

Contents

- Overview of the Customer Service Module3**
 - Purpose of the Customer Service Module3
 - Examples of Customer Service Tasks3
 - Correlation Between a Customer Service Entry and an Interaction4
 - Interaction Category and the Interaction Type4
- Customer Service Entry Screen.....5**
 - Overview of the Customer Service Entry Screen5
 - Buttons on the Customer Service Entry Screen5
 - Finding Existing Interactions (Customer Service Entry Screen)6
 - Limiting the Interactions to Select6
 - Creating a New Interaction (Customer Service Entry Screen)7
 - Entering the Account ID for an "Anonymous" Interaction7
 - Entering the Interaction Details8
 - Selecting the Interaction Category and the Interaction Type9
 - Entering the Source Code for an Interaction9
 - Selecting the Technique10
 - Setting the Contact Information for the Interaction10
 - Selecting the Program10
 - Entering the Response Information10
 - Including Comments in the Program Interaction Report11
 - Changing the Account if You Selected the Wrong Account11
 - The Status of an Interaction11
 - Inactivating an Account from Customer Service11
 - Accessing Information or Instructions Based on the Interaction Type11
 - Updating Interests for a Program-related Interaction12
 - Creating Multiple-page Interactions12
 - Determining How Many Pages to Create for an Interaction12
 - Creating a New Page for an Interaction12
 - Transaction, Benefit, and Account Activity Information13
 - The Account's Giving History13
 - The Account's Benefits14
 - Account Activity Information17
- The Inquiry and Referral View Screen.....17**
 - Overview of the Inquiry and Referral View Screen17
 - Buttons on the Inquiry and Referral View Screen18
 - Finding Interactions (IRV Screen)19
 - Creating a New Interaction (IRV Screen)19
 - Interaction Type (IRV Screen)20
 - Source Code (IRV Screen)20
 - Entering Response Information (IRV Screen)20
 - Setting the Contact Information for the Interaction on IRV21
 - Inactivating an Account from the IRV Screen21
 - Viewing and Updating Affiliation Information21
 - Referring Accounts to Service Providers22
 - Setting up Response Categories (Service Categories)22
 - Setting up Response Types (Service Types)22

Setting up Service Providers	23
Searching for Service Providers	24
Viewing and Updating Questionnaire Information	25
Common Customer Service and IRV Features	26
Using Surveys	26
Survey Response Entry Screen	26
Creating Surveys	27
Viewing and Updating Account Information	28
Accessing Additional Information for an Account	29
Updating or Adding a Note to an Account	30
Viewing and Updating an Interest for an Account	30
Viewing the Interaction History for an Account	30
Tracking Inventory and Value for Benefits Not Tied to a Gift	31
Merging Accounts (from Customer Service Entry)	31
Ticklers and Warnings	32
Working with Ticklers	32
Creating a Warning	33
Common Customer Service Questions	33
You Want to Enter the Interaction Details Before Selecting the Account	34
The Person Is Not Receiving the Membership Publication	34
The Person Is Reporting an Address Correction	35
The Person Does Not Want Any Telephone Solicitations	35
The Person States That Membership Was Not Renewed with the Last Gift	35
Benefits (Item or Package) has Not Been Awarded	36
The Person Reports a Problem with a Premium	36
The Person Received a Telemarketing Call or Direct Mail Piece and Wants to Know if Your Organization Is Responsible	37
Customer Service Reference Information	37
Control Codes (Customer Service)	38
System Preferences (Customer Service)	38

Overview of the Customer Service Module

[Purpose of the Customer Service Module](#)

[Correlation Between a Customer Service Entry and an Interaction](#)

[Interaction Category and the Interaction Type](#)

Purpose of the Customer Service Module

The Customer Service module enables you to meet two goals.

- To provide quality service to your donor base and non-donors with whom you interact by enabling you to work from one screen to resolve problems and provide information. Additional information on the account is quickly available from this screen.
- To track and report on the types of contacts that occur between an account and your organization. This module enables you to capture trends regarding how your organization is perceived in the community or how well your organization services the community.

To optimize the service you provide, you can coordinate what you enter through the Customer Service module with the queries and outputs you set up using the Query and Output module. For example, you can set up queries to select interactions to which you need to send a letter and have the letters sent in a timely manner. Your organization sets up these queries and outputs and can change them as needed.

The Customer Service module also includes several reports to help you service your donors and non-donors. These reports can help you see trends such as the following:

- Premium delivery problems which may represent a trend regarding the service provided by a particular vendor or postal problems in a particular geographic area
- Complaints about telemarketing solicitations which may represent a trend regarding the telemarketing service your organization uses

Your organization can update the codes. For example, if your organization wants to track the feedback it receives regarding articles in the membership publication or the feedback it receives regarding a regularly scheduled lecture series it sponsors each year, then you can set up codes to use to capture the feedback.

See Also:

[Examples of Customer Service Tasks](#)

Examples of Customer Service Tasks

As you learn more about your donor base and about the non-donors with whom you interact, the better able you are to improve your fundraising and the services you provide. This module enables you to handle a variety of situations including the following:

- Change of address
- Complaints regarding a premium never arriving, solicitation, or membership issue
- Requests for volunteer, event, and membership renewal information
- Inquiries for specific literature about your organization or its cause
- Canceling a pledge or refunding a donation
- For a PBS station, program and pledge break feedback

- Customer Service solicitations including recording the reason for refusing
- Referrals to other chapters or affiliates of your organization
- Annual report request
- Event RSVPs

Correlation Between a Customer Service Entry and an Interaction

An interaction refers to any contact between your organization and an account. A customer service entry is one way to create an interaction. You can create interactions using the following:

- The Customer Service Entry screen (see "[Customer Service Entry Screen](#)")
- The Account Diary screen, e.g., used by your major donors staff (see the [Corporate Gifts, Major Gifts and Grants chapter](#))
- The Inquiry and Referral View screen, e.g., to record requests for information, referrals, or literature your organization provides (see "[The Inquiry and Referral View Screen](#)")
- The [Create Interaction update procedure](#), i.e., an interaction created by Team Approach® (TA), e.g., when your organization pulls labels to mail premiums

Note: You can create an interaction for a person who is not a donor but for whom you have an account set up or for a person for whom you have no information. For more information, see "[Entering the Account ID for an "Anonymous" Interaction](#)".

You can create a multiple-page interaction if you discuss more than one issue during the contact with the account. For more information, see "[Creating Multiple-page Interactions](#)".

Interaction Category and the Interaction Type

When an interaction is created, it is assigned to an interaction category and type. The interaction category groups interactions with similar purposes. The interaction type refers to the specific topic such as an acknowledgement, or a request for specific information. (The Technique field on an interaction captures the method and direction of the interaction such as call to account, or call from the account, or a mass mailing to accounts.)

You can set a default interaction category and/or type for users through the [Default Interaction Category](#) and [Default Interaction Type](#) preferences so users can quickly enter interactions. On the Interaction Type Code Entry screen, there are also defaults that you can define for any interaction type. For example, whenever you create an interaction (either manually or through the Create Interaction Update procedure), using a particular interaction type code, fields such as Technique, Response Category, and Response Type can be pre-filled. (For any interaction type, you can even define which field the cursor should automatically go to.)

Note: Employing user-level defaults in conjunction with interaction type-level defaults can significantly reduce data entry time when users create interactions.

Each interaction type is assigned to one interaction category. The following table contains two of the interaction categories and a few of each one's interaction types.

Interaction Category	Category Description	Interaction Type	Interaction Description
CU	Cultivation	ACK	Acknowledgment
		BCARD	Birthday Card
		CUGEN	General Cultivation

Interaction Category	Category Description	Interaction Type	Interaction Description
MS	Member Service	ADDRESS	Change of Address
		ANNREP	Annual Report Request
		BENEFITS	Member Benefits Information

Customer Service Entry Screen

[Overview of the Customer Service Entry Screen](#)

[Finding Existing Interactions \(Customer Service Entry Screen\)](#)

[Creating a New Interaction \(Customer Service Entry Screen\)](#)

[Entering the Interaction Details](#)

[Accessing Information or Instructions Based on the Interaction Type](#)

[Updating Interests for a Program-related Interaction](#)

[Creating Multiple-page Interactions](#)

[Transaction, Benefit, and Account Activity Information](#)

Overview of the Customer Service Entry Screen

The Customer Service Entry screen contains a composite of information about the account. In addition to this information that is organized into the blocks (described below), you can access all of the major account-based screens by zooming from the related field. For example, you can zoom to the Account Overview screen from the Account ID or Account Name field or you can access the Name Entry screen from the Name field.

- The Account Information block in the upper left side of the screen and general interaction information across the top left of the screen
- Account-based information such as Names, Addresses, Telephones, and Classifications on the left of the screen.
- The content of the interaction details on the right side of the screen (from the Interaction Category field down through the Expire Date field)
- The Giving History block below the Account Information block
- The Benefits Awarded block below the Giving History block
- The Account Activity block below the Benefits Awarded block

See Also:

[Buttons on the Customer Service Entry Screen](#)

Buttons on the Customer Service Entry Screen

In addition, from this screen you can access additional information about the account or about the benefits your organization offers by using the following buttons.

- The <Merges> button to merge two accounts (see "[Merging Accounts \(from Customer Service Entry\)](#)")
- The <Interests> button to view or update the account's interests (see "[Viewing and Updating an Interest for an Account](#)")

- The <Interactions> button to view the account's interaction history (see "[Viewing the Interaction History for an Account](#)")
- The <Batch> button to enter a pledge, a gift, or an adjustment (see the [Entering an Account's Transactions and Benefits chapter](#) for more information on transactions)
- The <Benefits> button to view a benefit's award criteria, delivery criteria, and inventory (see "[Accessing Information About a Benefit Your Organization Offers](#)")
- The <New Page> button to create a new page for the interaction (see "[Creating a New Page for an Interaction](#)")

Finding Existing Interactions (Customer Service Entry Screen)

From the Customer Service Entry screen, press the [F3] key or click <Find> on the toolbar to access the Find Interactions window. The Find Interactions window enables you to enter the criteria to select the set of interactions you want to view or update.

Note: If you don't have a current account, TA displays the Find Interactions window when you access the Customer Service Entry screen.

You *must* enter at least one of the following two criteria to select a set of interactions; you can enter both if appropriate.

- The Account ID to view interactions for a particular account
- A date range to view interactions that occurred during a specified time period

You can find a set of interactions for an account within a specified time period by entering the Account ID along with the start and end dates of the time period.

If you want to find one or more interactions for a specific account and you don't know the Account ID, you can access the Find an Account window from the Account ID field by pressing the [F9] key. If you enter a date range, you need to enter the date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.

After you enter the necessary criteria to find the set of interactions you want to view, click <Find> or press the [Enter] key.

For example, you can select all of your open interactions for the previous week by entering the date range for that week, setting the staff person to your brief name, and setting the status to "O" for open. If you want to view all of the letters you entered for the previous week, you can enter the date range for that week, set the staff person to your brief name, and set the technique to "LF" for letter from account.

See Also:

[Limiting the Interactions to Select](#)

Limiting the Interactions to Select

In addition to searching for interactions by Account ID or Date Range, you can also enter one or more of the following criteria to further narrow the set of interactions in your search.

- The activity type, e.g., to view interactions associated with planned giving
- The source code, e.g., to view interactions for a specific mailing
- The staff person responsible for the interaction, i.e., the person's brief name that appears in the Staff field on the Reminder Information window (see "[Creating a Tickler](#)")

- The interaction category, e.g., to view all member service interactions
- The interaction type, e.g., to view all interactions coded as requests for your annual report
- The query associated with the interaction
- The solicitor responsible for the interaction, i.e., the person's brief name
- The status of the interaction, e.g., to view all open interactions
- The interaction's technique, e.g., to view all interactions identified as faxes to the account
- The response category, e.g., to view all invitation responses
- The response type, e.g., to view specifically all interactions representing the decline of an invitation

Creating a New Interaction (Customer Service Entry Screen)

From the Customer Service Entry screen, complete the following steps to create a new interaction.

1. Press the [F6] key or click <New> on the toolbar to access the Create New Interaction window and create a new interaction for the current account.

Note: You can assign the interaction type on the Create New Interaction window. Depending on how your user name was set up, TA may default the interaction type for you, or TA may display a list of interaction types. You are not required to enter an interaction type at this point.
2. Enter the Account ID of the account for which you want to create the interaction. TA defaults the current account's Account ID, but you can change it if applicable.
 - If you don't know the Account ID, press the [F9] key to access the Find an Account window.
 - If you need to create an account, press the [F6] key to access the Create New Account window.
3. Enter the date on which the interaction occurred. TA defaults the date to the current date but you can change it if applicable. *The date represents the date on which the interaction took place* and not the date on which you enter the interaction into TA. For example, if an account left you a voice mail message yesterday but you don't enter it until today, then set the date to yesterday. Enter the date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.
4. Click <New> or press the [Enter] key to create the interaction. Enter any remaining content or subject matter of the interaction.

See Also:

[Entering the Account ID for an "Anonymous" Interaction](#)

Entering the Account ID for an "Anonymous" Interaction

If the interaction is an anonymous or you don't have any information about the person, when you create the interaction, leave the Account ID blank on the Create New Interaction window. TA sets the Account ID to the one selected by your organization as the "unknown account". Your organization identifies the [Account for Unknown Interactions](#) as a system preference.

Note: You should not post gifts from unknown donors to this account. Your organization should have a separate account set up for unknown gifts.

Entering the Interaction Details

You can press the [F9] key in each field, except the Program and Comments fields, to see a list of values from which you can choose.

You can enter the	Which refers to	For example
Interaction category	The group to which the interaction belongs for reporting purposes	"MS" for Member Service
Interaction type	The reason or topic of the interaction	"ADDRESS" for a change of address
Technique	The method and direction of the communication with the donor.	"CF" for a call from the account or "CT" for Call to the account
Program (if applicable)	The program on which the account commented	"3TENORS" for The Three Tenors
Response category	The account's or organization's general response to this interaction	"INVITED" for a response to an invitation to an event
Response type	The account's or organization's specific response to this interaction	"DECLINED" if the account declines the invitation to an event
Comment	You can enter any comments about the interaction and, by marking the Use in Report? checkbox, indicate the comments should be included in the Program Interaction report.	"I have always enjoyed the articles in your magazine"
Origin	The geographical region from which the interaction was initiated. (This field pulls from the Region codes that your organization has set up.)	"NL" for National

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

See Also:

[Selecting the Interaction Category and the Interaction Type](#)

[Entering the Source Code for an Interaction](#)

[Selecting the Technique](#)

[Setting the Contact Information for the Interaction](#)

[Selecting the Program](#)

[Entering the Response Information](#)

[Including Comments in the Program Interaction Report](#)

[Changing the Account if You Selected the Wrong Account](#)

[The Status of an Interaction](#)

[Inactivating an Account from Customer Service](#)

Selecting the Interaction Category and the Interaction Type

You can select the interaction category and the interaction type in one of two ways.

- You can select the interaction category first. Once you select the interaction category, press the [Tab] key to move the cursor to the Interaction Type field. When you press the [F9] key from the Interaction Type field, TA displays a list of the interaction types assigned to the interaction category you selected. Select the interaction type from the list.
- You can select the interaction type first. When you select the interaction type, TA sets the corresponding interaction category. Using this method, you see all interaction types across all categories.

Your organization can assign a default interaction category or type to each user. Also, an interaction type can be configured with defaults so that when you create an interaction, fields such as Technique, Response Category and type, Program, and Benefit are pre-filled. You can even define which field the cursor should automatically go to. Use the Interaction Type Code Entry screen to set up defaults for interaction types.

Entering the Source Code for an Interaction

On the Customer Service Entry screen, the Source field appears on the Interaction Details window. Access the Interaction Details window by pressing the [F10] key from the Interaction Category field. You can enter in the Source field the source code that should be associated with this interaction. To get a list of valid source codes, enter the first letter of a source code and press the [F9] key.

For example, your organization's policy is to have you solicit a non-member who calls your organization when the tone of the call is positive. Once you create the interaction to represent the reason why the person called, you ask the person to become a donor. You create a second page for the interaction to record your solicitation as follows.

1. Set the interaction category to "SO" for solicitation.
2. Set the interaction type to "CSASK" for customer service ask.
3. Unless your organization has changed the preloaded codes, TA defaults the technique to "CF" for call from account.
4. If the person pledges, set the response category to "PLEDGE"; otherwise set the response category to "REFUSED." You can then set the response type to the reason why the person refused.

Note: If the person pledges, you can then enter the pledge by clicking <Batch>. TA displays the Batch Detail Entry screen. You can enter the details of the pledge using this screen. See "[About Creating a Batch from Customer Service or Planned Giving Screens](#)" and "[Overview of Basic Gifts and Pledges](#)" in the Entering an Account's Gifts and Benefits chapter for more information.

When you set the interaction type to "CSASK," TA also sets the source code to the default source code for customer service batches. This source code is stored in TA in the [Default Source Code for CS Batches](#) system preference. You can view this source code by pressing the [F10] key from the Interaction Category field after you set the interaction type to "CSASK."

By setting the source code on the interaction, TA can associate the interaction with the actual pledge. For example, when your organization sends out a membership renewal notice, your organization creates an interaction to record that the notice was mailed. On that interaction is the renewal source code. When the donor responds, your organization enters the donor's renewal gift using the renewal source code. Now, the "ask," i.e., the interaction that represents the renewal notice, is linked to the donation.

If you want to use a different source code, you can change it on the Interaction Details window and on the Batch Detail Entry screen.

Selecting the Technique

The technique describes the method and direction of an interaction. For example, if the donor calls you select "CF" for call from account. If you call the donor, select "CT" for call to the account. You can press the [F9] key to view a list of techniques.

Setting the Contact Information for the Interaction

You can associate the interaction with a specific name within the account. Likewise, you can associate an address or telephone number with the interaction.

To set the contact information related to the interaction, press the [Alt] [F10] key combination from the Account ID field or the Name field at the top of the Customer Service Entry screen. TA displays the Contact Information at the time of the Interaction window. You can press [F9] in the Name, Address, and Telephone fields to select the contact information related to the interaction. (You can also set the name by pressing the [F9] key from the Name field on the main screen and selecting the name from the list.)

Note: When you set the Name field on an interaction, TA automatically sets the Address and Telephone fields to the preferred address and telephone number for that person. You can change the address and telephone information, if necessary.

Selecting the Program

From the Program field, you can access a list of programs in one of two ways.

- You must enter at least the first letter of the program code and then press the [F9] key. TA displays a list of values with those programs for which the program code begins with the letter(s) you entered. The list of values contains two columns; the first is the program code and the second is the program title.
- You can search by the program title by entering the wildcard, i.e., "%," followed by the letters which are contained in the title and pressing the [Alt] [F9] key combination. The list of values contains two columns; the first is the program title and the second is the program code. For example, assume that the program "The Three Tenors" is stored in TA and the code is "3TENORS." If you don't know the code, you can enter "%three" and press the [Alt] [F9] key combination to have TA display the list of values with "The Three Tenors" included.

Entering the Response Information

The response category groups responses with similar purposes. The response category can be used for analysis. The response type refers to the nature of the response, e.g., an acceptance to an invitation. Each response type is assigned to one response category.

You can select the response category and the response type, as appropriate, in one of two ways.

- You can select the response category first. Once you select the response category, press the [Tab] key to go to the Response Type field. When you press the [F9] key from the Response Type field, TA displays a list of the response types assigned to the response category you selected. From this list, select the appropriate response type.
- You can select the response type first. When you select the response type, TA sets the response category (i.e., each response type is assigned to only one response category). Using this approach, you see all of the response types.

From either the Response Category field or the Response Type field on the Customer Service Entry screen, you can press the [F10] key to access the Response Information window. This window contains the following kinds of information:

- Benefit information, which includes the benefit's code and monetary value
- Response Date

- Quantity of items sent
- Source Code (display only)
- Transaction information, which includes the total amount pledged, pledge count, total soft credit amount pledged, and soft credit pledge count (display only)

If a benefit was assigned to the interaction type, TA defaults the benefit code and value. You can overwrite this information if necessary. If the response is system-generated (e.g., a letter), TA sets the response date (e.g., enters the date when the letter is sent). If the response is to a solicitation interaction, TA sets the transaction information that applies to the response.

Note: Your organization can assign a response category and a response type to each interaction type, i.e., your organization can set up TA to default the response category and response type when you select the interaction type for the interaction.

Including Comments in the Program Interaction Report

You can indicate that the comments you entered in the Comments field (e.g., a program comment) be included on the Program Interaction report by marking the Use in Report? checkbox.

Changing the Account if You Selected the Wrong Account

If you select the wrong account, you can change the Account ID for the interaction by entering the correct Account ID in the Account ID field in the upper left corner of the screen. If you do not remember the Account ID, press the [F9] key from this field to access the Find an Account window.

The Status of an Interaction

Three statuses exist for an interaction: "C" for complete, "D" for delete, and "O" for open. When you create a new interaction or a new page of an interaction, TA defaults the status to "C" for complete, i.e., no further action is needed for the interaction. You can change the status to "O" if you need to take an action to complete the interaction (e.g., you need to write a letter or call the person). You can change the status to "D" if you want to delete the interaction (e.g., you entered the same interaction twice).

Note: If you change the status to "O," TA sets the tickler start date to the current date (see "[Creating a Tickler](#)").

Inactivating an Account from Customer Service

You can access the Account Overview screen directly from the Customer Service Entry screen to inactivate an account or mark the account for deletion. Press the [F10] key from the Account ID field or from the Account Name field. See "[Inactivating or Deleting an Account](#)" for more information.

Accessing Information or Instructions Based on the Interaction Type

You can store information or instructions for anyone who creates interactions. If you see a plus sign in the Interaction Type field (on the Customer Service, Account Diary, IRV, or Media Entry screens), you can press the [F10] key to access the Interaction Type Notes window. The notes that appear in this window are stored as a comment on the interaction type. To set up these notes use the Interaction Type Code Entry screen and enter the information that is related to the interaction type in the Comments field.

Specific Interaction Type comments may contain information you need to give the caller (such as directions to a special event), or information that you want to give to your customer service employees whenever they receive a specific type of call (such as the steps required to send a premium if the caller did not receive a premium).

Your organization decides for which interaction types to enter comments and when these comments change. Your organization can update the comments as needed.

Updating Interests for a Program-related Interaction

For each interaction type within the Program Service interaction category, your organization can indicate whether TA should create and update the account with the interest(s) associated with the program on the interaction. If your organization sets the Create Interest? field to "Y" for yes on the interaction type you assign to an interaction, TA creates or updates for the account you associated with the interaction the interest(s) assigned to the program you enter in the Program field.

For example, a person asks for footage from The Nightly Business Report. The interests assigned to this program are "NIGHTBUS" for The Nightly Business Report and "BUSINESS" for Business/Finance. When you enter the interaction, you select the interaction type for requesting footage from the program. If your organization set the Create Interest? field to "Y" for yes for this interaction type, TA creates or updates for the account the "NIGHTBUS" interest and the "BUSINESS" interest.

Creating Multiple-page Interactions

An interaction represents a singular *contact* with an account. For each *topic* covered during the contact, you need to create a new page for the interaction. In other words,

- You create a new interaction when you are capturing information about the donor contact.
- You create a new page for the interaction each time a new issue is covered during the interaction. For example, the call involves reporting a change of address and requesting volunteer information or involves sending multiple pieces of your organization's information to a donor. The interaction should have the same number of pages as the number of topics covered or as the number of different pieces sent.

Note: The method and direction of the contact is captured by the technique you select for the interaction, e.g., call from account or letter to account.

When your organization runs reports based on interactions, the number of interactions represent the number of contacts handled while the number of pages represents the number of topics covered. For example, in one day, your organization may handle 40 calls for which 75 issues were covered. Your organization can easily find out the volume of contacts handled and the breadth of issues covered during that day. With this information, your organization can improve the services offered and use the information to improve fundraising campaigns.

See Also:

[Determining How Many Pages to Create for an Interaction](#)

[Creating a New Page for an Interaction](#)

Determining How Many Pages to Create for an Interaction

When you create an interaction, you can determine how many pages to create by remembering the following guidelines.

- Often a topic is reflected by the interaction type. When you create the interaction, if you find that multiple interaction types describe the contact with the account, e.g., a change of address and a program comment, then create one page for each interaction type.
- Sometimes a topic may be reflected by the response type. When you create the interaction, if you find that multiple response types describe the contact with the account, e.g., a package needs to be sent regarding volunteer information and the donor declined an invitation to an event, create one page for each response.

Creating a New Page for an Interaction

On the Customer Service Entry screen, you can create a new page for an interaction by clicking <New Page> or pressing the [Alt] [F6] key combination. When you create a new page, TA defaults the information from the first page to the second page with the following exceptions.

- The interaction type
- The program
- The response
- The comments

Note: You can change the interaction category for the new page if applicable.

Deleting Pages of an Interaction

You can mark a page of an interaction for deletion by setting the interaction status to 'D' for delete *on that page*. To mark a multiple-page interaction for deletion, set the interaction status to 'D' for delete on each page of the interaction.

Transaction, Benefit, and Account Activity Information

The Customer Service Entry screen includes summary information about an account's giving history, benefits, and account activity. You can access additional information from each of these information blocks.

See Also:

[The Account's Giving History](#)

[The Account's Benefits](#)

[Account Activity Information](#)

The Account's Giving History

In the Giving History block on the Customer Service Entry screen, the following summary information appears for each transaction the account has given.

- The date of the transaction
- The pledge amount for the transaction
- The payment amount
- The source code by which the transaction was received
- The gift kind, e.g., "IN" for installment
- The gift type, e.g., "AD" for additional gift
- The payment method, e.g., "CK" for check
- The type of soft credit, if applicable, e.g., "GM" for gift matched

Note: When you highlight a transaction in this block, the Benefits Awarded block contains the benefits awarded to the account based on the highlighted transaction.

Accessing Additional Giving History Information for an Account

From the Giving History block, you can access information about an account's transactions by pressing the [F10] key to access the Giving History Summary screen.

If the highlighted transaction is a tribute transaction, you can press the [Alt]-[F10] key combination to access Tribute information for the transaction.

When you highlight a transaction in the Giving History block, the Benefits Awarded block contains the benefits awarded to the account based on the highlighted transaction.

The Giving History Summary screen is described in the [Viewing Gifts, Benefits, and Interactions chapter](#).

The Account's Benefits

In the Benefits Awarded block on the Customer Service Entry screen, TA displays information based on the transaction highlighted in the Giving History block. When you first enter this screen (i.e., you have created a new interaction for an account or have selected an existing interaction for an account), the benefits displayed in this block are those associated with the first transaction listed in the Giving History block. To view the benefits awarded for a different transaction, highlight the transaction in the Giving History block.

For each benefit, the following summary information displays.

- The code for the benefit
- The date on which the benefit was last pulled (or sent), if applicable
- The date on which the benefit expires, if applicable
- Whether the benefit is OK to deliver, if applicable
- The benefit's description, or the recipient of the benefit, if the donor and the recipient are different

Accessing Additional Information About Benefits Awarded to an Account

From the Benefits Awarded block, you can view a list of the benefits for the transaction highlighted in the Giving History block by pressing the [F9] key from any of the fields in the block. If you want to view the information for a specific benefit, select the benefit from the list. TA displays the Benefits Awarded screen with the information for the benefit you selected. You can also access the Benefits Awarded screen directly by highlighting the benefit in the Benefits Awarded block and pressing the [F10] key.

From the Benefits Awarded screen, you can scroll through all of the benefits awarded to the account using the [Next Record] or [Previous Record] key.

See Also:

[Resending a Benefit Awarded to a Donor](#)

[Accessing Information About a Benefit Your Organization Offers](#)

Resending a Benefit Awarded to a Donor

If you need to send a benefit to the donor and that benefit was awarded to the donor, select that benefit from the Benefits Awarded block and zoom to the Benefits Awarded screen. On the Benefits Awarded screen, make sure the OK to Deliver? checkbox in the Delivery Information block is marked for the benefit. With the OK to Deliver? checkbox marked, delete the date from the Last Sent field. The next time your organization creates a list of people who should receive the benefit, the account will be included. For example, you may need to take this action if the person did not receive a premium or received a broken premium.

Accessing Information About a Benefit Your Organization Offers

You can view information about a benefit offered by your organization by clicking <Benefits>. This button enables you to access the Benefit Entry screen. You may need to access this screen to look at the information for a benefit awarded to the donor or to look at the information for a benefit the donor would like to receive.

When you access the Benefit Entry screen, TA displays the Find Benefits window. You can search for a benefit by entering one or more of the following criteria.

- The code for the benefit
- The activity type with which the benefit is associated
- The benefit type, e.g., item or package
- The benefit category, e.g., premium
- The premium category, e.g., compact disk
- The minimum amount the donor needs to give to be awarded the benefit
- The status of the benefit

If you are looking up the information for the benefit awarded to the donor, you can find the benefit's code in the Benefits Awarded block on the Customer Service Entry screen. Otherwise, you can use as many criteria as needed to find the benefit, e.g., set the premium category to "CD" for compact disc and the minimum amount to "100" to find all compact discs awarded for a \$100 donation.

Once you enter the selection criteria, press the [Enter] key or click <Find>. TA finds all benefits that meet the criteria entered and displays the first one on the first page of the Benefit Entry screen. If TA does not find any matches, TA displays a message to enable you to search again or create a new benefit. You can click <Find> to return to the Find Benefits window. You should follow your organization's policy regarding creating a benefit.

See Also:

[Viewing the Minimum Award Amount](#)

[Viewing the Delivery Criteria](#)

[Viewing Restrictive Award Criteria](#)

[Viewing Inventory Information](#)

[Viewing Package Information](#)

[Viewing Marketing Information](#)

Viewing the Minimum Award Amount

To find out the minimum amount the donor needs to give to be awarded a benefit, look at the Minimum Amount field in the Award Criteria block on the first page of the Benefit Entry. If the benefit is a membership benefit, then the Maximum Amount field is also set, e.g., midlevel members are awarded membership from \$250 to \$999.99.

Viewing the Delivery Criteria

To find out your organization's policy regarding how much the donor needs to pay to have a benefit delivered, e.g., have a premium mailed, look at the Delivery Criteria block on the first page of the Benefit Entry screen. TA marks a benefit ready for delivery when the donor pays the amount specified by your organization. Your organization can use a combination of the following four criteria to have TA mark a benefit ready for delivery.

- The minimum number of installment payments made for those donors paying in installments
- The percentage of the pledge that needs to be paid

- The dollar amount that needs to be paid, i.e., the payment amount
- The payment window, i.e., number of days within which payment must be received

If a criterion:

- Is blank, TA does not use it. For example, if the Percent of Pledge field is blank, TA does not use the percentage of the pledge.
- Is set to "0," TA marks the benefit deliverable as soon as the donor pledges. A zero means the donor doesn't need to make any payment to be delivered the benefit.

Finally, if the percentage of pledge and the payment amount are set, TA uses the lesser of the two. For example, your organization sets the delivery criteria for a videotape as follows:

- The minimum number of installments blank
- The percentage of pledge to 50%
- The payment amount to \$75

If a donor pledges \$120 and pays the pledge in monthly installments, TA marks the videotape ready for delivery once the donor pays \$60 because 50% of the \$120 pledge is less than \$75. For a donor who pledges \$200, TA marks the videotape ready for delivery once the donor pays \$75 because \$75 is less than \$100, 50% of the \$200.

Viewing Restrictive Award Criteria

To find out which criteria might prevent a benefit from being awarded to a donor, click <Page 2>, and look at the Award Criteria section. In order for the benefit to be awarded:

- If the **Must Meet Offer Amount** checkbox is marked, the donor must give an amount equal to or greater than the offer amount on the solicitation to which he responds. To view the Offer Amount for the solicitation, access the solicitation interaction on the Customer Service Entry screen. Click <Zoom> from the Interaction Category field to access the Interaction Details window, and view the value in the Offer Amount field.
- If the Disq Classification field has a value, the donor must NOT have that disqualifying classification on her account. If they do, they do not get the benefit.
- If any other criteria are listed in the fields in the Award Criteria section, the donor must meet at least one of the criteria listed in each of the fields that has criteria entered. For example, if the Payment Method field has CK for check and CH for charge card, and the Technique field has TM for telemarketing, the donor must give a check or charge card gift in response to a telemarketing solicitation.

Viewing Inventory Information

To look at the inventory for a benefit, click <Inventory>. TA displays the Benefit Entry: Inventory view. On this screen, you can view any inventory-related information your organization stores about the benefit including the number in inventory, and the shipping and handling costs.

Viewing Package Information

If you look at a benefit package, i.e., a benefit whose type is package or selection package, you can view the items in the package by clicking <Package>. TA displays the Benefit Entry: Package view. On this screen, you can see the items that make up this package.

Viewing Marketing Information

You can view the marketing information, i.e., the "selling points" your organization entered about a benefit, by clicking <Page 2>. TA displays the second page of the Benefit Entry screen. On this screen, you can see start and end dates of the benefit, if entered. These dates refer to when your organization first offered the benefit and when your organization stopped offering the benefit. In addition, you can look at the Marketing Points field for information your organization entered about the benefit.

Note: You can ignore the information in the Award Criteria block on this page. TA uses this information when TA tries to award a benefit to a donor automatically.

Account Activity Information

The Account Activity Information block on the Customer Service Entry screen lists each activity type with which the account is involved. This block displays the following summary information.

- The activity type
- The current giving level
- The current activity
- The account's status in the activity (e.g., "P" for prospect)

Note: You cannot view the Account Activity information on the Inquiry and Referral View screen.

Accessing Additional Account Activity Information for an Account

From the Account Activity block, you can view a list of activity types with which the account is involved by pressing the [F9] key from any field in the block. If you want to view the information for a specific activity type, select the activity type from the list. 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 highlighting the activity type and pressing the [F10] key.

From the Account Activity screen, you can scroll through the activity types for the account using the [Next Record] or [Previous Record] key.

The Inquiry and Referral View Screen

[Overview of the Inquiry and Referral View Screen](#)

[Finding Interactions \(IRV Screen\)](#)

[Creating a New Interaction \(IRV Screen\)](#)

[Viewing and Updating Affiliation Information](#)

[Referring Accounts to Service Providers](#)

[Viewing and Updating Questionnaire Information](#)

Overview of the Inquiry and Referral View Screen

All interactions tracked on the Inquiry and Referral View (IRV) screen are categorized under the interaction category specified in the "[Category for Inquiry and Referral Interactions](#)" system preference. If your organization left this system preference blank, you cannot access the IRV screen.

Use the IRV screen for any of these reasons:

- You routinely refer callers to a local chapter or affiliate and need quick access to each affiliate's contact information.
- You want to view each of the responses you enter for an interaction on one screen (e.g., to easily see each piece of literature a caller requests).
- You want to provide callers with information regarding where they can access specific services in their geographic area. See "[Referring Accounts to Service Providers.](#)"
- You have a "questionnaire" that you ask callers to respond to. Your organization can set up prompts in the Questionnaire block to collect additional information about interactions. The information you collect is available using TA's query and output facility. Note that TA also includes additional [survey functionality](#) that you can use separate from the IRV screen.

Information about the account is organized into the following "blocks" on the screen:

- General interaction information across the top of the screen such as Account ID, Account Name, date of the interaction record, page number (for multi-topics), and whether the particular record is an open tickler, or a completed interaction record.
- The Account Information block in the upper left side of the screen which displays name, addresses, telephone and email, classifications (if any) that are assigned to the account (or to any person within the account). You can press [F9] to access a list of records within each field and/or you can press [F10] to access the corresponding data entry screen. For example, you can zoom from the Address line and access the Address Entry screen.
- The specific content of the interaction details display on the right side of the screen. These fields include Interaction Category field through the Expire Date field.
- Affiliation information. You can immediately see which chapter the account is affiliated with or look up chapters by ZIP code.
- The Response block in the middle of the screen
- The Questionnaire block in the lower left of the screen

See Also:

[Buttons on the Inquiry and Referral View Screen](#)

Buttons on the Inquiry and Referral View Screen

You can access additional information about the account by using these buttons:

- The <Service> button to search for service providers (see "[Referring Accounts to Service Providers](#)")
- The <Merges> button to merge two accounts
- The <Interests> button to view or update the account's interests (see "[Viewing and Updating an Interest for an Account](#)")
- The <Interactions> button to view the account's interaction history
- The <Benefits> button to view a benefit's award criteria, delivery criteria, and inventory (see "[Accessing Information About a Benefit Your Organization Offers](#)")
- The <Batch> button to enter a pledge, a gift, or an adjustment (see the [Entering an Account's Transactions and Benefits chapter](#) for more information on transactions)
- The <Gifts> button to access the account's giving history. Use this screen to research transactions that have been posted to the account (or any name within the account).

Finding Interactions (IRV Screen)

From the Inquiry and Referral View screen, press the [F3] key or click <Find> on the toolbar to access the Find Interactions window. The Find Interactions window enables you to enter the criteria to select the set of interactions you want to view or update. On the Inquiry and Referral View screen, you can view only interactions with the interaction category that your organization identified in the Category for Inquiry and Referral Interactions system preference.

Note: If you don't have a current account (i.e., an account with which you are working), TA displays the Find Interactions window when you access the Inquiry and Referral View screen.

You *must* enter at least one of the following two criteria to select a set of interactions; you can enter both if appropriate.

- The Account ID, i.e., to view interactions for a particular account
- A date range, i.e., to view interactions that occurred during a specified time period

You can find a set of interactions for an account within a specified time period by entering the Account ID along with the start and end dates of the time period.

If you want to find one or more interactions for a specific account and you don't know the Account ID, you can access the Find an Account window from the Account ID field by pressing the [F9] key. If you enter a date range, you need to enter the date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.

In addition to searching by Account ID and/or a date range, you can also enter one or more of the following criteria to further narrow the set of interactions selected.

- The activity type, e.g., to view interactions associated with planned giving
- The source code, e.g., to view interactions for a specific mailing
- The staff person responsible for the interaction, i.e., the person's brief name that appears in the Staff field on the Reminder Information window (see "[Creating a Tickler](#).")
- The interaction type, e.g., to view all interactions coded as referrals to service providers
- The query associated with the interaction
- The solicitor responsible for the interaction, i.e., the person's brief name
- The status of the interaction, e.g., to view all open interactions
- The interaction's technique, e.g., to view all interactions identified as calls from the account
- The response category, e.g., to view all referrals
- The response type, e.g., to view specifically all interactions representing equipment referrals

After you enter the necessary criteria to find the set of interactions you want to view, click <Find> or press the [Enter] key. For example, you can select all of your open inquiry and referral interactions for the previous week by entering the date range for that week, setting the staff person to your brief name, and setting the status to "O" for open.

Creating a New Interaction (IRV Screen)

From the Inquiry and Referral View screen, complete the following steps to create a new interaction.

1. Press the [F6] key or click <New> on the toolbar to access the Create New Interaction window.

Note: You must have your cursor outside the Response block when you press the [F6] key or click <New> on the toolbar in order to create a new interaction.

2. Enter the Account ID of the account for which you want to create the interaction. TA defaults the current account's Account ID, but you can change it if applicable.
 - If you don't know the Account ID, press the [F9] key to access the Find an Account window.
 - If you need to create an account, press the [F6] key to access the Create New Account window.
3. Enter the date on which the interaction occurred. TA defaults the date to the current date but you can change it if applicable. *The date represents the date on which the interaction took place* and not the date on which you enter the interaction into TA. For example, if an account left you a voice mail message yesterday but you don't enter it until today, then set the date to yesterday. Enter the date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.
4. TA displays the Interaction Type and Source fields if your organization sets the [Require Values on Inquiry and Referral](#) system preference to Y for yes.
 - Enter the interaction type in the Interaction Type field. You can press the [F9] key to select from a list of values. (Depending on how your user name was set up, TA may default the interaction type for you, or TA may display a list of interaction types.)
 - Enter the source code in the Source field. You can enter at least the first letter of the source code and press the [F9] key to select from a list of values.
5. Click <New> or press the [Enter] key to create the interaction.

See Also:

[Interaction Type \(IRV Screen\)](#)

[Source Code \(IRV Screen\)](#)

[Entering Response Information \(IRV Screen\)](#)

[Setting the Contact Information for the Interaction on IRV](#)

[Inactivating an Account from the IRV Screen](#)

Interaction Type (IRV Screen)

You *must* enter an interaction type if your organization set the [Require Values on Inquiry and Referral](#) system preference to yes. You can press the [F9] key to choose from a list of values.

After you select an interaction type, you can press the [F10] key in the Interaction field to view text in the Note field (if it was entered when the interaction type was set up).

If the interaction type is associated with a benefit, the benefit code appears in the Benefit field on the Interaction Type Information window. Enter a benefit in this field only if your organization tracks inventory on special benefits such as information packets. For these special benefits you do not need to create a transaction to award or deliver the benefit. TA updates the inventory information when you run the [Update Benefit Sent](#) update procedure.

Source Code (IRV Screen)

You *must* enter a source code on the Inquiry and Referral View screen if your organization set the [Require Values on Inquiry and Referral](#) system preference to yes. To get a list of valid source codes, enter the first letter of a source code and press the [F9] key. This field can be used to track media placements that prompt inquires to your organization, e.g., a magazine or newspaper ad.

Entering Response Information (IRV Screen)

On the Inquiry and Referral View screen, you can enter one or more responses that should be made to the interaction. For example, if an individual requests information about your organization, you can enter responses indicating that several pamphlets should be mailed to the individual. You can also enter a response to indicate that you are searching for information regarding where the individual can access specific services in their geographic area.

When you create a new interaction, you *must* enter at least one response. TA creates a new page for each response you enter. You can select the response category and the response type, as appropriate, in one of two ways.

- You can select the response category first. Once you select the response category, press the [Tab] key to go to the Response Type field. When you press the [F9] key from the Response Type field, TA displays a list of the response types assigned to the response category you selected. From this list, select the appropriate response type.
- You can select the response type first. When you select the response type, TA sets the response category (i.e., each response type is assigned to only one response category). Using this approach, you see all of the response types.

Setting the Contact Information for the Interaction on IRV

You can associate the interaction with a specific name within the account. Likewise, you can associate an address or telephone number with the interaction.

To set the contact information related to the interaction, press the [Alt] [F10] key combination from the Account ID field or the Name field at the top of the Inquiry and Referral View screen. TA displays the Contact Information at the time of the Interaction window. You can press [F9] in the Name, Address, and Telephone fields to select the contact information related to the interaction. (You can also set the name by pressing the [F9] key from the Name field on the main screen and selecting the name from the list.)

Note: When you set the Name field on an interaction, TA automatically sets the Address and Telephone fields to the preferred address and telephone number for that person. You can change the address and telephone information, if necessary.

Inactivating an Account from the IRV Screen

You can access the Account Overview screen directly from the Inquiry and Referral View screen to inactivate an account or mark the account for deletion. Press the [F10] key from the Account ID field or from the Account Name field. See "[Inactivating or Deleting an Account](#)" for more information.

Viewing and Updating Affiliation Information

The affiliation information is located below the Account Information block on the Inquiry and Referral View screen. TA displays

- The ZIP Code of the current account. You can zoom from the ZIP Code field and enter a city and state combination. TA uses this combination to set the ZIP Code on the main screen, which in turn sets the affiliation.
- The Affiliation Code of your organization's chapter or affiliate that is associated with the current account

TA defaults the ZIP Code based on the preferred address of the current account. Based on the ZIP Code displayed on the Inquiry and Referral View screen, TA defaults the Affiliation Code of your organization's chapter or affiliate and its description. You can change the Affiliation Code on the Inquiry and Referral View screen to indicate to which chapter or affiliate you referred the contact.

The Affiliation Information window

If there is an affiliation code in the field and there is a brief name associated with the affiliation code (in the Affiliation Code Entry screen), you can view contact information for the chapter or affiliate by pressing [F10] or clicking <Zoom> on the toolbar. To view additional addresses and telephone numbers, click in the address or telephone field and press the [F9] key.

Referring Accounts to Service Providers

Through the Inquiry and Referral View screen, you can provide accounts with information regarding where they can access specific services in their geographic area. For example, if an individual in Dubuque, Iowa calls asking where he or she can find employment counseling, you can do a simple search and provide the individual with a list of all the organizations that provide this service in their area.

Before you can provide accounts with information regarding service providers, you must set up appropriate response categories, response types, and service providers. The basic process is as follows:

1. Set up the necessary response categories, each of which indicates a specific category of service (e.g., "EQUIPMNT" for inquiries about medical equipment).
2. Set up the necessary response types for each response category. For example, you might set up response types of "WHEELCHAIRS" or "BEDS" which link back to the "EQUIPMNT" category of service.
3. Designate certain accounts in TA as service providers. You may need to create an account for some providers. For each service provider, you can indicate which services the account provides.
4. Track each request for service provider information on the Inquiry and Referral View screen. When the call comes in, you create an interaction. Once you enter the response information, you can click <Service> to search for providers that offer the requested service (as indicated by the response category and type you set for the interaction). See "[Searching for Service Providers](#)" for complete details.

See Also:

[Setting up Response Categories \(Service Categories\)](#)

[Setting up Response Types \(Service Types\)](#)

[Setting up Service Providers](#)

[Searching for Service Providers](#)

Setting up Response Categories (Service Categories)

A response is composed of a response category and a response type. The response category specifies the category of service. For example, you can set up the response categories "EQUIPMNT," "FACILITY," and "COUNSEL."

You create response categories on the Response Category Code Entry screen. To access this screen, select Response Category Code Entry from the Main Menu (Codes module). TA displays the Find Code window.

1. Click <New> on the Find Code window. TA displays the Create New Code window.
2. Enter the code for this new response category in the Code field. (The response category code must be unique and can contain a maximum of 8 characters.)
3. Click <Create>. TA displays the response category code on the Response Category Code Entry screen.
4. Enter a description for the code in the Description field.

Setting up Response Types (Service Types)

A response is composed of a response category and a response type. Each response type is assigned to one response category. For example, within the response category "COUNSEL," you can create the response types "EMPLOY," "FAMILY," and "NEW-DIAG."

You can indicate the specific types of service by creating response type codes on the Response Type Code Entry screen. To access this screen, select Response Type Code Entry from the Main Menu (Codes module). TA displays the Find Code window.

1. Click <New> on the Find Code window. TA displays the Create New Code window.
2. Enter the response category to which this response type is assigned in the Category field. You can press the [F9] key to select from a list of response categories.
3. Enter the code for this new response type in the Code field. (The response type code must be unique and can contain a maximum of 8 characters.)
4. Click <Create>. TA displays the response type code on the Response Type Code Entry screen.
5. Enter a description for the code in the Description field.

Setting up Service Providers

You can designate organizations or individuals that have accounts in TA as service providers. For each service provider, you can indicate the services they provide, their eligibility requirements, and additional notes (such as office hours and accessibility information). If you want to capture even more information about a particular service provider, your organization can create service provider attribute records and fill in the fields on the Attributes tab on the Service Provider Entry screen.

Note: The Service Provider Entry screen includes the Referral Count field. TA increments the number in this field each time you complete a referral (which involves selecting the account on the Inquiry and Referral View Search Results screen and printing the Service Provider Referral Listing report). You can also manually enter the number of times you have referred accounts to this service provider in the Referral Count field.

Designate service providers by using the Service Provider Entry screen (Customer Service module). When you access this screen, TA attempts to find only accounts that have a service provider record associated with it. If you get the TA message that 'no records exists', it means that *service provider records* don't exist. It does not mean that the account does not exist. To create a service provider record for an account, follow the steps below.

1. Click <New> to access the Create New Service Provider window. TA displays the account's Account ID and name in this window.
2. Click <Create> to create a service provider record for the account.
3. On the Service Provider Entry screen, enter the contact for the account in the Contact field. You can press the [F9] key to select from a list of names.
4. For each service, enter the response category that represents the category of service and the response type that represents the specific service offered in the Services block. You can press the [F9] key from both the Response Category and Response Type fields to select from a list of values.
5. Enter any notes that you want the customer service representative to have about the service provider in the Comments field (such as office hours and accessibility information). This is a free-text field.
6. Enter any requirements that must be met in order to receive services from the provider in the Eligibility Requirements field. This is a free-text field.
7. If your organization has set up attributes, you can click on the Attributes tab and enter the fields according to the service provider that you are working with. Attributes can represent office accessibility and accommodations, insurance coverage accepted, and language/Interpreter services provided.

See Also:

[Setting Up Service Provider Attributes](#)

Setting Up Service Provider Attributes

If you want to capture standard information such as parking information or languages spoken, your organization can create service provider attribute records. When you create an attribute for service providers, you determine the question and determine the range of possible answers or values for that item. When you actually set up an account as a service provider on the Service Provider Entry screen, you fill out the fields in the Attributes tab for that particular provider. When your representative makes a referral, he or she can access this information and communicate it to the person requesting the referral.

Access the Attribute Definition Entry screen from the System Maintenance module on the Main Menu and complete the following steps.

1. From the Find Attribute window or from the Attribute Definition Entry screen, click <New>. TA displays the Create New Attribute window.
2. Press [F9] in the Attribute Table field. Select from the list of values according to the type of attribute you are creating. For example, select Service Provider to create an attribute for any service provider. TA defaults the attribute group field.
3. Assign a name in the Attribute field. Specify a short name that describes the information that you are tracking. (You enter a longer name in the Description and Prompt fields.)
4. Click <Create>.
5. On the Attribute Definition Entry screen, enter a description of the attribute code in the description field. This description appears in the list of attribute codes. Click here for [field descriptions on the Attribute Definition screen](#).

Searching for Service Providers

To search for service providers, complete the following steps.

1. Create an interaction for the account on the Inquiry and Referral View screen, in order to record the contact.
2. Enter the response category in the Response Category field (e.g., "COUNSEL"). You can press the [F9] key to select from a list of response categories.
3. Enter the response type that represents the service to search for in the Response Type field (e.g., "NEW-DIAG"). You can press the [F9] key to select from a list of response types.
Note: TA includes all pages of a multiple page interaction in the search, so you can enter multiple response category and response type combinations to search for more than one type of service.
4. Click <Service>. TA displays the Find Service Providers window.
5. TA displays the account's preferred address in the Address field. You can press the [F9] key to select from other addresses for the account, if applicable. TA searches for service providers in proximity to the address entered here.
6. Select either County, State, or Distance as the search type.
Note: If you select the Distance search type, you must also enter the number of miles within which the service provider must be located. TA can only search for service providers by distance if the latitude and longitude are set on the ZIP Code of the addresses being used in the search (both the account's and the service provider's).
7. Click <Find>. TA displays the resulting service providers on the Inquiry and Referral View (Search Results) screen. TA displays the service providers in the List Block, which is in the bottom half of the screen. TA displays the details for the highlighted service provider in the top half of the screen. If you want to view additional information (if it was set up), click on the zoom button corresponding to

the service provider. When your cursor is in the List Block, you can use the [Up Arrow] and [Down Arrow] keys to view details for the other service providers in the list.

Note: If you want to send the list of service providers to the account, you can mark the check boxes next to the service providers you want to include in the list and click <Print>. TA prints the service providers you selected on the Service Provider Referral Listing report. TA also increments the referral count for the service providers on the Service Provider Entry screen.

8. Click <Exit> to return to the Inquiry and Referral View screen.

Viewing and Updating Questionnaire Information

In the Questionnaire block on the Inquiry and Referral View (IRV) and on the Media Entry screens, TA displays prompts (or questions) and fields for entering answers to these questions. Questions can be configured so that users can press the [F9] key to view a list of answers.

When you enter answers in the Questionnaire block, TA displays the answers on that particular interaction. If you have a multi-page interaction, TA defaults the answers on each page. However, when you create a new interaction, the questions are displayed without any answers (even if you previously created an interaction and answered the questions.) The questions and answers are stored in TA as interaction attributes. You create an interaction query to access this information answered in questionnaires.

Configuring the Questionnaire

Your organization determines the questions (and range of answers) by using the Attribute Definition Entry screen. On this screen you create interaction attribute records that correspond to your questions and range of answers. When you have finished creating these attributes, click on <Manage Attribute Groups> to link the questions to the specific Interaction Category that your organization uses for the Inquiry and Referral screen. When a specific interaction record is created using the interaction category, then the list of questions displays in the Questionnaire block.

Note: If your organization uses both the Media Entry and the Inquiry and Referral screens, you configure a different questionnaire by linking different questions to the Interaction Category codes that are used for each of these corresponding screens.

TA also includes functionality where you can create [Surveys](#). You track answers to a survey using the Survey Entry screen. **Survey questions and answers** after they are entered for a particular account **are stored as classifications on the account**. Create surveys if you want the account to have classification records if anyone on the account answers the survey.

How to Create Interaction Attributes

1. From the Find Attribute window or from the Attribute Definition Entry screen, click <New>. TA displays the Create New Attribute window.
2. Press [F9] in the Attribute Table field. Select from the list of values according the type of attribute you are creating. For example, select **Interactions** to create an attribute that will be used for the questionnaire block on the IRV or Media Entry screens.
3. Assign a name in the Attribute field. Specify a short name that describes the information that you are tracking. (You enter a longer name in the Description and Prompt fields.)
4. Click <Create>.
5. On the Attribute Definition Entry screen, enter a description of the attribute code in the description field. This description appears in the list of attribute codes. Click here to access [field descriptions on the Attribute Definition screen](#).
6. To link the attribute to a specific interaction category, click <Manage Attribute Groups> to access the Interaction Category Code Entry screen. To find all of the interaction categories, click <Find> with the Code field blank. In the list block, highlight a specific interaction category that you use for the Inquiry and Referral

screen or for the Media Entry screen.

The left side of the screen displays all the interaction attributes that exist in the database. Highlight the specific attributes that you want associated with the interaction category and click on the > (right arrow button).

Use the Up and Down buttons to control the order that the attributes are displayed.

Make sure to click on <Save> before you work with another interaction category or before you exit the screen!

Common Customer Service and IRV Features

[Using Surveys](#)

[Viewing and Updating Account Information](#)

[Viewing the Interaction History for an Account](#)

[Merging Accounts \(from Customer Service Entry\)](#)

[Ticklers and Warnings](#)

[Common Customer Service Questions](#)

Using Surveys

You can track survey responses for each individual or account in TA through the Survey Response Entry screen, which is accessible through the Customer Service module. These survey questions and answers are stored in the Classifications table in TA. Your organization can create different classification categories that represent each survey. Your organization can create multiple classification codes to represent questions. For each classification code (i.e., question), the classification values represent the valid answers.

When you complete a survey on the Survey Response Entry screen, the answers are stored as classifications on the account. You can create an unlimited number of surveys that be entered on the Survey Response Entry screen.

Note: The Inquiry and Referral View (IRV) and the Media Entry screens include a Questionnaire block where you can collect information in relation to specific interactions. To use this functionality you must use the Attribute Definition screen to create Interaction attributes that correspond with either the IRV or Media Entry screens. You can only have one survey display at any given time on the IRV or Media Entry screen.

See Also:

[Survey Response Entry Screen](#)

[Creating Surveys](#)

Survey Response Entry Screen

In the Survey Response Entry screen you can enter survey responses for an individual or account as a whole. The survey must already be created before you can use this screen. To find and/or enter survey responses, enter an Account ID, a name (if the survey responses pertain to an individual within the account), and survey name in the Find/Create Survey Responses window. You can press the [F9] key from the Survey field to select a survey from the list of values.

Note: TA sets the survey to your organization's default survey as identified in the [Default Survey Classification Category](#) system preference. If you select a survey that contains classifications to which you don't have access, TA displays the message "The survey entered does not contain any questions. Please enter another survey."

- You can enter an answer to each survey question in the answer line of the Answers block. You can press the [F9] key for a list of answers.
- When you fill out a survey, the answers are stored as classifications on the account.
- If you change a default answer, TA updates the classification value on the account to reflect the new information.
- Click the <Clear> button to remove the responses that were entered on screen (e.g., if you entered survey responses for the wrong account). TA displays the Find/Create Survey Responses window, where you can enter responses for a different account or survey, or exit the screen.

Fields on the Survey Response Entry Screen

Name	Description
Account	The Account ID of the account responding to the survey. The account's name line appears to the right of this field.
Survey	The name of the survey (i.e., classification category). The description of the survey appears to the right of this field.
Questions Block	The Questions block contains the questions that make up the survey (i.e., the classification codes). Each question is displayed on a different line.
Answers Block	The Answers block contains the responses that correspond to the adjacent survey questions in the Questions block (i.e., the classification values). Depending on how the value is set up, you may enter a number, free text, or press the [F9] key and select from the list of values.

Creating Surveys

Below are instructions for creating surveys that can be entered on either the Survey Response screen or the IRV or Media Entry screens.

How to Create a Survey for the Survey Response Entry Screen

- Use the Classification Category Code Entry screen to create a classification category code for the survey you are creating. Enter a description of the survey in the Description field. Mark the Survey? checkbox to indicate that the classification category represents a survey.
- Use the Classification Code Entry screen to set up survey questions. Use the Classification Code field to represent a short name for the question and enter the specific full question in the Classification Description field. Also, make sure that you select the survey name from the Classification Category field.
- To set up a valid answer use the Value Type field for each question (i.e., classification code). Press the [F9] key to select a value type code from the list of values to indicate whether the answer can be a date, has a list of values, or can be a range of numbers or letters.

Type of Answer	Setting the Value Type Field
A limited free text (up to 12 characters)	Leave blank.
To create your own list of values	Enter "V" and click on the <Values> button. Create a new classification value for each valid answer to the survey question.
Date in MM/DD/YY format	Enter "D" for date.

To require a whole number (without decimals)	Enter "I" for integers.
To allow a number with decimals	Enter "N1" or "N2" for numbers with 1 or 2 decimal places
To require a single character	Enter "C" for characters of length one.

How to Create a Survey for the Inquiry & Referral View or Media Entry Screens

You can only have one survey at a time display on the IRV or Media Entry screen. Use the Attribute Definition Entry screen to add, edit, or remove questions that display on the bottom portion of the IRV or Media Entry screen.

1. From the Find Attribute window or from the Attribute Definition Entry screen, click <New>. TA displays the Create New Attribute window.
2. Press [F9] in the Attribute Table field. Select from the list of values according the type of attribute you are creating. For example, select Interactions to create a question to be displayed on either the IRV or Media Entry screens. In the attribute group field, select either IR (for Inquiry & Referral) or MD (for Media Entry) according to which screen you are working with.
3. Assign a name in the Attribute field. Specify a short name that describes the information that you are tracking. (You enter a longer name in the Description and Prompt fields.)
4. Click <Create>.
5. On the Attribute Definition Entry screen, enter a description of the attribute code in the description field. This description appears in the list of attribute codes.

In the Prompt Text field, enter the text that you want to be displayed to user. This corresponds to the field name that displays as the question.

In the Validation field enter how should TA validate the choices when the user enters information into the field. For example, the validation could be one letter or a range of numbers, or you use an existing list of values in TA.

Use the Display Order field to determine where in the list this particular question should appear. Enter a number. If you do not enter this field, TA displays the questions in alphabetical order according to the Prompt text.

Enter the hint text that will display in the status bar. This hint gives the user more information about what to enter in the Attribute Value field.

Mark the LOV for Validation? checkbox if there is a list of values for the attribute; mark the Null Allowed? checkbox if the attribute value can be null.

Viewing and Updating Account Information

On the Customer Service Entry screen and on the Inquiry and Referral View screen, a block of account information appears in the upper left corner. The following account information appears, if the information has been entered for the account.

- The first name added to the account (line one)

- The account's preferred address (line two)
- The account's preferred telephone number (line three)
- One classification for the account (line four)

Note: If you are working with an Organization account and no contact names have been entered for the account, the Organization's name appears on the first line. For the address, telephone, and classification information, if none exists each line is blank (e.g., if no address information is available then the second line is blank).

Indicators in the Account Information Block

The following indicators can appear in the Account Information block on the Customer Service or Inquiry and Referral View screens.

Indicator	Description
Type	Indicates the address or telephone type, e.g., "(Home)" or "(Work)."
More "+" symbol	Indicates that additional information of a certain kind exists for the account such as there are additional addresses. To see a list of that information, press the [F9] key from that line.
Usable (number)	Indicates the number of usable telephone numbers or addresses. For example, if the account has three addresses of which two are usable because one is marked undeliverable, then "(2)" appears.
Status (double angle bracket)	Indicates the status of the information displayed for the address line, the telephone line, and the classification line. For example, if the account's preferred address' status is undeliverable, then "<<Undeliverable>>" appears to the right of the address.
Comment (C)	Indicates that comments are entered. For example, if the account is assigned the classification "ACKNOWLEDGE/AD" for anonymous donor and the comment "Can use gift amount but not name" is entered for that classification, a "(C)" appears. On the classification line, this indicator appears to the right of the classification.

See Also:

[Accessing Additional Information for an Account](#)

[Updating or Adding a Note to an Account](#)

[Viewing and Updating an Interest for an Account](#)

Accessing Additional Information for an Account

You can view a list of names, addresses, telephone numbers, or classifications for the account by pressing the [F9] key from the corresponding line of account information. If you want to update information for a record, select the record from the list. TA displays the corresponding information entry screen with the information for the record you selected. You can also access an entry screen directly by pressing the [F10] key from the appropriate line of account information.

For example, to update an address, press the [F9] key from the line displaying the address. From the list, select the address that you want to update. TA displays the Address Entry screen, on which you can change the information.

You can add a record to the account *from the corresponding information entry screen* by pressing the [F6] key. For example, from the Name Entry screen you can press the [F6] key to access the Create New Name window.

Note: If no name, address, telephone, or classification records exist for the account, when you press the [F10] key from the corresponding line in the Account Information block, the appropriate window to create a new record appears. For example, if no addresses exist for the account and you press the [F10] key from the address line, the Create New Name window appears.

Updating or Adding a Note to an Account

To view an existing note or add a note for the account, press the [Notes] key or click <Notes> on the toolbar. The Notes feature is described in the Managing Account Information chapter.

Viewing and Updating an Interest for an Account

You can view and update interests for the account by clicking <Interests>. TA displays the Interest Entry screen. This screen is described in the Managing Account Information chapter.

Note: You cannot access this screen if the interaction is an anonymous one.

If no interests exist for the account, TA displays the message "There are no interest records for this account. Create a new record?" Click <Yes> to create an interest for the account. TA displays the Create New Interest window. Otherwise, click <No> to return to the Customer Service Entry screen or to the Inquiry and Referral View screen.

Viewing the Interaction History for an Account

You can view a history of interactions for the account by clicking <Interactions> on the Customer Service Entry screen or on the Inquiry and Referral View screen. TA displays the Interaction History screen. You can also access this screen from the Main Menu by selecting it from the Customer Service module. Note that your organization configures this screen and determines the exact fields that display.

Note: You cannot access the Interaction History screen if the interaction is an anonymous one (see "[Entering the Account ID for an "Anonymous" Interaction](#)").

The format of the Interaction History screen is as follows:

- The top right and left display fields determined by your organization.
- An on-screen filter that you can use to quickly display interactions according to solicitations sent. (Other filter choices may be added in future releases.)
- Total number of interactions selected based on your search.

Basics on using the screen:

- Use the horizontal scroll bar on the bottom right of the screen to view columns that are not immediately visible.
- Use the vertical scroll bar on the far right of the screen to view transactions that are not immediately visible.
- To view more detail: highlight an interaction and click on the corresponding zoom button (to the left). Your user setup determines the default screen (Customer Service Entry, Account Diary, Inquiry & Referral View, or Media Entry) that you use to view the details of an interaction.
- Resort the interactions listed by clicking on any column heading.
- To find interactions for another account or to limit or change other search criteria, click on [Find] on the toolbar, or press <F3> to access the Find Transactions window.

Tracking Inventory and Value for Benefits Not Tied to a Gift

Tracking Inventory for Benefits Not Tied to a Gift

You can track the inventory for items that accounts request that are not tied to a gift or pledge. For example, your organization's information packets or literature can be set up as benefits and assigned to the interaction that represents the request. Below is a summary of how to use this functionality:

- To set up a benefit for the sole purpose of tracking inventory, make sure to assign the benefit a Benefit Category of "V" for Inventory Items (on the Benefit Entry screen).
- Create an interaction (either from the Customer Service Entry or the Inquiry and Referral View screens) and associate the benefit with the interaction. Zoom from the Interaction Type field and enter the benefit code in the Benefit field.
- When you schedule your query to select interactions having this benefit, schedule the [Update Benefit Sent](#) update procedure so that TA updates the inventory for the benefit.

Note: Benefits are usually awarded to accounts through transaction processing, even if the benefit is given compliments of your organization. Awarding benefits in this manner enables you to track information such as delivery date and backorder information, start and expiration date, or mailing class. You should not assign benefits through interactions rather than transactions if you want to maintain this information. You can track inventory using either method.

Also note that when you track inventory through interactions, there is no automatic check or message to signal when the inventory has dropped below 0, and TA does not create a benefit record on the Benefits Awarded screen.

Tracking Value for Benefits Not Tied to a Gift

You can track the value for benefits that accounts request that are not tied to a gift or pledge. For example, your organization can track the cash value of an equipment grant given to an account. In this example, the benefit that represents the equipment is tied to the interaction that represents the request for the equipment. Below is a summary of how to use this functionality:

- Set the cash value for the benefit on the Benefit Entry screen. From the Benefit Entry screen, click <Inventory> to enter this amount in the Value field.
- Create an interaction that represents a client or member's request for assistance. You can either do this on the Customer Service Entry or Inquiry and Referral View screen.
- If the interaction type has a specific benefit set up for it, the benefit and its value default on the interaction. Otherwise, you can enter the benefit when you set the response category and type to indicate your organization's response to the request. Zoom from the Response Category or Response Type field to set the benefit and have the benefit's value default.
- You can run the Interaction Value report to gather information about the total value awarded through these benefits

Merging Accounts (from Customer Service Entry)

TA enables you to merge duplicate accounts (i.e., two accounts that exist for the same entity, e.g., an individual or organization) from the Customer Service Entry screen or from the Inquiry and Referral View screen. To access the Merge Entry screen, click <Merges>. TA displays the message "No records exist for this account. Find an account, create a record, or exit?" You can click <New> to access the Create New Merge record window and create the merge record for the account displayed on the Customer Service Entry screen or on the Inquiry and Referral View screen.

Note: If a merge record already exists for the account displayed on the Customer Service Entry screen or on the Inquiry and Referral View screen, TA displays that merge record on the Merge Entry screen when you click <Merges>.

For information on the Merge Entry screen, see the [Managing Account Information chapter](#).

Ticklers and Warnings

TA allows you to create a tickler to remind yourself or another staff member of any follow-up action for the account. For example, if you need to follow up with a phone call to the account, you can create a tickler as a reminder. You can also create a warning. Warnings display to anyone who accesses the account from anywhere in TA. For example, you can create a warning to alert staff members that a donor (or donor's family member) has passed away.

Ticklers and Warnings are always associated with an interaction record.

See Also:

[Working with Ticklers](#)

[Using the Open Ticklers Screen](#)

[Creating a Warning](#)

Working with Ticklers

You can create a tickler on any data entry screen where you can create an interaction. The tickler fields are listed below with descriptions. The interaction data entry screens where these fields appear are: Account Diary Entry, Customer Service Entry, Inquiry and Referral View, and Media Entry. Note that to access the tickler fields from the Customer Service Entry screen, zoom from the **Status** field.

By setting these fields on any interaction record, you create a tickler. Each page of an interaction can have different tickler information. You can view a summary of all your open ticklers by accessing the Open Ticklers screen. Use the Open Tickler Listing report if you want a print out of them.

Tickler Field Name	Field Description
Status	By default interactions are set to C (for Completed). To make an interaction a tickler, set this field to O (for Open).
Staff	This is who will be reminded of the follow up action. You can press [F9] to specify a different user if you want to delegate the task to another person in your organization. Most of the time, this field defaults to the person who is creating the interaction. However, for interactions created on the Account Diary Entry screen, you can configure a user to have different staff person default. For example, if you have temporary workers or volunteers entering interactions for someone else, you can set up the volunteer User ID to default this field to the staff person for whom the interactions are being created.
Action	This is a text field where you enter the content of your reminder notice. Note that you do not have to enter name or contact of the account since that is already captured on the interaction record.
Start Date	Enter the date when the reminder notice should start displaying to the user specified in the Staff field. This is also the date that the ticklers start displaying on the Open Ticklers screen. (Use MM/DD/YY format)
Due Date	Enter the deadline date of this task. (Use MM/DD/YY format)
Stop Date	Do not enter a date in this field unless you have completed the follow-up and you want to close the tickler. (If there is any date in this field, TA considers the tickler completed.) Enter a date if you want to close the tickler. (Use MM/DD/YY format) Note in the Open Ticklers screen, you can close a group of ticklers at the same time.

See Also:

[Using the Open Ticklers Screen](#)

Using the Open Ticklers Screen

The Open Ticklers screen displays a summary list of all your open ticklers. This screen displays all open (current, passed due, or future) ticklers. If any date is entered in the Stop Date field (even if it is future), TA considers the tickler closed and it will not display on this screen. You can click on the zoom button for any line, to view the full detail of the interaction.

From the Open Ticklers screen you can:

- Sort your ticklers by the Name field (the account that tickler is associated with) or by any of the date fields. (You can sort by the Action field but this is a text field so it might not make sense to sort by.)
- Close a group of ticklers by marking the checkbox corresponding to the item or by entering a Stop Date. Once you close it, the item is not displayed the next time you access the Open Tickler screen. (To view closed ticklers, you need to go directly to the interaction record.) Once you close a tickler, TA automatically sets the status of the interaction to "C" for completed.
- Click on the zoom button to view the full information associated with the interaction.
- Click on the <Audit> button if you want to see who assigned you the tickler that you have highlighted.

The Open Tickler Listing report permits you to print open ticklers. This report gives you other options such as to print only those open ticklers with a specific Due Date range or Start Date range, or those open ticklers associated with users other than yourself.

Creating a Warning

You can create a warning based on interaction. This warning displays for anyone who accesses the account from anywhere in TA. You can enter separate warnings for each interaction created and on each page of one interaction. To create a warning, complete the following steps.

1. Enter the text of the warning in the Comments field, e.g., family member passed away; please do not call or solicit.
2. Mark the Warning? checkbox.
3. Enter the date on which the warning should expire in the Expire Date field. Enter the date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.

Note: You must first enter the text of the warning in the Comments field before marking the Warning? checkbox.

Common Customer Service Questions

Some customer service questions, such as changes in account information (e.g., a member's address has changed) or problems with benefits (e.g., a member received the wrong premium), come up regularly. This section contains Instructions for handling common customer service questions.

See Also:

[You Want to Enter the Interaction Details Before Selecting the Account](#)

[The Person Is Not Receiving the Membership Publication](#)

[The Person Is Reporting an Address Correction](#)

[The Person Does Not Want Any Telephone Solicitations](#)

[The Person States That Membership Was Not Renewed with the Last Gift](#)

[Benefits \(Item or Package\) has Not Been Awarded](#)

[The Person Reports a Problem with a Premium](#)

[The Person Reports a Credit Card Was Charged Twice](#)

[The Person Received a Telemarketing Call or Direct Mail Piece and Wants to Know if Your Organization Is Responsible](#)

You Want to Enter the Interaction Details Before Selecting the Account

When you are on the phone with a person and do not have time to look up the Account ID of that person, you can attribute the interaction details you enter on the Customer Service Entry screen to the anonymous account. After completing the call, you can then assign the interaction to the correct account. To create the interaction and then assign it to the correct account, follow the steps below.

1. From the Customer Service Entry screen, create an interaction by clicking <New> on the toolbar. When TA displays the Create New Interaction window, make sure the Account ID is blank, and click <Create>.
2. Enter the details of the interaction while you have the donor on the phone. At this point, the interaction is being attributed to the anonymous account.
3. After you hang up the phone, click in the Account ID field in the upper left corner of the screen, and press the [F9] key. TA displays the Find an Account window to enable you to find the account based on what you know about it (e.g., name, address). When you select the account from the Find an Account: Selected Accounts screen, TA changes the account on the interaction from the anonymous account to the account you selected.

The Person Is Not Receiving the Membership Publication

When a person reports that he or she is not receiving the membership publication, you should first determine if the person had previously asked that the publication not be sent. See if the classification "Benefit, No Guide" has been assigned to the account.

If the classification is assigned, set the end date for the classification to the current date. To award the publication to the donor, you need to adjust the appropriate transaction (follow your organization's policy).

If the classification is not assigned, you need to see if the publication has been awarded to the donor.

Has the publication been awarded to the person?

The publication is a benefit. You need to look at the benefits awarded to the person to see if the publication is one of those benefits. You can look at the benefits in the Benefits Awarded block on the Customer Service Entry screen or you can zoom to the Benefits Awarded screen from this block.

If the person has been awarded the publication, you need to see if the current month's publication has been mailed. To see if the label for the publication has been pulled this month for this donor, you need to look at the Last Sent field for the publication benefit in the Benefits Awarded block on the Customer Service Entry screen. You can also look at the publication benefit on the Benefits Awarded screen. On the Benefits Awarded screen, you need to look at the Last Sent field in the Delivery Information block. By looking at the Last Sent field, you can determine the following:

- If the last sent date is close to the current date, i.e., the date for the most recent pull of labels for the publication (based on your organization's policy), then the publication may be "in the mail" since it may take your organization some time between delivering the mailing labels to the vendor that mails your publication and the time the vendor actually puts the publication in the mail.
- If the last sent date represents the date of the previous month's label pull, then the labels for sending the current month's publication have yet to be pulled.
- If the last sent date represents the mailing date for the most recent publication and the donor should have received the publication based on the difference between the current date and the last sent date, you should enter a customer service interaction indicating that the publication did not arrive. Your organization should establish a procedure for indicating that the publication needs to be sent, e.g., delete the date in the Last Sent field so that the donor is pulled by your publication query or base the query on the interaction type for this situation. Your organization also needs to establish the policy for running the query manually (or schedule the query to run on a regular basis) to select

donors who need to have the publication resent and to generate address labels and the other required output to send the publication.

If the person has not been awarded the publication, you need to follow your organization's policy for handling this situation.

If the person has not received the publication for months, change the expiration date of the Annual activity type (i.e., the account's Annual account activity record). By changing this expiration date, TA changes the expiration date of all related benefits (i.e., the card, the publication, membership, clubs).

The Person Is Reporting an Address Correction

To change the person's address, go to the address line in the Account Information block on the Customer Service Entry screen or on the Inquiry and Referral View screen and perform one of the following steps.

- If the address that needs to be updated appears on the address line, press the [F10] key to access the Address Entry screen and make the appropriate changes.
- If the address that needs to be updated does not appear on the address line, press the [F9] key to see a list of the account's addresses. Select the appropriate address. TA displays the Address Entry screen with the address you selected. Make the appropriate changes.
- If the address being reported is new (e.g., new home address), add the new address and follow your organization's policy regarding whether to archive the old address.

Note: You can update name, telephone number and classification information in the same manner, i.e., using either the [F10] key or the [F9] key from the appropriate line. TA displays the corresponding screen for you to update the account's information. If you need to add a name, address, telephone number, or classification, you can press the [F6] key from the appropriate screen to add that information.

The Person Does Not Want Any Telephone Solicitations

To indicate that your organization should not call this person to solicit gifts, assign the classification "Appeal, No Phone" to the appropriate name. You can access the Classification Entry screen by pressing the [F10] key from the classification line of the Account Information block on the Customer Service Entry screen or on the Inquiry and Referral View screen. TA displays the Classification Entry screen. From this screen, press the [F6] key to add a classification to the account.

Note: You can add other classifications (e.g., "Appeal, No Mail," "Appeal, No Exchange," or "Benefit, No Guide") in the same manner.

If the person is receiving too much mail and you suspect that your organization has duplicate accounts representing this person, click <Merge>. The merge functionality enables you to look for duplicate accounts.

If a merge record exists for the account, TA displays the merge record on the Merge Entry screen.

If no merge record exists for the account, TA displays a message to that effect and you can click <Cancel> to return to the Customer Service Entry screen or to the Inquiry and Referral View screen.

Note: You can create a merge record for an account from the Customer Service screen. The procedure for creating a merge record for two accounts is covered in the Managing Account Information chapter.

The Person States That Membership Was Not Renewed with the Last Gift

You need to check the gift type assigned to the donor's last gift. Look at the most recent gift in the Giving History block on the Customer Service Entry screen (the transactions are displayed in reverse chronological order). The gift type appears under the label "GT."

If the gift type assigned to the last gift is not "RN" for renew, the most recent gift was not considered a renewal gift. You need to adjust the gift, on the Batch Detail Entry screen, to change the gift type to "RN" and confirm that the proper member benefits are awarded.

If the gift type assigned to the last gift is "RN" for renew, you need to find out more from the donor (e.g., has the donor received the program guide, member card).

Benefits (Item or Package) has Not Been Awarded

There are a couple reasons why a person may not have been awarded a benefit item or package that was requested.

- If your organization sends specific offers to each donor (for example, Donor A can receive the membership for only \$25 whereas Donor B must pay \$75), the donor may not have paid enough money to receive the benefit for the offer s/he was sent. You can see the minimum amount a person must pay to receive a benefit package by selecting the solicitation interaction that represents the mailing the donor was sent and then viewing the offer amount. To view the offer amount, <Zoom> from the Interaction Category field on the solicitation interaction to the Interaction Details window, and view the value in the Offer Amount field.
- The donor may not have paid enough money to receive the particular benefit. See Viewing the Minimum Award Amount.
- The donor did not meet the [restrictive award criteria](#) for the benefit (for example, the donor is not a student, and the benefit is only awarded to people who are identified as students).

The Person Reports a Problem with a Premium

[The Person Hasn't Received the Premium](#)

[The Person Received a Broken Premium and Wants a Replacement](#)

[The Person Received the Wrong Premium](#)

[The Person Wants to Return the Premium and Receive a Refund](#)

The Person Hasn't Received the Premium

You need to check to see if the premium has been awarded to the person by looking at the Benefits Awarded block on the Customer Service Entry screen or by zooming to the Benefits Awarded screen .

If the premium has been awarded to the donor but the donor hasn't received the premium, check to make sure that the OK to Deliver? checkbox is marked.

If the OK to Deliver? checkbox has been marked, check to see if the label for mailing the premium has been pulled by looking at the Last Sent field.

- If no date is entered in the Last Sent field, the label hasn't been generated.
- If a date is entered in the Last Sent field, follow your organization's policy. That is, if the label was pulled two days ago, the premium is "in the mail." If the label was pulled two weeks ago, resend the premium by deleting the date in the Last Sent field. The next time your organization pulls for premiums, this premium will be included.

If the OK to Deliver? checkbox has not been marked, the donor has not paid enough of the pledge to receive the premium. You can look at the delivery criteria for the benefit on the Benefit Entry screen.

The Person Received a Broken Premium and Wants a Replacement

You need to check to see if the premium has been awarded to the person by looking at either the Benefits Awarded block on the Customer Service Entry screen or by zooming to the Benefits Awarded screen.

If the premium has been awarded to the donor, and your organization's policy is to replace damaged premiums, delete the date in the Last Sent field to resend the premium. The next time your organization pulls for premiums, this premium will be included.

If the premium has not been awarded to the donor, follow your organization's policy. If your organization's policy is to send the donor this premium, follow the procedure for awarding the donor the premium (e.g., if the person has given a gift recently, add the premium to the gift and mark it OK to Deliver, or give the premium compliments of the organization).

The Person Received the Wrong Premium

You need to adjust the transaction that awarded the wrong premium (i.e., you need to enter an adjustment by clicking <Batch> to access the Batch Detail Entry screen. For information on entering an adjustment for a transaction, see the [Entering an Account's Gifts and Benefits chapter](#).

The Person Wants to Return the Premium and Receive a Refund

You need to follow your organization's policy regarding refunds. You can click <Batch> to access the Batch Detail Entry screen and enter a refund or you can create an interaction with a tickler to enter a refund in TA after your accounting department sends the refund to the donor. In either case, your organization can run a report based on the interaction type to give to your accounting department to send the donor a refund. For more information on entering an adjustment for a transaction, see the [Entering an Account's Gifts and Benefits chapter](#).

The Person Reports a Credit Card Was Charged Twice

You need to check the person's giving history by looking at the Giving History block on the Customer Service Entry screen or by zooming to the Giving History Summary screen.

If you see that a gift was processed twice (e.g., two transactions look exactly alike for the credit card number) and you don't see an adjustment entered to correct this error, you need to follow your organization's policy regarding refunds. You can click <Batch> to access the Batch Detail Entry screen and enter a refund or you can create an interaction with a tickler to enter a refund in TA after your accounting department sends the refund to the donor. In either case, your organization can run a report based on the interaction type to give to your accounting department to send the donor a refund. For more information on entering an adjustment for a gift, see the [Entering an Account's Gifts and Benefits chapter](#).

If you see that a gift was processed twice (e.g., two transactions look exactly alike for the credit card number) and you do see an adjustment entered to correct this error, follow your organization's policy regarding what to tell the donor.

The Person Received a Telemarketing Call or Direct Mail Piece and Wants to Know if Your Organization Is Responsible

You need to check the interaction history for the person by clicking <Interactions> to view the Interaction History screen. Each contact with an account is logged as an interaction and can be viewed on this screen.

Customer Service Reference Information

[Control Codes \(Customer Service\)](#)

[System Preferences \(Customer Service\)](#)

Control Codes (Customer Service)

The following table identifies the fields affected by code tables your organization should set up before working with the Customer Service module.

Field Name	Table Name
Affiliation	Affiliation
Interaction Category	Interaction Category
Interaction Type	Interaction Type
Origin	Origin
Program	Program Entry
Response Category	Response Category
Response Type	Response Type
Technique	Technique

System Preferences (Customer Service)

The following table lists each system preference that affects the Customer Service module. See the [Setting System Preferences chapter](#) for more information on each system preference.

System Preference	See
Account for Unknown Interactions	Entering the Account ID for an "Anonymous" Interaction
Category for Inquiry and Referral Interactions	Selecting the Interaction Category and the Interaction Type
Default Source Code for Customer Service Batches	Entering the Source Code
High ZIP Check	The Origin field on the Customer Service, Account Diary, IRV, and Media Entry screens defaults to "LC" for local if the ZIP code for the account's preferred address falls between the Low and High ZIP range.
Low ZIP Check	Otherwise, TA defaults the origin field to "NL" for national.