

Team Approach 5.0.1
Understanding Benefits

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Benefit Concepts

[Overview of Benefits](#)

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Overview of Benefits

A benefit is any tangible or intangible item that an account receives, usually in return for a donation. For example, an intangible benefit is membership, and a tangible benefit is an organization mug.

Note: *You can award a benefit to an account that does not give a donation, e.g., you can give a complimentary membership to a major donor prospect. You can also award "gift benefits" where the account giving the donation requests that the benefit be sent to someone else. See the [Entering an Account's Transactions and Benefits](#) chapter to learn [how to give a complimentary benefit](#) to an account and [how to enter gift benefits](#).*

In trying to determine what benefits your organization offers, think about whether you want to track the benefit. For example, your organization may give an account a regularly produced organization publication and an organization decal. Your organization may want to track how many organization publications the account requests and receives but may not want to track how many decals the account requests and receives. In this situation, you would set up only the organization publication as a benefit.

When you set up a benefit in Team Approach® (TA), you set up as much of the following information about the benefit as appropriate.

- The structure of the benefit, including the type of benefit such as an item by itself (e.g., your organization's tote bag) or a package of items (e.g., a membership package that includes your organization's membership, membership card, and membership publication), the benefit category, and the activity type assigned to the benefit.
- The benefit's characteristics, such as the benefit's unit type and number of units to award (e.g., 12 months for a membership), the interests associated with the benefit, and the dates during which the benefit is offered.
- The benefit's award criteria, which include the minimum amount of money an account must pledge to qualify for a benefit, e.g., \$60 to be awarded your organization's tote bag.
- The benefit's delivery criteria, to indicate how much of the pledge an account must pay for your organization to send the benefit, e.g., \$60 must be paid for your organization to send the tote bag to the account.
- Automatic processing options, including the option to have TA automatically award a benefit based on the account and donation information.
- The benefit's inventory, cost, and vendor information.

TA awards benefits to an account during gift processing, and processes those benefits based on the characteristics and rules you set up for each benefit, e.g., the award criteria for the benefit, the delivery criteria for the benefit, and the automatic processing options selected for the benefit. You can always manually award a benefit.

Finally, you can set up an individual item or a package of items. When you set up a package, you have multiple options on how to set up the package as well as multiple processing options for the package.

See Also:

[Benefit Types and Categories](#)
[Renewable and Anchor Benefits](#)
[Importance of the Activity Type](#)

Benefit Types and Categories

Benefits are structured based on the type and the category of benefit. In addition, you may want to associate a benefit with an activity type.

See Also:

[Benefit Type](#)
[Benefit Category](#)

Benefit Type

You can create three types of benefits.

Benefit Type	Description
An item	The benefit item is any individual thing awarded to an account (e.g., a tote bag, a monthly publication, the intangible membership).
A package (Non-selection package)	A package contains a group of benefit items that are all awarded to an account together (e.g., a membership package containing the intangible membership, a membership card, and a membership publication). When the package is awarded to an account, each item is posted to the account.
A selection package	<p>A selection package contains a group of benefit items from which, when the selection package is awarded to an account, the account must select only one of the items.</p> <p>There are two kinds of selection packages:</p> <ul style="list-style-type: none"> • A <i>List Selection Package</i> contains a list of benefit items from which the account can select one item (e.g., a tote bag, t-shirt, or hat). • A <i>Category Selection Package</i> contains a selection category (e.g., Club, Premium), from which the account can select one item. The package may also contain an award amount that TA uses to limit the items from which the account can choose. <p>When a selection package is awarded to an account, only one item is posted to the account.</p>

See Also:

[Identifying Benefit Types](#)

Identifying Benefit Types

When you look at the benefits that your organization awards to accounts and that your organization wants to track, you need to think about which type each benefit is. Once you group your benefits according to the types, you need to break down your organization's packages and selection packages into their component items. All packages and selection packages *eventually* are composed of items. For example, your organization may have a membership package that is composed of the following items: the intangible membership, a membership card, and a membership

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publication. Once you identify all of the benefit items your organization offers in some manner (i.e., the item by itself or the item as part of a package), you should enter each item and then create your packages and selection packages.

TA, not you, assigns the benefit type. TA assigns the benefit type based on how you set up the benefit. That is, when you first create a new benefit, TA assigns the benefit type "Item" to it. If the benefit you are creating is a package, TA changes the type to "Package" when you construct the package. If the benefit you are creating is a selection package, TA changes the type to "Selection Package" when you construct the selection package.

Benefit Category

Once you identify all of the benefits (i.e., each item, package, and selection package), you need to identify the benefit category represented by each. TA enables you to assign a benefit to one of the following categories.

- Club
- Event
- Guide/Magazine
- Invitation
- Member Card
- Membership
- Newsletter
- Other benefits
- Premium
- Sweepstakes/Contest
- Tour
- Underwriting Credit

You can add benefit categories as needed using the Benefit Category Code Entry screen. You can inactivate a category using the Benefit Category Code Entry screen if your organization will not use that category; when you inactivate a category, TA does not include the category in the list of benefit categories.

Note: *Your organization can use the benefit category in queries instead of listing in the query each benefit assigned to the category.*

Categorizing Premiums

If the benefit category for an item is "Premium," you can further identify the benefit using the Premium Category field. For example, two premium categories delivered with TA are "Book" and "Compact disc."

You can add premium categories as needed using the Premium Category Code Entry screen. You can inactivate a category using the Premium Category Code Entry screen if your organization will not use that category; when you inactivate a category, TA does not include the category in the list of premium categories.

Renewable and Anchor Benefits

Some of the benefits you set up in TA are renewable, e.g., membership. When an account renews such a benefit, TA creates a new benefit record for the account.

If your organization has one or more renewable activity types for which donors are acquired and renewed, you must create an "anchor benefit" for each activity type. TA uses the anchor benefit to renew donors to a renewable activity type. If donors who give to a renewable activity type receive membership, then this anchor benefit represents the intangible membership associated with that renewable activity type.

TA uses the anchor benefit to track the start and expire dates of each "giving cycle" for a donor who gives to a renewable activity type. If your organization associates a membership with the renewable activity type, the anchor benefit tracks the start and expire dates of each member year for a donor. TA synchronizes a donor's expire date for a renewable activity type with the anchor benefit awarded to that donor. In this way, the donor's expire date always reflects the expire date for the donor's current giving cycle (e.g., member year). The donor's renewal window for a renewable activity type is based on the donor's expire date.

See Also:

[Renewable Activity Types](#)

[Renewable Benefit Processing](#)

Renewable Activity Types

In TA, the activity type represents the first breakdown of the total funds raised by your organization. An activity type is a "bucket" to which an account donates or in which an account participates. For example, your organization may divide giving to the organization into the following buckets: Annual Giving, Planned Giving, and Capital Campaign. Whenever you solicit an account for a donation, you create a source code to represent the solicitation; this source code begins with the activity type identifying the bucket to which the donation will be credited. When the account responds, the donation (i.e., transaction) is tied to an activity type.

A renewable activity type refers to an activity type for which your organization solicits a donor and then, typically near the anniversary of the donor's gift, your organization asks the donor to renew support for your organization. For example, your organization may renew donations credited to unrestricted giving for annual operations. In this example, your organization may set up an activity type to represent the donations credited to unrestricted giving for annual operations, e.g., "A" for Annual Giving, and make this activity type renewable by setting up an anchor benefit that drives the giving cycle of each donor to this activity type.

Renewable Benefit Processing

When a benefit is awarded to an account, TA posts the benefit to the account, i.e., TA creates a "benefit record" for that account. You can view these benefit records for an account using the Benefits Awarded screen.

Some of the benefits you set up in TA are renewable, e.g., membership. When an account renews such a benefit, TA creates a new benefit record. Now, for the account, two benefit records exist for the renewable benefit, the "old" benefit record and the "new" benefit record.

With these multiple benefit records, you can figure out which record represents the current renewable benefit (e.g., the current membership) by looking at the status of the benefit, the benefit's expire date, and the OK to Deliver checkbox for the benefit.

- Before the "new" benefit is marked ready for delivery (i.e., before the donor pays enough to have the benefit marked deliverable), both the "new" and the "old" benefit records have a status of "A" for active. However, only the "old" benefit is assigned an expire date and is marked ready for delivery.
- Once the "new" benefit is marked ready for delivery, its status remains "A" for active, TA sets the "new" benefit's expire date, and
 - If the account renewed the renewable benefit *before* the "old" benefit expired, TA sets the status for the "old" benefit to "S" for superceded.

If the account renewed the renewable benefit *after* the "old" benefit expired, TA sets the status for the "old" benefit to "C" for completed.

Importance of the Activity Type

You can assign an activity type to a benefit. You don't need to tie every benefit to an activity type. You should consider the following guidelines when determining whether to assign an activity type to a benefit.

- If your organization has one or more renewable activity types for which your organization acquires donors and renews donors, you must assign the appropriate activity type to each "anchor benefit" used by TA for renewing donors to that activity type.
- If your organization offers membership, you must assign the activity type to membership packages and the intangible membership you create.
- If you want TA to automatically award a benefit, you must assign the appropriate activity type to that benefit.
- If the benefit can be awarded to an account regardless of the activity type to which the account is contributing, do not assign an activity type to the benefit.

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See Also:

[Membership Benefits](#)

Membership Benefits

If your organization offers membership(s), you will set up one or more membership packages based on your organization's membership structure and marketing practices.

- Your membership structure may have one renewable activity type or multiple renewable activity types.
- Your marketing practices may include offering different packages for different giving levels.

Each package will contain the anchor benefit that represents the intangible membership benefit item. In addition, a package may contain a membership card, a membership publication, and other benefits based on your organization's marketing practices.

When you create the benefit code to represent a membership package, you must set the activity type to the renewable activity type to which the donor would contribute to become a member. The activity type is particularly important when your organization has multiple membership packages for multiple renewable activity types. TA selects the correct membership package to award to an account by comparing the activity type from the account's pledge or gift to that for the membership package.

You must also set the activity type for any other benefit tied to a particular renewable activity type such as the anchor benefit that represents the intangible membership. If your organization has different membership publications for different renewable activity types, you must assign the appropriate activity type to each membership publication benefit.

Benefit Awarding and Delivering

Benefits are awarded to an account through pledge and gift entry.

The following steps illustrate how benefits are awarded and processed for an account's pledge.

1. You set up each benefit your organization wants to track. You specify the rules concerning the amount of money an account needs to pledge to qualify for the benefit (i.e., the award criteria) and the rules concerning the amount of money an account needs to pay to have the benefit delivered (i.e., the delivery criteria). You can also specify additional restrictive award criteria if you set up the benefit to be automatically awarded by TA and want the benefit to be awarded only in certain situations (e.g., the account uses a credit card to make the donation).
2. An account makes a pledge. You enter the account's pledge in TA using the Batch Summary Entry and Batch Detail Entry screens.
3. Based on this pledge, the account qualifies for a benefit. The benefit may be automatically awarded by TA or manually awarded by you.
4. Your organization has set up gift processing to run nightly. TA processes the account's pledge and posts it to the account. You can view an account's pledges, pledge payments, outright gifts, and adjustments using the Giving History Summary and Giving History Detail screens. TA also posts to the account each benefit awarded for the pledge. You can view an account's awarded benefits using the Benefits Awarded screen.
5. The account pays the pledge in full. You enter the account's pledge payment in TA using the Batch Summary Entry and Batch Detail Entry screens.
6. TA processes the account's pledge payment and posts it to the account. TA evaluates each benefit awarded to the pledge being paid by the pledge payment. TA marks ready for delivery each benefit awarded for the account's pledge that meets the benefit's delivery criteria. Using the Benefits

Awarded screen, you can see that the OK to Deliver checkbox is marked for each benefit. If the benefit is one to which start and expire dates should be assigned, TA calculates those dates when the benefit is marked ready for delivery.

7. Your organization runs a query to select all benefits marked ready for delivery that haven't already been pulled.
 - With this query, your organization runs a user-defined output to pull the necessary information about each benefit selected and the account awarded the benefit. When the query is run with the user-defined output, TA creates an output file containing the data pulled for the benefit and the account. This output file is then merged either in-house or out-of-house to produce the necessary printed documents to deliver the benefit (e.g., the mailing labels).
 - With this query, your organization runs the Update Benefit Sent update procedure. For each benefit selected by the query, TA sets the Last Pulled field on the Benefits Awarded screen and updates the benefit's inventory.

See Also:

[Significance of the Met Award Criteria Flag](#)

[Special Process for Awarding Premiums](#)

[How TA Marks a Benefit Ready for Delivery](#)

[Special Considerations for Renewable Benefits](#)

[How TA Handles Upgrades](#)

[Overriding a Benefit's Award and Delivery Criteria](#)

Significance of the Met Award Criteria Flag

TA sets the Met Award Criteria flag behind the scenes for each benefit awarded to an account. TA sets this flag to "Y" for yes if the account's pledge or gift meets the award criteria for the benefit awarded; otherwise, TA sets the flag to "N" for no. TA uses this flag when determining whether to mark a benefit for delivery. See "[How TA Marks a Benefit Ready for Delivery](#)" to learn how TA marks a benefit deliverable.

During pledge and gift entry, a benefit can be awarded to an account in one of two ways: you award a benefit manually or TA awards the benefit automatically.

- If you manually award a benefit for which the account's pledge or gift qualifies, TA sets the Met Award Criteria flag to yes for that benefit.
- If you try to award a benefit for which the account's pledge or gift does not qualify, TA displays the message "Gift does not meet benefit requirements. Award anyway?" If you decide to award such a benefit, TA sets the Met Award Criteria flag to no for that benefit because you manually overrode the rules set up to award the benefit.
- For each benefit automatically awarded by TA for the account's pledge or gift, TA sets the Met Award Criteria flag to yes because TA only awards benefits set up for automatic awarding for which an account's pledge or gift qualifies. In other words, TA never automatically awards a benefit for which the account's gift or pledge does not qualify.

The Met Award Criteria flag ensures that any benefit awarded during pledge and gift entry for which the donor qualified is automatically delivered by TA while excluding from benefit delivery consideration any benefit that did not meet the award criteria. A benefit that did not meet the award criteria can only be delivered manually, i.e. you need to display that benefit on the Benefits Awarded screen and mark the OK to Deliver checkbox.

Note: *By manually awarding a benefit to an account when the account doesn't qualify for the benefit, you are "ignoring" or "overriding" the award criteria set up for the benefit. When you decide to award the benefit regardless of the rules for the benefit, you must also decide when to deliver the benefit (i.e., you must manually mark the benefit ready for delivery).*

See the [Viewing Transactions, Benefits, and Interactions chapter](#) to learn about the Benefits Awarded screen.

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Special Process for Awarding Premiums

During pledge and gift entry, TA awards premiums in a manner slightly different from the awarding of any other benefit. When you or TA awards a premium, TA subtracts the minimum award amount for the premium from the account's pledge or gift. The remaining amount is the amount available if you or TA award a second premium. In this way, TA keeps a running total of the dollars the donor can "spend" on premiums.

For example, an account pledges \$120. For this \$120, you can award to the account a total of "\$120 worth" of premiums based on the minimum award amount for each premium. If you award the account a \$60 premium and then try to award the donor a \$90 premium, TA displays the message "Gift does not meet benefit requirements. Award anyway?" If you award the \$90 premium, TA sets the Met Award Criteria flag to no for the \$90 premium. You will need to manually mark the \$90 premium ready for delivery based on your organization's policy.

Note: TA looks to the [Use Met Award Criteria for Delivery](#) system preference to determine whether to set benefits for delivery based on how the Met Award Criteria flag is set.

Your organization can set up a package of premiums that awards a set of premiums for a gift less than the amount the donor would need to give to be awarded the premiums individually. For example, you can set up a premium package for \$100 that contains a \$75 premium and a \$50 premium. TA uses only the package's \$100 minimum award for the running total of the dollars the donor can "spend" on premiums because your organization specifically set up this package to enable a donor to receive the two premiums at a price lower than that required if each were awarded individually.

Note: You can award as many premiums as your organization's practices permit even if the account's pledge or gift does not qualify for multiple premiums. As noted, for each additional premium you award to an account that brings the running total of the dollars the donor can "spend" on premiums over the account's pledge or gift amount, TA displays the message "Gift does not meet benefit requirements. Award anyway?" You can award the premium, but you will need to manually mark the premium ready for delivery based on your organization's policy.

How TA Marks a Benefit Ready for Delivery

During transaction processing, when TA posts the account's pledges, pledge payments, gifts, adjustments, and benefits, TA evaluates whether any of the benefits awarded can be marked ready for delivery.

- Each time TA processes an account's pledge, TA evaluates whether the benefits awarded for the pledge should be marked as deliverable. Often, the benefits associated with an account's pledge cannot be delivered until the account pays some or all of the pledge.
- Each time TA processes an account's gift, TA evaluates whether the benefits awarded for the gift should be marked as deliverable.
- Each time TA processes an account's pledge payment, TA evaluates whether any of the benefits associated with the pledge can be delivered given this new payment (i.e., is the account's total payments-to-date enough to deliver the benefits that are not yet marked deliverable).
- Each time TA processes an account's adjustment, TA evaluates whether any benefits associated with the transaction being adjusted that have not yet been delivered should be marked deliverable.

TA only evaluates the awarded benefits for which the Met Award Criteria flag is set to yes. If the Met Award Criteria flag is set to no, TA skips the benefit. See "[Significance of the Met Award Criteria Flag](#)" to learn how TA sets this flag.

Note: TA does not mark an awarded benefit ready for delivery if you manually awarded the benefit to an account for a pledge, pledge payment, gift, or adjustment for which the benefit did not qualify; in this situation the Met Award Criteria flag is set to no for the benefit. You need to manually mark such a benefit ready for delivery.

See Also:

[Benefit Delivery Processing Rules](#)

Benefit Delivery Processing Rules

TA only evaluates the awarded benefits for which the Met Award Criteria flag is set to yes. If the Met Award Criteria flag is set to no, TA skips the benefit. The Met Award Criteria flag ensures that all benefits awarded for an account's pledge or gift are delivered as long as the account qualified for each benefit.

TA evaluates whether a benefit awarded to an account can be marked deliverable by applying the following rules in the order noted. TA marks a benefit deliverable once a rule is "true" for the benefit (i.e., once the benefit meets the conditions of the rule).

1. At the time of entry, you manually set the OK to Deliver field to yes (i.e., you want the benefit delivered immediately).
2. The benefit is awarded to a pledge that is being paid using installments (including sustaining pledges), and one of the delivery criteria set for the benefit is the minimum number of installments. TA marks the benefit ready for delivery when the number of installment payments made by the account equals the minimum number of installments for delivery.
3. TA calculates the delivery amount (i.e., the amount used to determine whether to mark the benefit ready for delivery). The benefit is marked ready for delivery if the total of the account's pledge payments-to-date or the account's gift meets or exceeds the delivery amount. If a payment window is being used to limit the number of days in which payment can be received, the benefit is marked ready for delivery if the account's pledge or gift meets or exceeds the delivery amount and is received within the payment window.
4. The Met Award Criteria flag is set to yes
 - And the transaction is a pledge that is paid in full, or
 - The transaction is a gift.

See "[Significance of the Met Award Criteria Flag](#)." to learn how TA sets this flag.

See Also:

[How TA Calculates the Delivery Amount](#)

[Additional Rules for Premiums](#)

[Additional Rules for Packages](#)

How TA Calculates the Delivery Amount

To calculate the delivery amount for an awarded benefit, TA completes the following steps.

1. TA calculates the amount the account needs to pay based on the percent of pledge criterion for the benefit.
2. TA compares the amount from step 1 to the minimum payment amount criterion for the benefit.
3. TA selects the lesser of the two amounts as the delivery amount.

If either the minimum percent of pledge or the payment amount is blank, that criterion is ignored.

- If the minimum percent of pledge is blank, TA uses the minimum payment amount as the delivery amount. For example, if the minimum payment amount is \$40, TA marks the benefit ready for delivery when the account pays at least \$40.
- Conversely, if the minimum payment amount is blank, TA uses the minimum percent of pledge as the delivery amount. For example, if the minimum percent of pledge is 10% and the donor pledges \$120,

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TA marks the benefit ready for delivery after the account pays at least \$12 against the pledge. For a donor who pledges \$200, TA marks the benefit ready for delivery after the account pays at least \$20 against the pledge.

Additional Rules for Premiums

If multiple premiums have been awarded for an account's pledge or a gift or have been added to an account's pledge or gift through an adjustment, TA marks each premium ready for delivery as follows:

1. TA looks at the first premium awarded but not yet marked for delivery (based on the order in which the premiums were awarded). TA uses the delivery processing rules to determine whether or not to mark the premium ready for delivery. If TA does not mark the premium as ready for delivery, TA looks at the next premium and performs this step again.
2. If TA marks the premium ready for delivery, TA subtracts the delivery amount required for that premium from the total of the donor's payments-to-date.
3. TA looks at the next premium and performs step #1 using the total from step #2. If TA marks this second premium ready for delivery, TA performs step #1.
4. TA continues this process until TA has evaluated all premiums awarded but not yet marked for delivery.

By applying this set of rules to premiums, TA maintains a running tally for premiums and delivers as many premiums as qualify based on the account's total payments-to-date. As noted in rule #4 of "[Benefit Delivery Processing Rules](#)," when the account pays the pledge in full, any premiums not yet delivered are marked ready for delivery as long as the premiums originally qualified (i.e., as long as the Met Award Criteria flag is set to yes for each of the undelivered premiums).

For example, an account pledges \$120 and is awarded two \$60 premiums. This account pays the pledge using a monthly installment plan, paying \$10 per month. When the account's payments-to-date total \$60, TA marks the first premium ready for delivery. When the account fulfills the pledge, TA marks the second premium ready for delivery.

See "[Additional Rules for Packages](#)," which follows this section to learn how TA marks premiums deliverable when multiple premiums are awarded to a donor through a package.

Additional Rules for Packages

If the benefit is part of a package, TA uses the criteria on the package first to mark each benefit within the package ready for delivery.

- If the delivery criteria for the package are met, TA marks all of the benefits within the package ready for delivery.
- If the delivery criteria for the package are not met, TA uses the delivery criteria for each benefit to mark each one ready for delivery.

Note: *When evaluating the delivery criteria for a package, TA does not use the minimum number of installments or the payment window. For installment payers, if the amount of the account's first installment payment does not meet the delivery amount required for the package, TA uses the delivery criteria for each benefit in the package. If the minimum number of installments is set for each benefit, TA uses that delivery criterion.*

If the package contains at least one premium, when TA marks the premium ready for delivery, TA subtracts the delivery amount from the total of the payments-to-date. TA uses the remaining amount for delivering any additional premiums awarded for the account's pledge.

For example, you set up a package of premiums as a special offer. The package's minimum award amount and the delivery amount are \$100 even though the package contains three premiums each with a \$50 delivery amount. An account is awarded this package for a \$100 pledge. When the account pays \$50, the package delivery criterion is not

met. Since the package delivery criterion is not met, TA evaluates each item in the package. Based on the rules for delivering multiple premiums, one premium is marked ready for delivery. When the account fulfills the pledge (e.g., makes a second \$50 payment), the package criterion is met and the remaining two premiums are marked ready for delivery.

Note: TA does not use the delivery criteria on a selection package. When an account selects a benefit from a selection package, TA uses the delivery criteria for the benefit selected. See "[Building a Selection Package](#)" to learn what information you need to enter for a selection package.

Special Considerations for Renewable Benefits

When TA marks a renewable benefit ready for delivery, TA sets the start and expire dates for that renewable benefit. See "[Information About the Extend Existing Benefit Option](#)" to learn how TA sets these dates when this option is marked for the renewable benefit. See "[Information About the Renewable Option](#)" to learn how to mark a benefit as renewable and how TA sets these dates when this option is marked and the Extend Existing Benefit option isn't.

See Also:

[When TA Creates an Account Activity Record](#)

[When TA Sets Start and Expire Dates on an Account Activity Record](#)

[Linking an Anchor Benefit to its Renewable Activity Type](#)

[Length of the Renewal Window](#)

When TA Creates an Account Activity Record

When a renewable benefit is awarded to an account, if the benefit is the "anchor benefit" that drives the giving cycle for the renewable activity type assigned to that benefit, TA creates an account activity record for the account for that activity type if the account activity record does not already exist.

For example, assume your organization has one renewable activity type called Annual Giving, represented by the "A" activity type. Using the Benefit Entry screen, you set up the "MEM" benefit as the anchor benefit that controls the giving cycle for donors to Annual Giving. You assign the activity type "A" to the MEM benefit. Using the Activity Type Entry screen, you then set the Membership Benefit field to "MEM" for the Annual Giving ("A") activity type.

Note: See the *Understanding Marketing and Solicitations* chapter to learn how to set the Membership Benefit field for an activity type using the Activity Type Entry screen. By assigning an activity type to the anchor benefit and setting that benefit as the membership benefit on the activity type, you indicate that the activity type is a renewable activity type.

When a renewable benefit is awarded to an account, TA completes the following steps to determine whether to create an account activity record.

1. TA looks at the activity type of the renewable benefit awarded to the account. Assume that an account is awarded the MEM benefit. TA looks at the activity type assigned to MEM; the activity type is "A" for Annual Giving.
2. TA looks at the membership benefit assigned to that activity type. In this example, TA looks at the Membership Benefit field for Annual Giving; the membership benefit is set to MEM.
3. TA compares the benefit code of the renewable benefit awarded to the account to the benefit code of the membership benefit assigned to the activity type.
 - *If the codes are the same*, TA determines whether an account activity record for the activity type associated with the membership benefit exists. If the account activity record doesn't exist, TA creates it. In this example, the renewable benefit (MEM) awarded to the account is the same as the membership benefit (MEM) assigned to the Annual Giving activity type. If an Annual Giving account activity record does not already exist for the account, TA creates it.

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- *If the codes are different*, TA does not determine whether to create the account activity record for the activity type associated with the membership benefit. For example, assume the renewable benefit "ACARD" representing your organization's membership card is assigned the Annual Giving activity type and is awarded to an account. TA does not determine whether to create the account activity record because the renewable benefit (ACARD) is not the same as the membership benefit (MEM) assigned to the Annual Giving activity type.

When TA Sets Start and Expire Dates on an Account Activity Record

When TA marks a renewable benefit deliverable, in addition to setting the start and expire dates for the benefit itself, TA determines whether to set the start and expire dates on the account activity record associated with the activity type assigned to the benefit.

When a renewable benefit is marked deliverable, if the benefit itself is the "anchor benefit" for the renewable activity type assigned to that benefit (e.g., the benefit is the one that drives the giving cycle for your organization's renewable activity type or is the membership benefit that drives the member year for your organization's membership-based renewable activity type),

- TA sets the start and expire date on the account activity record if it is the first time the benefit is delivered to the donor (e.g., a new donor to your organization's renewable activity type or a new membership), or
- TA updates the expire date on the account activity record when the same benefit is delivered subsequently (a renewal of the donor's giving to your organization's renewable activity type or a renewal of membership).

Example

For example, assume your organization has one renewable activity type called Annual Giving, represented by the "A" activity type. Using the Benefit Entry screen, you set up the "MEM" benefit.

- If your organization does not associate membership with Annual Giving, this benefit controls the giving cycle for donors to Annual Giving.
- If your organization associates membership with Annual Giving, this benefit represents the intangible membership that controls the giving cycle for donors to Annual Giving.

You assign the activity type "A" for Annual Giving to the MEM benefit to associate Annual Giving with this benefit. Using the Activity Type Entry screen, you then must assign "MEM" as the membership benefit for the Annual Giving ("A") activity type to indicate that this benefit controls the giving cycle (and expire date) for a donor giving to Annual Giving.

See Also:

[How TA Determines which Dates to Set](#)

How TA Determines which Dates to Set

When a renewable benefit is marked deliverable, TA sets the start and expire dates for the benefit. TA then completes the following steps.

1. TA looks at the activity type of the renewable benefit marked deliverable. In this example, TA looks at the activity type assigned to MEM, which is "A" for Annual Giving.
2. TA looks at the membership benefit assigned to that activity type. In this example, TA looks at the Membership Benefit field for Annual Giving to find that the field is set to MEM.
3. TA compares the benefit code of the renewable benefit marked deliverable to the benefit code of the membership benefit assigned to the activity type.

- *If the codes are the same,*
 - *When the renewable benefit is delivered to the donor for the first time (e.g., a donor gives to your organization's renewable activity type for the first time or becomes a member for the first time), TA "copies" the start and expire dates from the renewable benefit to the donor's account activity record for the activity type associated with the renewable benefit. In this example, the renewable benefit marked deliverable (MEM) is the same as the membership benefit (MEM) assigned to the Annual Giving activity type. Therefore, TA copies the start and expire dates from the MEM benefit to the Annual Giving account activity record for the donor the first time MEM is delivered to a donor.*
 - *For each subsequently delivered renewable benefit (e.g., a donor renews giving to your organization's renewable activity type or a donor renews his membership), TA "copies" only the expire date from the renewable benefit to the donor's account activity record for the activity type associated with the membership benefit. In this example, the renewable benefit marked deliverable (MEM) is the same as the membership benefit (MEM) assigned to the Annual Giving activity type. Therefore, TA copies only the expire date from the MEM benefit to the Annual Giving account activity record for the donor when MEM is delivered to a donor renewing his giving or membership.*
- *If the codes are different, TA does not update the donor's account activity record for the activity type associated with the renewable benefit. In this example, assume instead that the renewable benefit "AGDE" (which represents your organization's regularly scheduled publication and is assigned the Annual Giving activity type) is marked deliverable. TA does not update the donor's Annual Giving account activity record because the renewable benefit (AGDE) is not the same as the membership benefit (MEM) assigned to the Annual Giving activity type.*

Linking an Anchor Benefit to its Renewable Activity Type

If your organization has one renewable activity type for which your organization acquires donors and renews donors, you must create a renewable benefit, e.g., "MEM," to represent the "anchor benefit" TA uses to track the start and expire dates of each "giving cycle" for donors to the renewable activity type. If your organization associates membership with the renewable activity type, the MEM benefit represents the intangible membership, and each cycle represents each of the donor's member years.

You must link the renewable benefit and the renewable activity type by completing the following two steps.

1. When you create the renewable benefit, set the activity type for the benefit to the renewable activity type. See "[Importance of the Activity Type](#)" for an explanation of the activity type.
2. Using the Activity Type Entry screen, enter the code for the renewable benefit into the Membership Benefit field for the renewable activity type.

You need to create this link for TA to synchronize the expire dates on the account activity record for the renewable activity type and on the renewable benefit that controls a donor's giving cycle for that renewable activity type.

See "[Align Expiration Dates in Packages](#)" to learn how to indicate that the account activity expire date should always be aligned with the expire date for the renewable benefit that controls a donor's renewal cycle whenever either is manually changed. See the Understanding Marketing and Solicitations chapter to learn about the Activity Type Entry screen.

Length of the Renewal Window

Your organization sets up the length of the "renewal window" by indicating when the renewal window starts and ends based on the number of months before and after a donor's expiration date. Within a renewable activity type, your organization has indicated the start and end of the renewal window for each activity in which a donor can renew.

Note: *Your organization does not necessarily set up a renewal window for each activity within a renewable activity type. Each activity within a renewable activity type represents a "sub-bucket" of the bucket*

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represented by the activity type. Your organization may set up an activity to track donations for giving to a particular purpose without having donors to that activity renew in that activity.

See the Understanding Marketing and Solicitations chapter to learn how to set the renewal window using the Activity Entry screen and when to set this window for an activity.

How TA Handles Upgrades

In TA, you can set up one of three types of upgrades.

- An upgrade of an account's giving level,
- An upgrade of an account's activity, or
- An upgrade of an account's benefits.

The first two types of upgrades may or may not include upgrading the benefit(s) awarded to an account when the account gives an upgrade gift or makes an upgrade pledge. The upgrade functionality

- enables an account to be awarded a benefit that requires an amount greater than the amount of the account's gift or pledge, and
- ensures that such a benefit is marked deliverable by TA even though the account's gift or pledge normally would not cause TA to mark the benefit ready for delivery.

See Also:

[How TA Awards Upgraded Benefits to an Account](#)

[How TA Marks Upgraded Benefits Deliverable](#)

How TA Awards Upgraded Benefits to an Account

When your organization conducts a campaign that can upgrade donors' benefits, your organization sets up one or more source codes to use for the campaign. When an account gives to the campaign, TA completes the following steps.

1. TA finds the activity to which the gift or pledge is credited. Usually, this activity comes from the source code through which your organization received the gift or pledge, but sometimes, during entry, the activity is changed based on the donor's wishes and your organization's policies.
2. TA references the gift type rules your organization assigned to this activity. TA includes multiple gift type rules. For each activity, your organization has selected one of these rules to determine what gift type should be assigned to each gift or pledge that is credited to the activity and whether the gift type should be used for an upgrade.
3. If the gift type is used for upgrades, TA references the Upgrade field for that activity. The Upgrade field contains the gift amount that TA should use for upgrade gifts. Most of the gift amounts refer to account activity information. For example, your organization can set the Upgrade field to the total amount paid for the current calendar year.

Note: *The account activity information shows selected and summary giving to an activity type for an account. An activity type is a "bucket" to which an account donates. For example, your organization may divide giving to the organization into the following buckets: Annual Giving, Planned Giving, and Capital Campaign. Each activity is a "sub-bucket" of an activity type. For example, your organization may divide giving to Annual Giving into the following sub-buckets: Basic (\$.01 - \$249.99), Mid-level (\$250 - \$999.99), and Major (\$1000 and over).*

4. TA finds the gift amount from the account for the gift amount noted in the Upgrade field. For example, assume the activity is "AM for Basic Annual Giving, an activity within the Annual Giving ("A") activity type, and the Upgrade field is set to the total amount paid for the current calendar year. TA references the account's Annual Giving account activity record to find the total amount the account has paid during the current calendar year to that activity type. This amount is the "upgrade gift amount."
5. TA adds the upgrade gift amount to the amount of the account's gift or pledge.
6. TA tries to award benefits to the account based on the total from step # 5 instead of on the amount of the account's gift or pledge. In addition, you can manually award benefits to the donor based on the total. TA sets the Met Award Criteria flag to yes for each benefit awarded in this way.

Note: TA still displays the "Gift does not meet benefit requirements. Award anyway?" message if you try to award a benefit that requires an amount greater than the total of the upgrade gift amount to the amount of the account's gift or pledge. See "[Overriding a Benefit's Award and Delivery Criteria](#)" to learn how to award and deliver such a benefit.

Based on this processing, an account can be awarded a benefit that requires a gift or pledge amount higher than that of the account's actual gift or pledge.

Note: See the [Setting Up Marketing and Solicitations](#) chapter to learn about activity types, activities, and source codes. See the [Viewing Transactions, Benefits, and Interactions](#) chapter for an explanation of the account activity record.

How TA Marks Upgraded Benefits Deliverable

TA references the Met Award Criteria flag to mark a benefit ready for delivery. The following steps outline how the Met Award Criteria flag works to enable TA to mark ready for delivery those benefits awarded to an account for an upgrade.

Note: These steps illustrate the general process but may not account for slight differences among the gift type rules that your organization can use for upgrades.

1. An account gives a gift that is not sufficient to award a particular benefit.
2. You send an upgrade mailing to this account.
3. The account responds by sending another gift.
4. When you enter the gift, TA references the gift type rules to determine what gift type to assign to the gift and whether this gift type is an upgrade gift type.
5. If the gift is an upgrade gift type, TA references the Upgrade field to find the upgrade gift amount to use for the account.
6. TA awards benefits to the account using the total of the account's gift and the upgrade gift amount assigned to the activity. In this way, TA uses a dollar amount greater than the gift itself to award benefits. You can also manually award a benefit to an account based on the total of the account's gift and the upgrade gift amount assigned to the activity.
7. TA sets the Met Award Criteria flag to yes for each benefit awarded because this total amount was equal to or greater than the minimum award amount for each benefit.
8. When TA processes this second (upgrade) gift, TA determines if each benefit awarded should be marked ready for delivery. For each benefit awarded to this gift, TA marks the benefit deliverable based on rule #4 for delivery processing ("If the transaction is a gift and the Met Award Criteria flag is set to yes, mark the benefit deliverable") even though the amount of the second gift most likely is less than the delivery amount required to mark the benefit deliverable.

Even though the second gift is paid in full, without the Met Award Criteria flag, TA may not have marked each benefit deliverable if the delivery amount required for each is more than the amount paid for the second gift. The Met Award Criteria flag ensures that the benefit on this gift is marked deliverable when the gift is fulfilled.

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See Also:

[Example \(TA Marking Upgraded Benefits Deliverable\)](#)

Example (TA Marking Upgraded Benefits Deliverable)

For example, assume your organization has one renewable activity type, Annual Giving, for which your organization gives membership, and that your organization set up the Basic Annual Giving activity for donors who give from \$40.00 to \$249.99. Assume also that your organization set the Upgrade field to the current member year paid amount (an account activity field).

1. An account gives \$40 that entitles the account to your basic membership package.
2. Several months later, your organization sends the account an upgrade mailing for Basic Annual Giving.
3. The account responds to the upgrade mailing with a gift of \$25.
4. When you enter the gift, TA sets the gift type on the gift and determines whether this gift type is used for upgrades. Assume that the gift type assigned is used for upgrades.
5. TA awards benefits to the account using the total of the account's gift, \$25, and the upgrade gift amount assigned to the activity, \$40. You or TA can award benefits to the account based on \$65 instead of on \$25. The membership package does not change because TA awards the basic membership package to accounts who give from \$40 to \$249.99, a range in which the \$65 total falls. However, the account wants to use this gift in conjunction with the account's first gift to qualify for a compact disc premium that requires a \$60 gift. The account now qualifies for the compact disc premium. You manually award the compact disc premium.
6. When TA processes this second gift, TA determines if the compact disc premium should be marked ready for delivery. In making this determination, TA only uses the amount of the second gift. The delivery amount for the compact disc is \$60. Even though the account's gift is not enough to meet the delivery criteria, TA marks the premium ready for delivery based on rule #4 for delivery processing. When the \$25 gift is processed, the compact disc is marked deliverable. (If the account had pledged the \$25 instead, when the account paid the \$25 in full, TA would mark the benefit deliverable based on rule #4: "If the transaction is a gift and the Met Award Criteria flag is set to yes, mark the benefit deliverable; if the transaction is a pledge that is paid in full and the Met Award Criteria flag is set to yes, mark the benefit deliverable.")

Note: *The activity type for both gifts must be the same. That is, the upgrade occurred within an activity type. You can't set up upgrade gifts to work across activity types.*

Overriding a Benefit's Award and Delivery Criteria

During pledge and gift entry, you can "override" a benefit's award criteria to award an account a benefit that the account requested but for which the account's gift or pledge does not qualify. When you manually award such a benefit, you must also manually deliver the benefit.

See the [Entering an Account's Transactions and Benefits chapter](#) for more information on awarding benefits through pledge and gift entry.

Note: *When you manually award a benefit, TA does not check the restrictive award criteria for the benefit; TA only uses the minimum and maximum award amounts to determine whether the account's gift or pledge qualifies for the benefit you are trying to award manually. See "[Price Points](#)" to learn about the minimum and maximum award amounts.*

See Also:

[Awarding a Benefit when an Account's Pledge or Gift Doesn't Qualify](#)

[Manually Marking a Benefit Ready for Delivery](#)

Awarding a Benefit when an Account's Pledge or Gift Doesn't Qualify

When you manually award a benefit for which an account's gift or pledge does not qualify, TA displays the message "Gift does not meet benefit requirements. Award anyway?". From this message, you can click <Yes> or <No>. If you click <Yes> on the message, TA sets the Met Award Criteria flag to no for this benefit.

TA will not automatically deliver this benefit based on the benefit's delivery criteria because the Met Award Criteria flag is set to no. You will need to manually mark the benefit ready for delivery based on your organization's policy.

Manually Marking a Benefit Ready for Delivery

If you manually award a benefit to an account when the account's gift or pledge does not qualify for the benefit, you must manually mark the benefit ready for delivery. To indicate that a benefit is ready for delivery, you need to mark the OK to Deliver checkbox for the awarded benefit. You can mark this checkbox at one of the following two points in time:

- when you award the benefit using the Benefits Requested window or
- after the account's pledge or gift has been processed using the Benefits Awarded screen.

Note: *You can manually mark any awarded benefit ready for delivery. That is, you can manually override the delivery criteria for a benefit awarded automatically by TA or by you, regardless of whether the account's gift or pledge met the benefit's award criteria.*

See "[Benefit Awarding and Delivering](#)." to learn how TA uses the Met Award Criteria flag to mark benefits ready for delivery. See the [Entering an Account's Gifts and Benefits chapter](#) to learn how to mark a benefit ready for delivery at the time you award the benefit using the Benefits Requested window or after the account's pledge or gift has been processed using the Benefits Awarded screen.

Overview of the Benefit Entry Screen

You can view and work with benefits on the Benefit Entry screen.

Accessing the Screen

You can access the Benefit Entry screen by selecting Benefit Entry from the Benefit Management module on the Main Menu. You can also access the Benefit Entry screen by clicking <Benefits> from the Customer Service Entry or Event Overview screens.

First Page of the Benefit Entry Screen

When you access the Benefit Entry screen, TA displays the first page of the screen, called "Benefit Entry." This screen is where you set the benefit characteristics, the basic award criteria for the benefit, the delivery criteria for the benefit, and the automatic processing options for the benefit.

Second Page of the Benefit Entry Screen

This page of the screen is where you set the restrictive award criteria, complimentary information, offer dates, and marketing points for the benefit. You can access the second page of the Benefit Entry screen, "Benefit Entry (Page 2)," by clicking the <Page 2> button on the Benefit Entry screen.

Benefit Entry (Inventory) View

You can use this page of the screen to enter inventory information about the benefit (e.g., a premium). You can access the Benefit Entry (Inventory) view by clicking <Inventory> on the first page of the Benefit Entry screen.

Benefit Entry (Package) View

You identify the benefit as a benefit package, indicate the type of benefit package (i.e., package or selection package), and enter the items or category for the package on this page of the screen. You can access the Benefit Entry (Package) view by clicking <Package> on the first page of the Benefit Entry screen.

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Benefit Procedures

The following update procedures relate to benefits. See the [Understanding Update Procedures chapter](#) for more information about these procedures.

Update Benefit Sent Procedure

The Update Benefit Sent procedure enables you to set the last pulled date for each awarded benefit selected by the query and to update the inventory for each benefit being sent.

Mark Benefits as Backordered Procedure

The Mark Benefits as Backordered procedure enables you to run a benefits query and pull only as many awarded benefits records that are marked OK to Deliver (benefit delivery records) as there are benefit items in inventory and to mark the remaining benefit delivery records as backordered. In addition, the backorder benefits procedure enables you to prioritize which donors should receive the benefits first.

Create Interaction Procedure

The Create Interaction procedure enables you to create an interaction for each account or name selected by the query with which the procedure is run, and set benefit information on the interaction when the query selects benefits, e.g., the benefit code if the interaction represents the mailing of a premium. For example, you can run the Create Interaction procedure when you send a premium to donors, to indicate when the premium was mailed.

Update Current Start Date Procedure

The Update Current Start Date procedure enables you to reset the start date for specified activities and activity types. For example, you can use this procedure with queries that select your organization's membership publication in order to ensure that new or renewing members get a sufficient number of issues. You can also run this procedure without a query.

Set Backorder Notice Date Update Procedure

The Set Backorder Notice Date procedure enables you to set the backorder notice date on the Benefits Awarded screen when you mail a backorder notice to a group of donors.

Benefit Auto-Renewal Procedure

The Benefit Auto-Renewal procedure is generally run with end-of-month processing to ensure that donors with sustaining pledges assigned automatically renewing benefits are renewed on a regular basis; both the pledge and the benefits are renewed. See the Understanding Procedures chapter for more information about this procedure.

Award Event Benefits

Use this procedure if you want TA to evaluate if registrants should be awarded the benefit that he or she has requested (based on the value in the Requested field on the Details tab in the Registration Entry screen) and award it if they do qualify. You can run this procedure from the main menu or with any registration query. (That is, the query must have a Query type of Registrations.)

Award Complimentary Benefits

Use this procedure if you want to award complimentary benefits (such as memberships) to a group of accounts or individuals (such as volunteers) based on the records that are selected from an Accounts or Names query type. For example, you can create a query find all volunteers who worked a specific amount of hours (or higher) and use the update procedure to create \$0 transactions that have the benefit(s) of your choice.

Benefit System Preferences

The following table lists each system preference for the Benefit Management module and includes a reference to the section of this chapter that describes tasks affected by the system preference. For an explanation of each system preference, refer to the [Setting System Preferences chapter](#).

System Preference	See
Align Expiration Dates in Packages	Align Expiration Dates in Packages
Amount of Cost or Pledge to Send Benefit	Percent of Pledge Minimum Payment Amount

System Preference	See
	Using the Cost Information to Set a Benefit's Delivery Criteria
Default Activity Type	Creating a Benefit
Default Inventory Location	Entering Inventory Information for a Benefit
Giving Level Calculation Method	Setting the Donor's Giving Level Based on the Package

Benefits Step-by-step

[Finding a Benefit](#)

[Creating a Benefit](#)

[Entering Inventory Information for a Benefit](#)

[Building a Benefit Package](#)

[Deleting or Inactivating a Benefit](#)

Finding a Benefit

When you access the Benefit Entry screen, TA displays the Find Benefits window to enable you to find one or more benefits (i.e., benefit items or benefit packages). This window contains the following search criteria.

- The benefit code
- The activity type
- The benefit type
- The benefit category
- The premium category
- The minimum amount (i.e., the minimum award amount)
- The status

You can press the [F9] key to view the list of valid codes in any of the fields except Benefit Code and Minimum Amount.

See Also:

[Finding a Specific Benefit](#)

[Finding a Set of Benefits Based on One or More Criteria](#)

Finding a Specific Benefit

To find an existing benefit, complete the following steps.

1. Access the Benefit Entry screen. TA displays the Find Benefits window.

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2. Enter the code for the benefit in the Benefit Code field. If you don't remember the benefit code, you can
 - Enter the first letter or letters that you believe begin the code and press the [F9] key. TA displays the list of benefits (by code) with codes that begin with the letter(s) you entered. You can select the appropriate benefit from this list.
 - Enter the wildcard percent ("%") followed by a set of letters you think are in the description of the benefit (e.g., "%TOTE" to search for all tote bags) and press the [Alt] [F9] key combination. TA displays the list of benefits (by description) where the description contains the letter(s) you entered. You can select the appropriate benefit from this list.
3. Click <Find>. TA displays the benefit on the Benefit Entry screen.

Finding a Set of Benefits Based on One or More Criteria

You can find a set of benefits by setting the fields on the Find Benefits window as follows:

- You can leave the Benefit Code field blank and set one or more other fields.
- You can use the wildcard percent ("%") in the Benefit Code field. If the codes for a set of benefits begin with the same series of characters or digits, you can find that set of benefits by entering the series of characters or digits followed by the wildcard percent ("%") and clicking <Find>.

If you set one or more of these fields and click <Find>, TA finds the benefits that meet the criteria you entered on the Find Benefits window. TA displays the first of these benefits on the Benefit Entry screen; all matching benefits appear in the List Block. You can view each benefit on the Benefit Entry screen by clicking <Prev> or <Next> on the toolbar as appropriate or by scrolling through the List Block.

For example, you can find all membership benefit packages by setting the Benefit Type field to "P" for package, the Benefit Category field to "M" for membership, and clicking <Find>.

Note: *You must set at least one of the search criteria to find one or more; you cannot leave all fields on the Find Benefit window blank and click <Find>.*

Searching Based on the Minimum Award Amount

You can find a set of benefits based on the minimum award amount for each benefit. You should enter the amount in DDD,DDD,DDD.CC format where "DDD,DDD,DDD" represents the dollars and "CC" represents the cents. If you are entering a whole dollar amount, you don't need to enter the decimal point plus two zeros.

You have two options when entering an amount into the Minimum Amount field.

- You can enter the amount by itself. When you enter the amount, TA selects each benefit where the minimum award amount for the benefit equals the amount you entered.
- You can enter the amount in combination with one of the following three mathematical symbols: "<" for less than, ">" for greater than, and "=" for equal to; you can also combine the equal to symbol with either the less than symbol or the greater than symbol. For example, you can enter ">=40" in the Minimum Amount field to select each benefit where the minimum award amount for the benefit is greater than or equal to \$40.

Creating a Benefit

Whether you want to end up with a benefit item, benefit package, or selection package, you start by creating the benefit item on the Create New Benefit window. To access the Create New Benefit window, select the Benefit Entry screen from the Menu and click <New> from the Find Benefits window that appears. (Or, if you have a benefit currently displayed on the Benefit Entry screen, click <New> on the toolbar.)

1. Enter the code for the benefit. You can enter a code up to 8 characters in length.
2. Enter the activity type if the benefit should be associated with a specific activity type (e.g., an anchor benefit). Change the default if necessary. You can press the [F9] key to view the list of activity types.

Note: TA defaults the activity type to the one your organization entered as the [Default Activity Type](#) system preference. See "[Renewable and Anchor Benefits](#)" to help you determine whether you need one (or more) anchor benefits. See "[Importance of the Activity Type](#)" to review the guidelines for assigning an activity type to a benefit.
3. Enter the benefit category for the benefit. You can press the [F9] key to view the list of benefit categories. You can leave the benefit category blank. If the benefit is an anchor benefit, set the benefit category to "M" for membership.
4. Enter the premium category only if the benefit is a premium; you cannot access this field unless you set the Benefit Category field to "P" for premium. You can press the [F9] key to view the list of premium categories. You can leave this field blank.
5. Click <Create> to create the benefit. TA displays the benefit on the Benefit Entry screen.
6. In the Description field on the Benefit Entry screen, enter the description of the benefit. You can enter up to 40 characters.

Once you create the benefit, you must enter the benefit's characteristics, award, and delivery criteria. You can then mark automatic processing options, enter inventory information, or build a benefit package if appropriate.

See Also:

[Considerations Before You Create a Benefit](#)

[Entering Benefit Characteristics](#)

[Setting Award Criteria](#)

[Setting Delivery Criteria](#)

[Setting Automatic Processing Options](#)

Considerations Before You Create a Benefit

To set up benefits in Team Approach[®] (TA), you should understand the following:

- [Important basic information](#) about a benefit, such as the definition of a benefit, and an overview of the kind of information you can set to award and deliver a benefit to an account.
- What an "[anchor benefit](#)" is.
- What a [renewable activity type](#) is.
- The steps you must complete to [set up a benefit](#).
- How a benefit is [awarded and delivered](#) to an account.
- How a renewable benefit is [processed](#).

Think about Naming Conventions

When you create a benefit, you must assign it a benefit code. When you determine each benefit code, Target Software, Inc. recommends that your organization follow a set of naming conventions that

- Make it easy to search for a benefit from a list of benefits. For example, when awarding a benefit to an account, you can access the list of all benefits. You can reduce the list by typing in the first letter(s) of the code for the benefit you want to award. If you are searching for a premium and all premium codes begin with the letter "P," you can reduce the list of benefits to all premium benefits by typing in the letter P. Therefore, the naming convention you use to code benefits can facilitate the ease with which users search for a benefit.

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- Make it easy for you to identify a benefit's benefit category by looking at the benefit's code.

Note: Although the benefit code can be up to eight digits or characters in length, we recommend you set up the codes with the shortest length possible to ease data entry.

TA is delivered with codes that use the following conventions:

Category	Convention
Membership Package	Codes begin with "M" (e.g., "MBAS" for Basic Membership Package, "MCOM" for Complimentary Membership Package).
Member Card and Publication	Codes begin with "A" (e.g., "ACARD," "AGDE").
Membership (intangible item)	Code is "MEM."
Premium	Codes begin with "P" (e.g., "PTOTE" for the Organization Tote Bag).
Newsletter	Codes begin with "N" (e.g., "NCIR" for the Circle Newsletter).

Entering Benefit Characteristics

For each benefit you create, you must enter the **Unit Type** (the options are number, week, month) and the number of **Units Awarded** for the benefit. The combination of these settings indicates what an account receives when the benefit is awarded to the account. For example, if your organization awards a donor a twelve-month publication, you assign the unit type of "M" for month and set the number of units to "12" when setting up the benefit that represents this publication. If your organization awards a donor an organization tote bag, you assign the unit type of "N" for number and set the number of units to "1" when setting up the benefit that represents the organization tote bag.

TA defaults the unit type and the number of units to award based on the benefit category. If you set the benefit category to "M" for membership, TA defaults the unit type to "M" for month and the units awarded to "12." If you don't set the benefit category or you set it to a category other than "M", TA defaults the unit type to "N" for number and the units awarded to "1."

Considerations When Setting Unit Type and Units Award

Note: You do not set this information for a selection package. For selection packages, TA uses the information for the **item** selected from the package.

<p>Renewable Benefits such as Memberships</p> <p><i>The length of the donor's Giving Cycle and the Expire Date are based on the unit type and number of units for the anchor benefit that corresponds to your organization's renewable activity type(s).</i></p> <p><i>For example, if your organization has a one year membership for which the giving cycle is twelve months, then set the unit type to "M" and number of units to "12" for the MEM benefit.</i></p>	<p>If the benefit you create should be assigned start and expire dates because the benefit can be renewed, you must set the unit type to either "W" for week or "M" for month with the appropriate number of units to award. TA uses the unit type and number of units to award to calculate the expire date. You must also mark the benefit as renewable to indicate that TA should set the start date and calculate the expire date. See "Information About the Renewable Option" to learn how to mark a benefit as renewable.</p> <p>If your organization awards a twelve-month, renewable membership to donors and this membership includes a card and a publication, you create a membership package that contains these items. You first set up each benefit (the membership itself, the card, and the publication) in TA. For each benefit, you will set the unit type to "M" for month and the number of units to award to "12." You will then set up the membership package for which you will also set the unit type to "M" for month and the number of units to award to "12."</p> <p>See "Recommended Approach for Creating Membership Packages" to read the guidelines for identifying what membership packages you need to create.</p>
<p>Non-renewable Benefits</p>	<p>If the benefit you create isn't renewable, i.e., it should not be assigned start and expire dates, you should set the unit type to "N" for number and the number of units to award to "1."</p> <p>Note: You can award multiple non-renewable benefits to an account through pledge and gift entry based on your organization's marketing practices. For example, if an account requests three of your organization's tote bags, you can award the tote bag three times. See "Special Process for Awarding Premiums."</p>

Premium Benefits	You must set the unit type to "N" for number and the number of units to award to "1." TA prevents you from changing this information when the benefit category is set to premium.
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Additional Information you can Associate with the Benefit

Option	Description
Office	<p>Identify the office associated with the benefit, if applicable, by entering the office code in the Office field. You can press the [F9] key for a list of office codes.</p> <p>TA automatically sets the office code for the benefit based on the activity type you assign to the benefit under the following circumstances.</p> <ul style="list-style-type: none"> Your organization has multiple chapters being represented by different office codes and Your organization has assigned one office code per activity type (e.g., each activity type represents a chapter). <p>If an office code is not assigned to the activity type you assign to a benefit, you can set the Office Code field.</p> <p>Note: <i>If your organization has assigned one office code per activity type, you cannot change the office code set by TA.</i></p>
Interests (Benefits)	<p>When you assign an interest to a benefit (for example, assigning an interest of "Birds" to a tropical bird calendar) and an account is awarded that benefit, TA creates or updates that interest for the account when the benefit is posted to the account. By assigning interests to a benefit, you can have TA automatically add to an account's interest profile, which can then be used for segmentation and analysis.</p> <p>Note: <i>If TA creates an interest for an account, TA creates an implied interest since your organization is assuming the account has this interest based on the account selecting the benefit, not based on the account directly informing your organization of the interest.</i></p> <p>You can assign up to three interests to a benefit by entering the interest codes in the Interest fields. You can press the [F9] key in each Interest field to view the list of interests. When you assign an interest to a benefit, TA removes that interest from the list so that you can't assign the same interest to a benefit more than once.</p> <p>See the Managing Account Information chapter to learn about interests and how to view an account's interests.</p>
Classifications (Benefits)	<p>You can assign up to three classifications to a benefit on the second page of the Benefit Entry screen. If the benefit is awarded to an account, TA creates that classification for the account if the classification does not already exist for the account. (If the account already has an expired or inactive classification, TA adds an active and un-expired one.)</p> <p>See the Managing Account Information chapter to learn about classifications and how to view an account's classifications.</p> <p>Related Functionality</p> <p>See "Restrictive Award Criteria" to learn how to require that a classification exist on the account before it can automatically be awarded by TA. See "Setting Automatic Processing Options." to learn how to mark a benefit for automatic awarding by TA.</p>
Offer Dates	<p>If you want to note that the benefit is being offered for a limited time (i.e., the benefit is only available during a specified time period), you can enter the start and end dates of the time period during which a donor can be awarded the benefit in the Start Date and End Date fields (on Page 2 of the Benefit Entry screen). Use the MM/DD/YY format when entering these dates. <i>These fields are for information only and are not used by TA to award a benefit.</i></p>

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Marketing Points	If you want to describe the marketing points ("selling points") to use when describing the benefit, you can enter this free text information in the Marketing Points field on the second page of the Benefit Entry screen.
Relationship Type	<p>If you want to indicate the relationship TA should set for the giver and recipient when a gift membership benefit is awarded, you can enter the relationship type (giver to recipient) in the Relationship Type field on the second page of the Benefit Entry screen. You can press the [F9] key for a list of relationship types.</p> <p>Note: <i>You can only set this field for a benefit item that has the benefit category of Membership.</i></p> <p>When the relationship record is first created, TA sets the start date of the relationship to the gift date, and the end date of the relationship to the expiration date for the benefit. If the relationship already exists (for example when the gift giver is renewing the gift membership), TA updates the end date of the relationship to be the expiration date of the new membership benefit.</p>

See Also:

[Complimentary Information](#)

Complimentary Information

If you have large groups of accounts to which you award a benefit compliments of your organization on a regular basis, you can create a complimentary benefit. For example, your organization may give all employees membership to the organization; you can create a complimentary membership package for this group.

For a complimentary benefit, you can set both the Minimum Amount field and the Maximum Amount field to zero. See "[Price Points](#)" to understand how TA uses these fields to award a benefit to an account.

You can also enter a complimentary code and department. The Complimentary Code field indicates the reason a complimentary benefit is created (e.g., Campaign Prospect). The Department field indicates who awards the benefit (e.g., Capital Campaign). You can set these fields on the second page of the Benefit Entry screen, which can be accessed by clicking <Page 2> on the first page of the Benefit Entry screen. You can press the [F9] key in both of these fields for a list of values.

Note: *If the complimentary codes and departments differ for accounts awarded the benefit, you can leave the complimentary code and department blank on the benefit itself, requiring staff to enter this information during pledge and gift entry.*

For accounts to which you award a complimentary benefit on an infrequent basis, you can award the appropriate benefit during gift entry. For example, you can award the major donor membership package to a prospective major donor or a capital campaign contributor to whom you want to give major donor membership. At that time, you can enter the appropriate complimentary code and department.

Setting Award Criteria

When you set up a benefit, you need to indicate the minimum and maximum amount of money an account must pledge or give to qualify for the benefit.

The **Include Prior Gifts** field: Use this field when you want to allow awarding of a specific benefit based on a donor's prior giving rather than just on the amount of one transaction. If you use the Include Prior Gifts field on any auto-awarded membership benefit package, you should use it on ALL of the packages within that Activity Type in order to avoid the potential that a transaction could qualify for more than one membership benefit package.

The list of values for the Include Prior Gifts field references all the fields from the Account Activities table that hold a dollar amount, such as Current Calendar Year Total, or Current Member Year Total. If you choose a value, you are indicating that you would like TA to use the total of the value of the transaction, along with the value from Account Activities you have indicated, to determine the qualifying amount for the awarding of the benefit.

See "[Setting Automatic Processing Options](#)" to learn how to mark a benefit as one that TA should award automatically.

- When a benefit is awarded to an account, TA marks a "flag," called the Met Award Criteria flag, to indicate whether the account's pledge or gift met the award criteria you set up for the benefit. See "[Significance of the Met Award Criteria Flag](#)" to learn how TA uses the flag to mark a benefit ready for delivery to an account.

See Also:

[Price Points](#)

[Offer Amounts](#)

[Restrictive Award Criteria](#)

Price Points

The "price points" refer to the amount of money, sometimes defined as a range, that a donor must pledge or give to qualify for a benefit. These price points are part of a benefit's award criteria. For each benefit (whether an item, package, or selection package), you need to identify the price points located in the Award Criteria section on the first page of the Benefit Entry screen.

- The minimum amount of the gift or pledge that awards this benefit, i.e., the account must pledge or give at least this amount of money to qualify for this benefit. You enter this amount into the Minimum Amount field.
- The maximum amount of the gift or pledge that awards this benefit, i.e., the account must pledge or give no more than this amount of money to qualify for this benefit. You enter this amount into the Maximum Amount field. Generally, you set the maximum award amount when setting up a membership package. See "[Recommended Approach for Creating Membership Packages](#)" which includes a guideline for setting the maximum amount. If the benefit is a premium, you cannot set the maximum amount.

During gift entry, TA looks at the minimum and maximum award amounts for each benefit awarded for an account's pledge or gift, whether you manually award the benefit or TA awards the benefit. If the benefit is a package, TA does not check the price points for each item in the package.

Offer Amounts

Offer amounts are particular dollar amounts that donors are asked to give in order to receive a benefit item or package when they respond to a specific solicitation. The offer amount for the benefit can be different for each donor you solicit. For example, your organization might send a mailing to a group of donors, and on each person's mailing you would ask for a minimum donation in order to receive a benefit. Donor 1 might be asked to give \$75 but Donor 2 only \$25. When the donors respond to the solicitation, the benefit is awarded only if the donors give an amount greater than or equal to the offer amounts on their solicitations. For example, if Donor 2 gives \$25, he receives the benefit, but if Donor 1 gives \$25, he does not, because he did not give enough to qualify for the benefit (Donor 1 had to give at least \$75 in this example).

When you set up a benefit (item, package, or selection package), you can specify that when an account or individual responds to a particular offer, she must give a donation greater than or equal to the offer amount in order to qualify for the benefit. In order to use the functionality for offer amounts, you must do two things:

1. Specify that the benefit item, package, or selection package has a specific offer amount that must be met in order to receive the benefit. To set these criteria, mark the Must Meet Offer Amount? checkbox on Page 2 of the Benefit Entry screen.
2. Create solicitation interactions with an offer amount assigned to them. Or, [upload interactions](#) that have been assigned offer amounts.

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See Also:

[Creating Solicitation Interactions](#)

Creating Solicitation Interactions

If you are creating the solicitation interactions in conjunction with Offer Amount benefit configuration, you first need to specify the different offer amounts that TA should calculate for the donors. For more information, see [Setting up Ask Amount Rules and Offer Amounts](#). Then, you run the Create Interaction procedure to create an interaction that represents the solicitation and to set the offer amount. You must use the interaction category of "SO" and the interaction type of "SOL". If you use different interaction categories and/or types, TA does not evaluate the offer amount when awarding the benefit(s). You also need to set the Ask Amount Rules field on the query that you run the Create Interaction procedure with or on the query and output schedule record. This allows TA to calculate the offer amounts you set up in the specified ask amount rule and assign the offer amounts to the interactions that are created. For more information on creating an interaction, see [Create Interaction](#).

Restrictive Award Criteria

For each benefit (whether an item, package, or selection package), you can identify the following restrictive award criteria TA should use if the benefit is marked for automatic awarding. For example, if you want to set up a benefit to be automatically awarded only to those accounts that give a new membership gift that is paid in installments using a credit card, you can set the Gift Type field to "NW" for new, the Gift Kind field to "IN" for installments, and the Payment Method field to "B%." (Every credit card code begins with the letter "B"; by using "B%," you don't need to enter each individual credit card code.) You would also need to set at least the minimum award amount for the benefit and mark the Automatically Award? checkbox.

TA checks the restrictive criteria (in addition to the minimum and maximum award amounts set for the benefit on page one of the Benefit Entry screen) when

- TA automatically awards a benefit (an item, a package, or a selection package).
- The automatically awarded benefit is a package; TA checks the restrictive criteria for each item in the package in addition to the package itself.
- You manually award a package of benefits or a selection package (not an item). In this situation, TA checks the restrictive criteria only for each item in the package or for the item selected from the package; TA does not check the restrictive criteria for the package itself or the selection package itself.

Each of these criteria is represented by a field located on the second page of the Benefit Entry screen. You can press the [F9] key for a list of values in most fields and you can enter one or more values in fields. You can either select from the list multiple times to enter multiple values or type in each value, separating each by a comma. You can also use the wildcard percent ("%").

Note: *You can't mix the use of the wildcard with the entry of a comma-separated list. For example, you should not enter for the payment method either "B%,CK" as the list of restrictive payment methods nor "B%, P%."*

Restrictive Award Criterion Fields	Example	Additional Information
Payment Method	A benefit offered only for credit card gifts	
Gift Type	A benefit offered only for additional gifts	
Gift Kind	A benefit offered only for installment gifts	
Package	A benefit offered only for a particular package used with one or more solicitations	
Source Code	A benefit offered only for gifts made to a specific solicitation (e.g., during a specific pledge break	

Restrictive Award Criterion Fields	Example	Additional Information
Activity	or in response to a specific mailing) A benefit offered only for gifts made to planned giving	
Campaign	A benefit offered only for gifts to lapsed campaigns	
Initiative	A benefit offered only for gifts made to solicitations initiated in March 1999 ("9903")	
Technique	A benefit offered only for gifts in response to telemarketing	
Event	A benefit offered at specific events	
Account category	A benefit offered only for corporate accounts	
Account type	A benefit offered only for large corporations	
Disqualifying Classification	A benefit that should not be awarded to an account assigned the student discount classification.	<p>You can enter only one classification code, but you can enter one or more classification values for each classification code.</p> <p>Use this field to suppress the benefit from being awarded if an account has particular classifications.</p> <p>If the benefit is ever automatically awarded to an account with the suppression classification, TA assigns the status of "Suppressed" to the benefit and deletes the benefit during transaction processing (it is not awarded).</p>
Required Classification	A benefit that should be awarded only to an account assigned the student discount classification	<p>You can enter only one classification code, but you can enter one or more classification values for each classification code.</p> <p>Use this field to indicate that only accounts with the corresponding classification should be awarded the benefit.</p> <p>If the benefit is manually awarded and the account isn't assigned the classification, TA creates the classification for the account; in this way, the next time that account qualifies for the benefit, TA will automatically award the benefit to the account because the classification is assigned to the account.</p> <p>If the required classification is not assigned to the account before TA automatically awards benefits, TA does not award the benefit. The benefit can be manually awarded to the account.</p>
The offer amount	A benefit offered to different donors for a different contribution amount, depending on their prior giving history	

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Restrictive Award Criterion Fields	Example	Additional Information
Suppress Gift Types	If a gift has a specific gift type AND the donor has been awarded the benefit during his or her current member year, the benefit will be awarded with a status of P (for Previously Awarded). These benefits are not actually added to the account.	

See "[Setting Automatic Processing Options](#)" to learn how to mark a benefit as one that TA should automatically award if the account's gift or pledge meets the price points you enter on page one as well as any of the restrictive award criteria.

See Also:

[Membership Benefits Restrictions](#)

[Package Restrictions](#)

Membership Benefits Restrictions

If you set the benefit category to "M" for membership for a benefit, TA defaults the Gift Type field to "NW" for new, "RN" for renew, and "RJ" for rejoin as additional restrictive award criteria.

Note: TA references the additional restrictive award criteria (such as gift type) only for a benefit that is automatically awarded by TA.

You should make sure that these gift types are set for

- Each anchor benefit you create for each of your organization's renewable activity types. Generally, you will still set up a package that includes only the anchor benefit if your organization does not offer any other benefits to donors who give to each of your organization's renewable activity types. You will mark this package as one that should be automatically awarded by TA.
- Each membership package you want TA to automatically award to ensure that TA does not automatically award a membership package for all gift types.

These gift types are the ones used for acquiring and renewing donors.

Note: If your organization uses a set of gift type rules that upgrades an account including the account's membership benefits, you should ensure that the Gift Type field includes the renewal and upgrade gift types.

To set up a package to be automatically awarded by TA, see "[Setting Automatic Processing Options](#)."

Package Restrictions

You can set any of these additional restrictive award criteria for a package. However, if you include in the package any benefit items assigned additional restrictive award criteria *more limiting* than those assigned to the package itself, and the account's pledge or gift does not also qualify for the more restrictive item in the package, TA displays the item with a status of "Disqualify" when TA or you awards the package.

For example, assume you set up a package that should be automatically awarded by TA if the account makes an installment pledge. You include in the package an item that requires the account's pledge or gift be an additional gift. Assume an account makes a pledge to be paid by installments and is the account's first gift ever (i.e., a new gift). Based on this pledge, TA awards the account the package you set up. The account qualifies for the package but not for the item in the package that requires the account's pledge to be an additional gift. TA displays that item with the status of disqualify. TA displays the status of "Disqualify" for that benefit on the Batch Detail Entry screen. TA deletes any benefit with the status of "Disqualify" during gift processing.

Note: *If, in the above situation, the package is manually awarded during gift entry, TA still sets the status of the item to "Disqualify."*

If you have one or more items with restrictive criteria that you want to award as part of a package, you should set up a special package with the same restrictions. This way, you will ensure that an account that qualifies for the package will receive all the items in the package.

Setting Delivery Criteria

For each benefit item and package, you need to set up the delivery criteria TA should use to determine when TA should mark a benefit ready for delivery.

Note: You do not set the delivery criteria for a selection package. *TA uses the delivery criteria for the item selected from the package.*

TA includes the following four delivery criteria on the first page of the Benefit Entry screen.

- Minimum number of installments for delivery
- Percent of pledge for delivery
- Minimum payment amount for delivery
- Payment window for delivery

If you leave a criterion blank, TA does not use that criterion when determining whether the benefit is deliverable. You do not need to use all four criteria, but you should use at least one of the first three. See "[How TA Marks a Benefit Ready for Delivery](#)" to learn when TA evaluates whether a benefit should be marked deliverable and how TA uses the delivery criteria for this evaluation.

Leaving all Criteria Blank

If you don't set either the minimum number of installments, the percent of pledge for delivery, or the minimum payment amount for delivery criteria, TA marks an awarded benefit ready for delivery

- When the pledge to which the benefit was awarded is paid in full, or
- At the time the benefit is awarded, if the benefit is awarded to a gift.

See Also:

[Minimum Number of Installments](#)

[Percent of Pledge](#)

[Minimum Payment Amount](#)

[Payment Window](#)

Minimum Number of Installments

You can set the Minimum Number of Installments field to indicate the minimum number of installment payments that the account must make for TA to mark the benefit deliverable. TA uses this delivery criterion only for installment and sustaining gift givers.

If you set this field to "0," TA marks the benefit ready for delivery when the benefit is awarded to an installment donor (i.e., when the account's installment pledge is processed, TA marks the OK to Deliver field for the awarded benefit).

TA does not use this criterion for delivery of packages. If you want the items in the package to be delivered based on the minimum number of installments, you can set this delivery criterion for each item in the package. When TA

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evaluates whether to mark each item deliverable, if the package delivery criteria are not met, TA checks the delivery criteria for each item. See "[Additional Rules for Packages](#)" to learn how TA marks the items in a package ready for delivery.

Percent of Pledge

You can set the Percent of Pledge field to indicate the percent of the account's pledge that the account must pay for TA to mark the benefit deliverable.

If you set this field to "0," TA marks the benefit ready for delivery when the benefit is awarded to an account (i.e., when the account's pledge or gift is processed, TA marks the OK to Deliver field for the benefit).

If you set this field to "100," TA marks the benefit ready for delivery when the account fulfills the pledge for which the benefit was awarded, i.e., 100% of the pledge is paid.

Note: *TA marks the benefit ready for delivery at the time the benefit is awarded if an account gives a gift, the account's gift qualifies for a benefit, the benefit is awarded to the account, and the Percent of Pledge criterion is the only one set for the benefit.*

When TA Defaults the Percent of Pledge

TA defaults the Percent of Pledge field for premium benefits if your organization sets the [Amount of Cost or Pledge to Send Benefit](#) system preference to: "PXXX" where "P" represents percent of pledge and "XXX" represents the actual percent (e.g., P050 means 50% of the pledge).

Minimum Payment Amount

You can set the Minimum Payment Amount field to indicate the amount the account must have paid-to-date against the pledge for which the benefit was awarded for TA to mark that benefit deliverable.

If you set this field to "0," TA marks the benefit ready for delivery when the benefit is awarded to the account (i.e., when the account's pledge or gift is processed, TA marks the OK to Deliver field for the benefit).

Note: *TA marks the benefit ready for delivery at the time the benefit is awarded if an account gives a gift, the account's gift qualifies for a benefit, the benefit is awarded to the account, and the Minimum Payment Amount criterion is the only one set for the benefit.*

When TA Defaults the Minimum Payment Amount

TA defaults the Minimum Payment Amount field for premium benefits if your organization set the [Amount of Cost or Pledge to Send Benefit](#) system preference to "CXXX" where "C" represents the cost of the benefit and "XXX" represents the actual percent of that cost (e.g., C050 means 50% of the cost of the benefit).

TA calculates the cost of the benefit by totaling the values in the Unit Cost field, the Shipping Cost field, and the Handling Cost field located on the Benefit Entry: Inventory view.

To enter these costs, click <Inventory> on the first page of the Benefit Entry screen to access the Benefit Entry: Inventory view. TA updates the payment amount in the Delivery Criteria block with the Amount of Cost or Pledge to Send Benefit system preference set to "CXXX", each time you update the cost fields.

Payment Window

You can set the Payment Window field to indicate that the benefit should only be delivered based on the timeliness of the payment, i.e., the benefit is only delivered if the account pays within a certain number of days from the time the account pledged. The payment window is used only in combination with the minimum payment amount and the percent of pledge.

If you set this field to "0," TA marks the benefit ready for delivery only if the account meets the minimum percent of pledge for delivery or the minimum payment for delivery on the day the benefit is awarded to the account.

Do not set this criterion for a benefit package. TA does not use this criterion for delivery of packages.

Setting Automatic Processing Options

TA includes the following checkboxes on the first page of the Benefit Entry screen to enable you to view and set the automatic processing options for a benefit.

Checkbox	Mark this checkbox to
Automatically Award?	indicate that you want TA to automatically award the benefit at the time of pledge and gift entry, if the account's pledge or gift meets all of the benefit's award criteria.
Automatically Renew?	indicate that you want TA to automatically renew this benefit before it expires (e.g., for an ongoing benefit given compliments of the organization or a benefit awarded for a sustaining gift).
Extend Existing Benefit?	indicate that you want TA to extend the expire date for a renewable benefit.
Prompt for Recipient?	<i>This feature is not currently in use.</i>
Renewable?	identify the benefit as one that TA can renew, e.g., membership.

See Also:

[Information About the Automatically Award Option](#)

[Information About the Automatically Renew Option](#)

[Information About the Extend Existing Benefit Option](#)

[Information About the Renewable Option](#)

[Automatic Processing Options TA Defaults on the Benefit Category](#)

Information About the Automatically Award Option

You should mark the Automatically Award? checkbox to have TA automatically award the benefit at the time of pledge and gift entry if the account's pledge or gift meets all of the benefit's award criteria.

You must assign an activity type to the benefit for TA to automatically award the benefit. If you don't assign an activity type to the benefit and you mark the Automatically Award? checkbox, TA does not include the benefit in the list of those benefits TA tries to award for an account's gift or pledge.

Note: *You should be thoughtful when marking the Automatically Award? checkbox. When this checkbox is marked, each time an account gives a donation that meets all of the award criteria for the benefit, the account is awarded the benefit. For example, if you mark this checkbox for a premium, each time an account gives a donation that meets all of the award criteria for the premium, the premium is awarded to the account.*

See Also:

[Account and Gift Information TA References](#)

[How TA Chooses from Multiple Qualifying Benefits](#)

[Automatically Awarding a Package Containing an Anchor Benefit](#)

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Automatically Awarding Membership Packages

Account and Gift Information TA References

When TA tries to automatically award benefits for an account's gift or pledge, TA compares the following account and gift information to the award criteria set up for each benefit that has been marked for automatic awarding.

<u>Account Information</u>	<u>Benefit's Award Criteria</u>
The account's account category	The account category(ies)
The account's classifications	The required classification(s) The disqualifying classification(s)

<u>Gift/Pledge Information</u>	<u>Benefit's Award Criteria</u>
The pledge amount for a pledge	Minimum and maximum amount
The payment amount for a gift	Minimum and maximum amount
The payment method	The payment method(s)
The event	The event(s)
The gift kind	The gift kind(s)
The gift type	The gift type(s)
The activity	The activity(ies)
The campaign	The campaign(s)
The initiative	The initiative(s)
The source code	The source code(s)
The technique	The technique(s)
The package	The package(s)

How TA Chooses from Multiple Qualifying Benefits

If two or more benefits are marked for automatic awarding within the same activity type and require the same minimum award amount, TA uses the following three fields from the additional restrictive award criteria to determine which of the benefits to award to the account's pledge or gift.

- Source Code
- Disqualifying Classification
- Required Classification

During gift and pledge entry, after you enter the information for an account's gift or pledge, TA tries to award any benefits set up for automatic awarding as follows:

1. TA finds all of the benefits marked for automatic awarding.
2. TA compares the activity type assigned to each benefit to the activity type from the source code for the account's gift or pledge.
3. TA reduces the list of benefits selected to only those for which the activity type matches the one from the source code for the account's gift or pledge.
4. For each benefit in the remaining list, TA compares the information from the account's gift or pledge to the award criteria for the benefit.

5. Based on the comparisons for each benefit in the remaining list,
 - If the award criteria from *only one benefit* matches the account and gift information, TA awards that benefit.
 - If the award criteria from more than one benefit matches the account and gift information,
 - If the restrictive criteria for only one of these multiple matching benefits includes the source code, the disqualifying classification, or the required classification, and the information from the account's gift or pledge matches this restrictive information, TA awards this benefit.
 - If TA is unable to select a benefit, TA displays the list of these ("qualified") benefits from which you can select the appropriate benefit to award. *However, if the gift or pledge is entered as part of an upload or conversion program, TA is unable to display a list and instead assigns the first benefit that meets the criteria. Because of this, you should be especially careful not to let your organization's benefits overlap.*

See Also:

[Examples \(TA choosing from Multiple Qualifying Benefits\)](#)

Examples (TA Choosing from Multiple Qualifying Benefits)

For example, you set up two benefits to be automatically awarded for the same minimum award amount in the same activity type; you did not set up any other benefits to be awarded automatically for this minimum amount in this activity type.

- For the first benefit, you set up additional restrictive award criteria *excepting the source code or classifications*.
- For the second benefit, you set the source code award criterion to restrict the benefit to gifts and pledges received through a particular source code.

An account gives a gift that meets the activity type and minimum amount for both benefits.

- If the source code for this gift is not the same as the one required to award the second benefit but does meet the additional restrictive award criteria for the first benefit, TA automatically awards the first benefit.
- If the source code for this gift is the same as the one required to award the second benefit, TA automatically awards the second benefit.

If the information from any of these three fields is set on both benefits and that information matches the information from the account's gift or pledge, TA displays the list of qualifying benefits to enable you to choose which of these matching benefits should be awarded for the account's gift or pledge. For example, you set up two benefits to be automatically awarded for the same minimum award amount in the same activity type; you did not set up any other benefits to be awarded automatically for this minimum amount in this activity type.

- You restrict the first benefit to gifts and pledges from accounts assigned a particular classification (i.e., you set the required classification award criterion).
- You restrict the second benefit to gifts and pledges received through a particular source code.

An account gives a gift that meets the activity type and minimum amount for both benefits. The account is assigned the classification required to award the first benefit, and the source code for this gift is the same as the one required to award the second benefit. TA displays both benefits in the list of qualifying benefits. You then can select which of the two benefits to award to the account.

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Understanding Benefits

Note: *When a gift or pledge is entered as part of an upload or conversion program, TA is unable to display a list and instead selects the first benefit that meets the criteria, so be especially careful not to let your organization's benefits overlap.*

Automatically Awarding a Package Containing an Anchor Benefit

You should mark the Automatically Award? checkbox for each package you set up that includes an anchor benefit. For example, assume your organization has one renewable activity type for which you set up one package containing the anchor benefit. If an account gives to this activity type and the amount of the account's pledge or gift qualifies the account for that package, TA automatically awards that package—you don't need to manually award the package. When TA marks the package deliverable, TA sets up the giving cycle and expire date for the donor.

Automatically Awarding Membership Packages

You should mark the Automatically Award? checkbox for your membership packages. If the amount of the account's pledge or gift qualifies the account for one of your membership packages, TA automatically awards that membership package—you don't need to manually award the membership.

Information About the Automatically Renew Option

You should mark the Automatically Renew? checkbox to have TA automatically renew a benefit when it is meant to be an ongoing benefit given compliments of the organization or when it is awarded for a sustaining gift.

A sustaining gift refers to a gift that the donor has specified should be ongoing until the donor stops the gift. Your organization does not send out renewal notices for this gift but can upgrade the donor's sustaining gift through an upgrade campaign. Your organization may want a sustaining donor to receive one or more benefits for the sustaining gift as long as the gift is active.

Note: *Through pledge entry, TA marks any benefit automatically awarded to a donor who gives a sustaining gift (i.e., the gift kind is "SG" for sustaining gift) as one that should be automatically renewed. TA does not mark a manually awarded benefit as one that should be automatically renewed. During pledge entry, you can manually mark such a benefit as one that should be automatically renewed based on your organization's policy.*

In TA, you enter the donor's sustaining gift as an installment pledge to which one or more automatically renewed benefits are awarded. As appropriate, your organization automatically renews the pledge and the benefit(s) using the Benefit Auto Renewal procedure. See the Understanding Procedures chapter to learn how the Benefit Auto Renewal procedure works.

Note: *The Benefit Auto Renewal procedure is dependent on the account being identified as one with automatic renewal treatment. You identify the account in this way by assigning the auto-renewal classification code with the appropriate classification value. See the [Managing Account Information chapter](#) to learn about classifications.*

Information About the Extend Existing Benefit Option

You should mark the Extend Existing Benefit? checkbox to have TA extend the expire date for a renewable benefit. TA automatically marks this checkbox when you indicate that the benefit can be renewed. See "[Information About the Renewable Option](#)" to learn how to mark a benefit as renewable.

If a benefit is renewable and the Extend Existing Benefit? checkbox is marked, TA determines the benefit's expire date based on the value of the Extend field for the gift type (e.g., "RJ" for rejoin) that is assigned to the pledge or gift to which the benefit is awarded. The Extend field can be set to one of three values.

- "R" for reset
- "Y" for yes

- "N" for no

Note: TA sets the start and expire dates for a renewable benefit when the benefit is marked deliverable.

See Also:

[Impact of the Extend Field Being set to Reset](#)

[Impact of the Extend Field Being set to Yes](#)

[Impact of the Extend Field Being set to No](#)

Impact of the Extend Field Being set to Reset

If the Extend field on the gift type is set to reset, TA sets the benefit's expire date based on the start date for the account's current activity (i.e., the activity that "owns" the donor). TA uses the benefit's unit type (e.g., months) and the units awarded (e.g., 12) to calculate the expire date.

When the Extend field is set to reset, TA's processing is the same whether

- your organization has one renewable activity type for which you have set up the MEM benefit as the anchor benefit that controls the donor's giving cycle or
- your organization has one renewable activity type for which you have set up the MEM benefit as the anchor benefit representing the intangible membership that controls the donor's giving cycle.

For example, assume your organization has one renewable activity type known as Annual Giving for which your organization set up the activity "AM" to group "basic" donors who give from \$0.01 to \$249.99; the renewal window for this activity ends 3 months past the donor's expire date. A lapsed, basic donor (i.e., the donor's current activity is AM) rejoins 6 months past the donor's expire date (beyond the renewal window). You enter this gift the day you receive it, the 24th of the month (e.g., 9/24/99). TA assigns the gift type "RJ" for rejoin to the gift and awards the MEM benefit to this account's gift. The MEM benefit, a 12-month benefit, is renewable and extendable. TA needs to set the benefit's start and expire dates. The Extend field for the rejoin gift type is set to reset. TA sets the start date on the benefit to the date of the gift that awarded the benefit and sets the expire date to 12 months past the start date for the account's current activity, i.e., AM for basic membership. If the start date for the AM activity is 10/1/99, TA sets the expire date to 10/1/00 on the benefit.

Note: In the example above, if the account rejoined by making a pledge, TA would set the start date to the date of the pledge.

Example

If your organization associates a membership with the renewable activity type and creates membership packages (e.g., containing your organization's intangible membership item, your organization's membership card, and your organization's membership publication), then the expire date for all of the renewable items in the membership package are set as described in the previous example. See "[Membership Packages](#)" to learn how to ensure that the expire dates of all the items in a membership package are aligned.

See the Understanding Marketing and Solicitations chapter to learn what an activity is and how to set one up including the activity's start date. See the [Understanding Update Procedures chapter](#) to learn how to change the start date using the Update Current Start Date update procedure. See the [Viewing Transactions, Benefits, and Interactions chapter](#) to learn how to view an account's activity information using the Account Activity screen.

Impact of the Extend Field Being set to Yes

If the Extend field on the gift type is set to yes, TA uses the "old" benefit's expire date, the benefit's unit type (e.g., months), and the units awarded (e.g., 12) to calculate the "new" benefit's expire date. See "[Renewable Benefit Processing](#)" for an explanation of what the "old" benefit is versus what the "new" benefit is.

When the Extend field is set to yes, TA's processing is the same whether

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- Your organization has one renewable activity type for which you have set up the MEM benefit as the anchor benefit that controls the donor's giving cycle or
- Your organization has one renewable activity type for which you have set up the MEM benefit as the anchor benefit representing the intangible membership that controls the donor's giving cycle.

Example

For example, assume your organization has one renewable activity type known as Annual Giving for which your organization set up the activity "AM" to group "basic" donors who give from \$0.01 to \$249.99. An existing basic donor, whose expire date is 11/1/99, sends in a renewal gift on 9/24/99. You enter this gift the day you receive it. The renewal window for all basic donors begins two months before the member's expiration date. When you enter this gift into TA, TA assigns the gift type "RN" for renew to the gift and awards the MEM benefit to this account's gift. The MEM benefit, a 12-month benefit, is renewable and extendable. TA needs to set the benefit's start and expire dates. The Extend field for the renewal gift type is set to yes. TA sets the start date on the "new" benefit to the date of the gift that awarded the benefit (e.g., 9/24/99). TA sets the expire date on the "new" benefit to 12 months past the expire date on the "old" benefit (e.g., 11/1/00).

Note: *In the example above, if the account made a renewal pledge, TA would set the start date to the date of the pledge.*

If your organization associates a membership with the renewable activity type and creates membership packages (e.g., containing your organization's intangible membership item, your organization's membership card, and your organization's membership publication), then the expire date for all of the renewable items in the membership package are set as described in the previous example. See "[Membership Packages](#)" to learn how to ensure that the expire dates of all the items in a membership package are aligned.

See the Understanding Marketing and Solicitations chapter to learn what an activity is. See the "[Viewing Transactions, Benefits, and Interactions chapter](#)" to learn how to view an account's activity information using the Account Activity screen.

Impact of the Extend Field Being set to No

If the Extend field on the gift type is set to no, TA sets the "new" benefit's start date to the date of the gift that awarded the benefit and sets the expire date to the "old" benefit's expire date. See "[Renewable Benefit Processing](#)" for an explanation of what the "old" benefit is versus what the "new" benefit is.

Note: *If the account made a pledge that awarded the renewable benefit, TA would set the start date to the date of the pledge.*

Information About the Renewable Option

You should mark the Renewable? checkbox to identify the benefit as one that TA can renew, e.g., membership. If your organization has one or more renewable activity types, you should mark this option for each anchor benefit that controls the donor's giving cycle to each of these renewable activity types. This option indicates that TA needs to determine the start date and expire date for a benefit. When you mark this checkbox, you should also mark the Extend Existing Benefit? checkbox.

TA sets the start and expire dates when the renewable benefit is marked deliverable. See "[How TA Marks a Benefit Ready for Delivery](#)" to learn how TA uses a benefit's delivery criteria to mark a benefit deliverable.

For example, a benefit, e.g. the anchor benefit that drives a donor's giving cycle, is marked renewable. An account has been awarded the benefit. TA sets the start date to the date of the transaction that awards the benefit. TA sets the expire date

- Using the value of the Extend field for the gift type assigned to the transaction that awards the benefit if the Extend Existing Benefit? checkbox is also marked for the benefit.
- Using the unit type, the number of units, and the start date for the current activity TA assigns to the account if the Extend Existing Benefit? checkbox isn't marked for the benefit. For example, if the unit

type is set to "M" for months, the number of units is set to "12", and TA assigns the Basic Membership (AM) current activity to the account, then TA sets the benefit's expire date to 12 months past the start date for Basic Membership.

We recommend that you always leave the Extend Existing Benefit? checkbox marked when you mark the Renewable? checkbox because the Extend field on the gift type provides multiple options for setting the expiration date, which ties the option to the gift type that renews the benefit.

See "[Information About the Extend Existing Benefit Option](#)" to learn how TA calculates the expiration date for a renewable benefit. See "[Renewable Benefit Processing](#)" for an explanation of what the "old" benefit is versus what the "new" benefit is.

Automatic Processing Options TA Defaults on the Benefit Category

TA automatically marks selected automatic processing options based on the benefit category you assign to a benefit.

Club Benefits

If the benefit category for the benefit is "C" for club, TA marks the Extend Existing Benefit? and Renewable? checkboxes and unmarks the Prompt for Recipient? and Award Automatically? checkboxes.

Membership Benefits

If the benefit category for the benefit is "M" for membership, TA marks the Extend Existing Benefit?, Renewable?, and Award Automatically? checkboxes and unmarks the Prompt for Recipient? checkbox.

Premium Benefits

If the benefit category for the benefit is "P" for premium, TA unmarks the Prompt for Recipient?, Extend Existing Benefit?, Renewable?, and Award Automatically? checkboxes.

Entering Inventory Information for a Benefit

You can enter inventory information for a benefit (e.g., a premium) by clicking <Inventory> on the first page of the Benefit Entry screen. The Benefit Entry: Inventory view appears. You can enter the following information.

- Stock information (e.g., inventory balance, reorder level, backorder information).
- Cost and shipping information (e.g., unit cost, mailing class)
- UPC and ISBN information
- Vendor information including the vendor's stock number for the benefit
- Last (i.e., previous) shipment information (e.g., date last received, purchase order number)

If your organization set the [Default Inventory Location](#) system preference, TA defaults the Inventory location field to the value of this system preference only if the benefit is a premium.

See Also:

[Stock Information](#)

[UPC and ISBN Information](#)

[Cost and Shipping Information](#)

[Vendor Information](#)

[Last Shipment Information](#)

Stock Information

Field	Description
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Field	Description
Inventory Balance	You can use the Inventory Balance field to keep track of the number of items you have in stock. TA can update this field during benefit pulls. See " Benefit Procedures " for more information.
Alternate Inventory Balance	You can use the Alternate Inventory Balance field to keep track of the number of items you have in a particular location (e.g., the number of organization mugs you have stored locally. This field is for information only.
Reorder Level	You can use the Reorder Level field to indicate the inventory balance (i.e., number) at which the benefit should be reordered.
Number On Order	You can use the Number On Order field to indicate the number of units on order with your vendor.
Date Ordered	You can use the Date Ordered field to keep track of when you ordered the benefit from your vendor. You can enter the date in the MM/DD/YY format.
Inventory Location	You can use the Inventory Location field to identify the location (internal or external) where the benefit inventory is stored. You can press the [F9] key for a list of inventory locations.
Alternate Inventory Location	You can use the Alternate Inventory Location field to identify a second location where you store benefit items. This field is for information only. You can press the [F9] key for a list of inventory locations.
Lead Time	You can use the Lead Time field to enter text indicating the amount of time it takes to receive this benefit (e.g., "It takes about two weeks to receive this item").
Number Backordered	You can enter the number of items backordered in the Number Backordered field.
Backorder Due Date	You can enter the date the backordered items are expected to arrive in the Backorder Due Date field. You can enter the date in the MM/DD/YY format.
Backorder Delivery Rules	You can enter the text explaining what priority method should be used to deliver backordered items (e.g., "Older gift dates get it first").

See Also:

[How TA Updates the Inventory Balance During Benefit Pulls](#)

How TA Updates the Inventory Balance During Benefit Pulls

When your organization runs a query to select a set of benefits for delivery to the accounts awarded those benefits (the benefits are marked deliverable but the accounts awarded the benefits haven't yet received the benefits), your organization runs the Update Benefit Sent update procedure with the query. For each benefit selected by the query, this procedure

- Decrements the inventory balance if the benefit has either a positive or negative balance, or
- Does not decrement the inventory balance if the balance is blank.

Note: *The Update Benefit Sent update procedure will decrement the inventory balance to a negative number.*

See the [Understanding Update Procedures chapter](#) to learn about the Update Benefit Sent update procedure.

For example, assume the benefit pull includes selecting your organization's tote bag where the tote bag is marked ready for delivery but the accounts awarded the tote bag haven't yet received it. The Update Benefit Sent update procedure updates the inventory balance as follows:

- If the inventory balance for your organization's tote bag is 200 and 150 are pulled for delivery, the inventory balance is 50.
- If the balance for your organization's tote bag is 100 and 150 are pulled for delivery, the inventory balance is -50.
- If the balance for your organization's tote bag is not set (blank) and 150 are pulled for delivery, the inventory balance remains blank.

You do not have to set the inventory balance for each benefit because some benefits don't have stock information (e.g., the benefit that represents the anchor code that drives a donor's giving cycle) or because you don't want to track the inventory (e.g., a membership card).

\$ K UPC and ISBN Information

If the benefit has a Universal Product Code (bar code), you can enter it in the UPC field to identify the benefit.

If the benefit is a published book, you can enter its International Standard Book Number in the ISBN field.

Cost and Shipping Information

Field	Description
Unit Cost	You can enter the cost to your organization of one benefit unit in the Unit Cost field.
Unit Value	You can enter the fair market value of one benefit unit in the Unit Value field.
Shipping Cost	You can enter the cost of shipping the benefit in the Shipping Cost field.
Handling Cost	You can enter the cost of handling the benefit in the Handling Cost field.
Mail Class	You can enter the mail class used to send the benefit in the Mail Class field (e.g., "3" for 3 rd class). You can press the [F9] key for a list of mail classes.

See Also:

[Using the Cost Information to Set a Benefit's Delivery Criteria](#)

UPC_and_ISBN_Information

\$ UPC and ISBN Information

K UPC;ISBN;Benefits;Benefits:UPC and ISBN information

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[Using the Market Value for Tax Statements](#)

Using the Cost Information to Set a Benefit's Delivery Criteria

Your organization can set the [Amount of Cost or Pledge to Send Benefit](#) system preference to have the benefit's payment amount for delivery set to the cost of the benefit. If your organization sets this system preference to "CXXX" where "XXX" is the percent of the cost, TA totals the unit cost, the shipping cost, and the handling cost to calculate the payment amount in the Delivery Criteria block on the first page of the Benefit Entry screen for a benefit.

See "[Percent of Pledge](#)" and "[Minimum Payment Amount](#)" for an explanation of how TA uses the Amount of Cost or Pledge to Send Benefit system preference to default the delivery criteria for a premium.

Using the Market Value for Tax Statements

You can use the value of the benefit to generate year-end tax statements (i.e., the value of the benefit is deducted from the gift amount for which the benefit was awarded) through TA's Query and Output facility. See the [Understanding Queries chapter](#) for an explanation of what a query is and to learn how to create a query, e.g. to select the benefits for year-end tax statements. See the [Understanding Outputs chapter](#) for an explanation of what an output is and to learn how to create a user-defined output e.g., to select the market value and other pertinent information for year-end tax statements. See the [Scheduling Queries and Viewing Records Retrieved chapter](#) to learn how to run a query with a user-defined output, a task you need to understand to generate year-end tax statements.

Vendor Information

Field	Description
Vendor/ Vendor Benefit ID	You can enter the brief name of the benefit vendor and the number the vendor uses to identify the benefit in the Vendor and Vendor Benefit ID fields. You can press the [F9] key for a list of vendors.
Alternate Vendor/ Vendor Benefit ID	You can enter the brief name of the alternate vendor and the number the vendor uses to identify the benefit in the Alternate Vendor and Vendor Benefit ID fields. You can press the [F9] key for a list of vendors.

Viewing Vendor Information on the Vendor Information Window

With a vendor's brief name entered into the Vendor field or the Alternate Vendor field, you can view selected account information for the vendor by pressing the [F10] key. TA displays the Vendor Information window. This window includes the following information about the vendor.

- The Account ID and name of the vendor*
- The vendor's address
- The vendor's telephone number
- The account's name*

You can click <OK> or press the [Enter] key to return to the inventory view of the Benefit Entry screen.

See Also:

[Marking an Existing Account as that of a Vendor](#)

[Creating a Vendor Account](#)

Marking an Existing Account as that of a Vendor

If an account exists for the vendor but isn't activated as a vendor account, access the Account Overview screen, find the account for the vendor, and complete the following steps.

1. Enter a [brief name](#) for the vendor in the Brief Name field. You can enter up to 12 characters including numbers for the brief name, but you cannot include any special characters (e.g., "&") and the brief name cannot begin with a number.
2. Press the [F10] key from the Brief Name field to access the Brief Name Functions window.
3. On this window, set the Vendor field to "A" for active.
4. Click <OK> to leave the window.

By completing these steps, you assign a brief name for the vendor and mark the account as that of a vendor. The brief name you assigned is now included in the list of vendors you can view by pressing the [F9] key from the Vendor field or the Alternate Vendor field.

Creating a Vendor Account

If an account does not exist for the vendor, you can create one and mark the account as a vendor account by completing the following steps.

1. Press the [F6] key from the Vendor field or from the Alternate Vendor field to access the Create New Account window.
2. Enter the information for the vendor (e.g., name, address, and telephone information). See the [Managing Account Information chapter](#) for a description of how to create an account.
3. Enter a [brief name](#) for the vendor in the Brief Name field on the Create New Account window. You can enter up to 12 characters including numbers for the brief name, but you cannot include any special characters (e.g., "&") and the brief name cannot begin with a number.
4. Press the [F10] key from the Brief Name field to access the Brief Name Functions window.
5. On this window, set the Vendor field to "A" for active.
6. Click <OK> to leave the window.
7. Click <OK> or press the [Enter] key to create the account.

By completing these steps, you create an account for the vendor, assign the account a brief name, and mark the account as that of a vendor. The brief name you assigned is now included in the list of vendors you can view by pressing the [F9] key from the Vendor field or the Alternate Vendor field.

Last Shipment Information

Field	Description
Date Last Received	You can enter the date the last shipment of benefits was received, using the MM/DD/YY format, in the Date Last Received field.
Number Damaged	You can enter the number of items damaged in the last shipment of benefits received in the Number Damaged field.
PO Number	You can enter the purchase order number used for the last shipment of benefits

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Field	Description
Invoice	You can enter the invoice number used for the last shipment of benefits.
Return Authorization	You can enter the return authorization number used for the last shipment in the Return Authorization field.

Building a Benefit Package

When you build a benefit package (i.e., non-selection package) or selection package, you must create the benefit that represents the package. You create this benefit in the same way as any other benefit. See "[Creating a Benefit](#)" for the steps involved in creating a benefit. See "[Benefit Type](#)" for the distinction between a package and a selection package.

Once you have created the benefit that represents the package, you can identify the type of package (i.e., package or selection package) and "build" the package (i.e., determine the items included in the package and set processing options for the package items) on the Benefit Entry (Package) view. You can access this view by clicking Package> on the first page of the Benefit Entry screen.

See Also:

[Building a Membership Package or Other Non-selection Package](#)

[Building a Selection Package](#)

Building a Membership Package or Other Non-selection Package

When an account is awarded a package (i.e., a non-selection package), each item in the package is posted to the account.

We recommend you build packages according to the following guidelines.

1. A package should contain only benefit items. The exception to this guideline is including a selection package within a package.
2. Make sure that each item you want to include in the package is set up in TA before you create the package, i.e., create a benefit code for the item and enter all of the appropriate information for the item.
3. Each item in the package, except premiums, should have only the following information entered for the item.
 - The description
 - The benefit category, activity type, and office code as appropriate
 - The unit type, the units awarded, and the units awarded until payment
 - The award and delivery criteria
 - The disqualifying classification if needed (e.g., "BENEFIT/NOCARD" for a membership card benefit)
 - The Renewable? checkbox or the Extend Existing Benefit? checkbox marked as appropriate.

Note: *If the package is a renewable benefit and you set it up for automatic awarding by TA, you may not want to include a premium in the package. If you do, each time an account is*

awarded the package (e.g., each time the account renews), the premium is awarded to the account.

4. When the benefit items are set up, create the benefit package. Create the benefit that represents the package in the same way as a benefit item (i.e., create the benefit code, enter the benefit characteristics, set the benefit award and delivery criteria, and mark the appropriate automatic benefit item processing options). See "[Creating a Benefit](#)" for the steps involved.
5. Assign items to the benefit package.
6. Modify the information for each package item, if applicable.
7. Set automatic benefit package processing options, if applicable.

See Also:

- [Package Exceptions](#)
- [Recommended Approach for Creating Membership Packages](#)
- [Assigning Items to a Package](#)
- [Setting Package Item Processing Options \(Non-selection Packages\)](#)
- [Setting the Donor's Giving Level Based on the Package](#)
- [Inactivating or Deleting a Non-selection Package Item](#)

Package Exceptions

When setting up a package,

- If you include in the package any benefit items assigned additional restrictive award criteria *more limiting* than those assigned to the package itself, and the account's pledge or gift does not also qualify for the more restrictive item in the package, TA displays the item with a status of "Disqualify" when TA or you awards the package.
- TA does not use the minimum number of installments for evaluating whether to deliver a package. If you want the minimum number of installments to be used for installment givers, set the minimum number of installments on each item in the package for which that delivery criterion should be used.

Recommended Approach for Creating Membership Packages

We recommend you use the following approach to create your membership packages.

1. Create the intangible membership benefit item that is the anchor benefit that controls the donor's giving cycle. Set only the benefit category, the activity type, the unit type, and the number of units. Mark only the Renewable? checkbox and the Extend Existing Benefit? checkbox. Set the award and delivery criteria as appropriate.
2. Create the membership publication benefit item. Set only the benefit category, the activity type, the unit type, and the number of units. Mark only the Renewable? checkbox and the Extend Existing Benefit? checkbox. Set the award and delivery criteria as appropriate. On page two, enter the disqualifying classification "BENEFIT/No Guide."
3. Create the membership card benefit item. Set only the benefit category, the activity type, the unit type, and the number of units. Mark only the Renewable? checkbox and the Extend Existing Benefit? checkbox. Set the award and delivery criteria as appropriate. On page two, enter the disqualifying classification "BENEFIT/No Card."
4. Create a basic membership package. Set the benefit category, the activity type, the unit type, and the number of units. Mark the Renewable? checkbox, the Extend Existing Benefit? checkbox, and the Automatically Award? checkbox. Set the award criteria based on the minimum and maximum giving level amount that should award this package. Set the delivery criteria. Include the following items in the package: the membership benefit, the membership publication, and the membership card.

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Note: *Don't include premiums in the membership package, as they will be awarded to an account each time the account renews.*

5. Create the next membership package you award at the next price point. In the Award Criteria block on the first page, set the minimum amount to one cent more than the maximum amount for the basic membership package.
6. Repeat the fifth step until you have created all of the membership packages for your organization.
7. Create the following special membership packages: a contributorship package, a discount package, and a complimentary membership package.

See Also:

[Special Membership Packages](#)

[Assumptions used in the Recommended Approach](#)

Special Membership Packages

Once you have created all of the regular membership packages for your organization, complete the following steps.

1. Create a contributorship package that includes only the intangible membership benefit item. Mark the Automatically Award? checkbox. In the Award Criteria block on the first page, set the minimum amount to one cent and the maximum amount to one cent less than the minimum amount for the basic membership package. By creating this package, you give any donor who is not awarded basic membership (or a discount package described next) an expiration date so that you can solicit the donor. For example, based on the expiration date, you can include in a basic membership renewal pull accounts awarded this package to try to get a "contributor" to renew at the level that awards basic membership.
2. Create each discount membership your organization wants to offer. For example, if your organization offers a discount membership to senior citizens, create a senior citizens discount package that includes the intangible membership benefit item, the membership publication benefit, and the membership card benefit. In the Award Criteria block on the first page, set the minimum amount to that which the senior citizen needs to give to be awarded this package and set the maximum amount to one cent less than the minimum amount for the basic membership package. On page two, enter "Discount/Senior" (a classification delivered with TA) as the required classification and set the first Create Classification to the "Discount/Senior" classification.
3. Create a complimentary membership if your organization offers one on a recurring basis to a standing group, e.g., employees, schools. This package should include the intangible membership benefit item, the membership publication benefit, and the membership card benefit. In the Award Criteria block on the first page, set the minimum amount and the maximum amount to zero. If you want this package to be awarded automatically, create at least one source code for use only to award this package and, on the package, mark the Automatically Award? checkbox, and enter that source code into the Source field on page two.

Note: *You can create a source code for each group that receives the complimentary membership if you want to track the groups separately, e.g., one source code for employees and a different one for schools.*

Assumptions used in the Recommended Approach

The membership package guidelines are based on the following assumptions.

- Your organization has one renewable activity type with which membership is associated.
- Your organization has multiple membership packages for that renewable activity type with the packages being differentiated by giving level.
- Each of your organization's membership packages includes a membership publication.

- Each of your organization's membership packages includes a membership card.

If your organization has multiple renewable activity types, each with a different membership, you should apply these guidelines to each activity type. If your organization does not have either a membership publication or a membership card, you do not need to create each benefit.

Assigning Items to a Package

You can assign items to a package (i.e., non-selection package) by following the steps below.

1. Access the benefit package on the Benefit Entry screen.
2. Click <Package> on the first page of the Benefit Entry screen to access the Benefit Entry: Package view.
3. Click <New> to display the Create New Package Item window.
4. Enter the benefit code of the first item that you want to include in the package. If you don't remember the benefit code, you can
 - Enter the first letter or letters that you believe begin the code and press the [F9] key. TA displays the list of benefits (by code) with codes that begin with the letter(s) you entered. You can select the appropriate benefit from this list.
 - Enter the wildcard percent ("%") followed by a set of letters you think are in the description of the benefit (e.g., "%TOTE" to search for all tote bags) and press the [Alt] [F9] key combination. TA displays the list of benefits (by description) where the description contains the letter(s) you entered. You can select the appropriate benefit from this list.
5. Click <Create>. TA displays the item in the List Block, which is located in the Items in Package portion of this view (the lower half of the screen).
6. Repeat the above steps for each benefit item you want to include in the package. You can enter up to 99 items in a package.

Note: You cannot add a package to itself or add a package that contains a package.

See Also:

[Setting Information for the Package Items](#)

Setting Information for the Package Items

When you add an item to a package, TA defaults some of the information for the item on the Benefit Entry (Package) view. You can modify information for each package item, if applicable.

Note: If you want a membership package to be delivered to installment and sustaining gift givers based on the number of installment payments, you must set the minimum number of installments for each item in the package. TA does not use the minimum number of installments delivery criterion for packages.

When a benefit item is awarded as part of a package, TA uses the activity type, unit type, and units awarded set on the Benefit Entry (Package) view rather than the corresponding fields on the Benefit Entry screen.

See Also:

[Activity Type \(Package Item\)](#)

[Award Status](#)

[Display Sequence Number](#)

[Unit Type and Units Awarded \(Package Item\)](#)

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Activity Type (Package Item)

When you add a benefit item to a package, TA defaults the activity type from the original record for the benefit item to the item's record in the package. If the original record for the benefit item is not assigned an activity type, then TA leaves the Activity Type field blank for that item's record in the package.

You may need to change the activity type for an item's record in the package under the following conditions.

- You set up a package that contains one or more renewable benefit items for which TA sets an expire date.
- You want the expire dates for all renewable benefit items to be the same.
- The activity type of the package is a renewable activity type.
- For one or more of the renewable benefit items in the package, the activity type for the package is different from the activity type from the original record for the benefit item.
- The renewable benefit item with an activity type different from that for the package is not the "anchor benefit" TA uses to track the start and expire dates for donors to the renewable activity type, e.g., the benefit item is not the intangible membership benefit item. (The activity type for a package should always be the same as the activity type of the anchor benefit you add to the package.)

Under these conditions, for each renewable benefit item in the package that has an activity type different from the activity type assigned to the package, you can change the activity type for the item's record in the package to the activity type of the package. You can press the [F9] key for a list of activity types.

See ["Same Expiration Date"](#) to learn how to indicate that all renewable benefit items in the package should have the same expiration date.

Award Status

When you add an item to a package, TA sets the Award Status field to "I" for new (insert). The award status refers to the status of the item when, during pledge and gift entry, the item is awarded to an account through the package. The award status can be either "I" for new (insert) or "D" for delete.

- If you set the award status to new (insert), at the time the package is awarded, you must manually delete the item from the package if the account does not want the item.
- If you set the award status to delete, the item is automatically deleted from the package during transaction processing unless you manually change the status of the awarded item to new.

For example, you want to create a package that contains an item you know most accounts decline such as a package that contains two organization tote bags (most accounts awarded this package usually decline the second tote bag). When you create the package, set the award status for the second tote bag to delete. During pledge and gift entry, no action is required to delete the second tote bag when it is awarded; the only way the account is awarded the second tote bag is if you change the tote bag's status to new.

See the [Entering an Account's Gifts and Benefits chapter](#) to learn how to change the award status from delete to new for a benefit awarded to an account.

Display Sequence Number

TA orders the items based on the order in which they are added to the package, unless you set a different order in the Display Sequence Number field. The display sequence number enables you to override the default ordering TA uses to display the list of the items in a package. To use the display sequence number, assign a number, beginning with the number "1," to each item you want to display in an order different from TA's default ordering.

For example, a package contains three items, and you want the third item added to the package to display first. In the Display Sequence Number field for that item, enter "1." Alternatively, assume you want the third item added to the package to display second. In this case, you would start by deciding which item in the package should display first. For the item you decide should display first, set its display sequence number to "1." For the third item (which you want to display second), set its display sequence number to "2."

Unit Type and Units Awarded (Package Item)

When you add a benefit to the package, if the unit type of the benefit is the same as the unit type of the package, TA defaults the units awarded for the item in the package to that from the package; TA does not change this information for the original item. You should not change this information.

For example, you create the anchor benefit item called "MEM" for your organization's intangible membership. On the first page of the Benefit Entry screen for this benefit, you set the unit type to "M" for months and units awarded to twelve. You then create a benefit package called "M6MO" which is a special six-month membership. On the first page of the Benefit Entry screen for the M6MO benefit, you set the unit type to "M" and the units awarded to six. You then click <Package> to build this special membership package. You add the MEM benefit to this package. TA sets the unit type to "M" and the units awarded to six (from the package), not twelve (from the item). TA does not change this information for the MEM item.

Setting Package Item Processing Options (Non-selection Packages)

You can set package item processing options in order to synchronize the expiration dates of the renewable benefits in a package.

See Also:

[Same Expiration Date](#)

Same Expiration Date

The Same Expiration Date option is located on the Benefit Entry: Package view. You should mark the Same Expiration Date? checkbox for packages that contain renewable benefits for which you want the start and expire dates synchronized. This option ensures that once all of the renewable benefits in the package are marked ready for delivery, the expire date for each renewable benefit is the same.

TA does not set the expire date for a renewable benefit until it is marked deliverable. If different delivery criteria apply to different renewable benefits in a package, then TA sets the expire date for each renewable benefit when each is marked deliverable. Using the Same Expiration Date option, you ensure that TA resets the expire date for all renewable benefits when the last of these benefits is marked deliverable. TA resets the expire date to the one calculated for the last renewable benefit marked deliverable.

For example, you set up a package with three renewable benefits. The package is marked deliverable only when the donor pays \$200. The first renewable benefit in the package is marked deliverable only when the donor pays \$50, but the second two have no delivery criteria (all are blank). This package is awarded to an installment giver who is paying a \$300 pledge in \$25 monthly installments. TA sets the expire date for the first renewable benefit after the donor makes the second installment payment (since the payments-to-date don't meet the delivery criteria of the package, TA checks the delivery criteria for each item in the package). TA sets the expire date for the second two renewable benefits after the donor makes the eighth installment payment.

- If the Same Expiration Date? checkbox is marked for this package, TA resets the expire date for the first renewable benefit to the expire date calculated for the second two renewable benefits.
- If the Same Expiration Date? checkbox is not marked for this package, then TA does not reset the expire dates for the renewable benefits in this package. The expire date for the first renewable benefit may then be different from the one for the second two renewable benefits.

See Also:

[Membership Packages](#)

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Understanding Benefits

Non-membership Packages

Membership Packages

You should mark the Same Expiration Date? checkbox for each of your membership packages. Your membership packages may contain your organization's intangible membership, membership publication, and membership card. By marking this checkbox, you ensure that the expire dates for all three items are the same.

If, for example, you set up the delivery criteria for the membership item and membership card to one installment payment but decide the monthly publication requires two installment payments, this option ensures that once the monthly publication is marked ready for delivery, TA resets the expire date for the membership item and membership card to the one for the monthly publication.

Non-membership Packages

You should mark the Same Expiration Date? checkbox for non-membership packages that contain renewable benefits you want to expire at the same time. By marking this checkbox, you ensure that the expire dates for all of the renewable benefits are the same as the one calculated for the last renewable benefit marked ready for delivery.

If, for example, you set up the delivery criteria for one renewable benefit in the package to one installment payment but decide the second renewable benefit in the package requires two installment payments, this option ensures that once the second renewable benefit is marked ready for delivery, TA updates the first renewable benefit with the expire date calculated for the second renewable benefit.

Align Expiration Dates in Packages

The [Align Expiration Dates in Packages](#) option is a system preference. This option enables you to indicate what type of automatic processing should occur if an expiration date for a renewable item in a package is changed manually. You can manually change the expire date on any of the renewable items in a package awarded to an account, e.g., you can change the expire date on the intangible membership, the membership card, or the membership publication.

You can set the Align Expiration Dates in Packages system preference to "A" for automatically align the expiration dates. If you change the expiration date

- On one of the renewable items in a package awarded to an account, TA changes the expiration dates on the other renewable items in the package. If the package contains the anchor benefit that controls the donor's giving cycle to the renewable activity type associated with the package, TA also changes the expiration date on the account's account activity record for that renewable activity type.
- On an account's account activity record for a renewable activity type, TA changes the dates on the renewable items for the active package associated with that renewable activity type and awarded to the account if that package contains the anchor benefit that controls the donor's giving cycle to the renewable activity type.

See Also:

[Changing the Expiration Date on an Awarded Renewable Benefit](#)

[Changing the Expiration Date on the Account Activity Record](#)

Changing the Expiration Date on an Awarded Renewable Benefit

If you change the expiration date on one of the renewable items in a package awarded to an account, TA changes the expiration dates on the other renewable items in the package. If the package contains the anchor benefit that controls the donor's giving cycle to the renewable activity type associated with the package, TA also changes the expiration date on the account's account activity record for that renewable activity type if the [Align Expiration Dates in Packages](#) system preference to "A" for automatically align.

For example, you have one renewable activity type, Annual Giving, for which you award membership. Annual Giving is represented by the "A" activity type. An account gives a gift to become a basic member within Annual Giving. TA automatically awards the basic membership package to the account and sets up the Annual Giving account activity record for the account. The expiration date for all of the renewable items in the membership package (e.g., the intangible membership that is the anchor benefit, the membership card, and the membership publication) and for the account's Annual Giving account activity record is 4/1/99. You change the expiration date on one of the renewable items in the package to 7/1/99 using the Benefits Awarded screen. TA changes the expiration date on the other renewable items in the package and the Annual Giving account activity record from 4/1/99 to 7/1/99.

TA selects the correct account activity record by completing the following steps.

1. TA looks at the activity type assigned to the renewable item you updated.
2. TA looks at the membership benefit assigned to that activity type (i.e., the anchor benefit assigned to the activity type to control a donor's giving cycle for that activity type).
3. TA compares the membership benefit for the activity type to the items included in the package.
 - *If the membership benefit is one of the items in the package, TA updates the account activity record for the activity type.*
 - *If the membership benefit isn't one of the items in the package, TA does not update the account activity record for the activity type.*

See "[Linking an Anchor Benefit to its Renewable Activity Type](#)" to learn how to create the link between the renewable benefit that controls the donor's giving cycle with the renewable activity type to which the donor gives.

Changing the Expiration Date on the Account Activity Record

If you change the expiration date on the account's account activity record for a renewable activity type, TA changes the dates on the renewable items for the active package that is associated with that renewable activity type and awarded to the account *if* that package contains the anchor benefit that controls the donor's giving cycle to the renewable activity type *and* the [Align Expiration Dates in Packages](#) system preference is set to "A" for automatically align.

For example, you have one renewable activity type, Annual Giving, for which you award membership. Annual Giving is represented by the "A" activity type. An account gives a gift to become a basic member within Annual Giving. TA automatically awards the basic membership package to the account and sets up the Annual Giving account activity record for the donor. The expiration date for all of the renewable items in the membership package and for the Annual Giving account activity record is 4/1/99. You change the expiration date on the Annual Giving account activity record to 7/1/99 using the Account Activity screen. TA changes the expiration date on the renewable items in the package (e.g., the intangible membership that is the anchor benefit, the membership card, and the membership publication) from 4/1/99 to 7/1/99.

TA selects the benefits to update by completing the following steps.

1. TA looks at the membership benefit assigned to the activity type for the updated account activity record. This membership benefit is the anchor benefit.
2. TA then finds the active, current membership benefit (anchor benefit) awarded to the account and updates the benefit's expiration date.
3. TA looks at the package code for that membership benefit to update the other renewable items in the package that have expiration dates.

See "[Renewable Benefit Processing](#)" to learn how TA creates benefit records for renewable benefits and identifies the current benefit.

Setting the Donor's Giving Level Based on the Package

If the package is a membership package (i.e., the benefit type is Package and the benefit category is Membership), you can enter a giving level code in the Giving Level field or press the [F9] key for a list of giving level codes.

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TA uses the information in the Giving Level field to set the donor's giving level if the benefit is a membership package and your organization has set the [Giving Level Calculation Method](#) system preference to "Benefit Package."

If your organization has set this system preference to "Benefit Package," TA determines the giving level on *all* activity types by the benefit package of the most recent membership gift for the donor. If the giving level is not set on a membership benefit, TA does not set the giving level for the account.

Note: *To use this method for determining giving level, it is necessary to fill in the giving level field on all membership benefit packages in the system. If there are membership benefit packages with no giving level value, then accounts that receive benefits from these packages will have no giving level. Also, if membership benefits are awarded outside of benefit packages, then the accounts receiving them will have no giving level.*

Inactivating or Deleting a Non-selection Package Item

Inactivating a Package Item

You can inactivate a package item to keep it from being awarded with the package. When a package item is inactivated, TA continues to display it in the Items in Package List Block with a status of "I." To inactivate a package item, set the status of the item to "I" for inactive.

The Status field for an item in a package is located on the package view of the Benefit Entry screen in the Items in Package portion of the screen. You can press the [F9] key from this field to view the list of valid status codes. You can access this view by clicking <Package> on the first page of the Benefit Entry screen.

Note: *When a package is awarded, only the active items in the package are awarded.*

Deleting a Package Item

You can delete an item from a package by highlighting the item in the List Block for the Items in Package portion of this view (the lower half of the screen) and pressing the [Shift] [F6] key combination.

Building a Selection Package

When an account is awarded a selection package, the account must select one item in the package; only this item is posted to the account.

To create a selection package, complete the following steps.

1. Create a benefit code for the selection package. See "[Creating a Benefit](#)" for the steps involved.
2. Enter the following information for the selection package as appropriate: benefit category, premium category, activity type, office, interests, award criteria, complimentary information, classification information, and the start and end dates.

Note: TA uses the delivery criteria, unit type, and units awarded from the item that the account selects from the selection package, so you do not need to set this information on page one of the Benefit Entry screen for the selection package.

3. Identify the type of selection package. You can create either a list selection package or a category selection package.
 - If the selection package is a list selection package, add each item you want included in the package.
 - If the selection package is a category selection package, identify the selection category for the package and set the Award Amount field if appropriate.

4. Mark package item processing options for the selection package, if appropriate.
5. Mark automatic processing options for the selection package, if appropriate. See "[Setting Automatic Processing Options](#)" for more information.

Note: For selection packages, we recommend that you indicate in the description of the package that the donor can select one item, e.g., "Select 1 Club".

See Also:

[List Selection Packages](#)

[Category Selection Packages](#)

List Selection Packages

To set up a list selection package, you need to identify the package as a list selection package and add each item from which the account can select when awarded this package. You can then set package item processing options, if appropriate.

See Also:

[Identifying the Package as a List Selection Package](#)

[Assigning Items to a List Selection Package](#)

[Setting Package Item Processing Options \(List Selection Packages\)](#)

[Inactivating or Deleting a List Selection Package Item](#)

Identifying the Package as a List Selection Package

To identify a package as a list selection package, click <Package> on the first page of the Benefit Entry screen to access the Benefit Entry (Package) view. Set the Selection Category field to "L" for list. When you set the selection category, TA changes the benefit type to "Selection Package."

Note: Do not set the Selection Category field to a value other than "L" for list; the other values are used to create category selection packages.

Assigning Items to a List Selection Package

Once you have identified a package as a list selection package, create the list of items from which the account can select when awarded the package. To add an item to a list selection package, complete the following steps.

1. Click <Package> on the first page of the Benefit Entry screen to access the Benefit Entry: Package view.
2. Click <New> to display the Create New Package Item window.
3. Enter the benefit code of the item you want to include in the selection package. If you don't remember the benefit code, you can
 - Enter the first letter or letters that you believe begin the code and press the [F9] key. TA displays the list of benefits (by code) with codes that begin with the letter(s) you entered. You can select the appropriate benefit from this list.
 - Enter the wildcard percent ("%") followed by a set of letters you think are in the description of the benefit (e.g., "%TOTE" to search for all tote bags) and press the [Alt] [F9] key combination. TA displays the list of benefits (by description) where the description contains the letter(s) you entered. You can select the appropriate benefit from this list.
4. Click <Create>.

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TA displays the item in the List Block, which is located in the Items in Package portion of this view (the lower half of the screen). You can enter up to 99 items in a selection package.

You can set the display sequence number for the item if needed. See "[Display Sequence Number](#)" to learn how to use the display sequence number.

See Also:

[Information TA Defaults for a Selection Package Item](#)

Information TA Defaults for a Selection Package Item

When you add an item to a selection package, TA defaults the following information from that item's benefit record.

- The activity type
- The unit type and units awarded

You should not change this information.

In addition, TA sets the award status to "1" for new (insert) which you should not change. See "[Award Status](#)" to understand how this field is used and why you don't need to change it for a selection package.

Setting Package Item Processing Options (List Selection Packages)

Default Prior Choice

The Default Prior Choice option is located on the Benefit Entry: Package view. You should mark the Default Prior Choice? checkbox for a list selection package that is automatically awarded by TA if you want TA to default, during pledge and gift entry, the benefit item the account selected previously from the selection package if TA re-awards the selection package to a subsequent pledge or gift from the account.

Assignment Order

The Assignment Order field is located on the Benefit Entry: Package view. You can set this field for a benefit item that belongs to a list selection package. This field indicates the order TA should use when attempting to award the selection item automatically.

You can enter a number in this field, or leave the field blank. If there is a number in the field, TA tries to award the benefit item with the lowest number in the Assignment Order field (i.e., TA awards the item if the required and disqualifying classifications are met for the item, otherwise it tries to award the next item in the assignment order).

For example, with a list selection package that contains a standard magazine and an alternative magazine, if you set the assignment order on the standard magazine to "1," TA attempts to award the standard magazine when the selection package is automatically awarded to an account.

Note: *The Default Prior Choice logic takes precedence over the assignment order (i.e., TA first tries to select an item using the Default Prior Choice logic, then if it hasn't been able to select an item, TA uses the Assignment Order logic.*

If TA is unable to select an item to award, TA awards the selection package to the account, and sets the status of the benefit to "Select." The user can then manually select the item during gift entry.

Note: *If the list selection package is manually awarded during gift entry, TA uses the default prior choice and assignment order logic to select the item. If TA succeeds in selecting an item, TA displays a message notifying the user that the selection item has defaulted. The user can change the item if necessary.*

Inactivating or Deleting a List Selection Package Item

Inactivating an Item

You can inactivate a list selection package item to exclude it from the list of items from which an account can select. When a list selection package item is inactivated, TA continues to display it in the Items in Package List Block with a status of "I." To inactivate a list selection package item, set the status of the item to "I" for inactive.

The Status field for an item in a selection package is located on the package view of the Benefit Entry screen in the Items in Package portion of the screen. You can access this view by clicking <Package> on the first page of the Benefit Entry screen.

Note: *When a selection package is awarded, only the active items in the selection package appear in the list of items from which the account can select.*

Deleting an Item

You can delete an item from a selection package by highlighting the item in the List Block for the Items in Package portion of this view (the lower half of the screen) and pressing the [Shift] [F6] key combination.

Category Selection Packages

To create a category selection package, identify the benefit category of the selection package by setting the Selection Category field and set the Award Amount field as appropriate.

See Also:

[Choosing the Category](#)

[Setting the Selection Award Amount](#)

[Setting Package Item Processing Options \(Category Selection Packages\)](#)

Choosing the Category

To set the benefit category for a category selection package, click <Package> on the first page of the Benefit Entry screen. Enter the benefit category from which an account can select in the Selection Category field. For example, set the Selection Category field to "C" for club if an account can select one club from all the club benefits you have set up. You can press the [F9] key to view the list of benefit categories. When you set the selection category, TA changes the benefit type to "Selection Package."

Note: *Do not set the Selection Category field to "L" for list; this value is used to create a list selection package.*

By selecting the benefit category, you indicate to TA which benefits TA should select when composing the list of benefits from which the account can choose. For example, assume you create the selection package "PREMSLCT;" for this selection package, you set the Selection Category field to "P" for premium. When you enter an account's gift on the Batch Detail Entry screen and the account is awarded the PREMSLCT package, you can highlight this benefit on the Batch Detail Entry screen and press the [F9] key. TA composes a list of premiums only. You can limit which premiums appear in the list by setting the Award Amount field. See "[Setting the Selection Award Amount](#)," which follows this section to learn how TA uses the award amount value to compose the list of benefits from which the account can choose. See the [Entering an Account's Gifts and Benefits chapter](#) to learn how to select the benefit for an account awarded a selection package.

Setting the Selection Award Amount

Once you identify the benefit category for the selection package, you need to set the Award Amount field as appropriate. The Award Amount field should be set to the amount of the pledge or gift amount that TA should use to compile the list of benefits from which the account can choose. You have two options.

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- You can set the award amount to the minimum award amount for those benefits from that category which should be included in the list. For example, you can create a "Select 1 \$100 Club" benefit by setting the selection category to "C" and the selection award amount to "\$100." When this selection package is awarded to an account, TA creates a list of all clubs that require a minimum pledge or gift less than or equal to \$100. TA creates this list by looking at the minimum amount to award for each club and selecting only those for which the minimum amount is \$100 or less. The staff member entering the gift or pledge can then select one of the clubs from this list based on the account's request.
- You can leave the award amount blank to indicate that the minimum award amount for the category should be based on the account's pledge or gift amount. For example, you can create a "Select Any Club" benefit by setting the selection category to "C" and leaving the award amount blank. When this selection package is awarded to a donor, TA creates a list of all clubs that require a minimum pledge or gift less than or equal to the amount of the account's pledge or gift. An account that gives \$500 would be able to select from any club that requires a minimum amount of \$500 or less whereas an account that gives \$200 would be able to select from any club that requires a minimum of \$200 or less.

See Also:

[Using Award Amount to Create a Discount Offer](#)

Using Award Amount to Create a Discount Offer

If you set the Award Amount field, you do not have to set it to the minimum award amount for the selection package. You can use this feature to set up discount offers to give a donor a benefit normally offered for a donation larger than the one the donor gives. For example, you can create a premium selection package assigned a minimum award amount of \$100 but set the Award Amount field to \$200. If an account gives \$100 and is awarded this selection package, TA composes a list of premiums that require a gift of \$200 or less. Through such a selection package, an account can pick a \$200 premium using a \$100 pledge. When the account pays \$100 to fulfill the pledge, TA marks the premium deliverable because the pledge is paid in full.

Note: *If you set up a discount offer like the one described in the previous example, you can set up the package to be awarded automatically, restricting it, for example, to specific solicitations. See "[Restrictive Award Criteria](#)" to learn which criteria you can set to restrict the automatically awarding of a benefit, including specifying for which solicitations a benefit should be automatically awarded.*

Setting Package Item Processing Options (Category Selection Packages)

The Default Prior Choice option is located on the Benefit Entry: Package view. You should mark the Default Prior Choice? checkbox for a category selection package that is automatically awarded by TA if you want TA to default, during pledge and gift entry, the benefit the account selected previously from the selection package if TA re-awards the selection package to a subsequent pledge or gift from the account.

For example, you set up a club selection package and mark the Default Prior Choice? checkbox. An account gives a gift for which TA awards the club selection package. The account selects the Nature club. The account gives one year later, and again TA awards this club selection package to the account, defaulting the Nature club as the one selected from the package.

Deleting or Inactivating a Benefit

Deleting a Benefit

If you create a benefit in error, you can mark the benefit for deletion by changing the Status field on the Benefit Entry screen to "D" for delete. You can press the [F9] key in the Status field to view the list of status codes. When you set the status to delete, the benefit is no longer included in any list of benefits throughout TA, e.g., the list of benefits you can access during gift and pledge entry. When your organization runs delete processing, the benefit is deleted.

Inactivating a Benefit

If you want to inactivate a benefit because you want to keep a record of the benefit but no longer want the benefit to be available to award, you can change the Status field on the Benefit Entry screen to "I" for inactive. You can press the [F9] key in the Status field to view the list of status codes. When you set the status to inactive, the benefit is no longer included in any list of benefits throughout TA, e.g., the list of benefits you can access during gift and pledge entry.

