the duplicate detection procedure, you can view the merge records that TA creates on the Merge Entry screen. TA automatically runs a report listing the counts of partial matches and exact matches found. You can also run the Merge Detail Report to view the merge records TA created through this procedure.

See the [Setting System Preferences chapter](#) for more information about searches and match scoring.

### Viewing Information for a Merge Record

On the Merge Entry screen, TA displays the following information for each account included in the merge record (i.e., both the account to be retained and the account to be deleted).

- The Account ID
- The Account name
- The first name added to the account
- The preferred address for the account
- The preferred telephone number for the account
- Whether notes exist for the account
- The first gift that the account gave to your organization
- The last gift (i.e., most recent) that the account gave to your organization
- The benefits awarded to the account
- The activities in which the account is involved
- The relationships for the account

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- Other types of account records (e.g., classifications, salutations, interests, education records)

TA displays information for the account to be retained on the left side of the screen in the Retained Account block and information for the account to be deleted on the right side of the screen in the Deleted Account block.

### See Also:

[Reversing the Accounts in the Merge Record](#)  
[Account Name \(Viewing a Merge Record\)](#)  
[Names \(Viewing a Merge Record\)](#)  
[Addresses \(Viewing a Merge Record\)](#)  
[Telephone Numbers \(Viewing a Merge Record\)](#)  
[Notes \(Viewing a Merge Record\)](#)  
[Gifts \(Viewing a Merge Record\)](#)  
[Benefits \(Viewing a Merge Record\)](#)  
[Account Activities \(Viewing a Merge Record\)](#)  
[Relationships \(Viewing a Merge Record\)](#)  
[Viewing Other Information in a Merge Record](#)

### Reversing the Accounts in the Merge Record

When you create a new merge record, you must specify on the Create New Merge Record window the account to be retained and the account to be deleted. You can reverse the accounts anytime before you process the merge record. Click <Switch> to reverse the accounts (i.e., the account to be retained becomes the account to be deleted, and the account to be deleted becomes the account to be retained).

### Account Name (Viewing a Merge Record)

TA displays the name line for each account. The account type, e.g., "IN" for Individual, appears in parentheses to the right of the account's name line.

From the Accounts field, you can press the [F10] key or click <Zoom> on the toolbar to access the Account Overview screen.

**Note:** If you want to return to the Merge Entry screen from the Account Overview screen, click <Merges>. If you exit the Account Overview screen, you return to the Main Menu.

### Names (Viewing a Merge Record)

TA displays the first name added to each account. If more than one name exists for the account, a plus sign (i.e., "+") appears to the right of the first name added to the account.

You can view a list of names for the account by pressing the [F9] key from the Names field. If you want to update or view additional information for a name, highlight that name in the list of values and click <OK>. TA displays the Name Entry screen with the information for the name you selected. You can also access the Name Entry screen directly by pressing the [F10] key from the Names field.

When you exit the Name Entry screen, you return to the Merge Entry screen.

### **Addresses (Viewing a Merge Record)**

TA displays the preferred address for each account and the address' type (e.g., "H" for home). If more than one address exists for the account, a plus sign (i.e., "+") appears to the right of the preferred address. The total number of addresses to which mail can be delivered (i.e., addresses for which the status is "A" for active and for which the Do Not Mail? field is not set to "Y" for yes) appears in parentheses.

You can view a list of addresses for the account by pressing the [F9] key from the Addresses field. If you want to update or view additional information for an address, highlight that address in the list of values and click <OK>. TA displays the Address Entry screen with the information for the address you selected. You can also access the Address Entry screen directly by pressing the [F10] key from the Addresses field.

When you exit the Address Entry screen, you return to the Merge Entry screen.

### **Telephone Numbers (Viewing a Merge Record)**

TA displays the preferred telephone number for each account and the telephone number type (e.g., "H" for home). If more than one telephone number exists for the account, a plus sign (i.e., "+") appears to the right of the preferred telephone number. The total number of telephone numbers to which contact can be made (i.e., telephone numbers for which the status is "A" for active and for which the Do Not Call? field is not set to "Y" for yes) appears in parentheses.

You can view a list of telephone numbers for the account by pressing the [F9] key from the Telephone Numbers field. If you want to update or view additional information for a telephone number, highlight that telephone number in the list of values and click <OK>. TA displays the Telephone Entry screen with the information for the telephone number you selected. You can also access the Telephone Entry screen directly by pressing the [F10] key from the Telephone Numbers field.

When you exit the Telephone Entry screen, you return to the Merge Entry screen.

### **Notes (Viewing a Merge Record)**

TA indicates whether notes exist for each account. If an account contains a note, TA displays "There are notes for this account." If an account contains no notes, TA displays "There are no notes for this account."

From the Notes field, press the [F10] key or click <Zoom> on the toolbar to view existing notes or to create a new note for the account.

### **Gifts (Viewing a Merge Record)**

TA displays information about the first and last gifts for each account, if the account has given a gift. For each gift, TA displays the following information.

- The gift date

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- The gift sequence (i.e., the number assigned to distinguish each gift or pledge processed for an account on the same date)
- The source code
- The amount pledged
- The amount paid

**Note:** You cannot see all of the information in the First Gift or Last Gift field at once. Use the cursor keys to move the application cursor to the right or left as needed.

### Benefits (Viewing a Merge Record)

TA displays information about the benefits that have been awarded to each account. If the account has been awarded a membership benefit, TA displays information for that membership benefit in the Benefits field. TA displays in parentheses the status of the benefit. A plus sign (i.e., "+") indicates that more than one benefit has been awarded to the account.

You can view a list of the benefits awarded to the account by pressing the [F9] key from the Benefits field. If you want to update or view additional information for a benefit, highlight that benefit in the list of values and click <OK>. TA displays the Benefits Awarded screen with the information for the benefit you selected. You can also access the Benefits Awarded screen directly by pressing the [F10] key from the Benefits field.

When you exit the Benefits Awarded screen, you return to the Merge Entry screen.

The Benefits Awarded screen is covered in more detail in the [Viewing Transactions, Benefits, and Interactions chapter](#).

### Account Activities (Viewing a Merge Record)

TA displays information about the activity types in which each account is involved. In the Activities field, TA displays information for the first activity type, alphabetically, in which the account is involved. TA also displays in parentheses the expiration date for the activity, if applicable. A plus sign (i.e., "+") indicates that the account is involved in more than one activity type.

You can view a list of the activity types in which the account is involved by pressing the [F9] key from the Activities field. If you want to update or view additional information for an activity type, highlight that activity type in the list of values and click <OK>. TA displays the Account Activity screen with the information for the activity type you selected. You can also access the Account Activity screen directly by pressing the [F10] key from the Activities field.

When you exit the Account Activity screen, you return to the Merge Entry screen.

See the [Viewing Transactions, Benefits, and Interactions chapter](#) for more information on account activities.

### Relationships (Viewing a Merge Record)

TA displays information about the relationships for each account. In the Relationships field, TA displays the following information for the first relationship created for the account: the name line of the name or the account with which the relationship exists and, in parentheses, the relationship type. A plus sign (i.e., "+") indicates that more than one relationship exists for the account.

You can view a list of relationships for the account by pressing the [F9] key from the Relationships field. If you want to update or view additional information for a relationship, highlight that relationship in the list of values and click <OK>. TA displays the Relationship Entry screen with the information for the name you selected. You can also access the Relationship Entry screen directly by pressing the [F10] key from the Relationships field.

When you exit the Relationship Entry screen, you return to the Merge Entry screen.

### Viewing Other Information in a Merge Record

TA displays information about the other types of account records for each account. In the Other field, TA displays the type of record that is first alphabetically. A plus sign (i.e., "+") indicates that more than one additional type of account record exists for the account. For example, if an account has interests, classifications, and education records, TA displays "Classifications+" in the Other field.

You can view a list of all the different types of records that exist for the account by pressing the [F9] key from the Other field. To update or view information for a type of record in the list, highlight that record type and click <OK>. TA automatically displays the first record of that type on the appropriate screen. For example, if an account has interests and you want to view information for one of them, highlight "Interests" and click <OK>. TA displays the Interest Entry screen with information for the first interest for the account.

**Note:** For the type of record that TA displays in the Other field, you can access the screen directly by pressing the [F10] key. For example, if TA displays "Classifications" in the Other field, press the [F10] key to access the Classification Entry screen.

When you exit a screen that you accessed by zooming from the Other field, you return to the Merge Entry screen.

### Default Merging Process

When you merge one account with another, TA merges the records for each account. For each type of account record (e.g., names, classifications, transactions), records from the deleted account are either merged with records from the retained account or added as new records for the retained account.

By default, the names, addresses, and telephone numbers from the deleted account are added as new records on the retained account (unless they are an exact match, in which case, TA merges the record on the deleted account into the corresponding record on the retained account). Also by default, the benefits from the deleted account are deleted.

See "[Appendix 4: Merge Processing](#)"

### See Also:

[Overriding TA's Default Merging Process](#)

### **Overriding TA's Default Merging Process**

TA enables you to specify how the name, address, telephone, and benefit records on the account to be deleted should be moved to the account to be retained (i.e., you can override the default merge process). For example, you can indicate that a name on the deleted account should be merged with a name within the retained account instead of being added as a new name for the retained account.

To override TA's default merge process, press the [Alt] [F10] key combination from the field in the Deleted Account column that you would like to override.

### See Also:

[Names \(Overriding Default Merging\)](#)  
[Addresses \(Overriding Default Merging\)](#)  
[Telephones \(Overriding Default Merging\)](#)  
[Benefits \(Overriding Default Merging\)](#)

### ***Names (Overriding Default Merging)***

From the Names field in the Deleted Account block, press the [Alt] [F10] key combination to access the Merge Names window. On the Merge Names window, TA displays a Retained Account block on the left and a Deleted Account block on the right. In the Deleted Account block, TA lists each name within the account to be deleted. An arrow points from each name within the deleted account to the name on the retained account with which the name is to be merged.

An arrow points from the name within the deleted account to the word "<New>" in the Retained Account block. To merge a name from the deleted account with a name that exists in the retained account, press the [F9] key from the corresponding Name field in the Retained Account block (i.e., the Name field to which the arrow points). TA displays a list of names associated with the retained account. Highlight the appropriate name, and click <OK>. TA displays the name you selected in the Retained Account block.

You can prevent TA from adding a name to the retained account by changing the status of the name to "D" for delete. You cannot change the status of a name on the Merge Names window; you must change the status of the name on the Name Entry screen. See "[Names \(Viewing a Merge Record\)](#)".

**Note:** See [Default Merging Process](#) for the default process that TA uses to merge records.

### ***Addresses (Overriding Default Merging)***

From the Addresses field in the Deleted Account block, press the [Alt] [F10] key combination to access the Merge Addresses window. On the Merge Addresses window, TA displays a Retained Account block on the left and a Deleted Account block on the right. In the Deleted Account block, TA lists each address for the

account to be deleted. An arrow points from each address for the deleted account to the address for the retained account with which the address is to be merged.

An arrow points from the address within the deleted account to the word "<New>" in the Retained Account block. To merge an address for the deleted account with an address that exists for the retained account, press the [F9] key from the corresponding Address field in the Retained Account block (i.e., the Address field to which the arrow points). TA displays a list of addresses associated with the retained account. Highlight the appropriate address, and click <OK>. TA displays the address you selected in the Address field in the Retained Account block.

You can prevent TA from adding an address to the retained account. To delete an address for the account to be deleted, change the status of the address to "D" for delete. TA will not add the address as a new address for the retained account.

**Note:** See [Default Merging Process](#) for the default process that TA uses to merge records.

### ***Telephones (Overriding Default Merging)***

From the Telephones field in the Deleted Account block, press the [Alt] [F10] key combination to access the Merge Telephones window. On the Merge Telephones window, TA displays a Retained Account block on the left and a Deleted Account block on the right. In the Deleted Account block, TA lists each telephone number for the account to be deleted. An arrow points from each telephone number for the deleted account to the telephone number for the retained account with which the telephone number is to be merged.

An arrow points from the telephone number within the deleted account to the word "<New>" in the Retained Account block. To merge a telephone number for the deleted account with one that exists for the retained account, press the [F9] key from the corresponding Telephones field in the Retained Account block (i.e., the Telephone field to which the arrow points). TA displays a list of telephone numbers associated with the retained account. Highlight the appropriate telephone number, and click <OK>. TA displays the telephone number you selected in the Telephones field in the Retained Account block.

You can prevent TA from adding a telephone number to the retained account. To delete a telephone number for the account to be deleted, change the status of the record to "D" for delete. TA will not add the telephone number as a new record for the retained account.

**Note:** See [Default Merging Process](#) for the default process that TA uses to merge records.

### ***Benefits (Overriding Default Merging)***

From the Benefits field in the Deleted Account block, press the [Alt] [F10] key combination to access the Merge Benefits window. On the Merge Benefits window, TA displays on the left side of the screen the *renewable* benefits that

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have been awarded to the retained account and on the right side of the screen the *renewable* benefits that have been awarded to the deleted account.

By default, when the retained account and the deleted account have been awarded the same renewable benefit, the benefit with the later expiration date is the benefit for the new merged account (i.e., the checkbox to the left of the benefit with the later expiration date is marked).

To add a benefit to the new merged account, mark the checkbox to the left of that benefit. To mark a benefit for deletion, unmark the checkbox to the left of that benefit.

The Merge Benefits window also displays the benefit's status, code, activity type, and end date, as well as whether this benefit has been marked OK to Deliver. You can update the end date from this window.

### Unsent Premiums

In addition to the renewable benefits, TA displays the unsent premiums for the deleted account on the Merge Benefits window. These benefits are listed for information only; you cannot prevent the benefits from being brought over to the new retained account as part of the merge process. However, if an unsent premium is no longer available or should not be pulled for delivery on the new retained account, this information can be used to prompt the user to take further action on the premium (e.g., to set the Suspend? flag to indicate that the premium should not be pulled for delivery).

## Processing a Merge Record

When you are ready to process a merge record for two accounts, you must set the [status of the merge record](#) to "M" for merge accounts. You can process a merge record for one pair of accounts at a time or you can process all merge records with a status of "M" for merge accounts.

See "[Appendix 4: Merge Processing.](#)"

The Merge Control Report summarizes merge statistics for each submitted merge process. It runs after merge processing and before the Merge Errors report. The report includes a Summary section with the number of completed and successful merges, number of merges that ended in error, and the total number of merge pairs handled by the process. The report also includes a Statistics section for the completed and successful merges that lists for each table the number of records added to the retained accounts, the number of duplicate records found, and the total number of records processed.

### Processing a Merge Record for One Pair of Accounts

To process a merge record for one pair of accounts, change the status of the merge record to "M" for merge accounts and click <Merge>. TA displays the Request an Operation window. TA defaults in the Retained Account ID and Duplicate Account ID fields the Account IDs from the Merge Entry screen. Click <Submit>.

You can check the status of the merge process on the Request Status window. To access the Request Status window, select Request Status from the System Menu on the menu bar. When the merge process is complete, TA changes the status of the merge record to "C" for completed merge.

### Processing Multiple Merge Records

You can schedule merge processing for every merge record with a status of "M" for merge accounts by accessing the Schedule Administration screen and scheduling the Merge Processing operation. When you schedule the Merge Processing operation, TA automatically displays the Request an Operation window for this operation.

The parameters on the Request an Operation window enable you to specify which merge records TA should process. By default, the Retained Account ID and Duplicate Account ID parameters are null (i.e., blank). If you leave these parameters null, TA processes all merge records with a status of "M."

You can enter criteria in the Account Category and Current Activity parameters to merge only records for which the retained account is assigned a particular account category or involved in a particular account activity. For example, you enter "I" for Individual/Family in the Account Category parameter and "AM" for Basic Membership in the Current Activity field. TA processes all merge records with the status "M" for which the retained account is assigned the Individual/Family account category and the retained account's current activity is "AM."

When TA processes a merge record, TA changes the status of the merge record to "C" for completed merge.

### See Also:

[Merge Records That Process in Error](#)  
[Retaining a Merge Record That Should Not Be Processed](#)  
[Accounts You Cannot Merge](#)

### Merge Records That Process in Error

When an Oracle® error prevents TA from processing a merge record, TA sets the status of the merge record to "E" for error.

**Note:** The Merge Errors report lists the Oracle® errors that prevented the processing of a merge record. See the Accounts Reports chapter for more information on the Merge Errors report.

### Retaining a Merge Record That Should Not Be Processed

When you create a merge record that should not be processed (i.e., the accounts are not duplicates and should not be merged), you can change the status of the record to "N" for no merge. By setting the status to "N" you retain the merge record even though you do not want TA to process the merge. Retaining the merge record indicates to other staff members that two accounts that appear to be duplicates are in fact separate accounts that should not be merged.

When you set the status of a merge record to "N," TA automatically creates the "Not a Duplicate" relationship between the two accounts. Press the [F10] key from the Status field to access the Relationship Type window.

**Note:** If you change the status of the merge record from "N" for no merge to any other status, TA sets the status of the "Not a Duplicate" relationship to "D" for delete.

### **Accounts You Cannot Merge**

You cannot merge two accounts that are designated as Matching Gift accounts. That is both accounts have [brief names](#) and brief name functions activating the matching gift functionality.

## Working with Account-based Screens

[Account Overview](#)  
[Names](#)  
[Addresses](#)  
[Telephone Numbers](#)  
[E-mail Addresses](#)  
[Relationships](#)  
[Salutations](#)  
[Interests](#)  
[Classifications](#)

### **Account Overview**

The Account Overview screen provides access to all of the functionality that you need to maintain account information including creating, updating, and deleting accounts. For each account, you capture and store names, biographical, demographic, financial and other information (such as interests or ratings). This information may pertain to the account as a whole or to a person within the account.

There are other versions of the standard Account Overview screen that are modified for specific audiences. For example the [Major Donor Account Overview screen](#) includes an Account Projects block (instead of a Benefits block) and is helpful for those who deal primarily with major donors and planned giving accounts. The [Volunteer Account Overview screen](#) displays volunteer history and availability information for those users who manage your organization's volunteers.

All versions of the Account Overview screen work the same way:

**Filter the information displayed:** Use the **Contact to Filter by** field if you want to view information associated with a particular person on the account. By default, TA displays information all information. When all records are displayed, preferred contact information first (address, telephone, and email), then information associated with the primary contact (if any), then information associated with the specific names on the account.

Press [F9] if you want to see name-specific information. TA displays information on the screen so that name-specific information is displayed first and then records set to the account-level are displayed. If there are no records set to the specific name that you selected, TA displays only account-level records.

**Names are displayed** in the order that they are added to the account. If a primary contact has been designated for the account, the primary contact's name always appears first.

*For organization accounts*, the names after the primary contact are listed alphabetically. To understand the information that can appear in parentheses to the right of a name, see "[Parenthetical Information on the Account Overview Screen](#)"

If your organization uses the [Display Sequence](#) field to control the order that records are listed, then records are displayed in the order you have established.

**View more detail:** Click in a block and Zoom to view the full data entry screen. Or you can click on the blue expand buttons  to see all of the records in the block. Note that you can place the cursor in a block and use your up or down arrow keys to scroll through the records.

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About the Matching Gifts tab: This tab only displays if the account is [set up as a matching gift account](#).

You cannot edit records directly on the Account Overview screen -except for the account-level fields. You must click in the area that you want to edit and then Zoom to the corresponding data entry screen. For example, if you need to update a name, click in the names block and zoom. TA navigates you to the Name Entry screen where you can add or update the record.

There is a short cut if you know you need to add a new record: click in the block and then press the [Ctrl] [T] key combination. TA displays the 'Create New' window that corresponds to the block your cursor is in. For example, if you click in the names block and then press [Ctrl] [T], TA displays the Create New Name window where you can add the new name record.

Records that are marked D (for Delete) are not displayed on the Account Overview screen. If you zoom to the data entry screen you see records that have a Status set to D. If a user does not have access to the Account Activities screen then the Last Gift Date in the Activities block is masked. The user cannot see these amounts for any activity record (nor can he or she zoom to the Account Activities screen).

On the standard version of the Account Overview screen, you can also view the non-premium benefits that have been awarded. The Benefits block displays the name of each non-premium benefit that your organization has awarded to the account and the benefit's expiration date, if applicable. You must zoom to view premiums( such as a mug) awarded to the account.

**Note:** The Managing Account Information chapter does not cover the Benefits Awarded screen. This screen is covered in the [Viewing Transactions, Benefits, and Interactions chapter](#).

### See Also:

[Parenthetical Information on the Account Overview Screen](#)  
[An Account's Name Line and Alpha Name](#)  
[Entering Account-level Information](#)  
[Inactivating or Deleting an Account](#)  
[Setting Up a Matching Company](#)  
[Switching to a Related Account](#)  
[Additional Information You Can View and Enter \(Account Overview\)](#)

## Parenthetical Information on the Account Overview Screen

### Names Block

TA displays the following information, if applicable, in parentheses (in the Names Block for Individual Accounts Only)

- The word "Deceased" if the name record has been marked as deceased. See "[Marking a Person as Deceased](#)"
- The word "Child" if the salutation flag for the name has been set to that of a child. See "[Identifying a Child](#)"
- The word "Tribute" if the name is associated with a recurring tribute.
- "Notified Party" if the name is displayed in the Notification Recipients block of any recurring tribute record.

### Addresses Block

In the Addresses block, TA displays the following information, if applicable, in parentheses.

- The address type (e.g., work)
- The name line of the person to whom the address belongs
- The valid to and from dates
- The address comments
- The phrase "Do not mail" if the address has been marked as one to which mail should not be sent

### Telephones and E-mails Block

In both the Telephones and E-mails block, TA displays the following information, if applicable, in parentheses.

- The first name of the person to whom the telephone number or e-mail address belongs
- The comments for the telephone number or e-mail address
- The phrase "Do not phone" if the telephone number has been marked as one to which no contact should be made

### Classifications and Relationships Block

In the Classifications block, TA displays in parentheses the first name of the person to whom the classification applies (if the classification does not apply to the account as a whole), the status of the classification, and the end date for the classification, if applicable.

In the Relationships block, TA displays in parentheses "MG" to the right of a relationship's description if it is a matching gift relationship. For more information on matching gift relationships, see the [Managing Matching Gifts chapter](#).

### An Account's Name Line and Alpha Name

TA stores two names for the account: the name line and the alpha name. The account's name line is used on displays and can be used on reports; this serves as the account's "full name" name. The account's alpha name is used for searches and can also be used on reports.

TA creates the name line when you create an Individual account. You enter the name line when you create an Organization account. TA composes the alpha name when you create either an Individual or an Organization account; see "[How TA Builds an Account's Alpha Name](#)". You can view and update both of these names on the Account Overview screen.

#### See Also:

[How TA Composes an Individual Account's Name Line and Alpha Name](#)  
[Customizing an Individual Account's Name Line and Alpha Name](#)

### How TA Composes an Individual Account's Name Line and Alpha Name

TA composes the account's name line and alpha name from the first two active adult names for which the salutation flag is not set to the no salutation code. An

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active name is one whose status is active. An adult name is not assigned the child's salutation code. TA composes the account's alpha name and name line based on the title, first name, middle name, last name, and suffix, from each active adult name.

If you change any of the name information for either of these adult names, TA updates the account's alpha name and name line. If you set the salutation flag for either adult name to the child's salutation flag or the no salutation flag, TA updates the account's alpha name and name line with the next active, adult name (if it exists) for which the salutation flag is not set to the no salutation code.

**Note:** TA references the [Salutation and Name Join](#) system preference to determine the text to use to separate two names included in the account's name line and alpha name (e.g., "&" or "and").

See "[Appendix 1: Names and Salutation Rules](#)"

### See Also:

[When an Individual Account's Name Line Is "Mr. & Mrs. Smith" Versus "Mr. Smith & Mrs. Smith"](#)

[When an Individual Account's Alpha Name Is "Smith, Mr. & Mrs." Versus "Smith, Mr. & Smith, Mrs."](#)

#### ***When an Individual Account's Name Line Is "Mr. & Mrs. Smith" Versus "Mr. Smith & Mrs. Smith"***

TA contains two different title codes, "MRS" and "M," to refer to a married woman using the title "Mrs." in her name. These codes determine the format, standard versus marital status exception, of the account's name line if her name is used in it. TA applies the marital status exception format to the account's name line when

- The last names of both names are the same.
- Both names have titles entered.
- The title code entered for her name is "M," which is the same as the title code in the [Marital Status Title](#) system preference, i.e., if the title code entered for her name is "M," then TA applies the marital status exception format to the account's name line.

For example, you create an account for Dr. John Smith and his wife Mary. If you enter "M" as the title code for Mary, TA applies the marital status exception format as follows: "Dr. & Mrs. John Smith." If you enter "MRS" as the title code for Mary, TA applies the standard format as follows: "Dr. John Smith & Mrs. Mary Smith."

See "[Name Line Marital Status Exception Format \(Account Level\)](#)"

#### ***When an Individual Account's Alpha Name Is "Smith, Mr. & Mrs." Versus "Smith, Mr. & Smith, Mrs."***

TA contains two different title codes, "MRS" and "M," for a married woman using the title "Mrs." in her name. These codes determine the format, standard versus marital status exception, of the account's alpha name if her name is used in it. TA applies the marital status exception format to the account's alpha name when

- The last names of both names are the same.
- Both names have titles entered.
- The title code entered for her name is "M," which is the same as the title code in the [Marital Status Title](#) system preference, i.e., if the title code entered for her name is "M," then TA applies the marital status exception format to the account's name line.

For example, you create an account for Dr. John Smith and his wife Mary. If you enter "M" as the title code for Mary, TA applies the marital status exception format as follows: "Smith, John Dr. & Mary Mrs." If you enter "MRS" as the title code for Mary, TA applies the standard format as follows: "Smith, John Dr. & Smith, Mary Mrs."

See "[Alpha Name Marital Status Exception Format \(Account Level\)](#)"

### Customizing an Individual Account's Name Line and Alpha Name

You can customize the account's alpha name and name line from the Account Overview screen. When you customize the account's alpha name or name line, the fields from which the alpha name and name line were composed do not change. If you customize the account's alpha name or the account's name line and later update one of the fields from which TA composes each, TA asks you if you want to overwrite the customization. You can keep the customization by clicking <No> or have TA update the account's alpha name and name line by clicking <Yes>.

See "[Appendix 1: Names and Salutation Rules](#)"

### Entering Account-level Information

Account-level information includes the Staff, Affiliation, Status, Account Type, Brief Name, and Comments fields. This information pertains to the account as a whole not, to specific names or address records within the account.

Field/Information	Comments/Description
Identifying the Staff Member Assigned to an Account	<p>For each account, you can assign a staff member who is responsible for the account by entering the staff member's brief name in the Staff field on the Account Overview screen. To see a list of staff members, press the [F9] key from the Staff field. TA displays the <a href="#">brief names</a> for which the Employee? brief name function is set to "A" for active.</p> <p><b>Note:</b> Your organization can have TA assign a staff member to an account when the account is created, based on the account's ZIP Code. Your organization uses the ZIP Code table to indicate for which ZIP Codes a certain staff member is responsible.</p> <p>You can zoom from the Staff field to the Staff Assignment Information window. This window displays the staff member's name, and the primary solicitor and project description for each project with which the account is associated.</p>

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	<p>You can also assign a staff person to a specific name on the account . See <a href="#">Identifying the Staff Responsible for a Name</a> for more information.</p>
Entering Affiliation	<p>Use the Affiliation field to enter or to view the account's current affiliation (regional chapter, office, or service). Your organization determines the affiliation codes that are available in the list of values for this field. Affiliation can be automatically determined from the account's ZIP code (preferred address) if the system preference "<a href="#">Set Account Level Affiliation</a>" is set to ZIP. (You must also map ZIP codes to affiliation codes.)</p> <p>If you mark the Lock Affiliation? checkbox then TA does not automatically change the account's affiliation if the account moves or requests a different preferred address (or region with a different ZIP code).</p> <p><b>Note:</b> TA uses a rule to determine which affiliation to retain when two accounts are merged. See the <a href="#">Account Affiliation Merge Rule</a> system preference for more information.</p>
Entering Comments	<p>If, for the account, you need to enter a comment that does not change over time, enter the comment in the Account Comments field on the Account Overview screen.</p> <p>If a comment is time-dependent, enter it using the Notes feature of TA. You can access the Notes feature by pressing the [Notes] key or by clicking &lt;Notes&gt; on the toolbar. The Notes feature enables you to enter detailed notes about the account.</p> <p>Before you enter a comment for the account, make sure that TA has no other place to store that information (e.g., a customer service entry or an interest for the account).</p>

### Inactivating or Deleting an Account

You can inactivate an account by setting the account's status to "I" for inactive. You can mark an account for deletion by setting the account's status to "D" for delete. In both cases, TA automatically displays the Account Termination Code window when you move the cursor from the Status field. In this window, enter the code representing the reason for which you are inactivating or deleting the account and enter the date on which this change is effective. TA defaults the current date after you enter the termination code.

Once you have inactivated an account or marked it for deletion, TA displays to the right of the account's status the description of the termination code you entered in the Termination Code window, rather than displaying the description of the status code. You can view the termination date by pressing the [F10] key or

by clicking <Zoom> on the toolbar from the Status field. TA displays the Account Termination Code window with the information entered for the account.

You can change the account's status back to "A" for active unless the account has actually been deleted (your organization will determine the delete processing schedule for all records marked for deletion). When an account's status is active, you cannot zoom to the Account Termination Code window.

**Note:** If an account marked inactive or marked for deletion includes a termination code, TA displays the following message when you change the account's status back to "A": "Should record be changed to active and termination code cleared?" Click <Yes> to have TA set the status to active and clear the termination code.

### Setting Up a Matching Company

You can set up an account as a matching company if the account matches gifts that its employees make to your organization. You must assign a brief name and activate the Match Company? function and then use the fields in the Matching Rules tab to specify the details of how the organization matches gifts.

For more information on identifying an account as a matching gift company and setting up the matching gift rules, see the [Managing Matching Gifts chapter](#).

### Switching to a Related Account

You can view the information for an account related to the current account by highlighting, in the Relationships block, the relationship for the account you want to view and clicking the <Switch> button to the right of the Relationships block. TA redisplay the Account Overview screen with the information for the related account (i.e., the related account is now the current account). You can return to the account originally displayed by clicking the <Switch> button again.

See "[Relationships](#)"

### Additional Information You Can View and Enter (Account Overview)

Field	Description/Information
Account Category	TA sets the account category based on the account type selected when you create an account (e.g., Family or Small Corporation). Your organization has assigned each account type to one of five account categories: Individual/Family, Corporation, Foundation, Government, and Other (e.g., religious organization). TA updates the account category if you change the account type for the account. See " <a href="#">Common Account Types and Categories</a> " for more information.
Default Currency	TA displays the country associated with the account's default currency in the Default Currency field. TA sets this field to "USA." You can change this information. The default country indicates in what currency to issue the year-end tax statements for this account.
Last Exchange Date	You can view the account's last exchange date on the Additional tab. This is the most recent date on which this account was included in an exchange list. You cannot update this information; your organization updates this information through an update procedure run when your organization creates a list of names for exchange.

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Random Number	<p>You can view the random number assigned to the account on the Additional tab. The random number is used when your organization needs to create a random sample of accounts.</p> <p>To reassign random numbers to your existing accounts, schedule the Randomize Accounts procedure on the Schedule Administration screen. This procedure reassigns random numbers for a range of accounts that you identify by specifying a range of Account IDs. To preserve the sample size generated by queries that use this procedure, run the procedure on the entire range of accounts in your system.</p>
Seed Record Information	<p>You can enter whether an account is a seed record on the Additional tab. A seed record is a "dummy" record used to confirm that an organization with which you have exchanged lists is not misusing the list. Enter "Y" in this field if the account is a seed record. TA defaults this field to "N" when you create a new account.</p>
Anon Gift Account	<p>Your organization can set aside specific accounts for specific purposes. Set this field to Y if you want this account to be used to store anonymous gifts. Activity records for these accounts do not track current activity, giving level and related data, as well as member year data. You can also specify an account to use to track anonymous interactions. See <a href="#">Account for Unknown Interactions</a> for more information.</p>
Total Number of Usable Addresses, Telephone Numbers, and E-mail Addresses: Address Status Phone Status Email Status	<p>You can view the total number of usable Addresses, telephone numbers and e-mail addresses for an account on the Additional tab. For example, if an account does not have a telephone number or e-mail address, TA displays "0" in the corresponding status field. If an account does not have any <i>usable</i> telephone numbers, e-mail addresses, or addresses (e.g., a record exists and the Do Not Call?, Do not Mail, or Do Not Use field for that record is marked yes), TA displays "U" in the appropriate status field. Otherwise, TA sets the Status fields to the total number of records that you can use.</p> <p>You cannot update these fields; they are display-only fields.</p>
Alternate Account ID	<p>You can view the account's alternate Account IDs on the Additional tab. An example of an alternate Account ID is an identifier that was on the account from before conversion to TA. During conversion from your legacy system to TA, your organization decided whether to have conversion set this field.</p> <p>An account can have an unlimited number of alternate IDs, organized by ID Type. This feature makes it easier to integrate and consolidate multiple databases in TA. The ID Type of DEFAULT is reserved for converted account IDs from a legacy system. You can use Account Data Upload to import Alternate Account IDs providing that the file being upload has ID Type and Alternate Account ID.</p> <p>See <a href="#">"Find an Account Using an Alternate Account ID"</a></p>

### See Also:

[Attaching and Viewing a File Stored Outside of TA](#)

#### **Attaching and Viewing a File Stored Outside of TA**

Many of the data entry screens permit you to attach an external file (such as a letter or spreadsheet) to a particular record in TA. To attach a file, click the <Attachments> button to access the Attachments window. Note that your organization can set up TA to disable the <Attachments> button.

#### **Attaching or Removing Files**

You can browse for and attach a file by doing any of the following in the **Attachment Name** field:

- Press [F9], or Double click (on a blank line), or Right-click and select Browse. You can also enter the file's name and path directly in the Attachment Name field.
- You can attach multiple files in the Attachments window (up to 99,999). If you fill up the first six lines with attachments, you can press [F6] to access a new line. You can enter a free-text description of each file in the **Description** field.
- To remove an attachment, click on the file in the Attachment Name field and press [Shift] [F6].

**Note:** If a file location changes or a file no longer exists, the name of the file is still considered valid and can remain in the Attachment Name field. Also note that you can use the [Attachment Exists](#) calculated field to identify which TA records have files associated with them.

### Launching and Printing the File

You can launch the default application and the file displayed by clicking on a file in the Attachment Name field and

- Pressing Enter, or Double clicking, or Right-click and select Open.
- You can print the file without having to open it by right-clicking in the Attachment Name field and selecting Print (if a file name is entered).

## Names

You can access the Name Entry screen in one of three ways.

- You can select the Name Entry screen from the Main Menu.
- You can zoom to the Name Entry screen from the Names block on the Account Overview screen by pressing the [F10] key or by clicking <Zoom> on the toolbar.
- You can zoom to the Name Entry screen from the Name field on selected screens (e.g., the Customer Service screen) by pressing the [F10] key or clicking the <Zoom> button on the toolbar.

### See Also:

[Entering Basic Information for a Name](#)  
[Entering Preferred Information for a Name](#)  
[Entering Demographic Information for a Name](#)  
[Viewing and Entering Other Information for a Name](#)  
[Adding a New Name to an Account](#)  
[How TA Detects Duplicate Names](#)

## Entering Basic Information for a Name

Entering the Title, First Name, Middle Name, Last Name, and Suffix

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You can update the person's title, first name, middle name, last name, and suffix. You can press the [F9] key in the Title field on the Name Entry screen to view a list of titles from which you can choose. When you select a title code from the list, TA formats the title in the Name Line and Alpha Name Line according to the Abbreviation field on the Title Code Entry screen.

You can press the [F9] key in the Suffix field to view a list of suffixes from which you can choose. You may enter multiple Suffix values if you want to capture the multiple degrees that an individual has. The value your organization has set in the [Suffix Separator](#) system preference determines how multiple suffix codes are displayed.

**Note:** TA inserts a comma before all suffixes except numeric suffixes (i.e., I, II, III) in the account-level and individual name lines and the account-level and individual outside salutations. If you want to change whether or not TA inserts a comma before a suffix, you can mark or unmark the "Precede by Comma?" checkbox on the Suffix Code Entry screen. If you mark the checkbox, TA inserts a comma; if you unmark it, TA does not insert a comma.

### See Also:

[About a Name's Name Line and Alpha Name](#)  
[Customizing the Alpha Name and Name Line](#)  
[Entering a Person's Job Title or Occupation](#)  
[Brief Names](#)  
[Entering a Person's Gender](#)  
[Designating an Account's Primary Contact](#)  
[Using the No Salutation Flag](#)  
[Identifying a Child](#)

### About a Name's Name Line and Alpha Name

TA stores two versions of a person's name: the name line and the alpha name. TA composes both the name line and the alpha name from the following information for a person: title, first name, middle name, last name, and suffix. TA uses the person's name line for the default salutations in which the person's name appears, for on-screen displays (e.g., in the Names block on the Account Overview screen), and on some reports. TA uses the person's alpha name (i.e., the full name with last name first) for searches and on some reports.

### Customizing the Alpha Name and Name Line

You can customize a person's alpha name and name line on the Name Entry screen. If you customize a person's alpha name or name line and later update one of the fields (title, first, middle, last, suffix) from which TA composes the person's alpha name and name line, TA displays the Proposed Name Changes window when you try to exit the Name Entry screen.

**Note:** If you customize a person's name line, TA updates the outside portion of the person's default salutation with this customization.

The Proposed Name Changes window contains the current version of the alpha name and name line and the proposed version of the alpha name and name line. TA displays this window because the current version of the alpha name, name line, or both includes customization done by someone at your organization. The

proposed version shows how TA will compose the person's alpha name and name line based on the changes made to the component name information (i.e., title, first, middle, last, suffix). You can keep the customization by clicking <Current> or have TA update the person's alpha name and name line by clicking <Proposed>.

**Note:** If you customize a name for which custom salutations exist, when you exit the Name Entry screen, TA displays the informational message, "Other salutations for this name exist. Only the default will be updated." Click <OK> to exit the window. TA updates the default salutation for the name, but any custom salutations are unchanged. This message, if applicable, also appears after you exit the Proposed Name Changes window. For more information on salutations, see "[Salutations](#)"

### Entering a Person's Job Title or Occupation

You can enter a job title by selecting the title from a list of titles or by entering the title yourself. You can see the list of job titles by pressing the [F9] key from the Job Title field on the Name Entry screen.

You can enter an occupation by selecting the occupation from a list of occupations. You can view the list of occupations by pressing the [F9] key from the Occupation field on the Name Entry screen.

### Entering a Person's Gender

When you add a name to an account, TA sets the person's gender based on the person's title or first name if your organization has set the [Automatically Default Gender?](#) system preference to "Y" for yes. If the title and first name are both gender specific but are of different genders, TA uses the gender of the title (e.g., TA assigns "F" for female to Mrs. Robert Smith because the title "Mrs." is female even though the first name "Robert" is male). If neither the title nor the first name is gender specific, TA sets the gender to "U" for unknown. You can change the gender on the Name Entry screen.

### Designating an Account's Primary Contact

You can identify the person who is the primary contact for an account by marking the Primary Contact? checkbox on the Name Entry screen. You do not have to identify a primary contact for an account but if you do, you can have only one.

This field is most relevant for organizational accounts since TA creates a salutation if there is a primary contact name for the organization.

### See Also:

[Organization Account Salutation Rules](#)

### Using the No Salutation Flag

You should set the Salutation Flag field to the no salutation flag for a name (i.e., a person) if the name has status of "A" for active and you want to exclude it from the account's name line, alpha name, and default salutation. If you enter this flag for a name already used in the account's name line, alpha name, and default salutation, TA deletes the name from them. TA then updates the account's name

line, alpha name, and default salutation according to its rules. You can enter this flag on the Name Entry screen and on the Create New Name Window.

See "[Appendix 1: Names and Salutation Rules](#)"

### Identifying a Child

You should set the Salutation Flag field to the child's salutation flag if you want to identify the name as that of a child. You can enter this flag on the Name Entry screen and on the Create New Name window. When you enter this flag, TA creates or updates the children's default salutation (see "[Children's Default Salutation](#)").

For Individual accounts, the child's salutation flag also indicates to TA that the name should be excluded from the account's name line, alpha name, and default salutation. If you enter this flag for a name already used in the account's name line, alpha name, and default salutation, TA deletes the name from them. TA then updates the account's name line, alpha name, and default salutation according to its rules.

See "[Appendix 1: Names and Salutation Rules](#)"

### Entering Preferred Information for a Name

#### Assigning a Name's Preferred Address

You can assign to a name a preferred address if it is different from the preferred address for the account. This option enables TA to select the address for mailings directed to only that person when that address differs from the address used for mailings to the entire account.

You assign the name's preferred address in the Preferred Address field on the Name Entry screen. TA defaults this field to the account's preferred address. From the Preferred Address field, you can press the [F9] key to view a list of the account's addresses and select the address that should be the preferred one for the person. The type of address (e.g., work, home) appears in parentheses next to each address.

To understand how TA initially identifies the account's preferred address, see "[How TA Initially Identifies an Account's Preferred Address](#)"

From the Preferred Address field, you can add a new address by pressing the [F6] key; TA displays the Create New Address window. See "[Adding a New Address to an Account](#)."

You can also update an address from this field by pressing the [F10] key; TA displays the Address Entry screen.

#### See Also:

[Assigning a Name's Preferred Telephone Number](#)  
[Assigning a Name's Preferred E-mail Address](#)

### **Assigning a Name's Preferred Telephone Number**

You can link a name to a preferred telephone number that is different from the preferred telephone number for the account. This option enables TA to select the telephone number for telemarketing solicitations directed to only that person when that telephone number differs from the one used for telemarketing solicitations directed to the entire account.

You assign the name's preferred telephone number in the Preferred Telephone Number field on the Name Entry screen. TA defaults this field to the account's preferred telephone number. From this field, you can press the [F9] key to view a list of the account's telephone numbers and select the number that should be the preferred one for the person. The type of telephone number (e.g., work, fax) and the first name of the person to whom the number belongs appear in parentheses next to each number.

To understand how TA initially identifies the account's preferred telephone number, see "[How TA Initially Identifies an Account's Preferred Telephone Number.](#)"

To understand how to associate a telephone number with a person, see "[Associating a Telephone Number with a Name.](#)"

From the Preferred Telephone Number field, you can also add a new telephone number by pressing the [F6] key; TA displays the Create New Telephone window. See "[Adding a New Telephone Number to an Account.](#)"

You can also update a telephone number from this field by pressing the [F10] key; TA displays the Telephone Entry screen.

### **Assigning a Name's Preferred E-mail Address**

You can assign to a name (i.e., a person) a preferred e-mail address that is different from the preferred e-mail address for the account. This option enables TA to select the e-mail address for e-mail solicitations directed to only that person when that e-mail address differs from the one used for e-mail solicitations directed to the entire account.

You assign the name's preferred e-mail address in the Preferred E-mail Address field on the Name Entry screen. TA defaults this field to the account's preferred e-mail address. From this field, you can press the [F9] key to view a list of the account's e-mail addresses and select the e-mail address that should be the preferred one for the person. The type of e-mail address (e.g., work, fax) and the first name of the person to whom the e-mail address belongs appear in parentheses next to each e-mail address.

To understand how TA initially identifies the account's preferred e-mail address, see "[How TA Initially Identifies an Account's Preferred E-mail Address.](#)"

To understand how to associate an e-mail address with a person, see "[Associating an E-mail address with a Name.](#)"

From the Preferred E-mail Address field, you can also add a new e-mail address by pressing the [F6] key; TA displays the Create New E-mail window. See "[Adding a New E-mail address to an Account.](#)"

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You can also update an e-mail address from this field by pressing the [F10] key; TA displays the E-mail Address Entry screen.

### Entering Demographic Information for a Name

You can enter demographic and other information for a name on the Name Entry screen (Biography tab). You can enter information in the following blocks.

- Marital Information (e.g., marital status, maiden name)
- Life Span Information (e.g., birth place, birth date, age range)
- Miscellaneous (e.g., social security number, political party)

### See Also:

[Marital Information](#)  
[Life Span Information](#)  
[Entering Miscellaneous Information](#)

#### Marital Information

You can enter the following marital information for a name.

- Marital status
- Marriage date
- Maiden name

You can enter the name's marital status (e.g., single, married) by selecting the status from a list of marital status codes. From the Marital Status field, press the [F9] key or click the <List> button on the toolbar to view a list of valid codes. Enter the person's date of marriage, if applicable, in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year. If you enter the maiden name for the person, you can use the maiden name to find the account (see "[Find an Account Using a Name](#)").

#### Life Span Information

You can enter the following life span information for a name record.

- Birth place
- Birth date
- Age range
- Birth note (e.g., hospital name)
- Deceased date

You do not need to enter the name's entire birth date if you don't know it. If you do enter the birth year, TA sets the age range. If you don't enter the birth year but do select an age range, TA enters an estimated birth year and, at the beginning of the birth note, enters the estimated birth year indicator, "E/." To estimate the birth year, TA subtracts from the current year the age that is at the midpoint of the

range you select. For example, if you select the 18 - 24 range, TA subtracts "21" from the current year to estimate the person's birth year.

**Note:** If you replace an estimated birth year with an actual birth year, TA removes the estimated birth year indicator from the Birth Note field.

**See Also:**

[Marking a Person as Deceased](#)

***Marking a Person as Deceased***

You can indicate that a person is deceased by marking the Deceased? checkbox on the Name Entry screen (Biography tab). If you know the partial or complete date on which the person died, you can enter it in the Deceased Date fields on the Name Entry screen. If you did not mark the Deceased? checkbox, TA marks it when you enter the date on which the person died.

When you mark a person as deceased, TA sets the status of the name to inactive, and displays a window containing a list of the proposed account-level salutations. You can change the proposed inside and outside salutations for the account if desired.

TA also deletes the age range if one is entered for the person. (TA deletes the age range because TA does not update this information for people who have died, i.e., TA updates the age range monthly of each person based on the person's current age range and date of birth.)

When you mark a person as deceased, TA displays a deceased flag on the person's name line on screen and prints a deceased flag on reports.

**Entering Miscellaneous Information**

You can enter the following miscellaneous information for a name (Biography tab).

- Social security number
- Number of children
- Number of grandchildren
- Political party
- Display sequence number

When you enter a name's social security number, you do not have to enter the hyphens. TA formats the social security number for you in the form "XXX-XX-XXXX."

Press the [F9] key from the Political Party field to select a political party from a list of values.

### Viewing and Entering Other Information for a Name

#### Entering a Person's Job Functions

You can enter one or more job functions for an individual on the Name Entry screen (Employment tab). A job function refers to a function the person performs that requires interaction with your organization. To view a list of job functions, press the [F9] key from the Code field. Once you select a job function, TA defaults the status to "A" for active. If a job function is no longer applicable, you can set the status to "I" for inactive or to "D" to mark the job function for deletion.

#### See Also:

[Viewing the Mailing Label for a Name](#)

[Entering Comments for a Name](#)

[Identifying the Staff Responsible for a Name](#)

[Entering Employee Information for Organization Employees](#)

[Attaching and Viewing a File Stored Outside of TA](#)

#### Viewing the Mailing Label for a Name

You can view the mailing label for a name on the Name Entry screen. The mailing label contains the following information.

- The person's default salutation
- The mailing address from the person's preferred address
- Line 1 and 2 of additional address information if entered for the person's preferred address
- The country (in all capital letters) is displayed on a separate line at the end if the address includes a country other than the system preference set up for [Default Country](#).

For Individual accounts, TA only includes the person's job title if the job title is entered for the person and the Use Job Title? field is set to "Y" for yes on the address record of the person's preferred address. See "[Adding Job Title to the Mailing Label \(Individual Accounts Only\)](#)"

For Organization accounts, TA automatically includes the person's job title if entered.

#### Entering Comments for a Name

You can enter a comment about a name in the Comments field (Other tab). For example, you can enter comments to prevent other users from making changes to a customized name line and alpha name. If you customize the name line and alpha name to indicate that the person does not use a period after his first initial (e.g., J Harry Smith), you can enter a comment to that effect to prevent other users from changing the customization.

#### Identifying the Staff Responsible for a Name

##### Identifying the Staff Member Assigned to a Name

You can assign to a staff member responsible for the name (Other tab). You assign this staff member to the person by entering the staff member's brief name

in the Staff field on the Name Entry screen. To see a list of staff members, press the [F9] key from the Staff field.

For example, you might assign a staff member to a name instead of to the account when the account is an Organization account involved with more than one activity at your organization. The Organization account may have a different contact name for each activity (i.e., one employee to contact concerning underwriting monies and a different employee to contact concerning capital campaign monies. Your organization has one staff member from underwriting responsible for soliciting the account for underwriting monies and a second staff member from capital campaign responsible for soliciting the account for a capital campaign gift. For the employee who should be contacted concerning underwriting monies, you assign the name of the staff member who is responsible for soliciting underwriting monies from the account. For the employee who should be contacted concerning capital campaign gifts, you assign the name of the staff member who is responsible for soliciting capital campaign gifts from the account.

### Identifying the Solicitor Assigned to a Name

Your organization can assign responsibility for a name to two different staff members (i.e., one staff member with overall responsibility for the person and one staff member responsible for soliciting the person). If the staff member responsible for the person is not the solicitor of the person, enter the solicitor's brief name in the Solicitor field. To see a list of solicitors, press the [F9] key from the Solicitor field.

### Entering Employee Information for Organization Employees

If the name record represents is an employee of your organization, you can record the department with which the employee is affiliated in the Department field on the Name Entry screen (Employment tab). To select from a list of departments within your organization, press the [F9] key from the Department field. Your organization creates a list of its departments on the Department Code Entry screen.

**Note:** To enter the department with which a name (i.e., employee) is associated, the name must be assigned the Employee? brief name function (with a status of "A" for active or "P" for past). If you try to enter a department for a name record that does not represent a present or past employee of your organization, TA displays the message "Only enter a value if the person is an employee of this organization."

You can enter the person's internal electronic mail address in the E-mail Address field on the Name Entry screen.

### Adding a New Name to an Account

You can add a new name record to an account from the Name Entry screen by pressing the [F6] key or by clicking <New> on the toolbar. TA displays the Create New Name window.

You can enter the person's title, first name, middle name, last name, and suffix. If your organization set the [Capitalize Initial Letter?](#) system preference to "Y" for yes, TA formats the person's first name, middle name, and last name by

capitalizing the first letter and lowercasing the remaining letters for each. TA applies this formatting only when you first enter each name. If you return to any of these three fields to make a change, TA does not reapply the formatting. For example, if you enter "van buren" as the last name, TA changes it to "Van Buren." If you return to the last name to change it to "van Buren" (i.e., to lowercase the "v"), TA does not recapitalize the "v." When you finish entering the name information, press the [Enter] key or click <Create> to add the name.

For Individual accounts only, when you enter the first name, TA defaults the last name to that of the first person added to the account. You can change the last name.

You can set the salutation flag when adding a name to an account if appropriate (e.g., adding the name of a child). See "[Using the No Salutation Flag](#)" and "[Identifying a Child](#)."

### How TA Detects Duplicate Names

When you add a new name to an account, TA checks to make sure that the name does not already exist within the account. TA looks for an exact match. For example, if you have an account for Mr. John Smith and try to enter his son as Mr. John Smith, TA displays a warning. However, if you try to enter the son as Mr. John Smith Jr., TA accepts this name with no warning because the name is not an exact match.

## Addresses

You can access the Address Entry screen in one of three ways.

- You can select the Address Entry screen from the Main Menu.
- You can zoom to the Address Entry screen from the Addresses block on the Account Overview screen by pressing the [F10] key or by clicking the <Zoom> button on the toolbar.
- You can zoom to the Address Entry screen from the Address field on selected screens (e.g., the Customer Service screen) by pressing the [F10] key or by clicking the <Zoom> button on the toolbar.

### See Also:

[Entering Basic Information for an Address](#)  
[Entering Additional Address Information](#)  
[Adding a New Address to an Account](#)  
[Searching for City, State and ZIP Code Information](#)

### Entering Basic Information for an Address

You can update the address' type (e.g., home, work), street number (including fractions, e.g., 100 1/2 Main St.), street name, apartment number, city, state, and ZIP Code. If you enter an apartment number, you do not need to enter the number sign (i.e., "#"); if you do enter this sign, TA deletes it. TA inserts the number sign when generating mailing labels and when displaying the complete

address on screen. TA also inserts a comma after the street address if you entered an apartment number (e.g., 100 Main St., #3). You can also enter or update additional address information, e.g., suite number, in the Line 1 and Line 2 fields.

The Address Lines fields display the mailing address in the following order: street number and name, apartment number, city, state, and ZIP Code. TA automatically updates the address lines when you change one of the address fields from which the address lines are composed (e.g., street number or ZIP Code).

### See Also:

[Entering Post Office Box and Rural Route Information](#)

[Customizing the Address Lines](#)

[Associating an Address with a Name](#)

[Archiving an Address](#)

[How TA Initially Identifies an Account's Preferred Address](#)

[Marking an Address as One That Should Not Be Used for Mailings](#)

[Marking an Address as Undeliverable](#)

### Entering Post Office Box and Rural Route Information

If you have both street and post office box (or rural route) information, you can enter the post office box number or the rural route number in the Line 1 and/or Line 2 fields in the Address Entry screen. However if you only have PO Box for an address you should enter it in the Street Name field (leaving street number blank).

Please note that you cannot search for addresses using the Line 1 and Line 2 fields. Therefore, if the account is more commonly known by the PO Box, then use the Street Name field.

### Customizing the Address Lines

You can customize the Address Lines fields for an address. If you customize the address lines and later update one of the fields (i.e., street number, street name, apartment number, city, state, zip code, zip code extension, country) from which TA composes the address lines, TA displays the Proposed Address Changes window when you tab out of that field.

The Proposed Address Changes window contains the current version of the address lines and the proposed version of the address lines. TA displays this window because the current version of the address lines includes customization done by someone at your organization. The proposed version shows how TA will compose the address lines based on the changes made to the component address information (i.e., street number and name, apartment number, city, state, and ZIP Code). You can keep the customization by clicking <Current> or have TA update the address line to correspond to the component fields by clicking <Proposed>.

### Associating an Address with a Name

When you add an address to an account, TA always associates the address with the account as a whole. In the Name field, TA displays the account's name line followed by the account name line indicator (i.e., "(Account)"). If the address belongs to a particular name within the account (e.g., a person's work address),

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you can enter that person's name in the Name field. Press the [F9] key to view a list of all the names for the account.

When you associate an address with a particular person in the account, TA asks you if you also want to assign the address as the name's preferred address (see "[Assigning a Name's Preferred Address](#)"). Click <Yes> to have TA change the person's preferred address (i.e., TA sets the Preferred Address field for the name to the current address). Click <No> if you do not want the address to be the person's preferred address.

### Archiving an Address

The phrase "archiving an address" refers to keeping a copy of an address that is no longer a current address. TA asks you if you want to archive an address if you change two or more of the following for the address: street name, city, state, ZIP Code, and country.

**Note:** If you change only the ZIP Code, TA asks you if you want to archive the old address because changing the ZIP Code automatically changes the city and state.

For example, Bob Smith moves his residence from one town to another. You update his home address to the new home address. If you want to keep a copy of the old home address, click <Save> when TA asks you if you want to archive the address. If you don't want to keep a copy of the old home address, click <Discard>.

When you archive an address, TA sets the address' status to "O" for old, and the address is not updateable (i.e., you cannot change any of the information for the address except its status). You can manually archive an address by doing the same (i.e., by setting the status to "O" for old). You can change the status of an archived address to "A" for active to update the address.

### Activating a Pending Address

Many organizations use uploaded information from vendors to create and/or update addresses. Some organizations set the [Current Activities with Pending Address Updates](#) system preference to prevent uploads from automatically updating their major donors' or planned giving donors' addresses. Instead, addresses for these donors that come through an upload may be given a pending status rather than an active status.

When you are viewing such an address on the Address Entry screen, you can use the <Activate> button to view the original and pending address information and decide whether you want to replace the original address with the updated pending address.

**Note:** The <Activate> button is only available in cases where an upload has set the status of an address to pending.

### How TA Initially Identifies an Account's Preferred Address

TA identifies the first address added to the account as the account's preferred address (i.e., TA defaults the Account's Preferred Address field to "Y" for yes for the first address added to the account).

### Changing an Account's Preferred Address

You can change the account's preferred address at any time. To change the account's preferred address, enter a "Y" for yes in the Account's Preferred Address field for the address that you want to be the account's preferred address. TA automatically changes the Account's Preferred Address field to "N" for no for the address that had been the account's preferred address.

**Note:** For each name record, you can set a preferred address that is different from the preferred address for the account as a whole.

### Marking an Address as One That Should Not Be Used for Mailings

You can indicate that a particular address should not be used for any mailings by setting the Do Not Mail? field to "Y" for yes. When TA creates mailing labels for a mailing, TA does not select any addresses with the Do Not Mail? field set to yes, providing that this is included in your standard queries.

Do not confuse this field with the "APPEAL/NO MAIL" classification (or any similar solicitation classification with a value of "NO MAIL"). The difference is that the Do Not Mail? field refers to not sending mail to the address and the "APPEAL/NO MAIL" classification refers to not sending mail to the account (for appeal solicitations specifically). See "[Classifications](#)"

Note that addresses marked with the undeliverable status are also not pulled for mailings (again providing that your standard queries select only Active addresses). This status corresponds to returned mail from the United States Postal Service. For more information, see the next section "[Marking an Address as Undeliverable.](#)"

If a seasonal or vacation address includes the dates in the Valid to and From fields and the **Use** checkbox is **unmarked**, then TA will not select the address if you pull a mailing during the date range. TA will automatically select the address if the Use checkbox is marked.

### Marking an Address as Undeliverable

Sometimes the United States Postal Service (USPS) returns a piece of mail because the USPS could not deliver it to the address your organization used (i.e., the address is "undeliverable"). You can update the address to reflect this situation by updating the Undeliverable Count field.

Your organization can set the [Maximum Undeliverable Count](#) system preference to the maximum number of times an address can be marked undeliverable before TA automatically sets the address' status to "U" for undeliverable. Once you update the Undeliverable Count field and the number in it equals the maximum number selected by your organization, TA changes the address' status.

**Note:** You can manually change the address' status to undeliverable regardless of the number in the Undeliverable Count field.

### Entering Additional Address Information

The Basic tab of the Address Entry screen contains the basic information for an address. Use the Additional tab to access the specific use fields, Valid date fields, and other miscellaneous information that you can have for an address record.

#### See Also:

[Marking an Address for Use with a Specific Type of Mailing](#)

[Entering a Seasonal Address](#)

[Updating an Address That Is a Copy of Another Address](#)

[Updating an Address from Which Copies Have Been Made](#)

[Viewing Census Information](#)

[Viewing the Mailing Label for an Address](#)

[Entering and Viewing Other Address Information](#)

### Marking an Address for Use with a Specific Type of Mailing

You can identify up to three specific uses, where an address should be used (such as membership publications or invitations). When your organization prepares the labels for a mailing, TA checks the specific uses for each of the account's addresses to ensure that the correct address is selected for the mailing. For example, Bob Smith's account has two addresses. The first address is the account's preferred address, which includes a post office box number. The second address is Bob's home address, including the street number and name. You set one of the specific use fields for his home address to premiums. When TA selects the addresses to use when creating the mailing labels for the premiums, TA selects Bob Smith's home address for any premiums to be mailed to Bob.

See "[Appendix 2: Address Selection Rules for Queries](#)"

### Entering a Seasonal Address

You can indicate that an address is a seasonal one by entering the valid time period for the address in the Valid From and Valid To fields (Additional tab). Do not include a year if the address is valid from year to year during this time period. For example, if the address is valid from June 1 to August 31 each year, enter "6/1" in the Valid From field and "8/31" in the Valid To field.

**Note:** You can set the address type to any type that is appropriate for the seasonal address, e.g., "V" for vacation or "SC" for school.

When you enter dates in the Valid To and Valid From fields, TA marks the Use During These Dates? checkbox. This checkbox indicates that the address should be used for any mailings during this time period. You can unmark the Use During These Dates? checkbox by clicking on it. When you unmark the checkbox, the address is not by default used for mailings during the time period (i.e., TA does not automatically select the address during the time period noted).

If you know the address is a seasonal address but you don't know the dates during which the address is valid, you can set the address type to "S" for seasonal.

### **Updating an Address That Is a Copy of Another Address**

If an address is a copy of another address, the account from which the address is copied appears in the Copied From Account field and the "original" address appears in the Copied From Address field (Additional tab). For an address that is a copy of another address, you can change only the information in the following fields without breaking the "link" to the original address.

- Name
- Account's Preferred Address
- Display Sequence Number
- Use Job Title?
- Undeliverable Count

If you try to change any other address information, TA tells you that the address is a copy and asks if you want to keep the changes you made or cancel them. If you click <OK>, TA keeps the changes and breaks the link between the copy of the address and the original address (i.e., TA deletes from the copy the Account ID that appears in the Copied From Account field and the address that appears in the Copied From Address field). If you click <Cancel>, TA does not keep the changes and returns fields to the value(s) before you made the change.

### **Updating an Address from Which Copies Have Been Made**

If an address is one from which copies have been made (i.e., it is the "original" address), you can change only the information in the following fields without affecting the copies.

- Name
- Account's Preferred Address
- Display Sequence Number
- Use Job Title?
- Undeliverable Count

If you try to change any other address information, TA asks you if you want to update the copy of the address. TA asks you this question for each copy of the address and includes the copy's Account ID and address. If you click <Yes>, TA updates the copy with the information you changed on the original. If you click <No>, TA does not update the copy and breaks the link between the copy and the original (i.e., for the copy, TA deletes the Account ID that appears in the Copied From Account field and the address that appears in the Copied From Address field).

### **Viewing Census Information**

You can view the following census information on the Address Entry screen.

- Census tract and census block identification numbers used by the United States Census Bureau for the address' geographical

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location. TA defaults these numbers based on the street name (future development).

- Congressional district number and the county. TA defaults the county based on the ZIP Code. The county is represented by the Federal Information Processing Standard (FIPS) number assigned to it by the United States Census Bureau. TA defaults the congressional district number based on the address' ZIP Code (or ZIP Code and ZIP Code extension, if you have a license for the [Legislative District Module](#)).

### Viewing the Mailing Label for an Address

You can view the mailing label for the address. This field contains the following information.

- The default salutation for the name associated with the address
- The mailing information (i.e., street number and name, apartment number if entered, city, state, and ZIP Code)
- Line 1 and 2 of additional address information if entered
- The country (in all capital letters) is displayed on a separate line at the end if the address includes a country other than the system preference set up for [Default Country](#).

For Individual accounts, TA only includes the person's job title if the job title is entered for the name associated with the address and the Use Job Title? field is set to yes on the address. For Organization accounts, TA automatically includes the person's job title if it is entered.

### See Also:

[Adding Job Title to the Mailing Label \(Individual Accounts Only\)](#)

### ***Adding Job Title to the Mailing Label (Individual Accounts Only)***

For Individual accounts, if you associate an address with a particular name, you can set the Use Job Title? field to "Y" for yes on the Address Entry screen. When you set the Use Job Title? field to yes, TA uses the person's job title as part of the mailing address as long as the person's job title is entered. To enter a person's job title, see "[Entering a Person's Job Title or Occupation](#)"

**Note:** For Organization accounts, TA automatically includes the person's job title with the mailing address if the person's job title is entered.

### Entering and Viewing Other Address Information

You can view the following additional address information on the Address Entry screen.

- Postal carrier route number used by the United States Postal Service. TA defaults this number based on the street name (future development).

- Cable and satellite access codes if the address has access to each. TA defaults these access codes based on the ZIP Code (future development). If you do not have the specific access codes, you can enter "Y" or "N" to indicate whether the address has cable and satellite access.
- Standard postal format address. TA displays the mailing address as formatted to meet United States Postal Service standards. The post office address is display-only; you cannot update it. To make any changes, you need to change the appropriate individual address field for the address (e.g., street number or ZIP Code).
- Comments about the address. You can enter a comment about the address in the Comments field.

### Adding a New Address to an Account

You can add a new address to an account from the Address Entry screen by pressing the [F6] key or by clicking <New> on the toolbar. TA displays the Create New Address window. You can enter the following information on the Create New Address window.

- Street number
- Street name
- Apartment number
- ZIP code
- City
- State
- Country
- Address type (e.g., home, work).

If your organization set the [Capitalize Initial Letter?](#) system preference to "Y" for yes, TA formats the street name and city name by capitalizing each name's first letter and lowercasing the remaining letters. TA applies this formatting only when you first enter each name. If you return to either one to make a change, TA does not reapply the formatting. For example, if you enter "mcdonald" as the street name, TA changes it to "Mcdonald." If you return to the street name to change it to "McDonald" (i.e., to capitalize the "d"), TA does not lowercase the "d." When you finish entering the address information, click <Create> to add the address.

**Note:** You can add additional address information (e.g., suite number) in the Address Line 1 and Address Line 2 fields on the Address Entry screen. If your organization set the Capitalize Initial Letter? system preference to "Y" for yes, TA formats the information in these fields by capitalizing the first letter of each word and lowercasing the remaining letters. TA applies this formatting only when you first enter information in these fields.

For Individual accounts, TA defaults the address type to "H" for home if the account has no home address. If the account has a home address, TA defaults the address type to "W" for work for each address added to the account.

For Organization accounts, TA defaults the address type to "W" for work for each address added to the account.

### See Also:

[Entering Abbreviations in the Address Fields](#)  
[Creating a New Address by Copying an Existing Address](#)  
[How TA Detects Duplicate Addresses](#)

### Entering Abbreviations in the Address Fields

TA enables your organization to standardize the abbreviations you enter in the following fields.

- Street Number
- Street Name
- Apartment Number
- City

For example, you can set the abbreviations "St.", "ST.", and "Str" to appear as "Street" when the abbreviations are entered in the Street Name field. Your organization sets the standard format for common abbreviations on the Abbreviation Code Entry screen.

### See Also:

[Creating Abbreviation Codes](#)

### ***Creating Abbreviation Codes***

The Abbreviation Code Entry screen allows you to configure TA to format text in different ways in the following address fields: street name, street number, apartment number, and city. TA uses information from this screen to format text that appears in these fields when creating new address records.

You can use this screen to standardize common abbreviations or words that users enter in different ways. For example, you can use this screen to expand abbreviations into words (e.g., "St" to "Street"), shorten words into abbreviations (e.g., "Street" to "St"), or add or subtract periods to abbreviations (e.g., "St" to "St.")

When you access the Abbreviation Code Entry screen, TA displays the Find Code window. To create a new code, press <New>. TA displays the Create New Code window. This window contains two fields: Abbreviation and Column.

- Enter the text that you want to replace in the Abbreviation field. For instance, if you want to expand every occurrence of "W." into "West," enter "W." into the Abbreviation field.
- Enter the column name that represents the field where the replacement should take place in the Column field. You can press the [F9] key to access the list of column names. For example, to enter an abbreviation code that only works in the

Street Name field in the Addresses table, set this code to "STREET\_NAME".

**Note:** You can create only one abbreviation record for each abbreviation/column name pair. For instance, in the Street Name column, you cannot have "St." expand to both "Street" and "Saint."

To create the code and access the Abbreviation Code Entry screen where you can enter the text TA should replace, click <Create>. TA displays the abbreviation code and column name at the top of the Abbreviation Code Entry screen. (You cannot update these fields.) There are three fields to set on this screen: Description, Instructions, and Entry Point.

- The description is the text you want the abbreviation to be replaced with. For example, if you want all occurrences of "W." to become "West", enter "West". If you want to add a period to all occurrences of "W" enter "W."
- TA uses the instructions in the Instructions field to decide when to replace an abbreviation. TA defaults this code to "PA" for partial field match. See the next section, "Instruction Codes" for information about the different instruction codes.
- The entry point determines when TA should follow the rules you've set up. TA defaults the entry point to "A" for all methods of entry. You can change the code to "turn off" the abbreviation when doing address-related uploads but keep it on for manual entry of addresses into TA, or vice versa. You can press the [F9] key to access the list of entry points.

### See Also:

[Instruction Codes](#)

#### *Instruction Codes*

The Instructions field is particularly important in setting up abbreviations, and is the most complicated part about the abbreviation code set up. There are six different instruction codes; each code gives TA a different set of instructions on when it is appropriate to replace the "abbreviation" with the "description".

**Note:** All of the descriptions below contain examples that refer to abbreviations associated with the Street Name column.

#### **PA (Partial Field Match)**

This instructs TA to replace the text when it is a partial field match. For instance, use PA if you want TA to turn all occurrences of "Street" into "St." PA is probably the most commonly used instruction code. However, be aware that if you were to use PA with an abbreviation of "St." that expands to "Street", TA would turn the street name "St. John St" into "Street John Street".

#### **WH (Whole Field Match)**

This instructs TA to replace the text wherever it occurs, even if it is part of another word. That is, any occurrence of the "abbreviation" will be replaced by the "description." If you use WH with an abbreviation of "St" that expands to "Street",

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and enter a street name of "Storrow Drive", TA turns the street name into "Streetorrow Drive".

### **LA (Translate Last Word)**

This instructs TA to replace the text only if it is the last word in the street name. This works well in situations like the "St. John St." example, as TA turns this street name into "St. John Street." However, if the original street name is "St. John St. SW," TA does not expand the second occurrence of "St." since it is not the last word.

### **FI (Translate First Word)**

This instructs TA to replace the text only if it is the first word in the street name. If you use FI with an abbreviation of "St" that expands to "Saint", TA turns "St. John St." into "Saint John St." However, TA does not expand "SW St. John St."

### **PR (Translate Primary Street Word)**

This instructs TA to replace the text only if it immediately precedes a phrase that usually denotes a street (e.g., St, Ave, Road, etc.). For example, if you want to expand "N" to "North" only when it appears to be the name of the street, you should use PR. In this example, TA turns "N. Street" into "North Street" but does not expand "N. St. John St."

### **SE (Translate Secondary Street Words)**

This instructs TA to replace the text only if it is a secondary street word. This does the reverse of the PR instruction in the above example; TA leaves "N. Street" untouched, but turns "N. St. John St." into "North St. John St."

## **Creating a New Address by Copying an Existing Address**

You can copy an address from one account to the same or a different account. For example, for an Organization account with multiple contacts, you make a copy of an address associated with one person within an account. You copy the address to the same account so that you can also associate the address with a second contact for the account. Another example of when you might copy an address is when a person has an Individual account and is also a contact for an Organization account. You can copy the person's work address from the Organization account to the person's Individual account.

When you create a copy of an address, TA links the copy to the original, and updates the copy when you change certain information on the original address. See "[Updating an Address That Is a Copy of Another Address.](#)"

From the Create New Address window, you can copy an address by entering the address' Account ID in the Copy Account field and the address in the Copy Address field.

## **How TA Detects Duplicate Addresses**

When you add a new address to an account, TA checks to make sure that the address does not already exist within the account. TA looks for an exact match, (i.e., the Street Number, Street Name, City, State, and ZIP Code fields must be identical to those of another address within the account). Address lines 1 and 2 are not used when searching for duplicates. TA looks at every address

associated with the account, including archived addresses (i.e., addresses for which the status is set to "O" for old), addresses for which the status is set to "U" for undeliverable, and addresses marked inactive or marked for deletion.

### Searching for City, State and ZIP Code Information

You can search for city, state, and ZIP Code information in several ways. You can perform these searches from the Create New Account window (Address block), the Create New Address window, and the Address Entry screen.

#### See Also:

[How TA Verifies ZIP Codes and City Names](#)

[Search on ZIP Code](#)

[Search on City Name Only](#)

[Search on City Name Within a Specific State](#)

[Viewing Multiple City Names for One ZIP Code](#)

### How TA Verifies ZIP Codes and City Names

TA has two system preferences that relate to ZIP Code entry: The [Low ZIP Check and High ZIP Check](#) system preference. Your organization sets these numbers.

These system preferences impact the acceptable ZIP Codes you can enter in the ZIP Code field in the following ways. Below, assume that the Low ZIP Check system preference is 01000 and the High ZIP Check system preference is 99999.

- If the ZIP Code you enter in the ZIP Code field is between the number in the Low ZIP Check the High ZIP Check system preferences, the ZIP Code must be in the ZIP Code table. For example, you enter 02182 in the ZIP Code field. This ZIP Code is not in the ZIP Code table. TA displays the hint, "Please enter a valid ZIP Code." You cannot leave the ZIP Code field until you enter a valid ZIP Code.
- If the ZIP Code you enter in the ZIP Code field is not between the number in the Low ZIP Check and the High ZIP Check system preferences, you can enter any number. For example, TA allows you to enter a foreign ZIP Code that is not included in the ZIP Code table if the foreign ZIP Code does not fall between the Low ZIP Check system preference and the High ZIP Check system preference. You enter an address in Toronto, Ontario, Canada. TA allows you to enter the ZIP Code "M3K 42T" because it is not a number between the number in the Low ZIP Check system preference and the number in the High ZIP Check system preference.
- The system preferences also impact what you enter in the City field. When you enter a valid ZIP Code that is within the range of the Low ZIP Check and High ZIP Check system preferences, you must enter a city in the City field that is valid for that ZIP Code. For example, you enter 02139 in the ZIP Code field, which is the ZIP Code for Cambridge, Massachusetts. You change the city to Cambridgeport, a specific area in Cambridge. TA displays the hint, "The city entered is not valid for the current ZIP code." You

cannot leave the City field until you enter a valid city. You can add valid cities to a ZIP Code on the ZIP Code Entry screen.

### **Search on ZIP Code**

To see a set of ZIP Codes that begin with the same number(s), enter the number(s) in the ZIP Code field (e.g., to see a list of all ZIP Codes that begin with "02," enter "02") and press the [F9] key. TA displays a list of values that contains the ZIP Codes with their associated cities and states. When you select the ZIP Code from this list, TA defaults the associated city and state in the City field and State field respectively.

### **Search on City Name Only**

If you do not enter the ZIP Code and you don't know the complete, correct spelling of the city name, you can enter the first few letters of the city's name in the City field and press the [Alt] [F9] key combination from the City field. TA displays a list of values that contains all of the cities whose names start with the letters you entered. When you select the city from this list, TA defaults the associated state and ZIP Code in the State field and ZIP Code field respectively.

### **Search on City Name Within a Specific State**

You can view a list of cities within a specific state if you have the state information. Enter the state's abbreviation in the State field and then enter the first few letters of the city's name in the City field. Press the [Alt] [F9] key combination. TA displays a list of values that contains all of the cities with names that start with the letters you entered and that are located in the state you entered. When you select the city from this list, TA defaults the associated ZIP Code in the ZIP Code field.

### **Viewing Multiple City Names for One ZIP Code**

TA defaults the city name based on the ZIP Code. If more than one city name is assigned to a ZIP Code (e.g., neighborhood names), TA defaults the primary city for that ZIP Code. If you want to change the city name, press the [F9] key to see a list of the city names for that ZIP Code. You can select the appropriate city name from this list.

**Note:** If you enter a city name that is not among those TA lists for the ZIP Code you entered, TA tells you that the city name is not valid for the ZIP Code. Press the [F9] key to view a list of the valid city names. TA will not let you exit this field until you have entered a valid city name.

## ***Telephone Numbers***

You can access the Telephone Entry screen in one of the following ways.

- You can select the Telephone Entry screen from the Main Menu.
- You can zoom to the Telephone Entry screen from the Telephones and E-mails block on the Account Overview screen by pressing the [F10] key or by clicking the <Zoom> button on

the toolbar, if the selected line represents a telephone number (as opposed to an e-mail address).

- You can zoom to the Telephone Entry screen from the Telephone field on selected screens (e.g., the Account Diary screen) by pressing the [F10] key or by clicking the <Zoom> button on the toolbar.

**See Also:**

[Entering Information on the Telephone Entry Screen](#)  
[Adding a New Telephone Number to an Account](#)

### **Entering Information on the Telephone Entry Screen**

The Telephone Entry screen contains all of the information you can store for a telephone number. You can update the telephone type (e.g., home, fax), the telephone number itself, including the area code, and the extension, if applicable.

When you update the telephone number, you do not have to enter the hyphens or, if you include the area code, the parentheses. TA formats the telephone number for you in the form "(###) ###-####," i.e., the standard telephone number format. If you enter information in the Telephone Number field to which TA cannot apply the standard telephone number format, e.g., an international number, TA leaves the number as you entered it.

Your organization can specify a [Default Area Code](#) as a system preference. If your organization uses this system preference, TA automatically inserts the area code according to your set up.

If you set the telephone type to "W" for work, TA defaults the Valid From field to "9:00 a.m." and the Valid To field to "5:00 p.m." You can change this information at any time. For example, if this work number is only valid from Monday to Wednesday, you can enter "Monday" in the Valid From field and "Wednesday" in the Valid To field. If you change the telephone type from work to another type, you may need to delete or change the information in these fields.

**Note:** Unlike addresses, TA does not automatically use the information in the Valid From and Valid To fields to select telephone numbers for a telemarketing campaign. Your organization needs to include this information as criteria when setting up the query to select the appropriate accounts for the telemarketing campaign.

**See Also:**

[How TA Initially Identifies an Account's Preferred Telephone number](#)  
[Associating a Telephone Number with a Name](#)  
[Associating a Telephone Number with an Address](#)  
[Marking a Telephone Number as One That Should Not Be Used](#)  
[Entering Comments for a Telephone Number](#)

### How TA Initially Identifies an Account's Preferred Telephone Number

TA identifies the first telephone number added to the account as the account's preferred telephone number (i.e., TA defaults the Account's Preferred Telephone field to "Y" for yes for the first telephone number added to the account).

### Setting an Account's Preferred Telephone Number

You can change the account's preferred telephone number at any time by entering "Y" for yes in the Account's Preferred Telephone field for the telephone number that you want to be the account's preferred telephone number. TA automatically changes the Account's Preferred Telephone field to "N" for no for the telephone number that had been the account's preferred telephone number.

**Note:** For each name, you can set a preferred telephone number that is different from the preferred telephone number for the account as a whole.

### Associating a Telephone Number with a Name

When you add a telephone number to an account, TA always associates the telephone number with the account as a whole. In the Name field, TA displays the account's name line followed by "(Account)". If the telephone number belongs to a particular person within the account (e.g., Bob Smith's work telephone number), you can enter that person's name in the Name field. Press the [F9] key to view a list of all the names for the account.

When you associate the telephone number with a particular name in the account, TA asks you if you also want to assign the telephone number as the name's preferred telephone number. Click <Yes> to have TA change the person's preferred telephone number (i.e., TA sets the Preferred Telephone Number field for the name to the telephone number you just associated with the name). Click <No> if you do not want the telephone number to be the person's preferred telephone number.

### Associating a Telephone Number with an Address

You can associate the telephone number with a particular address by entering the address in the Address field. Press the [F9] key to view a list of all the addresses for the account.

### Marking a Telephone Number as One That Should Not Be Used

You can indicate that a telephone number should not be used by setting the Do Not Call? field to "Y" for yes on the Telephone Entry screen. When TA creates a list of telephone numbers for a telemarketing campaign, TA does not select any telephone numbers with the Do Not Call? field set to yes.

Do not confuse this field with the "APPEAL/NO PHONE" classification (or any similar classification with a classification value of "NO PHONE"). The difference between the two is that the Do Not Call? field refers to not calling the telephone number and the "APPEAL/NO PHONE" classification refers to not calling the account (for appeal solicitations specifically). See "[Classifications](#)."

## Entering Comments for a Telephone Number

You can enter any comments pertaining to a telephone number in the Comments field. If you enter comments for a telephone number, you should be certain that TA does not provide a specific field in which to enter the information.

## Adding a New Telephone Number to an Account

You can add a new telephone number to the account from the Telephone Entry screen by pressing the [F6] key or clicking <New> on the toolbar. TA displays the Create New Telephone window. You can enter the telephone number, including the area code, and, if applicable, the extension. When you finish entering the telephone information, click <Create> to add the telephone number.

When you enter a telephone number, you do not have to enter the hyphens or, if you include the area code, the parentheses. TA formats the telephone number for you in the form "(###) ###-####," i.e., the standard telephone number format. If you enter information in the Telephone Number field to which TA cannot apply the standard telephone number format, e.g., an international telephone number, TA leaves the number as you entered it.

Your organization can specify a [Default Area Code](#) as a system preference. If your organization specified such an area code, when you add a number that is within this area code, you do not need to enter the area code. TA inserts for you the area code that is the system preference (i.e., if you enter only seven numbers and your organization specified an area code as the system preference, TA automatically inserts that area code). Otherwise, include the area code when you enter the telephone number.

For Individual accounts, TA defaults the telephone type to "H" for home if the account does not have a home telephone number. If the account does have a home telephone number, TA defaults the telephone type to "W" for work for each telephone number added to the account.

For Organization accounts, TA defaults the telephone type to "W" for work for each telephone number added to the account.

**Note:** You can access the Create New Telephone window from the Telephones and E-mails block on the Account Overview screen by pressing the [Ctrl]+[T] key combination and indicating that you want to create a new telephone record.

### See Also:

[How TA Detects Duplicate Telephone Numbers](#)

## How TA Detects Duplicate Telephone Numbers

When you add a new telephone number to an account, TA checks to make sure that the telephone number does not already exist within the account. TA looks for an exact match. TA looks at every telephone number associated with the account, including telephone numbers marked inactive and those marked for deletion.

### ***E-mail Addresses***

The E-mail Address Entry screen contains all of the information you can store for an e-mail address.

#### **Accessing the E-mail Address Entry Screen**

You can access the E-mail Address Entry screen in one of the following ways.

- You can select the E-mail Address Entry screen from the Main Menu.
- Highlight an e-mail address from the E-mails block on the Account Overview screen and press the [F10] key or click the <Zoom> button on the toolbar.

#### **See Also:**

[Adding a New E-mail Address to an Account](#)  
[How TA Initially Identifies an Account's Preferred E-mail Address](#)  
[Associating an E-mail Address with a Name](#)  
[Marking an E-mail address as One That Should Not Be Used](#)  
[Marking an E-mail Address for a Specific Use](#)  
[Indicating Whether an E-mail Address is HTML Enabled](#)  
[Entering Comments for an E-mail Address](#)

#### **Adding a New E-mail Address to an Account**

You can add a new e-mail address to an account from the E-mail Address Entry screen by pressing the [F6] key or clicking <New> on the toolbar. TA displays the Create New E-mail window. Enter the e-mail address. TA defaults the e-mail type to "I" for Internet, but you can press the [F9] key in the E-mail Type field to select from a list of e-mail types. Click <Create> to add the e-mail address to the account. After the e-mail address is created, you can [assign it to a name](#) or [mark it for a specific use](#).

#### **How TA Detects Duplicate E-mail Addresses**

When you add a new e-mail address to an account, TA checks to make sure that the e-mail address does not already exist within the account. TA looks for an exact match. TA looks at every e-mail address associated with the account, including archived e-mail addresses, and e-mail addresses marked inactive or marked for deletion.

#### **How TA Initially Identifies an Account's Preferred E-mail Address**

TA identifies the first e-mail address added to the account as the account's preferred e-mail address (i.e., TA defaults the Account's Preferred E-mail field to "Y" for yes for the first e-mail address added to the account).

#### **Setting an Account's Preferred E-mail Address**

You can change the account's preferred e-mail address at any time, by entering "Y" for yes in the Account's Preferred E-mail field for the e-mail address that you

want to be the account's preferred e-mail address. TA automatically changes the Account's Preferred E-mail field to "N" for no for the e-mail address that had been the account's preferred e-mail address.

**Note:** For each name, you can set a preferred e-mail address that is different from the preferred e-mail address for the account as a whole.

### **Associating an E-mail Address with a Name**

When you add an e-mail address to an account, TA always associates the e-mail address with the account as a whole. In the Name field, TA displays the account's name line followed by the account name line indicator (i.e., "(Account)"). If the e-mail address belongs to a particular person within the account (e.g., Bob Smith's work e-mail address), you can enter that person's name in the Name field. Press the [F9] key to view a list of all the names for the account.

When you associate the e-mail address with a particular name in the account, TA asks you if you also want to assign the e-mail address as the preferred e-mail address for the name record. Click <Yes> to have TA change the person's preferred e-mail address. Click <No> if you do not want the e-mail address to be the person's preferred e-mail address but just want to associated the name with the e-mail address.

### **Marking an E-mail Address as One That Should Not Be Used**

You can indicate that an e-mail address should not be used by setting the Do Not Use? field to "Y" for yes on the E-mail Address Entry screen. When TA creates a list of e-mail addresses for an electronic-marketing campaign, TA does not select any e-mail addresses with the Do Not Use? field set to yes.

### **Marking an E-mail Address for a Specific Use**

You can identify up to three specific uses for an e-mail address (e.g., newsletters, invitations, program guides). When your organization selects the e-mail addresses for an e-mail campaign, TA checks the specific uses for each of the account's e-mail addresses to ensure that the correct address is selected. For example, Mary Jones might have indicated that she wants to receive all e-invitations at her home e-mail address, and all e-newsletters at her work e-mail address. When TA selects the e-mail address to use for the e-newsletter, TA selects Mary Jones' work e-mail address.

### **Indicating Whether an E-mail Address is HTML Enabled**

You can indicate whether the e-mail address can read HTML messages. TA defaults the HTML Enabled field on the E-mail Address Entry screen to "U" for unknown. You can change this field to either "No" or "Yes" if you gather this information. You can use the HTML Enabled field in a query to help you select e-mail addresses for an electronic mailing.

### Entering Comments for an E-mail Address

You can enter any comments pertaining to an e-mail address in the Comments field. If you enter comments for an e-mail address, you should be certain that TA does not provide a specific field in which to enter the information.

### **Relationships**

These associations let you maintain an accurate picture of the relationships between and within accounts. You can create a relationship between

- An account and a name within the same or a different account (e.g., organization to president or broker to client);
- One account and a second account (e.g., foundation to company); and
- One name within an account and one name within the same or a different account (e.g., sister to brother).

When you create a relationship, for example, sister to brother, TA automatically creates the corresponding reverse relationship on the related account, for example, brother to sister.

#### **Switching to the Reverse Relationship**

When you view a relationship for the current account on the Relationship Entry screen, you can view the corresponding reverse relationship by clicking <Switch>. The related account switches and becomes the current account. For example, if you are viewing the relationship record of Bob Smith to the ABC Corporation. The List Block contains a list of relationships for Bob Smith's account. If you click <Switch>, TA displays the relationship from the ABC Corporation point of view, and, in addition to the relationship record between Bob Smith you see all other relationships for the ABC Corporation in the List Block. (Note if you exit to the Account Overview screen or any other account-based screen, TA navigates you to ABC Corporation, the new current account that you switched to.) You can also switch to a related account by highlighting the relationship in the Relationships block on the Account Overview screen and clicking the <Switch> button to the right of the Relationships block.

#### **See Also:**

[Entering Information on the Relationship Entry Screen](#)  
[Adding a New Relationship to an Account](#)

### **Entering Information on the Relationship Entry Screen**

On the Relationship Entry screen, you can enter or update the following information.

- The names between which the relationship exists
- The type of relationship
- The start and end dates of the relationship if applicable such as a board member's term.
- Any comments concerning the relationship

- Soft credit information - The term "soft credit" refers to a non financial credit posted to an account based on a gift given by a different account. The Soft Credit fields on the Relationship Entry screen permits you to *award soft credit* (automatically or to prompt the user in the Batch Detail Entry screen) *to the related account*, if the current account (the account field at the top of the screen) gives a gift.

For example, if you create a relationship record between a board member and her prospects, you can use this field so that if a gift is processed from the prospect, then the Board member automatically (if this field is set A) gets awarded soft credit. In this scenario, make sure you are looking at the relationship record with the prospect account ID in the top Account field.

- Matching gift information: You can set up a relationship to indicate that one account matches gifts made by the other account. For information on setting up an account as a matching gift company and creating matching company relationships, see the [Managing Matching Gifts chapter](#).

Each relationship type maps to one relationship category. When you select the relationship type, TA sets the relationship category. The relationship category enables your organization to analyze or select donors by category, e.g., Family Relationships, Member/Organization Relationships. In addition, on selected screens, e.g., Financial Research, TA displays relationships based on the relationship category.

**Note:** You can set TA to display only relationships of a specific category. To view the relationships that map to a specific category, e.g., Family Relationships, click the drop down arrow in the List Relationship Category of field and highlight the relationship category.

In addition, you can [attach](#) an outside file to the relationship record.

### Adding a New Relationship to an Account

You can create a relationship for the account from the Relationship Entry screen by pressing the [F6] key or by clicking <New> on the toolbar. TA displays the Create New Relationship window. To create the new relationship, enter the name from the current account, the related account's Account ID, the name from the related account, and the relationship type. When you finish entering the relationship information, click <Create> or press the [Enter] key to create the relationship.

**Note:** From the Related Account field you can press the [F9] key to search for the related account. TA displays the Find an Account window. Once you find the correct account, TA returns to the Create New Relationship window with the Account ID of the account you selected.

When you create a relationship, TA automatically creates the reverse relationship for you. For example, for Bob Smith's account, you create a "Founder to Organization" relationship between Bob Smith and the Smith Corporation, a different account. TA automatically creates the "Organization to Founder" relationship for the Smith Corporation account (i.e., the Smith Corporation

account has the relationship "Organization to Founder" between it and Bob Smith).

### See Also:

[The Relationship Types that TA Lists for a New Relationship](#)

### The Relationship Types that TA Lists for a New Relationship

When you enter the relationship type on the Create New Relationship window or you update the relationship type on the Relationship Entry screen, you can press the [F9] key to view a list of relationship types. TA does not list every relationship type available. TA selects only those relationship types that are appropriate. TA determines which ones are appropriate by looking at the genders of the names for the relationship and the account categories of each account.

For example, if you want to create a relationship between two individuals and each name you select is a male name, then TA does not list the "Mother to Daughter" relationship type but does list the "Father to Son" relationship type. In addition, TA does not list the "Franchiser to Franchiser" relationship type because this relationship represents one between two corporations (i.e., the account category for each account must be Corporation).

**Note:** Your organization can change the rules TA follows to compose the list.

You can view a complete list of relationship types (i.e., all relationship types) by pressing the [Alt] [F9] key combination.

When you enter the relationship type on the Create New Relationship window or you update the relationship type on the Relationship Entry screen, you can enter the code for any relationship type that exists in TA (i.e., you are not restricted to the list of relationship types that TA composes based on gender and account category).

## Salutations

A salutation record is composed of two parts: the inside salutation and the outside salutation. The inside salutation is the format of the name or names that follows the greeting (e.g., "Dear") in a letter. The outside salutation is the format of the name or names that appear with the mailing address on the envelope or label.

### See Also:

[Accessing and Viewing the Salutation Entry Screen](#)

[Default Salutations](#)

[Creating a New Salutation](#)

### Accessing and Viewing the Salutation Entry Screen

You can access the Salutation Entry screen in one of three ways.

- You can select the Salutation Entry screen from the Main Menu.

- You can click <Salutations> on the Account Overview screen.
- You can zoom to the Salutation Entry screen from the Salutations field on selected screens (e.g., the Account Information window on the Batch Detail Entry screen) by pressing the [F10] key or by clicking the <Zoom> button on the toolbar.

### Viewing the Salutation Information on the Salutation Entry Screen

You can view the inside and outside salutations on the Salutation Entry screen. The inside salutation refers to what is printed after the greeting in a letter (e.g., "Dear"). The outside salutation refers to the name printed on a mailing label. This name is printed above the address selected for the mailing.

### See Also:

[Marital Status Exception Format](#)  
[Viewing the Mailing Label for a Salutation](#)

### Marital Status Exception Format

TA contains two different title codes, "MRS" and "M," to refer to a married woman using the title "Mrs." in her name. These codes determine the format, standard versus marital status exception, of the account's default salutation if her name is used in it. TA applies the marital status exception format to the account's default salutation when

- The last names of both names are the same;
- Both names have titles entered; and
- The title code entered for her name is "M," which is the same as the title code in the [Marital Status Title](#) system preference (i.e., if the title code entered for her name is "M," then TA applies the marital status exception format to the account's name line).

For example, you create an account for Dr. John Smith and his wife Mary. If you enter "M" as the title code for Mary, TA applies the marital status exception format as follows: "Dr. & Mrs. Smith" as the inside salutation and "Dr. & Mrs. John Smith" as the outside salutation. If you enter "MRS" as the title code for Mary, TA applies the standard format as follows: "Dr. Smith & Mrs. Smith" as the inside salutation and "Dr. John Smith" on the first line and "Mrs. Mary Smith" on the second line of the outside salutation.

**Note:** If your organization has the [Combine Inside Salutation If Same Title/Last Name](#) system preference set to "Y" for yes, the inside salutation is "Dr. & Mrs. Smith" whether the title code is "M" or "MRS."

See ["Marital Status Exception Format \(Individual Account's Default Salutation\)"](#)

### Viewing the Mailing Label for a Salutation

You can view the mailing label for a salutation by clicking <Label> on the Salutation Entry screen. TA displays the Label Preview window, which contains the following information.

- The salutation

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- The mailing information (i.e., street number and name, apartment number if entered, city, state, and ZIP Code) of the preferred address for the name represented by the salutation
- Line 1 and 2 of additional address information, if entered
- The country (in all capital letters) is displayed on a separate line at the end if the address includes a country other than the system preference set up for [Default Country](#).

**Note:** You can view the mailing label in standard USPS format by marking the P.O. Address checkbox in the Label Preview window.

For Individual accounts, TA includes the person's job title only if the Use Job Title field is set to 'Y' for the address that you are mailing to. See "[Adding Job Title to the Mailing Label \(Individual Accounts Only\)](#)"

For Organization accounts, TA automatically includes the name's job title if it is entered.

### Default Salutations

TA creates the following default salutations for an active account: the account's default salutation, each name's default salutation, and the children's default salutation. You cannot delete a default salutation. Each default salutation ensures that an appropriate salutation is available for use with each mailing.

#### See Also:

[Account's Default Salutation](#)  
[Name's Default Salutation](#)  
[Children's Default Salutation](#)  
[Customizing a Default Salutation](#)

### Account's Default Salutation

TA creates a default salutation for the account as a whole when an account is created. The account's default salutation ensures that a salutation is available for the mailings addressed to the account as a whole. TA updates the account's default salutation when any of the name information TA uses to create the salutation changes.

**Note:** To identify the account's default salutation, TA includes the account name line indicator (i.e., "(Account)").

See "[Salutation Rules](#) "

### Name's Default Salutation

TA creates a default salutation for each name you add to the account. TA creates this salutation when the name is added to the account. The name's default salutation ensures that a salutation is available for the mailings addressed to a particular name. TA updates the name's default salutation when any of the name information TA uses to create the salutation changes.

For all accounts (i.e., Individual or Organization), TA composes the inside portion of the name's default salutation from the following information: title, first name, and last name. For all accounts, TA sets the outside portion of the name's default salutation to the name's name line. For Organization accounts, TA also includes the person's job title and the account's name line in the outside portion of the name's default salutation. If you customize a name's name line, TA updates the name's default salutation with this customization.

See "[A Name's Default Salutation \(Individual Account\)](#)"

**Note:** If you inactivate a name (e.g., by marking an individual deceased), TA inactivates the name's salutations. TA also enables you to edit the salutations for the account. See "[Marking a Person as Deceased.](#)"

### Children's Default Salutation

TA creates a children's default salutation for all of the children within an account. The inside salutation contains all of the children's first names (e.g., Dear John, Mary & Suzy). The outside salutation contains all of the children's first and last names on one line (e.g., John Smith, Mary Smith, & Suzy Smith). TA identifies a name as that of a child when the Salutation Flag field is set to "C" for the child's salutation code (see "[Identifying a Child](#)"). You cannot delete the children's default salutation. TA updates the children's default salutation when any of the name information TA uses to create the salutation changes and when you add a child to the account.

See "[The Children's Default Salutation](#)"

### Customizing a Default Salutation

You can customize a default salutation, i.e., edit the inside and outside salutation for a default salutation. If you customize a default salutation and, at a later time, the information that TA uses to compose that default salutation changes, TA overwrites the salutation (i.e., TA does not keep the customized content of the salutation but updates it with the new information according to the salutation rules TA follows).

### Creating a New Salutation

You can create a customized salutation from the Salutation Entry screen by pressing the [F6] key or by clicking <New> on the toolbar. TA displays the Create New Salutation window. To create a new salutation, select the name to whom the new salutation belongs and select the Salutation code that corresponds to the department or signer of the letter for whom you are creating customized salutations. (The list of values corresponds to [brief names](#) that have been activated as an Employee or Solicitor.)

Once you have made these selections, click <Create> or press the [F6] key to create the salutation.

When you create the new salutation, TA copies the information from the appropriate default salutation to the new salutation. You can then change the salutation. For example, you create a new salutation for Bob Smith. TA copies the information from the default salutation for Bob Smith (i.e., the name's default salutation) to the new salutation for Bob Smith. You can then edit the new salutation.

### **Interests**

You can access the Interest Entry screen in one of two ways.

- You can select the Interest Entry screen from the Main Menu.
- You can click <Interests> on selected screens (e.g., the Account Overview screen, the Customer Service screen).

### **See Also:**

[Entering Information on the Interest Entry Screen](#)

[Adding an Interest to an Account](#)

[Researching Accounts Based on an Interest](#)

### **Entering Information on the Interest Entry Screen**

When TA updates an existing interest, TA updates the most recent time the interest was expressed including the date, the source of the interest (e.g., gift transaction), and, if applicable, the program. TA also increases the number of hits by one. You can view and update the following information for an interest.

- The name on the account (or the account as a whole) associated with the interest.
- Interest Category. Displays the category associated with the Interest code. When interest codes are created, you assign the interest under categories such as Hobby, Program, Activity Related, or Giving Related. Your organization can create your own categories according to your query and output and tracking needs.
- The first and the most recent time the interest was expressed. This includes the date, the source through which the interest was expressed (e.g., gift transaction, customer service conversation), and, for PBS stations, the program through which the interest was expressed, if applicable (e.g., gift during a pledge break).
- Whether the interest is implied or confirmed. When TA creates an interest, TA defaults the interest to implied (i.e., TA marks the Implied option button). TA does not change the implied/confirmed information when automatically updating the information for an existing interest. You can change the interest from implied to confirmed and vice versa. For an explanation of the difference between a confirmed interest and an implied interest, see the next section "[Implied Interest and Confirmed Interest](#)."
- The number of times the interest has been expressed (Hits). You can manually update the number of hits by entering the new number or by clicking <Update Hits>, which increases the hits by one.
- The end date of the interest
- Comments about the interest

**See Also:**

[Implied Interest and Confirmed Interest](#)  
[Interest for the Account vs. a Name Within the Account](#)  
[About the Dollar Symbol on an Interest Code](#)  
[Automatic Updating of Interests](#)  
[PBS-specific Issues](#)

**Implied Interest and Confirmed Interest**

TA enables you to identify an interest as either implied or confirmed. An "implied" interest is one that your organization infers based on the donor's behavior such as the donor sends a gift for a mailing focused on supporting your outreach programs. A "confirmed" interest is one that the donor directly tells you such as the donor calls or writes you a letter explaining how wonderful your organization's outreach programming is.

**Interest for the Account vs. a Name Within the Account**

An interest can apply to the account as a whole or to a name within the account (i.e., a person). If the interest applies to the account as a whole, TA displays in the Name field the account's name line followed by the name line account indicator (i.e., "(Account)"). If the interest applies to a name within the account (i.e., a person), TA displays the name's name line in the Name field.

You can create an interest that can be restricted either to an account as a whole or applied on the account and the name-level. The names that display in the name field's List of Values corresponds to whether the code is restricted. That is, if it is an account-level interest, then the List of Values displays the account's name (and not any additional names if they exist).

**About the Dollar Symbol on an Interest Code**

The interest code for some interests is prefixed with a dollar sign (i.e., "\$"). The dollar sign indicates that the interest is usually created by TA during gift processing (i.e., you do not generally add the interest to an account from the Interest Entry screen). The following gift information can generate a dollar sign interest for an account.

- The gift kind, e.g., "\$INSTALL" for an installment gift
- The gift type, e.g., "\$ADDITNL" for an additional gift
- The payment method, e.g., "\$EFT" for an electronic funds transfer
- The affiliation, e.g., "\$RD" for radio support

**Automatic Updating of Interests**

When TA processes a pledge or gift, the following information is among that which is required.

- The source code
- The payment method (e.g., by check)

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- The kind of gift (e.g., an installment gift)
- The type of gift (e.g., additional)

Your organization can assign interests to a source code. The source code can also include the type of organization support being solicited. For each type of organization support (e.g., television, radio, Massachusetts Chapter, New England Chapter), your organization can assign an interest to represent that type of organization support. Your organization can assign one interest to each of the rest of the information in the above bulleted list (e.g., an interest to represent payment by the American Express card). Therefore, when TA processes a pledge or gift, TA creates or updates the existing interests for an account based on each interest assigned to the pledge or gift through the required information listed above. Interests created by TA are identified as implied.

In addition, the donor may receive a benefit (e.g., a premium such as an umbrella) for a gift. Your organization can assign up to three interests to a benefit. When TA processes the gift and awards the benefit to the donor, TA creates or updates the existing interests for an account based on each interest assigned to the benefit.

If a transaction is associated with a project, TA creates or updates any interests associated with the project. See "[Linking Interests to the Project](#)" for more information.

Finally, at the time of entry, you can manually add up to three more interests to the pledge or gift (e.g., a donor indicates on the reply device that the donor is interested in volunteering for your organization). When TA processes the pledge or gift, TA updates the account with the interests you have added manually. These interests are identified as confirmed.

### **PBS-specific Issues**

For PBS stations, TA includes the following two additional ways by which TA can update an account's interests.

- If the source code represents a pledge break, your station can assign up to three interests associated with the program during which the break occurred.
- Your station can indicate that TA should create or update a program interest based on the interaction type and program information for an interaction (e.g., created by a customer service entry). For each interaction type within the Program Service interaction category, your station can indicate whether TA should create or update a program interest for an account when you select that interaction type. If your organization sets this preference to yes (on the Interaction Type Code Entry screen), TA creates or updates the interest associated with the program entered for the interaction.

### **Adding an Interest to an Account**

An interest can apply to the account as a whole or to a name within the account (i.e., a person). You can add an interest to the account from the Interest Entry

screen by pressing the [F6] key or by clicking <New> on the toolbar. TA displays the Create New Interest window. On this window, enter the interest and the name to which the interest applies (i.e., the account as a whole or a name within the account). When you finish entering this information, press the [Enter] key or click <Create> to add the interest.

When an interest is first created for an account, whether by you or by TA, TA copies the information from the first time the interest was expressed (i.e., the date, the interest source, and the program, if applicable, for the first time) to the most recent time the interest was expressed. TA also defaults the hits to "1." If you create the interest, TA defaults the interest to confirmed (i.e., TA marks the Confirmed option button).

### Researching Accounts Based on an Interest

You can view a list of accounts that have expressed the same interest on the Accounts by Interest screen.

When you access the Accounts by Interest screen, TA displays the Select an Interest window. On this window, enter the following:

- Interest. Press [F9] to select the interest you want to research.
- Hits, if applicable. For example, enter ">2" to find accounts with two or more hits or enter "<2" to find accounts with one or two hits.
- Whether you want to see accounts with an implied interest, a confirmed interest, or either implied or confirmed. Mark the checkbox accordingly.

Once you select an interest, TA displays in the upper right corner of the screen the total number of accounts selected. TA also displays the following information for each account selected.

- The alpha name
- The Account ID
- Whether the interest is confirmed or implied
- The number of hits
- The first and most recent dates on which the interest was expressed
- The status of the interest

**Note:** If you select an interest assigned to a large number of accounts, TA may stop responding.

### Classifications

You can access the Classification Entry screen by selecting it from the Main Menu or by zooming to it from the Classifications block on such screens as the Account Overview and Customer Service Entry. You can [find classifications](#) for one account or all accounts with specific classifications.

### Purpose of a Classification

A classification is composed of a classification code and a classification value. The classification code refers to a preference, characteristic, or behavior of an account. The classification value is the specific treatment or value to apply to the account for the classification code selected. For example, the values for a classification code can be a range or a list. The value types include a date range, a range of numbers, a range of letters, and a list of values. TA includes Marts and Lundy cluster codes as classifications. The classification values for the Marts and Lundy classification code are the numbers 1 to 99.

You can organize your donors according to giving patterns or behaviors and to analyze your donors so that you can fundraise in the most effective and cost-efficient manner. As your organization learns more about its donor base, new categories of information may become important to track in order to organize and analyze your donors. Create a classification for each new category of information your organization wants to track.

*Classifications vs. Interests:* Often Classifications provide a method for you to treat donors differently based on demographics, appeal preferences, or Marts & Lundy values. Interests provide a means for you to gather information about prospects so that later you may target your contact specifically. Your organization should have business practices in place regarding when you update a donor's record with an interest versus a classification.

### Preloaded Classifications

TA includes many default classifications that your organization can use (or not use). The following examples are 12 of classifications that are delivered with TA. The first four represent acknowledgment preferences. The last eight represent appeal preferences.

<b>Classification (Code/Value)</b>	<b>Means</b>
Acknowledge/ad	Anonymous Donor
Acknowledge/ad guide	Anonymous Donor- Don't name in Guide
Acknowledge/ad on air	Anonymous Donor- Don't name in On Air
Acknowledge/no	No acknowledgment
Appeal/no	No appeals
Appeal/no add	No additional appeals
Appeal/no renew	No renewal appeals
Appeal/no phone	No telephone appeals
Appeal/1r	One renewal notice
Appeal/no sweeps	No sweepstakes appeals
Appeal/no mail	No mail appeals
Appeal/no remind	No installment reminders

### See Also:

[Finding Classifications](#)

[Automatic Updating of Classifications](#)

[Entering Information on the Classification Entry Screen](#)

## ***Finding Classifications***

Use the Find button from the Classification Entry screen to control the list of classifications that display. From the Find Classifications window:

- To find all of the classifications for the account: Enter the Account Number and leave all of the other fields blank (then click Find)
- To find all accounts with particular classifications: Leave the Account field blank, you can enter Class Code and leave the Value field blank or enter the Value field (then click Find).
- To find all classifications regardless of status: leave the Status field blank (along with the Account or the Classification Code/Value fields).
- To find all classifications with a specific status enter the status field (along with the Account or the Classification Code/Value fields).

## **Automatic Updating of Classifications**

When TA processes a gift, the account may receive a benefit (e.g., a premium such as an umbrella) for the gift. Your organization can assign up to three classifications to a benefit. When TA processes the gift and awards the benefit to the account, TA creates a classification for the account based on each classification assigned to the benefit and whether the classification is not already assigned to the account.

## **Entering Information on the Classification Entry Screen**

Your organization can set up TA so that your classifications display under tab pages. (Your organization can create custom tab names, otherwise you see tab name All.) The Classification Entry screen displays a multi-row block where you can enter or update the following information about a classification.

- **Name:** the account-level name or the specific name to which the classification applies
- **Code and Value:** The list of values that is available in the **Value** field depends upon what you have entered in the classification code field.
- **Start and End** dates: TA defaults the start date to the date on which it is added to the account. You can enter an end date, if applicable. For example, your organization may implement a policy whereby you enter an end date one year past the start date whenever you add the "APPEAL/NO MAIL" classification to an account. The query your organization sets up to pull accounts for mail solicitations will include those accounts with the APPEAL/NO MAIL classification if the end date is before the date of the pull.
- **Comments:** Enter text that applies to the classification. You can enter up to 256 characters. Your organization can set up TA to require that you enter comments for certain classifications.

- **Display Sequence:** This controls the order that the record is displayed in the multi-row block and on screens such as the Account Overview, that displays classifications.
- **Status:** When you add new records, this field defaults to 'A' (for active). You can change this field to 'I' (for inactive) or 'D' (for delete). TA changes the classification line to **red** if you update the record with an I or D. Your organization can set up TA so that only Active classifications are displayed in the Classification Entry screen.
- **Account ID:** The account ID is the same across classification records if you are viewing records for one account. You can click [Find] to limit the classifications displayed or find accounts with specific classifications.

### See Also:

[Limiting Classifications by Security Level](#)  
[Adding a Classification to an Account](#)

#### Limiting Classifications by Security Level

Your organization can assign each classification a security level. TA uses the security level to determine which users can view and update the classification. Users can view only classifications at or below the user's classification security level.

For example, if your organization assigns a classification security level of "5" to a certain classification, and a user's classification security level is set to "4," the user cannot view that classification on screens or reports in TA.

### Related Topic:

[Security Level](#)

#### Adding a Classification to an Account

You can add a classification to the account from the Classification Entry screen by clicking on a blank line, pressing the [F6] key, or by clicking <New> on the toolbar. At a minimum enter the Classification Code and Value fields. Enter other fields according to your business practices.

#### Adding a Unique Classification Code to an Account

If your organization marks a classification code as "unique," you cannot assign the classification code more than once to the same name. For example, the Smith Foundation is an account with different contact names, including John Jones. If your organization marks the classification code "APPEAL" as unique, you cannot assign it more than once to the same name. You cannot assign the classification code "APPEAL" with the classification value "NO MAIL" to John Jones and then assign the same classification code ("APPEAL") with the classification value "NO SWEEPS" to him. If the classification code is not marked unique, you can assign the classification code to a name more than once as long as you use different classification values (i.e., you can assign the classification "APPEAL/NO MAIL" to John Jones and then assign "APPEAL/NO SWEEPS" to him).

#### Classifications for the Account vs. One for a Name Within the Account

The Name field determines whether the classification is set to the account-level or name-level. Your organization can create a classification that can be restricted to either to an account as a whole or applied to the account and name-level. The names that display in the name field's List of Values corresponds to whether the code is restricted. That is, if it is an account-level classification, then the List of Values displays the account's name (and not any additional names if they exist).

## Accounts Module Reference Information

- [Appendix 1: Names and Salutation Rules](#)
- [Appendix 2: Address Selection Rules for Queries](#)
- [Appendix 3: Searching Criteria Rules for Accounts](#)
- [Appendix 4: Merge Processing](#)
- [Appendix 5: Control Code Tables](#)
- [Appendix 6: System Preferences](#)

### Appendix 1: Names and Salutation Rules

TA creates and stores two forms of each account name and of each name within an account.

- The name line, which is the complete full name for the account-level or the individual name record.
- The alpha name, which is how TA sorts the account within a group of accounts or to sort the name within a group of names (i.e., last name, first name).

The alpha name and name line for an account are referred to as the account-level alpha name and the account-level name line, respectively. The alpha name and name line for a name within an account are referred to as the name-level alpha name and the name-level name line, respectively.

#### See Also:

- [Name-level Alpha Name and Name Line](#)
- [Account-level Alpha Name and Name Line](#)
- [Salutation Rules](#)

#### Name-level Alpha Name and Name Line

When you add a name to any account, you can enter the title, first name, middle name, last name, and suffix for that name. TA formats the name-level name line and alpha name as follows.

	Format	Example
<b>Name Line</b>	{Title} {First} {Middle Initial}. {Last} {Suffix}	Mr. John H. Smith Jr.
<b>Alpha</b>	{Last}, {First} {Middle Initial}. {Suffix} {Title}	Smith, John H. Jr. Mr.

### Name

#### **Account-level Alpha Name and Name Line**

When you create an account, you assign an account type to the account. The account type determines whether the account is an Individual account or an Organization account. The alpha name and name line rules are slightly different depending upon whether the account is an Individual account or an Organization account.

For an Individual account, two formats of the account-level alpha name and name line exist: the standard format and the marital status exception format.

#### **See Also:**

[Individual Accounts \(Account Level Names\)](#)  
[Organization Accounts \(Account Level Names\)](#)

#### **Individual Accounts (Account Level Names)**

TA creates the account-level name line and the alpha name for an Individual account based on the first two active, adult, non-deceased name records that are on the account. TA composes the name line and alpha name based on the title, first name, middle name, last name, and suffix information for each adult name.

- If a name record is marked deceased and that name record is used for the account-level name, TA removes the name from the account-level name.
- TA does not include name records marked as children for the account-level name. That is, if the Salutation Flag field is set to "C" (for child) TA identifies a name as that of a child and the name record is not included in the account-level name.
- TA does not use a name for which the Salutation Flag field is set to the no salutation flag (i.e., "N"). The no salutation flag indicates that the name should not be used in the account-level name line, the account-level alpha name, and the account-level salutation.

#### **See Also:**

[Name Line Standard Format \(Account Level\)](#)  
[Name Line Marital Status Exception Format \(Account Level\)](#)  
[Alpha Name Standard Format \(Account Level\)](#)  
[Alpha Name Marital Status Exception Format \(Account Level\)](#)

#### ***Name Line Standard Format (Account Level)***

When TA applies the standard format to the account's name line, TA combines the names in the order in which they were added to the account. In the format syntax that follows, the "-1" refers to the first name added to the account and the "-2" refers to the second name added to the account.

**Format**      {Title-1} {First-1} {Middle Initial-1}. {Last-1}, {Suffix-1} &  
                  {Title-2} {First-2} {Middle Initial-2}. {Last-2}, {Suffix-2}

**Example**     Dr. John H. Smith, Jr. & Mrs. Mary D. Smith



### Organization Accounts (Account Level Names)

When you create an Organization account, you enter the name line. TA then sets the alpha name to the name line you enter. If you begin the name line with the word "The," TA removes the "The" from the beginning of the alpha name. For example, if you enter the name line "The ABC Corporation" for a new Organization account, TA sets the alpha name to "ABC Corporation."

### Salutation Rules

TA automatically creates default salutations for any account or names in the account if the Status field is set to "A" for active. Salutation records are updated whenever you change any component of the name. (Title, First or Last name for example.) Salutation records include the Inside, the format of the name that follows the greeting, and Outside, the format of the name that appear with the address on the envelope. (The outside salutation can contain up to three lines.) Salutation records are automatically created for:

- The account as whole (account or household level)
- Each name record on the account
- An account-level child salutation record (all of the children on the account)
- A child salutation for each name record marked as child

**Note:** TA references the [Salutation and Name Join](#) system preference to determine the text to use to separate two names included in the account's default salutation (e.g., "&" or "and").

### Configuring Title Codes & Salutation Defaults

Settings on the Title Code Entry screen determine the inside and outside salutations that are created by default when you add or edit an account or name. You can configure TA so that different salutations default for the inside and outside according to gender. That is, for any title code, you can map what the salutation should be if the code is assigned to a male or a female.

The fields in the **Salutation forms for this title** determine the default salutation records that are created if the title is used for either a male or female. If these fields are blank then TA uses the standard Salutation Rules as are outlined in subsequent topics in this chapter. Enter the **Plural Title** field if your organization has the Combine Inside Salutation Format system preference set to Y. TA uses what you have in this field for the account-level salutation if both people on the account have the same title.

Using the **Salutation forms for this title** fields: Use this placeholder text to control whether the first, last, or full name is used in the salutation:  
&FIRSTNAME, &LASTNAME, &FULLNAME

Enter the title and one of the placeholders above to configure the default salutation.

For example, if you want the inside salutation to compose as Dr. Barrett, enter Dr. &LASTNAME; If you want the outside salutation to compose as Wendy Barrett, M.D. Enter: &FULLNAME, M.D.

### See Also:

**Individual Account Salutation Rules:**

- [Combined Inside Salutation Format](#)
- [Standard Format \(Individual Account's Default Salutation\)](#)
- [Marital Status Exception Format \(Individual Account's Default Salutation\)](#)
- [A Name's Default Salutation \(Individual Account\)](#)
- [The Children's Default Salutation](#)
- [Organization Account Salutation Rules](#)

***Combined Inside Salutation Format***

TA includes the [Combine Inside Salutation If Same Title/Last Name?](#) system preference (under Background/Upload & Download), which enables your organization to specify that when two names on an account have the same title and/or last name, the titles and/or last names are combined in the inside salutation. The following table identifies the contents of the account's default inside salutation when this system preference is set to "Y" for yes.

<b>Name Information</b>	<b>Inside Salutation</b>
Same last name, no titles	John and Mary Smith
Same last name, two titles	Mr. & Ms. Smith
Different last names, same title	Messrs. Smith & Jones
Same last name, same title	Drs. Smith

**Note:** You set up the plural titles for TA to use by entering a plural title in the Plural Title field on the Title Code Entry screen for the singular title code. For example, you enter the plural title "Drs." on the Title Code Entry Screen for the title code "DR."

***Standard Format (Individual Account's Default Salutation)***

For an Individual account, the account's default salutation is based on the names TA used to create the account's name.

**Note:** TA does not use a name in the account's default salutation for which the Salutation Flag field is set to the no salutation code, i.e., "N" or the child's salutation code, i.e., "C."

TA composes the inside portion of the account's default salutation from the title (if entered), first name, and last name of each name TA used to create the account's name. TA composes the outside portion of the account's default salutation from the name line for each name TA used to create the account's name.

The following table identifies the contents of the account's default salutation (inside and outside) based on the name information TA used to create the account's name.

<b>Name Information</b>	<b>Inside Salutation</b>	<b>Outside Salutation</b>
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Name Information	Inside Salutation	Outside Salutation
One name and no title	John	John Smith
One name, first initial only, and no title	J. Smith	J. Smith
One name and a title	Mr. Smith	Mr. John Smith
Two names* (same or different last names) and no titles	John & Mary	John Smith Mary Smith
Two names* (same or different last names and one title)	John & Mary	Mr. John Smith Mary Smith
Two names* (same or different last names) and two titles	Mr. Smith & Ms. Smith	Mr. John Smith Ms. Mary Smith
One name (i.e., no spouse name) with the title "Mr. & Mrs."	Mr. & Mrs. Smith	Mr. & Mrs. John Smith

\* The order in which the names are added to the account determines their order of appearance in the salutation.

**Note:** When you add a name to an account, you can enter the person's title (e.g., Dr.), first name, middle name, last name, and suffix (e.g., Jr.). If the middle name is entered, TA includes the middle initial followed by a period in the outside salutation. If a suffix is entered, TA includes the suffix in the outside salutation. The table above does not show examples with the middle name and suffix included.

TA includes a system preference that enables your organization to specify that an inside salutation should always include a last name (i.e., TA should create formal inside salutations). The following table identifies the contents of the account's default salutation (inside) when your organization sets the [Create Formal Inside Salutation?](#) system preference to "Y" for yes.

Name Information	Inside Salutation
One name and no title	John Smith
Two names* (same or different last names) and no titles	John Smith & Mary Smith
Two names* (same or different last names) and one title	John Smith & Mary Smith

**Note:** The Create Formal Inside Salutation? system preference has no effect on the outside default salutation for the account.

***Marital Status Exception Format (Individual Account's Default Salutation)***

TA contains two different title codes for a woman using the abbreviated title "Mrs." in her name. These codes determine the format of the account's alpha name and name line and the format of the account's default salutation if her name is used in each.

TA applies the marital status exception format to the account's default salutation when

- The last names of both names are the same.
- Both names have titles entered.
- The title code entered for her name is "M," which is the same as the title code in the Marital Status Title field (i.e., if the title code entered for her name is "M," then TA applies the marital status exception format to the account's alpha name).

The following table includes an example of the account's default salutation when the marital status exception format is applied and an example of the account's default salutation when the standard format is applied.

Title Code	Inside Salutation	Outside Salutation
M	Dr. and Mrs. Smith	Dr. and Mrs. John Smith
MRS	Dr. Smith and Mrs. Smith	Dr. John Smith* Mrs. Mary Smith

\* The order in which the names are added to the account determines their order of appearance in the salutation.

**Note:** When you add a name to an account, you can enter the person's title (e.g., Dr.), first name, middle name, last name, and suffix (e.g., Jr.). If the middle name is entered, TA includes the middle initial followed by a period in the outside salutation. If a suffix is entered, TA includes the suffix in the outside salutation. The table above does not show examples with the middle name and suffix included.

***A Name's Default Salutation (Individual Account)***

TA creates a default salutation for each name within an Individual account. Whether a title is entered for the name determines the formatting of the salutation.

TA composes the name's inside default salutation from the title (if one is entered), first name, and last name. TA composes the outside default salutation from the name's name line.

**Note:** If the middle name is entered, TA includes the middle initial followed by a period in the outside salutation. If a suffix is entered, TA includes the suffix in the outside salutation. The table below does not show examples with the middle name and suffix included.

Title Status	Inside Salutation	Outside Salutation
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Name without a title	John	John Smith
Name with a title	Mr. Smith	Mr. John Smith

**Note:** If your organization sets the [Create Formal Inside Salutation?](#) system preference to "Y" for yes, TA includes the last name in the inside default salutation for a name even when no title is entered (e.g., John Smith).

### ***The Children's Default Salutation***

TA creates a children's default salutation for all the children within an account (i.e., an account-level salutation for all the children). TA identifies a name as that of a child by checking the Salutation Flag field for the child's salutation code.

TA composes the inside children's default salutation from the title (if it is entered), first name, and last name. TA composes the outside children's default salutation from the children's name line.

**Note:** If the middle name is entered, TA includes the middle initial followed by a period in the outside salutation. If the title and suffix are entered, TA includes both in the outside salutation. The table below does not show examples with the middle name and suffix included.

<b>Number of Children</b>	<b>Inside Salutation</b>	<b>Outside Salutation</b>
One	John	John Smith
Two	John and Mary	John Smith and Mary Smith
Three or more	John, Mary, and Carol	John Smith, Mary Smith, and Carol Smith

The maximum length of the inside salutation and of one line of the outside salutation is 50 characters (including spaces and commas). TA will include as many full names as possible but will not include a truncated name (e.g., an outside salutation of "John Smith, Mary Smith, Carol Smith and Robert Smi" if there are four Smith children, John, Mary, Carol and Robert. In this example, TA only includes the first three children's names in the outside salutation).

### **Organization Account Salutation Rules**

For an Organization account, the account's default salutation is based on the following:

- *Account name* that displays on the account's name line
- *Primary contact's name:* When you add the first name to the account, TA marks the Primary Contact? checkbox for that name. You can mark the checkbox for any name within the account to identify that name as the primary contact for the Organization account.

**Note:** An Organization account can have only one primary contact. You can also unmark the Primary Contact? checkbox for all names if you do not have a primary contact for an Organization account.

If an Organization account does not have a primary contact, no name is used in the account's default salutation. In addition, TA does not use a name for which the Salutation Flag field is set to the no salutation flag. The no salutation flag indicates that the name should not be used in the account-level salutation.

- *Job title* of the primary contact for the account
- *Title* of the primary contact for the account

TA includes a system preference ("[Non-Individual Inside Salutation](#)") that enables your organization to customize the inside salutation used for Organization accounts with no primary contact. TA defaults this salutation to "Sir or Madam."

TA composes the inside default salutation from the title (if one is entered), first name, and last name. TA composes the outside default salutation from the primary contact's name line (if there is a primary contact) and the account's name line. The account name is always included. The following table summarizes the account's default inside and outside salutation based on which salutation components are entered.

<b>Salutation Components</b>	<b>Inside Salutation</b>	<b>Outside Salutation</b>
No primary contact No job title No title	Sir or Madam	ABC Corporation (3rd line)
A primary contact No job title No title	John Smith	John Smith (1st line)  ABC Corporation (3rd line)
A primary contact No job title A title	Mr. Smith	Mr. John Smith (1st line)  ABC Corporation (3rd line)
A primary contact A job title No title	John Smith	John Smith (1st line) President (2nd line) ABC Corporation (3rd line)
A primary contact A job title A title	Mr. Smith	Mr. John Smith (1st line) President (2nd line) ABC Corporation (3rd line)

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**Note:** If the middle name is entered, TA includes the middle initial followed by a period in the outside salutation. If a suffix is entered, TA includes the suffix in the outside salutation. The table does not show examples with the middle name and suffix included.

### See Also:

[A Name's Default Salutation \(Organization Account\)](#)

#### ***A Name's Default Salutation (Organization Account)***

TA creates the default salutation for each name within an Organization account based on the account's name line and on the title, first name, middle name, last name, and suffix for that name. In addition, TA includes the job title for a name if entered.

The contents of a name's default salutation are determined by whether a title and a job title are entered for the name.

TA composes the inside default salutation from the title (if one is entered), first name, and last name. TA composes the outside default salutation from the name's name line and the account's name line.

**Note:** If the middle name is entered, TA includes the middle initial followed by a period in the outside salutation. If a suffix is entered, TA includes the suffix in the outside salutation. The table below does not show examples with the middle name and suffix included.

<b>Title and Job Title</b>	<b>Inside Salutation</b>	<b>Outside Salutation</b>
No title No job title	John Smith	John Smith (1st line) ABC Corporation (3rd line)
Title No job title	Mr. Smith	Mr. John Smith (1st line) ABC Corporation (3rd line)
No title Job title	John Smith	John Smith (1st line) Vice President (2nd line) ABC Corporation (3rd line)
Title Job title	Mr. Smith	Mr. John Smith (1st line) Vice President (2nd line) ABC Corporation (3rd line)

## ***Appendix 2: Address Selection Rules for Queries***

For all query types except addresses and sources, TA selects the address to use in queries based on the criterion in the Address Type field on page 2 of the Query Entry screen. You can enter an address type or a specific use in this field. If the account or name does not have an address that matches the criterion, TA evaluates the addresses according to the rules that follow in order to select the most appropriate one.

For example, your organization sets up a code to identify the address to which your membership publication should be mailed. For some accounts, this code is

entered in one of the Specific Use? fields for the address specified for the publication mailing; however, this information is not specified for every account. You create a query to select all accounts to which this month's member publication should be mailed. You set the Address Type field on the Query Entry screen to the code for the member publication. For each account selected by the query, TA checks each address to see if one address has a Specific Use? field set to the member publication code. If the member publication code is entered in one of the Specific Use? fields for an address, TA selects that address. Otherwise, TA follows the address selection rules described below to select the correct mailing address.

### See Also:

[Expected Arrival Date \(Query for Mailing\)](#)

[Selection Rules Application \(Query for Mailing\)](#)

### Expected Arrival Date (Query for Mailing)

In TA, you can assign a date range during which an address is valid and you can indicate that the address should be used for mailings during that time period. When your organization runs a query for a mailing, the query must have a date on which the mailing is expected to arrive at the address so that TA does not select an address that is not valid for that arrival date. TA determines the expected arrival date as follows:

- If you have entered the effective date of the query, TA sets the expected arrival date to the effective date.
- If you have not entered the effective date of the query but have scheduled the query to run, TA sets the expected arrival date to the scheduled run date for the query. See the *Scheduling and Viewing a Query and Output* chapter for an explanation of how to set the scheduling date for a query.

### Selection Rules Application (Query for Mailing)

When your organization sets up a query for a mailing using any query type except addresses or sources, the query type indicates whether the mailing is being sent to the account or to a particular person within the account. TA applies Rules 1 and 2 to all queries to select a valid address for each account or name selected by the query. TA then applies Rules 3 through 6 as needed. That is, if TA does not select an address by applying Rule 3, TA applies Rule 4. If TA selects an address by applying Rule 4, TA does not apply the remaining rules. In addition, if more than one address meets the rule, TA selects the first address it finds that meets the rule.

**Note:** When you use the addresses query type, TA does not apply these address selection rules, and instead allows you to specify your own criteria for picking addresses. TA also does not apply the address selection rules for queries using the sources query type, because no address is returned by sources-level queries.

#### Rule 1: Select Active, Mailable Addresses

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TA selects only from those addresses that are active (i.e., the Status field for the address is set to "A" for active). Five statuses are available for an address: active, delete, inactive, old, and undeliverable.

In addition, TA selects only from those addresses that do not have the "do not mail" flag set (i.e., the Do Not Mail? field for the address is blank or set to "N" for no). You can mark an address as one that should not receive any mail by setting the Do Not Mail? field to "Y" for yes.

### **Rule 2: Select Valid Addresses for the Account or Name**

Given the addresses TA selected based on Rule 1, TA only selects those addresses associated with the selected account or the selected name. That is, for each address, you can designate that the address belongs to the account as a whole or to a specific name within the account. If your query is selecting accounts, then TA selects only those addresses assigned to the account as a whole. If your query is selecting names, then TA selects only those addresses assigned to that name.

TA uses Rules 1 and 2 to filter out addresses that cannot be used for the query. For example, an account may have six addresses. Of the six, one has a status of undeliverable, one has a status of old, two are associated with the account as a whole, and the remaining two are each associated with a different person in the account. TA "throws out" the undeliverable and old addresses based on Rule 1. If the query is searching for accounts, TA throws out the last two addresses because each is associated with a particular person. If the query is searching for names, TA throws out the addresses associated with the account as a whole. If more than one address remains, TA selects the appropriate one based on Rules 3 to 6.

### **Rule 3: Select the Address Matching the Query's Address Type and Expected Arrival Date**

TA selects the address that matches the address type specified in the query and that is valid for the expected arrival date. TA determines whether the address is valid for the expected arrival date by checking the address' date range as follows.

- If a date range is assigned to the address, the expected arrival date falls within this range, and the Use During These Dates? checkbox is marked, then TA selects this address.
- If no date range is assigned to the address, then TA selects this address.

### **Rule 4: Select the Address Stored on the Record Selected by the Query**

If the query selects an address as part of the query itself, TA uses that address.

### **Rule 5: Select the Preferred Address for the Name If the Query is Selecting Names**

TA selects the preferred address for the name if the query is selecting names.

### **Rule 6: Select the Preferred Address for the Account**

TA selects the preferred address for the account if

- the query is selecting accounts or

- the query is selecting names but the name has no preferred address.

**Rule 7: Do Not Mail If No Address Is Selected**

If no address meets any of the selection criteria, no address is selected and the account or name is dropped from the list of accounts or names that TA selects for the mailing (if the query is for a mailing).

**Choosing to Include Invalid Addresses**

You may want to include invalid addresses in your output file, e.g., if you run a query to select accounts for which you have only inactive or undeliverable addresses and you want to output the address. You can choose to include invalid addresses when you schedule your query and output by marking the Include Invalid Addresses? checkbox on the File Output Options window, which you access by zooming from the Output Name field on the Query and Output Schedule screen. When you mark the Include Invalid Addresses? checkbox, TA broadens the address selection rules to include addresses marked Do Not Mail as well as those containing any status except "D" for delete.

### ***Appendix 3: Searching Criteria Rules for Accounts***

TA enables you to search for an account using the Find an Account window. When you enter search criteria on the Find an Account window, TA applies the following rules as needed. That is, if TA does not find an account by applying Rule 1, TA applies Rule 2. If TA finds the account by applying Rule 2, TA does not apply the remaining rules.

**Rule 1: Search by Account ID**

TA looks for an Account ID and ignores any other information you enter on the Find an Account window. If you enter an Account ID, TA searches for an exact match and displays a single account if a match is found (i.e., TA finds the account and returns you to the field or screen from which you accessed the Find an Account window). If you enter an invalid Account ID (i.e., an Account ID not assigned to any account), TA indicates that no account matches the criteria you entered, regardless of whether you also entered other information for which an account does match.

**Rule 2: Search by Brief Name**

TA looks for a brief name and ignores any other information you enter on the Find an Account window. If you enter a brief name, TA searches for an exact match and displays a single account if a match is found (i.e., TA finds the account and returns you to the field or screen from which you accessed the Find an Account window). If you enter an invalid brief name (i.e., a brief name not assigned to any account), TA indicates that no account matches the criteria you entered, regardless of whether you also entered other information for which an account does match.

**Note:** You can search for a brief name assigned to an account or for a brief name assigned to a name within an account.

**Rule 3: Search by Telephone Number**

TA looks for a telephone number and ignores any other information you enter on the Find an Account window. If you enter a telephone number, TA searches for

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an exact match and displays on the Find an Account: Selected Accounts screen a list of accounts with telephone numbers that match the number you entered. If no match is found, TA indicates that no account matches the criteria you entered, regardless of whether you also entered other information (i.e., name or address information) for which an account does match.

### **Rule 4: Search by Query Retrieved**

TA looks for a query name and ignores any other information you enter on the Find an Account window. If you enter a query name, TA searches for all accounts saved for the query. TA displays the accounts on the Find an Account: Selected Accounts screen.

**Note:** From the Query field, press the [F9] key to select a valid query name from the list of values.

### **Rule 5: Fuzzy Logic Search**

TA looks for information in either of the following sets of fields:

- Name,
- Street Name, and
- ZIP Code

Or

- Name,
- Street Name, and
- Street Number

If you enter information in either of these sets of fields, TA performs a "fuzzy logic" search and displays the Find an Account: Selected Accounts screen with a list of accounts with exact or near exact matches on the information you entered. See "[About Fuzzy Logic Searching](#)."

### **Rule 6: Search by Name and ZIP Code**

TA looks for a name and ZIP Code. TA displays the Find an Account: Selected Accounts screen with a list of accounts with an address within the ZIP Code you entered and for which the name you entered matches a name on the account or the account's alpha name if the account is an organization account. See Rule 8 for more information on how TA uses information you enter in the Name field to search for accounts.

### **Rule 7: Search by Name**

TA looks for a name. TA displays the Find an Account: Selected Accounts screen with a list of accounts for which the account's name or any name within the account matches the name you entered.

When you enter criteria in the Name field on the Find an Account window, TA searches through

- The Last Name, Maiden Name and First Name fields of all name records associated with Individual accounts;
- The Last Name, Maiden Name and First Name fields for all name records associated with Organization accounts; and

- The account's Alpha Name field on Organization accounts.

**Note:** If you customize the account's name line or alpha name on an Individual account, you cannot search by the customized name, because TA does not use these fields for searching on an Individual account.

If you enter a last name only, TA lists

- All accounts with last names or maiden names that begin with the letters you entered,
- All accounts with a part of a hyphenated last name that begins with the letters you entered, and
- All Organization accounts with an alpha name that begins with the letters you entered.

For example, if you enter "Smith," TA lists all accounts with the name "Smith," "Smithfield," "Smithers," "Rodriguez-Smith," "Smith-Rodriguez," "Smith Foundation," etc.

If you enter a last name and first initial, TA lists

- All accounts with last names or maiden names that begin with the letters you entered and the first name begins with initial you entered,
- All accounts with a part of a hyphenated last name that begins with the letters you entered and the first name begins with the initial you entered, and
- All Organization accounts with an alpha name that begins with the letters you entered.

For example, if you enter "Smith, R" TA lists accounts with the names "Smith, Ron," "Smith, Renee," "Smithman, Richard," "Rodriguez-Smith, Roy," "Smith-Rodriguez, Ronald," etc.

**Rule 8: Search by Address (i.e., Street Number, Street Name, and ZIP Code)**

TA looks for a street number, street name, and ZIP Code. TA displays the Find an Account: Selected Accounts screen with a list of accounts that include an address for which the street number, and ZIP Code are an exact match and for which the street name begins with the letters you entered in the Street Name field.

**Rule 9: Search by Street Number and Street Name**

TA looks for a street number and street name. TA displays the Find an Account: Selected Accounts screen with a list of accounts that include an address for which the street number is an exact match and the street name begins with the letters you entered in the Street Number field.

**See Also:**

[Using the Wildcard to Search for an Account Searches TA Cannot Perform About Fuzzy Logic Searching](#)

### Using the Wildcard to Search for an Account

#### See Also:

[Using the Wildcard in the Telephone Number Field](#)

[Using the Wildcard in the Street Name Field](#)

[Using the Wildcard in the ZIP Code Field](#)

#### Using the Wildcard in the Telephone Number Field

When you search for an account, you can use the wildcard, i.e., "%," as a placeholder for information that you do not know. For example, you want to search for an account using a telephone number, but you are not sure of the last digit in the telephone number. You enter "(617) 876-227%" to search for the account. TA displays the Find an Account: Selected Accounts screen with all accounts that include the following telephone numbers: (617) 876-2270, (617) 876-2271, (617) 876-2272, (617) 876-2273, (617) 876-2274, (617) 876-2275, (617) 876-2276, (617) 876-2277, (617) 876-2278, and (617) 876-2279.

When you enter a telephone number on the Find an Account window, TA must be able to format the number in the standard telephone format (i.e., (###) ###-####). If you use the wildcard to search for a telephone number, you must enter a wildcard for each digit that you are omitting from the number. For example, you want to search for an account by telephone number, but you are unsure of two digits in the number (i.e., you have the following information for the number: "(617) 876-2\_\_5"). You must enter "(617) 876-2%%5" to search for the account using the telephone information that you have.

If you do not enter an area code and your organization has specified a [Default Area Code](#) as a system preference, TA inserts that area code to conduct the search. If you are uncertain of the area code and know the rest of the number, you can enter "%%%" as a placeholder for the area code.

**Note:** Where you use the wildcard determines how long TA takes to search. For example, if you enter "(617) 876-%%%", TA lists accounts with telephone numbers from (617) 876-0000 to (617) 876-9999.

#### Using the Wildcard in the Street Name Field

You can use the wildcard in the Street Name field when you are uncertain of one or more letters in the street name. For example, you want to search for an account using the address, but you are uncertain if the street name is "Sturbridge" Road or "Stowbridge" Road. You can enter "St%bridge Road" in the Street Name field, and TA will find the account if either is the street name.

**Note:** You do not have to enter a wildcard for each letter that you are omitting from the street name. When you enter a wildcard, it represents an unspecified number of letters.

#### Using the Wildcard in the ZIP Code Field

You can use the wildcard in the ZIP Code field if you are uncertain of one or more numbers in the ZIP Code. For example, you want to search for an account using the address, but you are uncertain if the ZIP Code is "02135" or "02146." You can enter "021%" in the ZIP Code field, and TA will find the account if either number is the ZIP Code for the address.

**Note:** You do not have to enter a wildcard for each number that you are omitting from the ZIP Code.

### Searches TA Cannot Perform

You cannot search for an account using only the following criteria.

- Name and street name
- Street name
- ZIP Code
- Street number and ZIP Code
- Street name and ZIP Code
- Alpha name for an individual

**Note:** You cannot search for an account using data entered in the Address Line 1 or Address Line 2 fields.

### About Fuzzy Logic Searching

A fuzzy logic search uses a scoring mechanism to rank the likelihood that an existing account matches the account for which you enter search criteria on the Find an Account window. A fuzzy logic search returns a list of accounts with exact or near exact matches on the information you enter, thus the search allows for misspellings.

### See Also:

[Search Criteria You Must Enter \(for Fuzzy Logic\)](#)  
[How TA Compares the Find Criteria with Existing Accounts](#)  
[How TA Determines Which Accounts Are Potential Matches](#)

### Search Criteria You Must Enter (for Fuzzy Logic)

You must enter information in the following fields to have TA perform a fuzzy logic search.

- Name
- Street Name
- ZIP Code

Or

- Name
- Street Name
- Street Number

Or

- Name

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- Street Name
- Street Number
- ZIP Code

**Note:** Fuzzy logic searching only works if you enter the complete last name in the Name field (e.g., "S%" or "Sm" will not work to find someone with the last name "Smith," even if you include other information like the street name and ZIP Code). You can leave the Street Number field blank if the address does not include a street number (e.g., the address is a P.O. Box number or Rural Route number).

### How TA Compares the Find Criteria with Existing Accounts

When you enter the information required for a fuzzy logic search, TA compares the fields with those for existing accounts. For each account, TA awards points for each of the following fields based on how similar the fields are to the information you enter on the Find an Account window.

- Name
- Street Number
- Street Name
- Apartment Number
- ZIP Code

Each of the above fields has a specific point structure. TA awards an account a percentage of the total points for a field when the search criteria you enter partially matches that field for an existing account. The information entered in a field is called a "string." TA awards points based on the fraction of either the beginning or end of the string that matches the search criteria you enter. For example, you enter complete name and address information on the Find an Account window. You enter the name "O'Connell." For an account with the last name "O'Donnell," TA awards 16 points for the Name field (7 points come from the first two characters matching, and 9 points come from the last three characters matching).

The following fields must match exactly for TA to award an account any points for the field.

- Street Number
- ZIP Code
- Apartment Number

### How TA Determines Which Accounts Are Potential Matches

After you enter the search criteria for a fuzzy logic search, TA compares the information to the fields in existing accounts and displays the Find an Account: Selected Accounts screen with a list of accounts that TA considers potential matches. TA includes all accounts for which the total score is greater than or equal to the value that your organization has specified as the cutoff score.

**Note:** Your organization sets the cutoff score for potential matches using the [Cutoff Score for Partial Matches](#) system preference on the System Preference Administration screen.

## **Appendix 4: Merge Processing**

TA enables you to merge duplicate accounts (i.e., two accounts that exist for the same entity, e.g., an individual or organization). For each type of account record (e.g., names, addresses), records from the deleted account are either merged with records from the retained account or added as new records for the retained account. For example, when you create a merge record for two accounts, you can specify that TA add a name from the deleted account as a new name for the retained account or you can specify that TA merge the name with an existing name for the retained account (i.e., the names represent the same person).

**Note:** For names, addresses, and telephone numbers you can also mark a record for deletion to prevent TA from adding the record to the retained account.

This appendix explains the processing that TA completes to merge the records for two accounts.

### **See Also:**

[About Names, Addresses, Telephone Numbers, and E-mail Addresses](#)  
[Rules to Merge Two Records](#)  
[How TA Merges Transactions and Interactions](#)

### **About Names, Addresses, Telephone Numbers, and E-mail Addresses**

You can add an unlimited number of names, addresses, telephone numbers, and e-mail addresses to an account. For each type of record, TA assigns an identification number that is unique within the account. These unique identification numbers are called the Name ID, Address ID, Telephone ID, and E-mail ID. TA assigns these identification numbers based on the order in which you add these records to the account.

For example, you create an account with two names. TA assigns Name ID 1 to the first name and Name ID 2 to the second name. If you add two addresses to the account, TA assigns Address ID 1 to the first address and Address ID 2 to the second address.

The Name IDs, Address IDs, Telephone IDs, and E-mail IDs do not appear on screen with the records they identify; the identification numbers are used by TA "behind the scenes" to uniquely identify each name, address, telephone number, and e-mail address for the account.

### **See Also:**

[How TA Reassigns Name IDs, Address IDs, and Telephone IDs](#)

### How TA Reassigns Name IDs, Address IDs, and Telephone IDs

When TA merges two accounts, TA merges the names, addresses, and telephone numbers first. Names, addresses, and telephone numbers are often referenced in other types of records. For example, on a relationship record, you indicate for which name on the account the relationship exists. If the relationship exists for the first name added to the account, TA assigns Name ID 1 to the relationship record.

When TA merges the names, addresses, and telephone numbers from the deleted account to the retained account, TA must store the Name ID, Address ID, and Telephone ID assigned to each record for the deleted account. Otherwise, when TA merges other types of records (e.g., relationships), TA won't know which name, address, or telephone number on the deleted account is associated with that record.

For example, the deleted account has two names and the retained account has two names. The first name within the deleted account (i.e., Name ID 1 for the deleted account) is merged with the first name on the retained account (i.e., Name ID 1 for the retained account). The second name within the deleted account (i.e., Name ID 2) is added as a new name for the retained account. Because Name ID 2 is already assigned to the second name within the retained account, TA must assign Name ID 3 to the second name within the deleted account when it is added to the retained account.

TA stores this information in a table that holds the data as follows.

<b>Deleted Account Name IDs</b>	<b>Original Retained Account Name IDs</b>	<b>New Retained Account Name IDs</b>
Name ID_1	Name ID_1	Name ID_1
	Name ID_2	Name ID_2
Name ID_2		Name ID_3

When TA merges other records for the two accounts, TA refers to this table. For example, if a relationship exists for Name ID 2 on the deleted account, the table instructs TA to associate the relationship with Name ID 3 on the retained account.

### Rules to Merge Two Records

When TA merges two records (e.g., a name from the retained account with a name from the deleted account), TA follows a set of rules to determine how to merge each individual column on the record. For example, if TA merges two names but the information on the name records is not identical (e.g., the names have two different birth dates), TA must follow these rules to determine to which value to set each column.

The following table describes the rules that TA applies on a column by column basis when merging a record from the deleted account with a record from the retained account.

<b>Rule</b>	<b>Description</b>
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<b>Rule</b>	<b>Description</b>
TF	Use the value from the retained account unless the column is null (i.e., blank). If the column is null, use the value from the deleted account.
T	Use the value from the retained account regardless of the value from the deleted account. If the column is null (i.e., blank) for the retained account, keep the column null on the new merged record.
F	Use the value from the deleted account regardless of the value from the retained account. If the column is null (i.e., blank) for the deleted account, keep the column null on the new merged record.
A	Append the value from the deleted account to the value from the retained account (e.g., for comments).
C	Calculate the new value for the column after the records have been merged.
D	Determine which Name ID, Address ID, or Telephone ID to associate with the record.
L	For numbers, use the larger number from either the retained account or the deleted account. For dates, use the more recent date.
S	For numbers, use the smaller number from either the retained account or the deleted account. For dates, use the older date.
R	The list of values for the column are ranked from "strongest" to "weakest." Determine whether the retained account or the deleted account has the stronger value for that column and use that value.
N	If either the retained account or the deleted account has a value for that column (i.e., the column is not null for one of the accounts), use that value. If both accounts have a value for that column (i.e., the column is not null for both accounts), generate an error.
X	Set the Account ID for each record to that of the retained account.
Z	Set code values that are copied from the deleted account to the retained account (e.g., classification code, interest code).
U	Add the value from the deleted account to the value from the retained account.

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Rule	Description
I	Link the column to another column (e.g., if the value from the deleted account is used for the linked column, use the value from the deleted account for this column).

### See Also:

[Accounts \(Merge Rules\)](#)  
[Addresses \(Merge Rules\)](#)  
[Names \(Merge Rules\)](#)  
[Classifications \(Merge Rules\)](#)  
[Education Records \(Merge Rules\)](#)  
[Financial Research \(Merge Rules\)](#)  
[Interests \(Merge Rules\)](#)  
[Job Functions \(Merge Rules\)](#)  
[Other Charitable Giving Records \(Merge Rules\)](#)  
[Account Projects \(Merge Rules\)](#)  
[Relationships \(Merge Rules\)](#)  
[Break Challenges \(Merge Rules\)](#)  
[Program Functions \(Merge Rules\)](#)  
[Memorials \(Merge Rules\)](#)  
[Tributes \(Merge Rules\)](#)  
[Prospect Ratings \(Merge Rules\)](#)  
[Salutations \(Merge Rules\)](#)  
[Telephone Numbers and E-mail Addresses \(Merge Rules\)](#)

### Accounts (Merge Rules)

For account-level information, TA applies the rules listed below to set each column for the retained account.

Column Name	Rule	Column Name	Rule
ACCOUNT_CATEGORY	TF	INSTALLMENTS_ALLO WED <sup>†</sup>	R
ACCOUNT_GENDER*	R	LAST_EXCHANGE_DA TE	L
ACCOUNT_ID	X	MATCH_RATIO	TF
ACCOUNT_TYPE	TF	MAX_CONTRIBUTION	L
ADDRESS_STS**	R	MAX_MATCHED	L
ALT_ACCOUNT_ID	TF	MIN_CONTRIBUTION	S
ANONYMOUS_GIFT_ACC OUNT	TF	PREMIUMS_ALLOWED †	R
COMMENTS	A	RANDOM	TF
DEDUCT_PREMIUM <sup>†</sup>	R	SEED_RECORD <sup>†</sup>	R
DEFAULT_CURRENCY	TF	STAFF	TF
DISTRIBUTION_DATE_1	TF	STS	C
DISTRIBUTION_DATE_2	TF	TELEPHONE_STS**	R
DISTRIBUTION_DATE_3	TF	TERMINATION_CODE	TF
DISTRIBUTION_DATE_4	TF	TERMINATION_DATE	L

Column Name	Rule	Column Name	Rule
DISTRIBUTION_FREQU NCY	TF		

- \* TA ranks the values in this column from strongest to weakest as follows:  
B, M, F, U.
- \*\* TA ranks the values in this column from strongest to weakest as follows:  
4, 3, 2, 1, N.
- † TA ranks the values in this column from strongest to weakest as follows:  
Y, N.

### Addresses (Merge Rules)

When TA merges an address from the deleted account with an address from the retained account, TA sets each column on the new address record to the value from the retained account, unless the column for the retained account is null (i.e., blank). If the column is null for the retained account, TA sets that column to the value from the deleted account.

### Names (Merge Rules)

When TA merges a name from the deleted account with a name from the retained account, TA applies the rules listed below to set each column on the new name record.

Column Name	Rule	Column Name	Rule
AGE_RANGE	C	LAST_NAME	N
ALPHA_NAME	TF	LAST_REVIEWER	I
BIRTHPLACE	TF	LAST_REVIEW_DATE	L
BIRTH_DATE	TF	MAIDEN_NAME	TF
BIRTH_DAY	TF	MARITAL_STATUS	TF
BIRTH_MONTH	TF	MIDDLE_NAME	N
BIRTH_NOTE	TF	NAME_LINE	TF
BIRTH_YEAR	TF	NUMBER_OF_CHILDREN	L
COMMENTS	A	NUMBER_OF_GRAND_CHIL DREN	L
CUSTOM_NAME_FL AG	R	OCCUPATION_CODE	TF
DATE_MARRIED	L	POLITICAL_PARTY	TF
DECEASED_DATE	TF	PREFERRED_ADDRESS_ID*	R
DECEASED_DAY	TF	PREFERRED_TELEPHONE_I D*	R
DECEASED_FLAG*	R	PRIMARY_NAME_FLAG*	R
DECEASED_MONTH	TF	PRIMARY_NAME_ID	R
DECEASED_YEAR	TF	SALUTATION_FLAG†	R
DEPARTMENT	TF	SOLICITOR	TF
DISPLAY_SEQUENC E	TF	SSN	TF

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<u>Column Name</u>	<u>Rule</u>	<u>Column Name</u>	<u>Rule</u>
EMAIL_ADDRESS	TF	STAFF	TF
FIRST_NAME	N	STS	C
GENDER**	R	SUFFIX	TF
JOB_TITLE	TF	TITLE	TF

- \* TA ranks the values for this column from strongest to weakest as follows:  
Y, N.
- \*\* TA ranks the values for this column from strongest to weakest as follows:  
B, M, F, U.
- † TA ranks the values for this column from strongest to weakest as follows:  
C, N.

### Classifications (Merge Rules)

When TA merges a classification from the deleted account with a classification from the retained account, TA applies the rules listed below to set each column on the new classification record.

<u>Column Name</u>	<u>Rule</u>	<u>Column Name</u>	<u>Rule</u>
ACCOUNT_ID	X	END_DATE	L
CLASSIFICATION_COD E	Z	NAME_ID	D
CLASSIFICATION_VAL UE	Z	START_DATE	S
COMMENTS	A	STS*	R
DISPLAY_SEQUENCE	TF		

- \* TA ranks the values in this column from strongest to weakest as follows:  
A, I, D.

### Education Records (Merge Rules)

When TA merges an education record from the deleted account with an education record from the retained account, TA applies the rules listed below to set each column on the new education record.

<u>Column Name</u>	<u>Rule</u>	<u>Column Name</u>	<u>Rule</u>
ACCOUNT_ID	X	EDUCATION_BEGIN_DATE	N
COMMENTS	A	EDUCATION_END_DATE	N
DEGREE_CODE	Z	LAST_REVIEWER	I
DEGREE_MAJOR	N	LAST_REVIEW_DATE	L
DEGREE_YEAR	N	NAME_ID	D
SCHOOL_CODE	Z	STS*	R

- \* TA ranks the values in this column from strongest to weakest as follows:  
A, I, D.

**Financial Research (Merge Rules)**

When TA merges a financial research record from the deleted account with a financial research record from the retained account, TA applies the rules listed below to set each column on the new financial research record.

Column Name	Rule	Column Name	Rule
ADVERTISING_BUDGET_YEAR <sup>††</sup>	I	FIGURES_AT_CLOSING <sup>**</sup>	I
BUSINESS_FULL_NAME	TF	NET_INCOME <sup>†</sup>	I
EXPIRE_DATE_NOT_VESTED	TF	NET_WORTH_RATING	TF
EXPIRE_DATE_VESTED	TF	NUMBER_EMPLOYEES	TF
NAME_ID	D	OFFAIR_ACTIVITIES	A
SHARES_NOT_VESTED	TF	OFFAIR_GOALS	A
SHARES_VESTED	TF	PO_REQUIRED	TF
TICKER_SYMBOL	TF	PRE_SELECT_ORGANIZATIONS	TF
BUSINESS_PRODUCT	TF	PROBLEMS_AT_COMPANY	A
ACCEPT_APPLICATIONS	TF	PROBLEMS_AT_FOUNDATIONS	A
ACCOUNT_ID	X	PRODUCTS_DISTRIBUTED	A
ACRES	TF	PROPERTY_DESCRIPTION	A
ADVERTISING_BUDGET	TF	PROPERTY_VALUATION_DATE	L
ANNUAL_REPORT	TF	RESEARCH_COMMENTS	A
AS_OF_DATE	TF	RETIRED_FLAG	TF
BUSINESS	Z	REVENUE <sup>†</sup>	I
BUSINESS_SEGMENT	TF	SIC_CODE <sup>***</sup>	I
COMPENSATION	TF	STS <sup>**</sup>	R
COMPENSATION_FISCAL_PERIOD	TF	TOTAL_ASSETS <sup>†††</sup>	I
DATE_OF_STOCK_CLOSING <sup>†</sup>	L	TOTAL_DONATIONS <sup>†</sup>	I
DEADLINE_DATE	L	TOTAL_WORTH	TF
DEADLINE_NOTE	TF	UNDERWRITING_INTERESTS	A
DIRECT_SHARES	TF	VALUATION_DATE	L
EXCHANGE	TF	VALUE_OF_PROPERTY <sup>*</sup>	I
FOUNDATION	N	YEAR	L
FOUNDATION_ASSETS	TF	YEAR_HIGH	L
GIVE_IN_STATES	TF	YEAR_LOW	S
GUIDELINES	TF		
HIGH_GRANT	L		
INDIRECT_SHARES	TF		

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Column Name	Rule	Column Name	Rule
LOW_GRANT	S		
MARKET_SEGMENT	TF		
MARKETING_OBJECTIVES	A		
MEETING_DATE	TF		
MEETING_NOTE	TF		

\* TA links this column to the Property Valuation Date column.

\*\* TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

\*\*\* TA links this column to the Market Segment column.

† TA links this column to the Stock Information as of column.

†† TA links this column with the Advertising Budget column.

††† TA links this column to the Company Financials for column, and the Stock Information as of column.

### Interests (Merge Rules)

When TA merges an interest from the deleted account with an interest from the retained account, TA applies the rules listed below to set each column on the new interest record.

Column Name	Rule	Column Name	Rule
ACCOUNT_ID	X	INTEREST_FIRST_DATE	S
COMMENTS	A	INTEREST_LAST_DATE	L
CONFIRMED_IMPLIED <sup>††</sup>	R	LAST_INTEREST_SOURCE <sup>**</sup>	I
DATE_AVAILABLE	S	LAST_PROGRAM <sup>**</sup>	I
DISPLAY_SEQUENCE	TF	NAME_ID	D
END_DATE	L	SPONSORING_ORGANIZATION	TF
FIRST_INTEREST_SOURCE <sup>*</sup>	I	STS <sup>†</sup>	R
FIRST_PROGRAM <sup>*</sup>	I	VOLUNTEER_CONTACT	TF
INTEREST_CODE	Z	WORK_TYPE	TF
INTEREST_COUNT	U		

\* TA links this column to the First Date column.

\*\* TA links this column to the Last Date column.

† TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

†† TA ranks the values for this column from strongest to weakest as follows:  
C, I.

### Job Functions (Merge Rules)

When TA merges a job function from the deleted account with a job function from the retained account, TA applies the rules listed below to set each column on the new job function record.

<b>Column Name</b>	<b>Rule</b>	<b>Column Name</b>	<b>Rule</b>
ACCOUNT_ID	X	NAME_ID	D
JOB_FUNCTION_CO DE	Z	STS*	R

- \* TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

### **Other Charitable Giving Records (Merge Rules)**

When TA merges a charitable giving record from the deleted account with one from the retained account, TA applies the rules listed below to set each column on the new charitable giving record.

<b>Column Name</b>	<b>Rule</b>	<b>Column Name</b>	<b>Rule</b>
ACCOUNT_ID	X	NAME_ID	D
AMOUNT	N	REASON	TF
GIVE_DATE	N	RECIPIENT	N
GIVING_DESCRIPTION	A	STS*	R

- \* TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

### **Account Projects (Merge Rules)**

When TA merges an account project record from the deleted account with one from the retained account, TA applies the rules listed below to set each column on the new account project record.

<b>Column Name</b>	<b>Rule</b>	<b>Column Name</b>	<b>Rule</b>
ACCOUNT_ID	X	NAME_ID	D
ACCOUNT_MANAGER	N	PLEDGE_NUMBER	TF
ACTIVITY	TF	PRIMARY_SOLICITOR	N
ACTIVITY_TYPE	TF	PRIORITY	L
ADDITIONAL_SOLICITOR	N	PROGRAM	N
ADDITIONAL_STAFF	N	PROJECT	Z
ASK_AMOUNT**	I	PROPOSAL_NOTE	A
ASK_AMOUNT_DATE	N	PROPOSAL_NUMBER <sup>†</sup>	I
AWARD_DATE	N	PROPOSAL_SUBMIT_DATE	N
CAMPAIGN	TF	PURPOSE	N
EFFORT	TF	SOURCE	TF
EXPECTED_AMOUNT***	I	STAGE*	R
EXPECTED_AMOUNT_DATE	L	START_DATE	S
EXTERNAL_RATING <sup>†††</sup>	I	STEWARD	N

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Column Name	Rule	Column Name	Rule
EXTERNAL_RATING_DATE	L	STS <sup>†††</sup>	R
INITIATIVE	TF	TOTAL_PAYMENT_AMOUNT	C
INTERNAL_RATING <sup>††</sup>	I	TOTAL_PLEDGE_AMOUNT	C
INTERNAL_RATING_DATE	L		

\* TA ranks the values for this column from strongest to weakest as follows:  
ST, DR, GV, RF, PL, PN, SY, RE, ID.

\*\* TA links this column to the Internal Rating Date column.

\*\*\* TA links this column to the Expected Date column.

† TA links this column to the Submit Date column.

†† TA links this column to Internal Rating Date column.

††† TA links this column to the External Rating Date column.

†††† TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

### Relationships (Merge Rules)

When TA merges a relationship from the deleted account with a relationship from the retained account, TA applies the rules listed below to set each column on the new relationship record.

Column Name	Rule	Column Name	Rule
ACCOUNT_ID	X	RELATED_ACCOUNT_ID	Z
AUTOMATIC_SOFT_CR_EDIT	TF	RELATED_NAME_ID	Z
COMMENTS	A	RELATIONSHIP_CATEGORY*	I
COMPANY_MATCH	TF	RELATIONSHIP_TYPE	Z
DISPLAY_SEQUENCE	TF		
END_DATE	L	START_DATE	S
NAME_ID	D	STS**	R

\* TA links this column to the Relationship Type column.

\*\* TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

### Break Challenges (Merge Rules)

When TA merges a break challenge record from the deleted account with one from the retained account, TA applies the rules listed below to set each column on the new break challenge record.

Column Name	Rule	Column Name	Rule
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## Accounts Module Reference Information

<u>Column Name</u>	<u>Rule</u>	<u>Column Name</u>	<u>Rule</u>
ACCOUNT_ID	X	STS*	R
CHALLENGE_AMOUNT	N	TARGET_PAYMENT_AMOUNT	TF
CHALLENGE_FORMULA	TF	TARGET_PAYMENT_NUMBER	I
ESTIMATED_PLEDGE_AMOUNT	TF	TARGET_PLEDGE_AMOUNT	TF
ESTIMATED_PLEDGE_NUMBER	TF	TARGET_PLEDGE_NUMBER	I
SOURCE	Z		

\* TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

### Program Functions (Merge Rules)

When TA merges a program function record from the deleted account with one from the retained account, TA applies the rules listed below to set each column on the new program functions record.

<u>Column Name</u>	<u>Rule</u>	<u>Column Name</u>	<u>Rule</u>
ACCOUNT_ID	X	PROGRAM_FUNCTION	Z
PROGRAM	Z	STS*	R

\* TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

### Memorials (Merge Rules)

When TA merges a memorials record from the deleted account with one from the retained account, TA applies the rules listed below to set each column on the memorials record.

<u>Column Name</u>	<u>Rule</u>	<u>Column Name</u>	<u>Rule</u>
ACCOUNT_ID	Z	MEMORIAL_NAME_ID	D
ACKNOWLEDGE_FREQUENCY	TF	MEMORIAL_TYPE	Z
ADDRESS_ID	TF	NAME_ID	Z
DATE_LAST_ACKNOWLEDGED	L	STS*	R
MEMORIAL_ACCOUNT_ID	X		

\* TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

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### Tributes (Merge Rules)

When TA merges a tributes record from the deleted account with one from the retained account, TA applies the rules listed below to set each column on the tributes record.

Column Name	Rule	Column Name	Rule
COMMENTS	A	MEMORIAL_NAME_ID	T
DATE_ESTABLISHED	S	MEMORIAL_TYPE	N
DESCRIPTION	N	STS*	R
MEMORIAL_ACCOUNT_ID	X		

- \* TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

### Prospect Ratings (Merge Rules)

When TA merges a prospect ratings record from the deleted account with one from the retained account, TA applies the rules listed below to set each column on the prospect ratings record.

Column Name	Rule	Column Name	Rule
ACCOUNT_ID	X	PRIORITY	TF
ACTIVITY_TYPE	Z	RATER	N
COMMENTS	A	RATING	N
LAST_REVIEWER	I	RATING_DATE	I
LAST_REVIEW_DATE	L	STS*	R
NAME_ID	D		

- \* TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

### Salutations (Merge Rules)

When TA merges a salutation from the deleted account with a salutation from the retained account, TA applies the rules listed below to set each column on the new salutation record.

Column Name	Rule	Column Name	Rule
ACCOUNT_ID	X	SALUTATION_LINE_1	TF
DISPLAY_SEQUENCE	TF	SALUTATION_LINE_2	TF
INSIDE_SALUTATION_1	N	SALUTATION_LINE_3	TF
INSIDE_SALUTATION_2	TF	STAFF	TF

<b>Column Name</b>	<b>Rule</b>	<b>Column Name</b>	<b>Rule</b>
NAME_ID	D	STS*	R
SALUTATION_CODE	Z		

- \* TA ranks the values for this column from strongest to weakest as follows:  
A, I, D.

### **Telephone Numbers and E-mail Addresses (Merge Rules)**

When TA merges a telephone number or e-mail address from the deleted account with one from the retained account, TA sets each column on the new telephone or e-mail record to the value from the retained account, unless the column for the retained account is null (i.e., blank). If the column is null for the retained account, TA sets that column to the value from the deleted account.

### **How TA Merges Transactions and Interactions**

When TA merges two accounts, TA reassigns the transactions (e.g., gifts) from the deleted account to the retained account.

Each transaction in TA is uniquely identified by the Account ID, gift date, and gift sequence. When TA reassigns a transaction from the deleted account to the retained account, the Account ID, gift date, and gift sequence for the new transaction on the retained account are set as follows:

- The Account ID for the transaction is set to the Account ID for the retained account.
- The gift date for the transaction does not change.
- The gift sequence for the transaction does not change unless the retained account already has a gift on that date. For example, the deleted account and the retained account each have one gift for May 13, 1997. When TA reassigns the gift from the deleted account to the retained account, TA must assign a gift sequence to uniquely identify the gift for that date. Because the retained account already has a gift for May 13 with gift sequence "1," TA assigns gift sequence "2" to the deleted account's May 13 transaction when TA reassigns the transaction to the retained account.

### **Merging Interactions**

When TA merges two accounts, TA reassigns the interactions from the deleted account to the retained account.

### **See Also:**

[Reassigning Transaction Benefits \(TA's Merge Process\)](#)  
[Reassigning Batch Detail Records \(TA's Merge Process\)](#)  
[Recalculating Account Activities \(TA's Merge Process\)](#)

### **Reassigning Transaction Benefits (TA's Merge Process)**

When TA merges two accounts, TA merges the benefits awarded to the accounts. By default, the benefits awarded to the retained account are the

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benefits for the new merged account and the benefits awarded to the deleted account are deleted.

**Note:** TA enables you to override the default merging of benefits for the two accounts (i.e., you can add a benefit from the deleted account to the retained account).

### Reassigning Batch Detail Records (TA's Merge Process)

When TA merges two accounts, TA looks in all unprocessed batches (i.e., batches with a status of "O" for open or "R" for released) for a batch detail record for the deleted account. If the deleted account has a batch detail record, TA updates the batch detail record with the information for the new retained account.

### Recalculating Account Activities (TA's Merge Process)

After TA reassigns transactions from the deleted account to the retained account, TA recalculates the account activities records for both accounts.

For the retained account, TA changes the account activity records to include the transactions reassigned from the deleted account. TA subtracts these transactions from the deleted account and sets the status of each account activity record for the deleted account to "D" for delete.

**Note:** For renewable activity types, TA sets the expiration date for the account activity record based on the membership benefits retained for the merged account.

## Appendix 5: Control Code Tables

The following table identifies the fields affected by code tables your organization should set up before working with the Account Management module.

<u>Screen Name</u>	<u>Field Name</u>	<u>Table Name</u>
Account Overview	Type	Account Type
Address Entry	(Address) Type	Address Type
	Census Block	Census Block
	Census Tract	Census Tract
	Congress District	Congressional District
	Country	Country
	County	County
	State	State
	Type	Address Type
	Zip Code	Zip Code
Classification	Classification	Classification

<b>Screen Name</b>	<b>Field Name</b>	<b>Table Name</b>
Entry	Category	Category
	Classification Value	Classification Value
	Classification Code	Classification Code
E-mail Address Entry	E-mail Type	E-mail Type
Interest Entry	Interest	Interest
	Origin	Interest Source
	Program	Program
Name Entry	Age Range	Age Range
	Department	Department
	Job Functions	Job Function
	Job Title	Job Title
	Marital Status	Marital Status
	Occupation	Occupation
	Political Party	Political Party
	Suffix	Suffix
	Title	Title
Gender	First Name	
Notes Window	Interaction Type	Note Type
Relationship Entry	Relationship Type	Relationship Type
		Relationship Category
Salutation Entry	Salutation	Salutation
Telephone Entry	Phone Type	Telephone Type

## ***Appendix 6: System Preferences***

The following table lists each system preference that affects the Account Management module and includes a reference to the section of this chapter related to the system preference.

<b>System Preference</b>	<b>See</b>
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<b>System Preference</b>	<b>See</b>
Account Affiliation Merge Rule	<a href="#">Entering Account-level Information</a>
Automatically Default Gender?	<a href="#">Entering a Person's Gender</a>
Capitalize Initial Letter?	<a href="#">Adding a New Name to an Account</a> <a href="#">Adding a New Address to an Account</a>
Combine Inside Salutation If Same Title/Last Name?	<a href="#">Combined Inside Salutation Format</a>
Create Formal Inside Salutation?	<a href="#">Salutation Rules</a>
Cutoff Score for Partial Matches	<a href="#">Using the Find an Account: Selected Accounts Window</a> <a href="#">Finding Possible Matching Accounts</a>
Cutoff Score for Exact Matches	
Default Account Type	<a href="#">Selecting the Account Type</a>
Default Area Code	<a href="#">Entering Information on the Telephone Entry Screen</a>
Default Country	<a href="#">Additional Information You Can View and Enter (Account Overview)</a>
Delete Old Address on NCOA Processing?	<a href="#">Archiving an Address</a>
Low ZIP Check	<a href="#">How TA Verifies ZIP Codes and City Names</a>
High ZIP Check	<a href="#">How TA Verifies ZIP Codes and City Names</a>

<b>System Preference</b>	<b>See</b>
Maximum Undeliverable Count	<a href="#"><u>Marking an Address as Undeliverable</u></a>
Marital Status Title	<a href="#"><u>An Account's Name Line and Alpha Name</u></a> <a href="#"><u>Marital Status Exception Format</u></a>
Non-Individual Inside Salutation	<a href="#"><u>Organization Account Salutation Rules</u></a>
Require Comment for Classification ?	<a href="#"><u>Adding a Classification to an Account</u></a>
Require Complete Name and Address?	<a href="#"><u>Entering Information for a New Account</u></a>
Salutation and Name Join	<a href="#"><u>How TA Composes an Individual Account's Name Line and Alpha Name</u></a>
Set Account Level Affiliation	<a href="#"><u>Entering Account-level Information</u></a>