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Using the System Preference Administration Screen

Each organization makes decisions about how they want Team Approach® (TA) to work in certain situations. A system preference identifies a system-wide decision as to how TA should work in a given situation. As a system administrator, you use the System Preference Administration screen when configuring the TA environment for your entire organization. (You can then further customize TA for individual users or user groups, if desired. See [Setting up a User](#) and [Setting up a User Group](#) for more information.) Preferences are divided into the following areas on the System Preference Administration screen.

- Entry preferences, which affect data entry functionality
- Background processing preferences, which affect things like gift processing, user creation, and uploads
- General preferences, which affect things like file locations, outputs, and security
- Preferences that affect a particular operation (screen, report, or procedure)

In addition, there are system settings that control the menu layout for your organization and your queue set up.

Note: Some preferences can be set differently for a particular user (these are known as user preferences), and some can be set differently for each "copy" of a screen, report, or procedure (these are known as operation preferences). All user and operation preferences are initially set at the system level, but can be changed later on.* The description for each preference notes how the preference is used.

See Also:

[Setting Preferences for Screens, Reports, and Procedures](#)

[Setting Entry, Background, and General Preferences](#)

[Granting Users Access to Preferences](#)

[Organizing Queues](#)

[Customizing the Menu for Your Organization](#)

[Printing the System Preferences Listing](#)

[Index of System Preferences](#)

*** Warning:** Administrators have the ability to modify any operation- or user-level preferences for a given user on the User Preference Administration screen. If your organization wants to maintain a single value for a preference across all users, then do not give the users access to the preference on the User Preferences screen, and do not change the value for any users. If you want to be sure that all users have a certain value for a preference, but don't want to check through every single user on the User Preference Administration screen, you can contact TA Support for assistance.

Setting Preferences for Screens, Reports, and Procedures

You can set preferences for a particular screen, report, or procedure on the corresponding tab on the System Preference Administration screen.

Note: Some of the preferences that you expect to find associated with a particular screen, report, or procedure may in fact be listed on the Entry, General, or Processing tabs. This may be because the preference affects multiple areas of TA, or the preference may be available at the user level rather than the operation level.

Select the name of the screen, report, or procedure in the Operation field. TA displays two blocks of preferences. The top block contains preferences that can be modified at the user or operation level (as well as other parameters for reports and procedures). The bottom block contains preferences that can have only one setting for the system. See [Granting Users Access to Preferences](#) for information about setting the columns to the right of each preference. Once you have set the preferences to meet your organization's needs, press <Save> to commit the changes.

Note: If you do not want to save your changes, you can press <Undo> to revert the settings to how they were when last saved. You can press <Restore> to revert to the default system settings.

See [Creating Copies of Screens, Reports, and Procedures](#) for the steps involved in creating copies.

Note: You can distribute copies of a screen, report, or procedure on the User Preference Administration or User Group Preference Administration screens.

Viewing Statistics for an Operation

You can view statistical information for a report or procedure by pressing <Statistics>. TA displays a window that contains the date when the operation last ran, the amount of time the operation last took to run, and the date when the operation is scheduled to run next. You can access the Schedule Administration screen from this window by pressing <View>.

Setting Entry, Background, and General Preferences

You can set data entry, background processing, and general preferences for the system on the corresponding tab on the System Preference Administration screen. Select the system area affected by the preference in the Operation field. TA displays a block where you can set the preferences to meet your organization's needs. See [Granting Users Access to Preferences](#) for more information. Once you have set the preferences to meet your organization's needs, press <Save> to commit the changes.

Note: If you do not want to save your changes, you can press <Undo> to revert the settings to how they were when last saved.

Granting Users Access to Preferences

Each preference (as well as general parameters for reports and procedures) on the System Preference Administration, User Preference Administration, and User Group Preference Administration screens contain Yes/No fields that control users' access to the settings.

Should the Preference be Displayed on the User Preferences Screen

Set the value in the Displayed on User Preferences? field (labeled "DUP") to "Y" to indicate that the user can see both the preference label and the preference value on the User Preferences screen, if he or she has access to that screen.

Should the Preference be Updateable on the User Preference Screen

Set the value in the Updateable on User Preferences? field (labeled "UUP") to "Y" to indicate that the user can update the preference value on the User Preferences screen, if he or she has access to that screen.

Should the Preference be Available to the User When Scheduling

Set the value in the Available when Scheduling? field (labeled "AWS") to "Y" for a preference that represents a report or procedure parameter if you want to indicate that the user is allowed to view and update the parameter value when scheduling the operation (on the Request an Operation window, the Schedule Administration screen, and the Query and Output Schedule screen).

Valid Combinations

Only the following combinations of values for these three fields are allowed by TA:

Displayed on User Preferences	Updateable on User Preferences	Available when Scheduling
N	N	N
Y	N	N
Y	Y	N
Y	Y	Y

If you set the fields in any other way, TA resets the fields to make a valid combination.

Organizing Queues

TA includes 18 processing queues. You can assign one or more of your organization's processing queues to a virtual queue and/or a queue category on the Queues tab of the System Preference Administration screen.

Assigning a Processing Queue to a Virtual Queue

The function of virtual queues is to enable you to schedule an operation such that one of multiple processing queues can process the operation, depending on which processing queue is first available. Team Approach® includes several virtual queues: Queues 91, 92, 93 and 94. Each virtual queue can be used for a certain type of operation. For example, Queue 91 (Virtual Short) can be used to process operations that typically run quickly, while Queue 93 (Virtual Long) can be used to process operations that typically take more time to run (e.g., query and output processing or management reports).

TA includes 18 processing queues. You identify which processing queues comprise a virtual queue by setting the Virtual Queue field on the System Preference Administration screen. For example, assume that you set the Virtual Queue field to "93" for both Queue 3 and Queue 4, which are both processing queues. You schedule the Query and Output Processing operation to run. Rather than scheduling the operation to run on Queue 3 or Queue 4, you schedule it to run on Virtual Queue 93. TA processes the operation on *either* Queue 3 or Queue 4, depending on which processing queue is available first.

To assign a processing queue to a virtual queue, select the processing queue to work with in the Operation field. Then select the virtual queue in the Virtual Queue field. You can press the [F9] key to select from a list of virtual queues.

Assigning a Queue to a Queue Category

The queue category is an informational way to group processing queues. Select the processing queue to work with in the Operation field. Then select the queue category in the Queue Category field. You can press the [F9] key to select from a list of queue categories.

Customizing the Menu for Your Organization

TA is delivered with a certain set of operations assigned to particular modules. You can change where certain operations display in each module, and you can change the module that TA displays when your users log on to TA.

You can also customize the menus for a particular user or a user group on the User Preference Administration screen or User Group Preference Administration screen, respectively. Likewise, users that have been given access to the User Preferences screen can customize their own menus.

See [Customizing Your Menu](#) in the System Wide Features and Functions section of Help. Note that those steps refer to the System Preference Administration screen, but the steps involved in customizing menus are the same regardless of which Preference screen you use.

Printing the System Preferences Listing

You can print the System Preferences Listing report from the System Preference Administration screen by clicking <Report>. This report includes each system preference and the preference's setting.

Index of System Preferences

System preferences are organized into several areas. To access a list and find out more about any system preference, click on a button below. (Note that some preferences are available at the user and operation level. For more information, see the specific preference.)

```
{button Entry System
Preferences,JumpID('Entry_System
_Preferences')}
{button Background System
Preferences,JumpID('Background_
Processing_System_Preferences')}
{button General System
```

```
{button Screen-specific System
Preferences,JumpID('Screen-
specific_System_Preferences')}
{button Report-specific System
Preferences,JumpID('Report_specific_System_Preferen
ces')}
{button Procedure-specific System
```

Preferences,JumpID('General_System_Preferences'))

Preferences,JumpID('Procedure_specific_System_Preferences'))

Note: For more information about the types of preferences in each area, see [Using the System Preference Administration Screen](#).

Entry System Preferences

Accounts

[Automatically Default Gender?](#)

[Capitalize Initial Letter?](#)

[Check Digit Method](#)

[Cutoff Score for Exact Matches](#)

[Cutoff Score for Partial Matches](#)

[Default Account Type](#)

[Default Area Code](#)

[Default Country](#)

[Default E-Mail Type](#)

[Default Search Type](#)

[High/Low ZIP Check](#)

[Preferred Account Overview Screen](#)

[Require Comment for Classification?](#)

[Require Complete Name and Address?](#)

[Resetting the Account ID](#)

[Status of Accounts with All Inactive Names](#)

Addresses

[Automatically Rebuild PO Lines for Address Changes](#)

[Maximum Undeliverable Count](#)

[Set Account Level Affiliation](#)

Benefits

[Align Expiration Dates in Packages?](#)

[Warn if Expiration Date Changed?](#)

General

[Enable Attachments?](#)

[User Default Activity](#)

[User Default Activity Type](#)

Gifts

[Allow Gifts to Master Project?](#)

[Allow Manual Booking Pledges?](#)

[Ask to Save Changed Settings on Giving History](#)

[Automatically Assign Pledge Numbers?](#)

[Automatically Convert Foreign Currency?](#)

[Automatically Extend Installments?](#)

[Award Benefits on Transactions?](#)

[Award Benefits Using Account's Preferred Currency?](#)

[Batch Locks On?](#)

[Calculate Recipient Gift Type?](#)

[Customer Service/Planned Giving Batch Sequence](#)

[Default Source Code for CS Batches](#)
[Default Transactions to Include](#)
[Derive Credit Account and Fund?](#)
[Duplicate Charge Card Check Days](#)
[Financial Adjustments on Batch Detail](#)
[Fiscal Adjustments on Batch Summary](#)
[GL Mode](#)
[Length of Batch Sequence Numbers](#)
[Minimum Installment Amount](#)
[Order by Default](#)
[Optional Financial Adjustment Fields?](#)
[Payment Reconciliation Method](#)
[Payment Reminder Offset](#)
[Post to Closed Fiscal Month?](#)
[Range for Pledge/Gift Date \(+/- months\)](#)
[Reevaluate Benefits on Auto Change of Gift Type?](#)
[Resetting the Pledge Number](#)
[Set Transaction Level Affiliation](#)
[Sustainer Renewal Basis](#)
[Sustainer Classification Value](#)
[Use Total Amount](#)
[User Batch Sequence Start Range](#)
[Validate Credit Account/Fund Combinations?](#)
[When to Retain Benefit Delivery Information](#)
[Years to Keep Pledge Schedule Records](#)

Interactions

[Account for Unknown Interactions](#)
[Category for Inquiry and Referral Interactions](#)
[Category for Media Interactions](#)
[Confidential Interaction Restriction](#)
[Default Interaction Category](#)
[Default Interaction Type](#)
[Display Interaction Types Automatically?](#)
[Preferred Screen for Viewing Interactions](#)
[Require Values on Inquiry and Referral](#)

Marketing/Solicitations

[Create Interest from Program?](#)
[Maximum Activity Type Length Allowed](#)
[Prefix for Source Code Queries](#)

Automatically Default Gender?

Set this system preference (under Entry/Accounts) to "Y" for yes if TA should default the gender of each name within an account. TA defaults the gender when you add a name or when you update a name. You can change the gender of the name if needed. Set this system preference to "N" for no if you do not want TA to default the gender. You can press the [F9] key to view the list of options.

TA defaults the gender based on the gender assigned to the first name or to the title; the gender of the title always overrides that of the name (e.g., TA defaults the gender to "F" for female for Mrs. John Smith). TA's First Name table and Title table are delivered with gender defaults. Your organization can review these tables and update them as necessary.

You must set this system preference; you cannot leave it blank. This system preference affects only online creation and updating of names (i.e., TA does not reference it for names created during an upload).

Capitalize Initial Letter?

Set the Capitalize Initial Letter? system preference (under Entry/Accounts) to "Y" for yes if TA should capitalize selected name and address information the first time that information is entered. Enter "N" for no if TA should not capitalize the information. You can press the [F9] key to view the list of options.

If you set this system preference to yes, TA capitalizes the first letter of each word the **first time** the information is entered into the following name and address fields (i.e., TA does not capitalize the first letter of each word when you update information).

- First name
- Middle name
- Last name
- Street name
- City name
- Line 1 of additional address information
- Line 2 of additional address information

Some or all of the fields appear on the following screens and windows.

- Address Entry
- Create New Account
- Name Entry

Note: When information in each of these fields is updated, TA *does not* capitalize the initial letter of the new information.

See the [Managing Account Information chapter](#) to learn how to add names and addresses to an account.

You must set this system preference; you cannot leave it blank.

Check Digit Method

This system preference is under Entry/Accounts. Your organization can specify a check digit method to be used for the online creation of Account IDs in TA. "Check digit" is one method organizations can use to reduce data entry error by validating a number when it is entered based on a formula that computes the last digit based on the other digits of the number.

By default, this system preference is null (i.e., there is no checking of digits of Account IDs that were created online). Currently, there is only one defined checking digit method, "MOD-10" for Modulo-10. You can press the [F9] key to view the list of check digit values. When a new Account ID is generated and there is a check digit system preference set (i.e., the value is not null), the Account ID will be valid according to the check digit method indicated by the system preference.

You do not have to set this system preference; you can leave it blank. This system preference affects only online creation of accounts.

Cutoff Score for Exact Matches

TA references the Cutoff Score for Exact Matches system preference (under Entry/Accounts) when determining whether to create a new account or not through manual entry or through uploads. The duplicate detection logic uses the values that you set for this system preference. Enter a number between 1 and 100 for this preference.

TA compares the account information entered for each account (either when the account is manually created or in the upload file) to that for each account stored in TA. TA assigns a matching score for each comparison.

- If the score for only one existing account is equal to or higher than the value of this system preference, TA uses the existing account (e.g., assigns the existing account's Account ID to the uploaded pledge). In other words, only one existing account in TA "matches" the account information in the import.
- If two or more existing accounts are assigned scores equal to or higher than this system preference, TA prints the possible matching accounts on the upload's associated duplicate merge report. You can then decide which account is the correct account to use (e.g., for an uploaded pledge, you can review the Pledge Upload Duplicate Merge report).
- If no existing accounts are assigned a score equal to or higher than this system preference, then TA references the [Cutoff Score for Partial Matches](#) system preference as follows.
 - For each existing account assigned a score equal to or greater than the Cutoff Score for Partial Matches system preference (but less than the Cutoff Score for Exact Matches system preference), TA prints the Account ID on the upload's associated duplicate merge report.
 - If none of the existing accounts are assigned a score equal to or greater than the Cutoff Score for Partial Matches system preference, TA creates a new account.
- The scoring for corporate accounts includes this built-in scoring: Address: 40%, Company Name: 20%, and Contact Name: 40%

You must set this system preference; you cannot leave it blank.

Cutoff Score for Partial Matches

TA references the Cutoff Score for Partial Matches system preference (under Entry/Accounts) when you search for an account, when you manually create an account, and when an upload through which an account can be created runs (e.g., the Pledge Upload). You can set this system preference to a number between 1 and 100. The score should be set to a value that is less than the value that you set for the Cutoff Score for Exact Matches system preference.

You must set this system preference; you cannot leave it blank. This system preference affects only off-line creation of names and addresses (i.e., TA does not reference it for names and addresses created online).

More about Searching and Creating Accounts and Possible Matching Accounts

When searching for or creating an account, TA compares the name and address information entered to that for each account stored in TA. TA assigns a matching score for each comparison. The value for the Cutoff Score for Partial Matches system preference represents the minimum score TA uses to consider an existing account a match for the criteria entered; if the score of an existing account is equal to or greater than the partial matches system preference, TA considers the account a possible match for the account you are trying to find or create.

- If searching for an account, the existing account is listed in the Find an Account: Selected Accounts screen.
- If creating an account, the existing account is listed in the Possible Matching Accounts screen.

The matching accounts are listed in order of the highest score to the lowest score. The higher the score, the more closely the account's information matches the account information you entered. For example, if the Cutoff Score for Partial Matches system preference equals 60, TA displays any existing accounts with a score equal to or greater than 60, displaying them from the highest to the lowest score.

- The scoring for corporate accounts includes this built-in scoring: Address: 40%, Company Name: 20%, and Contact Name: 40%

Default Account Type

Set the Default Account Type system preference (under Entry/Accounts) to the account type that should default when creating an account. You can press the [F9] key to view the list of account types.

Note: You should check to ensure that the default account type's status in the Account Type table is set to "A" for active (i.e., do not change this system preference to an inactive account type).

You must set this system preference; you cannot leave it blank.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Default Area Code

You can set the Default Area Code system preference (under Entry/Accounts) to the area code which should default when adding a 7-digit telephone number to an account or updating an account's existing telephone number (e.g., you overwrite the existing number with a seven-digit telephone number). You can enter a number up to three digits in length. If you leave this system preference blank, TA does not default an area code but inserts a set of parenthesis (i.e., "()") before the number as a placeholder for the area code (e.g., "() 555-1234").

Note: By entering a default area code, only seven digits need to be typed when you enter a telephone number that is within the default area code.

TA recognizes non-U.S. telephone numbers (i.e., telephone numbers longer than 10 digits). If the system preference is null (i.e., no default area code is entered), and the telephone number is a foreign telephone number, TA does *not* insert a set of parenthesis (e.g., "()") before the number as a placeholder for the area code.

See the [Managing Account Information chapter](#) to learn how to add and update an account's telephone number(s).

You do not have to set this system preference; you can leave it blank. This system preference affects only online creation of telephone numbers (i.e., TA does not reference it for telephone numbers created during an upload).

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Default Country

The Default Country system preference (under Entry/Accounts) contains the code TA defaults as the country when an address is added to an account. You can change the country when you add the address.

This system preference must be a valid country code. **Your organization cannot change this system preference without consulting TSI.**

See the [Managing Account Information chapter](#) to learn how to add an address to an account.

Default E-Mail Type

This system preference (under Entry/Accounts) determines the email type code that defaults when your users create a new e-mail address, the type defaults based upon what you set for this system preference. A user can change the value as necessary when entering email addresses.

Default Search Type

TA references the Default Search Type system preference (under Entry/Accounts) when a user accesses the Find an Account window. The default search type indicates how TA defaults the Limit to field when a user accesses the Find an Account window. The Limit to field provides the option to focus the search to corporations, foundations, matching companies, planned giving accounts, service providers, or accounts with a recurring tribute.

Most organizations set this system preference to "All Accounts." If you have users that generally work with a specific subset of accounts, consider setting this field for the user on the Default Search Type user preference.

- The user can always override the default search type on the Find an Account window by pressing the [F9] key in the Limit to field and selecting from the list of values.
- The following screens default the search type based on the type of record that you access on the screen: Matching Gifts Reconciliation, Planned Gift Information Entry, Service Provider Entry, Tributes Entry, and the Tributes window in Batch Detail Entry

The screen's default search type overrides the user-level default search type.

Note: If the user enters information in the Account, Brief Name, Phone, or Query fields on the Find an Account window, TA bypasses the record type restriction and searches for the account strictly by Account ID, brief name, telephone number, or query.

You must set this system preference; you cannot leave it blank.

High/Low ZIP Check

TA references the High ZIP Check system preference (under Entry/Accounts) in conjunction with the Low ZIP Check system preference to

- validate the ZIP Code entered or updated for an address,
- validate the city entered or updated for an address, and
- set the origin for an interaction created using the Customer Service Entry screen.

Set the Low ZIP Check system and the High ZIP Check system preferences to the first ZIP Code and the last ZIP Code of the range of ZIP Codes for which you want to ensure the ZIP Code and city information are valid (i.e., stored in TA). In addition, these system preferences control whether TA defaults the origin of an interaction to local or national.

Note: TA validates the ZIP Code and city against the ZIP City table when you add an address to an account, update an account's existing address, and enter the address when creating an account.

You must set both of these system preferences; you cannot leave them blank. These system preferences only affect online creation of addresses (i.e., TA does not reference them for addresses created during an upload).

See Also:

[Validating the ZIP Code Entered for an Address](#)

[Validating the City Entered for an Address](#)

[Defaulting the Origin for an Interaction](#)

Validating the ZIP Code Entered for an Address

Each time you enter a ZIP code for an address, TA checks to see if the ZIP code is in the range established by the High ZIP Check and Low [ZIP Check system preferences](#).

- If the ZIP Code is in the range, including the [starting and ending ZIP codes](#), TA uses the ZIP Code table to ensure that the ZIP code entered is a valid. If the ZIP Code entered is not stored in TA, TA displays an error message in the status bar stating that you need to enter a valid ZIP Code.
- If the ZIP Code is outside of the range, TA does not compare the ZIP Code entered to those in the ZIP Code table (i.e. TA accepts a ZIP Code outside of the range).

For example, if the ZIP Code range is 00000 (Low ZIP Check) to 04000 (High ZIP Check), TA does not check any ZIP codes entered from 04001 upward. TA also does not validate foreign ZIP Codes if the foreign ZIP codes do not fall within the range. In this example, only ZIP Codes from 00000 to 04000 must be stored in TA for you to enter the ZIP Code as part of an address.

Validating the City Entered for an Address

Each time you enter a ZIP code for an address, you can enter a city different from the one that TA defaults. If you change the name of the city from the one that TA defaults,

- If the ZIP code entered is in the range, including the starting and ending values, TA refers to the ZIP Code table to ensure that the city you entered is valid for that particular ZIP code. If the city is not included in the list of valid cities for the ZIP code, TA displays an error message in the status bar stating that the city is invalid. You must change the city to one that is valid for the ZIP code. You can press the [F9] key from the City field to see the list of cities that are valid for that ZIP code.
- If the ZIP code entered is outside of the range, TA refers to the ZIP Code table to check if the city you entered is also entered for that particular ZIP code. If the city is not included in the list of valid cities for the ZIP code, TA displays a message stating that the city is invalid. From the message, you can click the <View> button to view the list of cities associated with the ZIP code or you can click <Accept> to keep the city you entered. TA does not add the city to the list of valid cities for the ZIP code.

Defaulting the Origin for an Interaction

TA sets the origin for an interaction created by comparing the ZIP code for the account associated with the interaction with the range defined by the Low ZIP Check system preference and the High [ZIP Check system preference](#).

- If the account's ZIP code is in the range, including the starting and ending values, TA sets the origin to "LC" for local (i.e., your organization considers this interaction to be with a local account).
- If the ZIP code entered is outside of the range, TA sets the origin to "NL" for national (i.e. your organization considers this interaction to be with a national account).

Note: You can change the origin of an interaction using the Customer Service Entry screen. You can press the [F9] key to view the list of origins. The origin for an interaction is validated by the Region table.

Preferred Account Overview Screen

Change this preference (under Entry/Accounts) to Major Donor Account Overview if a user or users don't need to see the Benefits block and he or she works primarily with major donors or planned gifts. The [Major Donor Account Overview](#) is an alternative view of the standard Account Overview screen.

Require Comment for Classification?

You can set the Require Comment for Classification? system preference (under Entry/Accounts) to "Y" for yes to indicate that a comment must be entered when classifications are added to or updated for an account. You can set this system preference to "N" for no or leave it blank if you do not want to implement this TA feature. You can press the [F9] key to view the list of options.

Your organization controls which classifications require a comment to be entered by entering a comment in the Comment Prompt field on the appropriate classifications. Your organization cannot enter the comment prompt for a classification if this system preference is set to "N" for no (i.e., the system preference must be set to "Y" for yes in order to access the Comment Prompt field).

When this system preference is set to "Y" for yes and you add a classification to an account or update an existing classification, TA checks to see if a comment prompt is set up for the classification. If the comment prompt is set up for the classification, TA automatically displays the Purpose of Classification window, which contains the text of the comment prompt.

For example, assume your organization has not changed the classifications delivered with TA and your organization wants staff to explain why a donor does not want a member card. Your organization could set up the Benefit/No Card classification with the comment prompt "Indicate why the donor does not want a membership card." If a staff member adds this classification to an account, TA displays the Purpose of Classification window, which contains the comment prompt. The staff member should then enter the explanation as a comment for the classification; TA prevents the staff member from exiting the classification if a comment isn't entered.

Note: Your organization can track this same information using interactions. TA includes the Interaction Statistics report and the Interaction Comparison report that provide information about which interactions and the number of interactions your organization has recorded over a time period you specify. Your organization may want to set up the comment prompt and enter the interaction so that not only can any staff member see the comment when viewing a particular classification for an account but the organization is also able to analyze the service provided using interactions.

See the [Managing Account Information chapter](#) for an explanation of what a classification is, how to add a classification to an account, and how to update an existing classification.

You do not have to set this system preference; you can leave it blank. This system preference affects only online creation of classifications (i.e., TA does not reference it for classifications created during an upload).

Require Complete Name and Address?

Set this system preference (under Entry/Accounts) to "Y" for yes if, for each account created, your organization requires the following name and address information.

- The title, the first name, and the gender for each name
- The street number, street name, city, state and ZIP Code for the address

When this system preference is set to yes, if you don't enter the name and address information for a new account, TA displays the appropriate message to indicate which piece of information is missing. Each message provides the option to continue without entering the missing information (i.e., to create the account even though information is missing).

You can set this system preference to "N" for no if your organization does not want to implement this feature. You can press the [F9] key to view the list of options.

You must set this system preference; you cannot leave it blank. This system preference affects only online creation of accounts (i.e., TA does not reference it for accounts created during an upload).

Resetting the Account ID

Use this system preference (under Entry/Accounts) to reset the Account ID that TA references when assigning the next available Account ID when an account is created. To reset the Account ID, complete the following steps.

1. Click <Reset Account ID> to access the Choose Next Account ID window.
2. Enter the Account ID that TA should use for the next account created.
3. Click <OK> to return to System Preference Administration screen. (If you don't want to reset the Account ID, you can click <Cancel> on the Choose Next Account ID window.)

When you reset the Account ID, TA ensures that the new Account ID isn't already assigned to an existing account before assigning it to the next account created. When an account is created manually by you or through a TA upload, TA references the next available Account ID.

1. If the next available Account ID isn't assigned to an existing account
 - TA assigns it to the new account, and
 - TA increments the Account ID by one to create the next available Account ID.
2. If the Account ID is already assigned to an existing account, TA increments the Account ID by one and repeats the check.

By checking the existing accounts to see if the Account ID is already assigned, TA ensures that the Account ID remains unique and "fills-in the gaps" which occur when you cancel the creation of an account.

Status of Accounts with All Inactive Names

TA references this system preference (under Entry/Accounts) when all of the names on an account are set to inactive to determine what the account status should be. This system preference is also referenced if you use Account Data Upload.

You can set this system preference to one of the following values:

- Active = Leave the account status as it is.
- Inactive = Change the account status to inactive. Account Data Upload will set the Termination code to IN (All Names Inactive).
- Prompt = Display a prompt that enables the user to select the account status. Account Data Upload will write an alert "All of the names on this account are inactive or marked to be deleted."

Note: If the account's status is changed to inactive (either because the system preference is set to Inactive, or because it is set to Prompt and the user chooses to inactivate the account), TA sets the termination code to "IN" (All Names Inactive), and sets the termination date to today's date.

You must set this system preference; you cannot leave it blank.

Maximum Undeliverable Count

Set the Maximum Undeliverable Count system preference (under Entry/Addresses) to the number of times you require staff to record an address as undeliverable for TA to set the status of the address to undeliverable; when a staff member sets the undeliverable count for an address to the number set for this system preference, TA sets the address' status to undeliverable. You can enter a number from 1 to 99.

Note: When you run a query to select accounts for a mailing, TA does not select as the mailing address any addresses with the undeliverable status.

See the [Managing Account Information chapter](#) to learn how to update an address' undeliverable count and set the address' status to undeliverable.

You must set this system preference; you cannot leave it blank.

Automatically Rebuild PO Lines for Address Changes

TA references the Automatically Rebuild PO Lines for Address Changes? system preference (under Entry/Addresses) when an address is updated on the Address Entry screen to determine if TA should automatically rebuild the standardized postal address lines (the standardized address line and the standardized address last line). You can set this preference to one of the following values:

- Yes = When an address is changed, rebuild the standardized postal address lines as the uppercased version of the new address
- No = Do not rebuild the standardized postal address lines when an address is changed (i.e., retain the existing PO lines).
- Prompt = Display a pop-up window on the Address Entry screen when an address is changed. The pop-up window displays the existing standardized postal address lines and asks the user if he or she would like TA to automatically update the standardized postal address lines. If the user says yes, TA rebuilds the standardized postal address lines as the uppercased version of the new address. If the user says no, he or she can manually update the standardized postal address lines directly on the pop-up window or leave them unchanged.

Note: TA displays the standardized postal address lines on the Additional tab of the Address Entry screen.

You must set this system preference; you cannot leave it blank.

Set Account Level Affiliation

Your organization can track donors by account-level affiliation, which is independent of a donor's giving history and activity. The account-level affiliation can be set by the donor's ZIP Code only. To use this functionality, set the Set Account Level Affiliation system preference (under Entry/Addresses) to "ZIP" for affiliation by ZIP Code. If you do not want to use this functionality, set the system preference to "N" for no account affiliation. You can press the [F9] key to view the valid options.

Note: In order to use this functionality, you must configure the ZIP Code defaults for each ZIP Code, specifying the affiliation code that should be assigned for each ZIP Code.

TA sets the account-level affiliation on the Account Overview screen. When a gift is processed, the account-level affiliation at the time of the transaction is posted to the transaction in the Current Affiliation field. You can access this field by pressing the [F10] key from the Affiliation field on the Giving History Detail screen. TA also sets the transaction-level affiliation when the gift is processed.

You must set this system preference; you cannot leave it blank. This system preference affects only online creation of accounts (i.e., TA does not reference it for accounts created during an upload).

Align Expiration Dates in Packages?

This system preference (under Entry/Benefits) is for future development; currently, your only option is for TA to automatically align the expire dates. TA references the Align Expiration Dates in Package? system preference

whenever the expiration date for a membership package is changed. You can press the [F9] key to view the list of options.

TA identifies a package as a membership if the package contains a benefit item with the benefit category of membership. The standard membership packages delivered with TA contain the following benefit items: "MEM" for the intangible membership, "ACARD" for your organization's membership card, and "AGDE" for your organization's membership publication. The benefit category of membership is assigned to the MEM benefit.

This system preference controls whether TA resets the expire dates for all of the items in the membership package if the expire date for one of the items is changed. You can set this system preference to one of two values.

- "A" for automatic which indicates that TA should automatically align the expire dates.
- "P" to prompt which indicates TA should prompt the user as to whether the expire dates should be aligned. *This option will be available in future releases of TA.*

The expiration date for a membership package can be changed in one of three ways.

- You manually change the date using the Benefits Awarded screen.
- You manually change the date using the Benefits Requested window accessed by zooming from the Benefits block of the Batch Detail Entry screen.
- TA changes the date because you manually changed the date on the associated account activity record.

Note: When you change the expiration date, TA references the Should Expire Dates Be First or Last of Month system preference to set the expire date either to the first day or the last day of the month you entered. See ["Should Expiration Dates Be First or Last of Month"](#) for an explanation of how that system preference controls the expiration date.

If you manually change the expiration date on a package, TA updates the expiration date for the appropriate account activity record as follows:

1. TA finds the activity type for the benefit with the benefit category of membership. For example, if your organization has one membership, you might assign the activity type "A" for Annual Giving as the activity type for your membership benefits (e.g., "MEM," "ACARD," and "AGDE").
2. TA finds the donor's account activity record for the activity type from the membership benefit, (e.g., TA finds the "A" activity type record). TA updates the expiration date on this account activity record to the one from the package.

If you manually change the expiration date on the account activity record, TA updates the expiration date for the appropriate membership package as follows.

1. TA finds the membership benefit for the activity type. For example, if you have one membership to your organization, you might assign "MEM" as the membership benefit for the activity type "A" for Annual Giving.
2. TA finds the membership package which contains the membership benefit for the activity type; this membership benefit must be active, marked deliverable, and have the same expire date as the one from the account activity record before you changed that date. If TA finds such a benefit, TA updates the expiration date for the benefit. If the benefit is part of a benefit package, TA also updates the expiration date of each item in the package. If TA does not find such a benefit, TA displays an error message to contact TSI.

Note: TA looks for the membership benefit that is active, marked deliverable, and has the same expiration date as that which the account activity record had before the change so that TA updates the correct membership package. In TA, each time a donor renews or rejoins, a new membership package is awarded to the donor. Once the donor meets the delivery criteria for the membership package, TA marks the package deliverable and sets the expiration date.

You must set this system preference; you cannot leave it blank.

Warn if Expiration Date Changed?

TA references the Warn if Expiration Date Changed? system preference (under Entry/Benefits) when the expiration date for a membership benefit is changed. If the system preference is set to "Y" for yes, and the expiration date for the membership is changed on the Benefits Awarded screen, TA determines whether the account is in its renewal window and warns the user that changing the expiration date may affect the renewal window. If you do not want TA to display a warning in this situation, you can set the system preference to "N" for no.

Note: Membership benefits can be indirectly affected by changing the expiration date of another benefit that is part of a package for which the benefits should simultaneously expire.

You must set this system preference; you cannot leave it blank.

Enable Attachments?

This system preference (under Entry/General) determines whether your users can click on the <Attachments> button to link a file outside of TA. This system is delivered with a default of 'Y.' Change this to 'N' if you do not want your users to be able to click on the <Attachments> button.

Related System Preference:

[Browse Start-In Location](#)

User Default Activity

TA uses the User Default Activity system preference (under Entry/General) to set the default activity for your organization's users.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

TA defaults the activity indicated by this preference every time a user accesses a screen for which an activity is required. For example, you might set the default activity for a user who works only with major donors to "AD" for annual development. If the User Default Activity field is left blank for a user, TA does not default any activity information. The user can change the activity if needed during data entry.

User Default Activity Type

TA uses the User Default Activity Type system preference (under Entry/General) to set the default activity type for your organization's users. The User Default Activity Type preference determines the following:

- The default account activity record that appears on the Account Activity screen when the user accesses the screen. If the default activity record does not exist for an account, the cumulative giving record appears. The user can view any of the account activity records for an account using the Account Activity screen.
- The default activity type that displays in the Activity Type field on the Work with Accounts for an Activity screen. If you do not set a default activity type for the user (leave it blank), TA leaves the Activity Type field blank on the Work with Accounts for an Activity screen.
- The default activity type that displays in the Activity Type field when the user creates a new planned gift record from the Planned Gift Information Entry screen. The user can change the default activity type. TA leaves the field blank on the Create New Planned Gift window if you do not set a default activity type for the user.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Allow Gifts to Master Project?

TA references the Allow Gifts to Master Project? system preference (under Entry/Gifts) in the following situations.

- Set this system preference to "Y" for yes if TA should allow a gift or pledge to be posted to a master project. Set this system preference to "N" for no if gifts and pledges should not be posted to a master project (gifts and pledges can be posted only to projects). You can press the [F9] key to view the list of options.
- TA references this system preference when you assign a project to an interaction on the Account Diary Entry screen. Set this system preference to "Y" for yes if TA should include master projects in the list of projects that you can associate with an interaction. Set this system preference to "N" for no if TA should not include master projects in the list of projects that you can associated with an interaction (interactions can be associated with sub-projects of the master project, but not the master project itself).
- If this system preference is set to "N" for no, you cannot make a project a master project if money has been posted to the project. If this system preference is set to "Y" for yes, you can make this project a master project.

Contact TSI to change the installed setting of this system preference.

Allow Manual Booking Pledges?

This system preference (under Entry/Gifts) determines whether your data entry staff can choose if a pledge is bookable or not. If you set this preference to Y, then the user can zoom on Pledge Amount and mark (or unmark) the Bookable? checkbox. (Your bookable rules determine whether pledges are bookable or not bookable by default.)

If every user who has access to Batch Detail should be able to determine the bookable nature of a pledge, then set this field to Y. Set it to N if you do not want to permit your users to change the Bookable? Checkbox.

- If your organization determines the bookable nature of a pledge partly using rules set up on funds or entirely without rules set up on funds, then you should set the system preference as above.
- You can set a minimum pledge amount to determine whether a pledge is bookable at the Fund level (use the Fund Code Entry screen). When a transaction is entered for that fund and it is of at least the minimum amount, TA sets the bookable flag on the transaction. If you want users to be able override the default, then set the preference to Y.
- If you define any bookable rules via funds, TA will continue to use the bookable rules that your organization has defined to set the bookable nature of a pledge, but those users who have privileges to the Batch Detail Entry screen to book pledges manually will be able to override this setting if the system preference is set to Y.
- If your organization sets the bookable nature of a solely pledge by rules set up on funds, you do not need to do anything since the default value of this system preference is N.

Ask to Save Changed Settings on Giving History

TA references the Ask to Save Changed Settings on Giving History? system preference (under Entry/Gifts) when users make changes to either of the following:

- Any of the Include checkboxes on the Find Transactions window or Giving History screen
- The Sort Order field on the Find Transactions window

If you want TA to display an alert asking users if they would like to use the settings they have just chosen as the default settings in the future, set this preference to "Y" for yes. If you do not want TA to display such an alert, set this preference to "N" for no.

Note: The alert includes an option for users to indicate that they do not want to receive the alert again.

You must set this system preference; you cannot leave it blank.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Related System Preferences:

[Ask to Save Settings](#)

[Default Transactions to Include](#)

Automatically Assign Pledge Numbers?

TA references the Automatically Assign Pledge Numbers? system preference (under Entry/Gifts) when you enter a pledge for a donor. Set this system preference to "Y" for yes if TA should assign the next available pledge number each time a new pledge is entered using the Batch Detail Entry screen; TA assigns the pledge number if the person entering the pledge does not enter the pledge number. You can set this system preference to "N" for no if your organization uses its own set of pledge numbers.

You must set this system preference; you cannot leave it blank.

Automatically Convert Foreign Currency?

Your organization can determine if TA should convert gifts and pledges made in a foreign currency into U.S. dollar amounts. If the value in the Default Currency field on the Batch Summary Entry screen is set to a foreign currency and you set this system preference (under Entry/Gifts) to "Y" for yes, TA uses the appropriate exchange rate from the Country Code table to convert the values in either the Pledge Amount or Payment Amount fields to U.S. dollar amounts. The original currency amount is stored for the transaction.

You can set this system preference to "N" for no if you do not want to utilize this feature. You can press the [F9] key to view a list of values. You must set this system preference; you cannot leave it blank.

Automatically Extend Installments?

TA references the Automatically Extend Installments? system preference (under Entry/Gifts) when a donor with an open, partially fulfilled standard installment renews and wants to pay the renewal using an installment plan. A standard installment refers to a pledge whose gift kind is "IN" for installment, and for which the payment frequency is not "I" for installment schedule. An open installment that is partially fulfilled refers to an installment pledge for which you have received some payment but not full payment. In addition, this system preference only applies if the renewal is for the same activity type as that for the current installment plan.

Set this system preference to

- "A" for automatic if TA should extend a donor's existing installment plan at the time you enter the renewal installment pledge for the donor. TA sets the start date on the new installment to the later of the following two dates:
 - the gift date of the transaction
 - one payment frequency cycle beyond the previous installment pledge's Schedule End Date
- "N" for no if TA shouldn't extend a donor's existing installment plan when you enter a renewal installment pledge for the donor. TA creates a new installment plan for the renewal; this new plan is independent of the existing installment plan.
- "P" for prompt if TA should ask the person entering the pledge whether to extend a donor's existing installment plan or create a concurrent installment pledge for the donor when entering the renewal installment pledge for the donor. You can press the [F9] key to view the list of options.

For example, a donor has set up an installment plan of \$10 per month for 12 months for a renewable activity type (e.g., Annual Giving). Ten months into the installment plan (after the donor has made 10 installment payments), the donor renews within Annual Giving for \$120. If this system preference is set to yes, TA sets the start date for the renewal installment pledge to the end date of the existing installment plan. The donor is not sent two bills (one for the existing installment plan and one for the renewal installment payment) because the installment plan for the renewal does not start until the first installment plan ends. You can change the installment schedule dates if needed.

See the [Entering an Account's Transactions and Benefits chapter](#) to learn how to set up an installment pledge and change the installment schedule information.

You must set this system preference; you cannot leave it blank. This system preference is referenced by the Pledge Upload, Batch Upload, and Benefit Auto-Renewal procedures, and during manual entry.

Award Benefits on Transactions?

TA references the Award Benefits on Transaction? system preference (under Entry/Gifts) during gift and pledge entry to determine how to set the Benefits? field on the Batch Detail Entry screen. You can press the [F9] key to view the list of options.

- Set this system preference to "Y" for yes if TA should set the Benefits? field to "Y" for yes to automatically award benefits to the donor. If the Benefits? field on the Batch Detail Entry screen is set to yes, after you enter the information for a donor's gift or pledge pertinent to awarding benefits, TA searches the benefits your organization set up for automatic awarding and awards to the donor those benefits for which the donor qualifies.
- Set this system preference to "N" for no if you don't want TA to automatically award benefits to the donor. Any benefits to be awarded to the donor can be manually awarded. If benefits set up for automatic awarding should be awarded by TA, the person entering the item must set the Benefit field to yes on the Batch Detail Entry screen before manually awarding benefits and before creating the next item in the batch.

You must set this system preference; you cannot leave it blank.

Award Benefits Using Account's Preferred Currency?

Your organization can decide whether TA should use the account's default currency amount to award benefits (i.e., if the account's default currency is foreign). You can set the Award Benefits Using Account's Preferred Currency? system preference (under Entry/Gifts) to "Y" for yes if you want TA to award benefits using the account's default currency. TA then refers to the value in the Default Currency field on the Account Overview screen to determine the currency values on which the benefits should be awarded. This system preference works in conjunction with the Preferred Foreign Currency system preference.

This system preference should be set to "N" for no if you do not want TA to use the account's default currency when awarding benefits.

Your organization should contact TSI to change this system preference.

Batch Locks On?

TA references the Batch Locks On? system preference (under Entry/Gifts) when you [set up the batch defaults for a batch](#). Set this system preference to "Y" for yes if TA should automatically mark the Lock checkbox if you enter a default for a particular field on the Batch Summary Entry screen. If a field is locked then the user cannot change the default setting on the Batch Detail Entry screen. (You can override the default for any particular field.) If you don't want TA to lock the batch defaults automatically, set this system preference to "N" for no.

You must set this system preference; you cannot leave it blank. You can set up defaults and lock the values in the Defaults section on the Batch Summary Entry screen for these fields.

- Transaction Type
- Source Code

- Payment Method
- Gift Kind
- Gift Type
- Deposit Location
- Event
- Team

Calculate Recipient Gift Type?

Your organization can decide if gift types for gift memberships should be based on the membership recipients' accounts. If this system preference (under Entry/Gifts) is set to "Y" for yes, you can enter the gift giver's Account ID in the Account ID field on the Batch Detail Entry screen and press [Alt] [F10] from the Account ID field to enter the recipient's Account ID on the Recipient Account Information window. The recipient's Account ID will then be used with the gift information to calculate the recipient gift type, which is displayed on both the Recipient Account Information window and the Batch Detail Entry screen.

The giver's gift type is set to "GM" for gift membership, which also appears on the Recipient Account Information window. The benefits are assigned to the recipient's account. To indicate whether the giver or the recipient should receive membership renewal information, set the Renewal Recipient field on the Recipient Information window to "G" for giver or "R" for recipient. Leave this field blank to indicate that you can solicit either the giver or the recipient, according to your organization's practices. You can update this field.

Note: You *cannot* reassign benefits that have been awarded to the recipient Account ID using the Benefits requested window on the Batch Detail Entry screen. Any changes to the recipient's information must be made on the Recipient Account Information window.

You must set this system preference; you cannot leave it blank. If you do not want to use the gift recipient feature (i.e., you do not want to use the gift membership feature), set the system preference to "N" for no.

Note: TA references this system preference for the Account Data and Batch Uploads to assign uploaded premiums to the recipient account.

Customer Service/Planned Giving Batch Sequence

TA references this user preference (under Entry/Gifts) when a user creates a batch from either the Customer Service Entry or the Planned Gift Information Entry screens. If this preference is blank then the user cannot access the Batch Detail Entry screen from either the Customer Service Entry or the Planned Gift Information Entry screens. If you enter a number (make sure it is a number equal to or higher than what your organization has entered in the [User Batch Sequence Start Range](#).) then the user is permitted to create a batch from either the Customer Service Entry or the Planned Gift Information Entry screens.

- **Important:** While this preference is available as a system preference, please leave this blank at the system level and only assign it at the user level.
- The number that you enter must be unique to each user. TA composes the batch number based on today's date and the number you assign in this preference. The customer service or planned giving user adds items to the *same batch* throughout the day. Since this method of entering batches bypasses the Batch Summary screen (where you enter batch target totals), your organization should have business practices in place that includes Releasing Open Batches (so that they can be posted) or reviewing these batches (and releasing them).

- If a user is entering a batch directly from the main menu, TA automatically assigns a sequence number and does not use the number that you enter for this preference.
- If you enter this preference, the user must be granted access to the Batch Detail Entry screen. TA displays the message "Insufficient privileges to call this operation." if you assign a user a batch sequence but he or she does not have access to the Batch Detail Entry screen.

Related Preferences:

[User Batch Sequence Start Range](#)

[Length of Batch Sequence Numbers](#)

Default Source Code for CS Batches

TA references the Default Source Code for Customer Service Batches system preference (under Entry/Gifts) in the following situations.

- You create an interaction to which you assign an interaction type that defaults this system preference source code. This source code defaults onto the interaction. For example, the interaction type "CSASK" for a solicitation done by a customer service representative is a standard interaction type delivered with TA. This interaction type is set up to have this system preference source code automatically default onto an interaction when the interaction type CSASK is assigned to the interaction.
- You enter a pledge directly from the Customer Service Entry screen. TA defaults the source code from this system preference to the pledge.
- You create a new account from the Customer Service Entry screen. TA defaults the source code from this system preference onto the Prospect Source code for the account (i.e., the code representing how the account was acquired).

Note: You can change the source code on the interaction and on the transaction if the default customer service source code isn't the correct source code to use.

If your organization has "customer service" staff solicit for donations, the interaction created using the Customer Service Entry screen to record the solicitation should have the same source code as the source code the staff use for the donor's pledge; if granted access, the staff can enter the donor's pledge directly from the Customer Service Entry screen.

Note: Your organization can tie each solicitation to the donor's gift or pledge in response to that solicitation by creating an interaction at the time of the solicitation (e.g., when you pull the accounts for a mailing). When you create the interaction at the time of the solicitation, the interaction contains the source code from the solicitation. When the donor responds with a pledge or gift, you enter that pledge or gift including the source code from the solicitation's reply device. The source code "links" the donor's pledge or gift with the solicitation. See the Understanding Update Procedures chapter for an explanation of the Create Interactions procedure you can run with your solicitation queries.

Set this system preference to a valid source code (up to 14 characters in length).

You must set this system preference; you cannot leave it blank.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Default Transactions to Include

TA references the Default Transactions to Include system preference (under Entry/Gifts) when marking the **Include checkboxes** on the Find Transactions window, which appears when users find transactions from the Giving History Summary screen, the Giving History Detail screen, and in some cases the Gift and Interaction History screen. The

Include checkboxes determine whether the list of transactions TA displays includes soft credits, pledge payments, and/or the complete set of transactions that make up an adjustment.

Enter the names of the Include checkboxes that you want TA to default as marked (in a comma-separated list). You can press [F9] from this field to select the types of transactions to include. Users can mark or unmark the Include checkboxes when they access the Find Transactions window.

Note: Depending on how the [Ask to Save Changed Settings on Giving History?](#) preference is set, TA may display an alert for the user if they change the settings on the Find Transactions window, to enable them to reset their default settings. This alert does not display if the UUP (updatable on user preference) field is marked Y for the system preference.

You do not have to set this system preference; you can leave it blank. In addition to setting this preference at the system level, you can also set it at the user level.

Related System Preferences:

[Ask to Save Settings](#)

[Ask to Save Changed Settings on Giving History?](#)

Derive Credit Account and Fund?

TA references the Derive Credit Account and Fund? system preference (under Entry/Gifts) when you release a batch. This preference enables your organization to have TA apply a set of derivation rules to set the general ledger credit account and the fund for each item in the batch.

Your organization sets up the derivation rules using the Derivation Rule Entry screen. TA references these rules to select the correct general ledger credit account and the fund for each item in the batch.

When this system preference is set to yes, as part of the process of releasing a batch, TA sets the general ledger credit account and the fund on each item in a batch based on the derivation rules your organization set up. Set this system preference to "N" if your organization does not use derivation rules; the credit account and fund are defaulted from the source code or manually entered. You can press the [F9] key to view the list of options.

If your organization sets the Derive Credit Account and Fund? system preference to yes and sets the Validate Credit Account/Fund Combinations? system preference to yes, TA derives the general ledger credit account and fund before validating the combination. See "[Validate Credit Account/Fund Combinations?](#)" for more information about that system preference.

Note: If you set this system preference to yes, TA marks a batch item in error if no rule can be applied to the item or if more than one rule can be applied to the item. TA marks the item in error with the error identifying the problem (no rule to apply or more than one rule to apply). TA does not release the batch because a batch must be error-free to be released.

You must set this system preference; you cannot leave it blank.

Duplicate Charge Card Check Days

This system preference (under Entry/Gifts) determines the number of days in the past that TA checks to see if the same credit card number was used for another transaction. If a number is in this field, TA provides a warning to the user (during data entry or during upload) that the same credit card has been entered within the number of days specified in this system preference. TA determines the duplicate credit card number by comparing the gift dates on the transactions. You can leave this system preference blank if you do not want TA to check for duplicate credit card numbers.

Financial Adjustments on Batch Detail

TA references this system preference (under Entry/Gifts) to determine if users can adjust specific fields on the Batch Detail Entry screen. Set this system preference to "Y" to indicate that users can make financial adjustments on the Batch Detail Entry screen. Set this system preference to "N" to indicate that users are not permitted to make financial adjustments. In addition to setting this preference at the system level, you can also set it at the user level.

Changing information in any of the following fields on an adjustment transaction constitutes a "financial adjustment":

- Deposit date
- Fund
- General ledger credit account
- General ledger debit account
- Gift date
- Payment amount
- Total payment amount

Note that that the [Optional Financial Adjustment Fields?](#) system preference can be set to expand the specific fields that are considered 'financial adjustments.'

Fiscal Adjustments on Batch Summary

TA references the Fiscal Adjustments on Batch Summary system preference (under Entry/Gifts) to determine if users can set the Fiscal Month and Fiscal Year fields on the Batch Summary Entry screen to a closed fiscal month (i.e., to post batches to a closed fiscal month).

Set this preference to "Y" to indicate that users can set the Fiscal Month and Fiscal Year fields on the Batch Summary Entry screen to a closed fiscal month. Set this system preference to "N" to indicate that they are not permitted to set the Fiscal Month and Fiscal Year fields on the Batch Summary Entry screen to a closed fiscal month.

You must set this system preference; you cannot leave it blank. In addition to setting this preference at the system level, you can also set it at the user level.

Note: Most organizations set this system preference to "N," and then override the preference at the user level for a limited number of users.

Also note that to enable a user to post a batch to a closed fiscal month, the [Post to Closed Fiscal Month](#) system preference should be set to "Y." You should also keep in mind the [Last Closed Deposit Date](#) system preference, which can be set to prevent users from entering transactions to a date that should be closed. If your organization uses the Last Closed Deposit Date system preference, TA will not release a batch with a deposit date that is less than or equal to the value set for that system preference, even if the user has privileges to post a batch to a closed fiscal month.

GL Mode

TA references the GL Mode system preference (under Entry/Gifts) during entry of each item in the batch. You can set this system preference to

- "GL ACCOUNTS" to ensure that the credit account and debit account is set for each gift, pledge payment, or pledge in the batch to be exported to the general ledger.
- "GL ACCOUNTS AND FUNDS" to ensure that the credit account, debit account, and fund is set for each gift, pledge payment, or pledge in the batch to be exported to the general ledger.
- "NONE" if you don't want to use this feature.

Note: All gifts and pledge payments are exported when the General Ledger Interface is run. Only those pledges marked to be exported are pulled by the General Ledger Interface.

You can press the [F9] key to view the list of options.

Note: If an item in the batch does not have the appropriate fields set, TA marks the item in error. TA does not release the batch because a batch must be error-free to be released.

You can leave this system preference blank.

If your organization has the Derive Credit Account and Fund? system preference and/or the Validate Credit Account/Fund Combinations? system preference set to yes, TA reruns this processing after those checks are completed.

Length of Batch Sequence Numbers

TA references this system preference (under Entry/Gifts) each time you create a batch of transactions either manually or through an upload or update procedure. TA's default batch number is composed of the current date and a sequence number. This system preference determines the length of that sequence number.

- The default value of this system preference when TA is delivered is "3." You can set this value at the time of installation to "3," "4," or "5." For example, if this system preference is set to "3," TA assigns sequence number "001" to the first batch created, "002" to the second batch created, etc.
- This system preference works in conjunction with the [User Batch Sequence Start Range](#) system preference. And User Batch Sequence Start Range works in conjunction with [Customer Service/Planned Giving Batch Sequence](#)
- You must set this system preference; you cannot leave it blank. **To change this system preference after installation, please contact TSI.**

Minimum Installment Amount

TA references the Minimum Installment Amount system preference (under Entry/Gifts) when you enter an installment pledge. You can set this system preference to the smallest installment payment your organization accepts preventing your staff from setting up an installment schedule with payments less than this minimum amount. For example, if your organization does not process installment payments less than \$5 regardless of frequency (e.g., \$5 with a quarterly frequency is a \$20 gift whereas \$5 with a weekly frequency is a \$260 gift), set this system preference to \$5. You can enter a number up to four digits in length.

Note: If you enter an installment pledge with an installment amount that is less than the amount entered for this system preference, TA marks the pledge in error. TA does not release the batch because a batch must be error-free to be released.

This system preference affects only online creation of transactions (i.e., TA does not reference it for transactions created during an upload).

You must set this system preference; you cannot leave it blank.

Order by Default

TA references the Order by Default system preference (under Entry/Gifts) when setting the Order field on the Find Transactions window, which appears when users find transactions from the Giving History Summary screen, the Giving History Detail screen, and in some cases the Gift and Interaction History screen.

The Order field determines the order in which the found transactions appear. Set this preference to one of the following values:

- Account ID, Gift Date. TA displays the selected transactions by Account ID from the most recent to the oldest (reverse chronological order).
- Activity Type. TA displays the selected transactions by activity type (alphabetically).

Users can change the Order field when they access the Find Transactions window.

Note: Depending on how the Order by Default preference is set, TA may display an alert for the user if they change the settings on the Find Transactions window, to enable them to reset their default settings.

You must set this system preference; you cannot leave it blank. In addition to setting this preference at the system level, you can also set it at the user level.

Optional Financial Adjustment Fields?

This system preference (under Entry/Gifts) is used by the General Ledger Interface to determine whether an adjustment to these fields should be downloaded to the GL: Deposit Date, Fund Type, and Transaction Level Affiliation. You can enter multiple values in this system preference.

Also, this system preference is referenced by the batch release process and checks whether a user is privileged to make the financial adjustment. For example, if this preference is set to 'Transaction Level Affiliation' the user needs to have financial adjustment privileges to make an adjustment to the field.

Payment Reconciliation Method

The Payment Reconciliation Method system preference (under Entry/Gifts) controls how Installment payments (those transactions with a Gift Kind set to 'IN' or 'SG') are automatically reconciled against the schedule that was determined when the pledge or sustaining gift was create. While you can manually change how a particular payment is credited, this system preference automatically applies the payment according the value that you specify. Your choices are:

- **Pay Current and Future:** The payment will pay off the current pledge payment. If the donor pays more then the extra amount is applied toward the next installment (future).
- **Pay Current Only:** The payment will pay off the current pledge payment only. If the donor pays more then it is NOT applied toward any future installments.
- **Pay Current and Complete Future:** The payment will pay off the current pledge payment and will only pay off future installments if any extra amount equals the total (complete) payoff amount of the installment. That is if the donor includes two full payments, then TA automatically applies each payment with the current installment and the next one. If the donor includes one full payment and only a portion of the second payment, TA applies the entire amount to the current installment. TA does not apply the extra amount as a partial payment toward the next installment.
- **Pay First and Future:** The payment will pay off the first expected payment that has not been completely paid. Remaining amounts are used for the subsequent expected payments.
- **Pay Current and First:** The payment will pay off the current pledge payment. If the donor pays more then the extra amount is applied toward any past payments that are due.

Payment Reminder Offset

The Payment Reminder Offset system preference (under Entry/Gifts) determines the default date that is entered on the Reminder Due Date field for the installment schedule record. Enter the number of days before the payment's due date (or expected payment date) that a reminder should be sent to the donor.

Post to Closed Fiscal Month?

TA references the Post to Closed Fiscal Month? system preference (under Entry/Gifts) when you set up the fiscal information for a batch. Only users identified as managers can enter transactions for a closed fiscal month.

Set this system preference to "Y" for yes to allow the posting of gifts and pledges to a closed fiscal month. Set this system preference to "N" for no if gifts and pledges should not be posted to a closed fiscal month. You can press the [F9] key to view the list of valid options.

You must set this system preference; you cannot leave it blank.

Range for Pledge/Gift Date (+/- months)

TA references the Range for Pledge/Gift Date (+/- months) system preference (under Entry/Gifts) during gift and pledge entry. TA calculates the start of the range of acceptable pledge and gift dates by subtracting the number of months indicated by this system preference from the system date. TA calculates the end of the range of acceptable pledge and gift dates by adding the number of months indicated by this system preference to the system date. TA then compares the pledge or gift date for each item entered to this range. If the date isn't within the range, TA displays a message stating that the date is outside of the range. TA does not prevent you from entering a date outside of the range. You can enter a positive number up to 9 digits in length (you cannot enter a negative number).

This system preference is helpful in catching data entry errors. For example, you set this system preference to "2." On January 2, 1999, you enter a gift using the date "1/2/98" instead of "1/2/99" (you may not yet be adjusted to the change in year). Based on the current date, the acceptable range for gifts is from 11/2/98 to 3/2/99. TA displays the message to warn you that the date you entered is outside of the acceptable range.

You do not have to set this system preference; you can leave it blank.

Reevaluate Benefits on Auto Change of Gift Type?

TA references the Reevaluate Benefits on Auto Change of Gift Type? system preference (under Entry/Gifts) when the execution of a gift type rule on the Batch Detail Entry screen causes TA to automatically change the gift type on a first pledge payment.

Set this system preference to "Y" for yes if you want TA to prompt the user to reevaluate benefits if the gift type has been automatically changed. Set this system preference to "N" for no if you do not want TA to prompt the user to reevaluate benefits in such a situation. The default value of this system preference is N.

Note: This system preference does not affect the Batch Upload procedure; that procedure always reevaluates benefits if the gift type is changed. Also, this system preference does not affect situations where the user manually changes the gift type on the Batch Detail Entry screen. TA always displays a prompt when the user manually changes the gift type.

You must set this system preference; you cannot leave it blank.

Resetting the Pledge Number

This system preference (under Entry/Gifts) permits you to reset the pledge number that TA references when assigning the next available pledge number during pledge entry. To reset the pledge number, complete the following steps.

1. Click <Reset Pledge Number> to access the Choose Next Pledge Number window.
2. Enter the pledge number that TA should use for the next pledge entered.
3. Click <OK> to return to the System Preference Administration screen. (If you don't want to reset the pledge number, you can click <Cancel> on the Choose Next Pledge Number window.)

When you enter a pledge using the Batch Detail Entry screen, you or TA sets the pledge number. TA checks the pledge number to ensure the number is unique. If the pledge number is already assigned to an existing pledge, TA displays a message indicating that the pledge number is not unique. You cannot leave the Pledge Number field until you change the pledge number to one that is unique across all pledges.

Your organization may need to reset the pledge number if your organization has an outside vendor take pledges and provides that vendor with a series of pledge numbers to use. Your organization can reset the pledge number to the one that follows the last pledge number given to the vendor. If your organization manually enters the pledges taken by the vendor (versus using TA's Pledge Upload procedure), staff would enter the pledge number instead of letting TA assign the pledge number.

Set Transaction Level Affiliation

TA references the Set Transaction Level Affiliation system preference (under Entry/Gifts) during the creation of batches (both on screen and during uploads that create batch items).

There are several options available if your organization wants to track [transaction level affiliations](#):

- [Affiliate Rule](#): TA references the gift type and source code associated with the transaction to determine the affiliation.
- [Source](#): TA references the source code associated with the transaction to determine the affiliation,
- [ZIP](#): TA references the donor's ZIP Code associated with the transaction to determine affiliation,
- [Event/ZIP](#): TA references the affiliation on the Event code. If there is no event on the transaction then the donor's Zip code is used to determine the affiliation.
- [Source/ZIP](#): TA references the source code associated with the transaction to determine the affiliation; if there is no affiliation specified on the source code, TA references the donor's ZIP Code associated with the transaction

Note: You must configure your ZIP Codes with the desired affiliations on the ZIP Code Entry screen. TA uses the [ZIP Code Defaults Precision Level](#) system preference to indicate the level of precision you want to use when setting up ZIP Code affiliations.

You must set this system preference; you cannot leave it blank. You can press the [F9] key to view the list of options for setting transaction level affiliations.

Note: The Set Transaction Level Affiliation system preference replaced the Set Affiliation Code system preference that was available in previous versions of TA. If your organization set the Set Affiliation Code system preference to "Y" for yes in a previous version of TA, you should set the Set Transaction Level Affiliation system preference to "ZIP" for affiliation by ZIP Code.

Sustainer Renewal Basis

TA references the Sustainer Renewal Basis system preference (under Entry/Gifts) to determine how to set the expiration date when you enter a "sustaining gift," which in this case refers to a pledge with a gift kind of SG.

The three values for the preference are Rolling, Calendar, and Fiscal.

- **Rolling.** When you enter a SG pledge, TA sets the end date of the pledge to 12 months in the future. Use Rolling if donors in the sustainer program can have an expiration date that falls in any month of the year. If you set this preference to Rolling, run the Benefit Auto-Renewal procedure on a monthly basis.
- **Calendar.** When you enter a SG pledge, TA sets the end date of the pledge to the last day of the calendar year (or the first day of the next calendar year, depending on whether you have TA set expiration dates to the first or last of the month). Use Calendar if donors in the sustainer program have an expiration date that falls at the end of the calendar year. If you set this preference to Calendar, run the Benefit Auto-Renewal procedure once at the end of the calendar year.

- **Fiscal.** When you enter a SG pledge, TA sets the end date of the pledge to the last day of the fiscal month in the fiscal year (or the first day of the next fiscal year, depending on whether you have TA set expiration dates to the first or last of the month). Use Fiscal if donors in the sustainer program have an expiration date that falls at the end of the fiscal year. If you set this preference to Fiscal, run the Benefit Auto-Renewal procedure once at the end of the fiscal year.

If you set this preference to Calendar or Fiscal, when you enter a SG pledge, TA calculates the pledge amount and number of payments based on the time between the schedule start date and end of the calendar/fiscal year. TA awards benefits based on the amount expected from the donor over 12 months. In addition, TA calculates the giving level and giving level amount based on the amount expected over 12 months.

You must set this preference; you cannot leave it blank.

Sustainer Classification Value

This system preference (under Entry/Gifts) determines when TA displays an alert indicating that the account is a sustaining giver account. Press [F9] to select from the list of AUTO-RENEW classification values. You can have multiple values for this system preference. TA will alert any user who accesses an account with the classification(s) that are entered for this system preference. This system preference is also available at the user-level.

Use Total Amount

The Use Total Amount system preference (under Entry/Gifts) is used for "split gift" and "split pledge" processing. A split gift refers to one donation where the amount is applied to multiple areas of your organization.

If you set this system preference to "Y" for yes, users are required to set the **Total Payment Amount** field on the first page of the split gift. (To do this, he or she needs to press [F10] in the **Payment Amt** field). By default, TA sets the Total Payment Amount field to the payment amount you entered for the first part of the split gift. If this system preference is set to Y, then your users need to enter the sum of all the payment amounts you are entering for the split gift into the Total Payment Amount field.

Also, if this preference is set to Y then TA brings in all pages of the split transaction if the transaction is selected for an adjustment. If this system preference is set to 'N', if transactions are adjusted, TA will only bring in the page of the transaction that is selected (the user has to select the specific page).

When this system preference is set to yes and you try to release a batch, TA completes the following tasks.

- For a split gift, TA compares the amount displayed in the Total Payment Amount field on the first page of the gift to each payment amount for each page of the gift (each split). If the total payment amount does not equal the sum, TA does not release the batch and marks the batch item in error.
- For a split pledge, TA compares the total pledge amount from the first page of the pledge to the sum of the pledge amounts for each page of the pledge (each split). If the total pledge amount does not equal the sum, TA does not release the batch and marks the batch item in error.

A split pledge refers to multiple pledges that need to be tied together. When you enter each pledge, you enter them using multiple pages of the same batch item instead of creating a separate batch item for each pledge.

Note: For a non-split gift, the gift has only one page, and the total payment amount always equals the payment amount. For a non-split pledge, the pledge has only one page, and the total pledge amount always equals the pledge amount.

User Batch Sequence Start Range

TA references this system preference (under Entry/Gifts) when you assign a customer service/planned giving batch sequence number to a user on the User Preference Administration screen. This system preference determines the lowest sequence number that you can assign to a user. For example, if the system preference is set to "900," you can assign batch sequence numbers between 900 and 999. The length of the sequence number you assign depends on the [Length of Batch Sequence Numbers](#) system preference.

The default value for this system preference when TA is delivered is "900," "9000," or "90000," depending on the Length of Batch Sequence Numbers system preference. You can change this value at the time of installation.

You must set this system preference; you cannot leave it blank. **To change this system preference after installation, please contact TSI.**

Related Preference:

[Customer Service/Planned Giving Batch Sequence](#)

Validate Credit Account/Fund Combinations?

TA references the Validate Credit Account/Fund Combinations? system preference (under Entry/Gifts) during entry of gifts and pledges. This preference enables your organization to have TA verify that the credit account and the fund for each item in the batch are a valid combination. You can press the [F9] key to view the list of valid options.

Your organization sets up funds using the Fund Code Entry screen. When setting up a fund, your organization designates one fund group for which the fund is valid. Your organization sets up general ledger accounts using the General Ledger Account Code Entry screen. When setting up a general ledger account, your organization designates one or more fund groups that are valid for that general ledger account. TA compares the fund group for the fund assigned to the batch item to the fund groups for the general ledger account assigned to the batch item. A valid combination means that the fund group for the fund is included in the fund groups for the general ledger account.

When this system preference is set to "Y" for yes, TA verifies that the general ledger credit account and the fund on each item in a batch are a valid combination. Set this system preference to "N" for no if your organization does not want to verify the credit account and the fund combinations.

If your organization sets the Derive Credit Account and Fund? system preference to yes and sets the Validate Credit Account/Fund Combinations? system preference to yes, TA reruns this validation after deriving the general ledger credit account and fund (the derivation occurs when you release the batch). See "[Derive Credit Account and Fund?](#)" for more information about that system preference.

Note: If you set this system preference to yes, TA marks a batch item in error if the credit account and the fund combination is not valid for the item. TA does not release the batch because a batch must be error-free to be released.

You must set this system preference; you cannot leave it blank.

When to Retain Benefit Delivery Information

TA references the When to Retain Benefit Delivery Information system preference (under Entry/Gifts) when re-awarding automatically awarded benefits on adjustment transactions on the Batch Detail Entry and Batch Summary Entry screens. (When you change one of a number of fields on these screens, TA displays a message that gives you the opportunity to reevaluate benefits. For adjustment transactions, if you choose to reevaluate the benefits, TA references this system preference.)

This system preference enables your organization to have TA retain the delivery information* for benefits that were awarded and delivered prior to an adjustment.

You can set this system preference in one of three ways:

- Never
- Always
- Downgrades

The default value for this system preference is "Never," which means that on an adjustment, if TA reawards a benefit that was previously awarded and delivered on the original transaction, the new benefit will not have any of the delivery information that was associated with the original benefit.

If you want TA to always retain the delivery information for benefits that were awarded and delivered prior to an adjustment, set this system preference to "Always."

If you want TA to retain the delivery information for benefits that were awarded and delivered prior to an adjustment for downgrade adjustments only, set this system preference to "Downgrades." If you set the system preference to "Downgrades," TA retains the benefit delivery information from the original benefits if the pledge amount on the adjustment is lower than the original pledge amount (or the payment amount on the adjustment is lower than the original payment amount).

* The information TA retains from the original benefits include:

- Recipient Account ID
- Recipient Name ID
- Recipient Address ID
- Recipient Salutation
- Complimentary Code
- Department
- Complimentary Note
- Comments
- Start Date
- End Date
- Mail Class
- Ok To Deliver flag
- Auto Renew
- Last Date Sent
- Renew Recipient
- Priority
- Suspend Delivery
- Meal
- Participation
- Seating Preference
- Attended flag

You must set this system preference; you cannot leave it blank.

Years to Keep Pledge Schedule Records

This system preference (under Entry/Gifts) determines whether pledge schedule records are created for standard installment transactions. When this preference is set to 0, TA creates pledge schedule records for only irregular installment pledges. (TA will automatically attempt to reconcile pledge payments made to irregular installment pledges.) When this preference is set to 1 or higher, TA automatically creates a pledge schedule for all pledges with a regular payment frequency (such as monthly or quarterly), and TA automatically reconciles pledge payments made against these pledges.

Account for Unknown Interactions

TA references the Account for Unknown Interactions system preference (under Entry/Interactions) when you create an interaction without associating the interaction with an existing account. Set this system preference to the Account ID for the account with which such an interaction should be associated (e.g., a comment from a person who calls your organization but does not provide name and address information). TA uses this Account ID when an unknown interaction is created using the Customer Service Entry screen.

To set up this system preference, you first need to create the account in TA. For example, you can create an account with the Name "Unknown Interactions" and the account type of "OT" for other. Once you create this account, set this system preference to the account's Account ID.

Note: The account for unknown interactions **is not the same** as your organization's "John Doe" account (i.e., the account to which your organization assigns gifts when the donor is unknown). TSI Conversion includes converting the John Doe account from your legacy system; you should continue to use your organization's John Doe account for posting gifts from unknown donors.

See the [Customer Service chapter](#) to learn how to create an anonymous interaction.

You must set this system preference; you cannot leave it blank.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Category for Inquiry and Referral Interactions

TA references the Category for Inquiry and Referral Interactions system preference (under Entry/Interactions) when creating Inquiry and Referral interactions. You can set this system preference to a specific type of Interaction Category that will be used when creating Inquiry and Referral interactions. You can press the [F9] key to view the list of categories.

Important: If the system preference is not set to a category, you *cannot* access the Inquiry and Referral View screen.

Note: If the system preference is set to a category, you *cannot* update the Interaction Category field on the Inquiry and Referral View screen. You must accept the default determined by the system preference. Also, you cannot view interactions with the inquiry and referral interaction category on the Customer Service Entry screen, Account Diary Entry screen, or Notes window.

You do not have to set this system preference; you can leave it blank.

See Also:

[Require Values on Inquiry and Referral system preference](#)

Category for Media Interactions

TA references the Category for Media Interaction system preference (under Entry/Interactions) when creating media interactions for buys of airtime from a media vendor on the Media Entry screen. You can set this system preference to a specific type of interaction category (e.g., "MD" for media buy) as the default. You can press the [F9] key to view the list of categories.

You do not have to set this system preference; you can leave it blank.

Confidential Interaction Restriction

TA references the Confidential Interaction Restriction preference (under Entry/Interactions) when a user accesses a confidential interaction through a screen, report, or user-defined output. This preference determines if TA should display the interaction summary line and comments, or if TA should display the word *Confidential*. This system preference affects the following screens and reports:

- Account Diary Entry screen
- Customer Service Entry screen
- Inquiry and Referral View screen
- Media Entry screen
- Interaction History screen
- Gift and Interaction History screen
- Notes Entry window
- Account Profile report
- Solicitation Response report
- Interaction Statistics report
- Interaction Summary report
- Interaction Value report
- Open Tickler Listing report

You can set this preference to Full Access to indicate that users can view the interaction summary line and comments for confidential interactions on the above screens and reports, and that TA can output this information in user-defined outputs. Users that have full access can mark interactions confidential (by marking the Confidential? checkbox on the screens listed above).

If you don't want users to have access to the summary line and comments for confidential interactions, set this preference to No Access. In this case, TA displays the word *Confidential* instead of the actual data. Users with no access can view all other information related to a confidential interaction, but they cannot change the Confidential? checkbox on an interaction.

Your organization must set this system preference; you cannot leave it blank.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Default Interaction Category

TA uses the Default Interaction Category system preference (under Entry/Interactions) to set the default interaction category for your organization's users.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

The default interaction category determines the interaction category that TA defaults when a user creates interactions from the Customer Service and Account Diary Entry screens. (See the [Category for Inquiry and Referral Interactions](#) and [Category for Media Interactions](#) system preferences for information about categories for these screens.) Set the default according to the category of interactions that the user creates most often.

Note: The Default Interaction Category preference works in conjunction with the Default Interaction Type preference; if the user generally creates different types of interactions that fall under one category, enter only a default for Interaction Category. If the user generally enters one type of interaction, enter a default value for the Interaction Type field. (TA automatically defaults the Interaction Category that corresponds to the type.)

You do not have to set this system preference; you can leave it blank.

Default Interaction Type

TA uses the Default Interaction Type system preference (under Entry/Interactions) to set the default interaction type for your organization's users.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

The default interaction type determines the interaction type that TA defaults when a user creates interactions from the Customer Service, Account Diary Entry, Inquiry and Referral, and Media Entry screens. Set the default according to the type of interactions that the user creates most often.

Note: The Default Interaction Type preference works in conjunction with the [Default Interaction Category](#) preference; if the user generally creates different types of interactions that fall under one category, enter only a default for Interaction Category. If the user generally enters one type of interaction, enter a default value for the Interaction Type field. (TA automatically defaults the Interaction Category that corresponds to the type.)

(See the [Category for Inquiry and Referral Interactions](#) and [Category for Media Interactions](#) system preferences for information about categories for these screens.)

You do not have to set this system preference; you can leave it blank. See [Display Interaction Types Automatically?](#) for information on setting a preference that causes TA to display a list of interaction types instead of setting a default value.

Note: On the Interaction Type Code Entry screen, there are also defaults that you can define for any interaction type. For example, whenever you create an interaction (either manually or through the Create Interaction Update procedure), using a particular interaction type code, fields such as Technique, Response Category, and Response Type can be pre-filled. You can even define which field the cursor should automatically go to. Configuring this user preference in conjunction with interaction type-level defaults can significantly reduce data entry time when a user creates interactions.

Display Interaction Types Automatically

TA references the Display Interaction Types Automatically? system preference (under Entry/Interactions) when a user creates a new interaction on the Customer Service, Account Diary Entry, Inquiry and Referral, and Media Entry screens. Set this preference to "Y" for yes if you want TA to display the List of Values for the Interaction Type field when users create a new interaction. For example, set this preference to "Y" if your users tend to create many types of interactions so that a default value is not helpful.

Set this preference to "N" for no if you do not want TA to display the List of Values for the Interaction Type field when users create a new interaction. For example, if you have specified a [Default Interaction Type](#), you will probably want to set this preference to "N" for no.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Preferred Screen for Viewing Interactions

Set this system preference (under Entry/Interactions) according to the screen that most TA users in your organization prefer to view the details of an interaction. Your choices are Account Diary Entry, Customer Service Entry, Inquiry & Referral, or Media Entry. You can set this preference on the user-level as well. If a preference is not established, then TA provides a prompt asking the user which screen to use to view the interaction details.

Require Values on Inquiry and Referral

TA references the Require Values on Inquiry and Referral system preference (under Entry/Interactions) when creating interactions on the Inquiry and Referral View screen. You can set this system preference to "Y" for yes to require users to enter the source code, interaction type, response category, and response type on all interactions on the Inquiry and Referral View screen. You can set this system preference to "N" for no if you do not want to require all of these fields (note that Response category is always required).

You must set this system preference; you cannot leave it blank. **Your organization cannot change this system preference without consulting TSI.**

Note: If you want to use the Inquiry and Referral View screen, you are required to enter a specific interaction category in the "[Category for Inquiry and Referral Interactions](#)" system preference. You cannot use the Inquiry and Referral View screen without entering a value in this system preference.

Create Interest from Program?

Set the Create Interest from Program? system preference (under Entry/Marketing/Solicitations) to "Y" for yes if, when you add a program to the Program table, TA should complete the following two tasks.

- Create an interest code for the program and add that interest code to the Interest Code table. The interest code will be up to the first eight letters of the program code. TA does not set up any other information for the interest code (e.g., the description; you need to enter that information).
- Assign the interest code representing the program to the program (i.e., set the first of three interests for the program to the interest code representing the program).

You can set this preference to "N" for no if you don't want TA to automatically create an interest for a new program. You can press the [F9] key to view the list of options.

Note: TA references this system preference during conversion. For PBS organizations, if you use a set of program codes with one code per program episode (e.g., NOLA codes), you may consider setting this system preference to no so that you don't have TA add one interest per episode to the Interest Code table. Instead, during conversion you can create an electronic file that maps each program code to the appropriate interest code (e.g., use "NOVA" for every NOVA episode). Please consult your TSI Project Manager to accomplish this task.

You can create a new program and assign interests to the program using the Program Entry screen. You can update the interest code using the Interest Code Entry screen.

You must set this system preference; you cannot leave it blank.

Maximum Activity Type Length Allowed

The Maximum Activity Type Length Allowed system preference (under Entry/Marketing/Solicitations) indicates the maximum length of the activity type code. TA references this system preference when your organization creates activity types using the Activity Type Entry screen.

This system preference can be a number from 1 to 3. **Your organization cannot change this system preference without consulting TSI.**

Prefix for Source Code Queries

TA references the Prefix for Source Code Queries system preference (under Entry/Marketing/Solicitations) when your organization creates a query for a source code using one of TA's source code query automation features: creating the query at the time your organization creates the source code or copying a query using TA's [Copy Sources and Queries by Effort](#) screen.

Set this system preference to the characters you want to prefix each source code query; TA creates the query, setting the query name to PFX SOURCECODE where "PFX" is the prefix you enter as the system preference and "SOURCECODE" is the source code for which you created the query. For example, if the Prefix for Source Code Queries system preference is set to "ASK" and you use one of TA's automation features to create a query for the source code "AMA980101001," then TA sets the name of the query to ASK AMA980101001. You can enter up to six characters for the prefix. By entering a prefix, all source code queries will appear together on the Query Listing report.

Note: The name of a query can be up to 20 characters in length including spaces. TA automatically inserts a space between the prefix and the source code. You should determine the maximum number of characters to which you can set this system preference subtracting the maximum length for source codes at your organization from nineteen. For example, if the maximum length of your organization's source codes will be 14 (e.g., AMAMA980101001), then you can enter up to 5 characters for the prefix. The maximum length of your organization's source codes is determined by the Maximum Activity Type Length system preference and whether your organization is using the fixed length option for source codes. See "[Maximum Activity Type Length Allowed](#)" for more information about this system preference.

Leave this system preference blank if you don't want to prefix source code queries with a set of characters; TA creates the query, setting the query name to SOURCECODE. For example, if the Prefix for Source Code Queries system preference is blank and you use one of TA's automation features to create a query for the source code "AMA980101001," then TA sets the name of the query to AMA980101001.

You do not have to set this system preference; you can leave it blank.

Background Processing System Preferences

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Auto Release Merge Rule

The Auto Release Merge Rule system preference (under Background/General) allows you to streamline the merge process at your organization by setting up TA to automatically release merge pairs where the name, address, and telephone numbers match exactly between the two accounts. This system preference applies to merge pairs created through Duplicate Detection, the Duplicate Merge Upload, and on-line entry of merge pairs.

If the account to be deleted has fewer names than the account to be retained, and the names that are on the deleted account match ones on the retained, then the accounts are considered an exact match on names. The rule is the same for telephones and addresses. If TA determines that the names, addresses, and telephone numbers match exactly, the status of the merge record is automatically set to "M" and the merge pair will be picked up for processing the next time Merge Processing is submitted for all released merge pairs (those with a status of "M").

Set the Auto Release Merge Rule system preference to "Auto Release Exact Matches" if you want TA to automatically release merge pairs with exact matches. Set this system preference to "Do Not Auto Release" if you want to review each merge pair before it is released.

You must set this system preference; you cannot leave it blank.

Reschedule Operations That End in Error?

TA references this system preference (under Background/General) when a schedule record ends in error. If the system preference is set to "Y" for yes, and the schedule record is returned in error, TA reschedules the record. The

default value of this system preference is "Y" for yes. You can set this system preference to "N" for no if you do not want to use this functionality.

You must set this system preference; you cannot leave it blank.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

All Activity Types

The All Activity Types system preference (under Background/Gifts) contains the activity type TA uses to identify that the information being viewed on the Account Activity Entry screen is the sum of all the account activity records for an account. The activity type appears in the Activity Type field on that screen. The All Activity Types account activity record is also referred to as the cumulative giving record.

For example, an account may give to your Annual Giving activity type as a major donor and to your Capital Campaign activity type. The All Activity Types account activity record for that donor is a sum of the donor's giving to Annual Giving and to Capital Campaign. Any of the fields based on a member year are blank for the All Activity Types account activity record (e.g., the Current Member Year Amount).

This system preference must be a valid activity type. **Your organization cannot change this system preference without consulting TSI.**

Current Fiscal Month

When your organization wants to "close" a month, your organization runs the End of Month Processing operation. "Closing a month" means that your organization has entered all pledges, pledge payments, and gifts for the fiscal month and wants to "close the books" for that fiscal month. The End of Month procedure updates the Current Fiscal Month system preference (under Background/Gifts). The current fiscal month is used in conjunction with the Current Fiscal Year system preference to set the fiscal year and month when creating batches for entry of gifts and pledges.

The End of Month procedure updates the current fiscal month and the current fiscal year by incrementing the Current Fiscal Month system preference by 1 and, if the new month is 13, setting the Current Fiscal Month system preference to 1 and incrementing the Current Fiscal Year system preference by 1.

Note: When your organization went "live" with TA, your organization ensured that the Current Fiscal Month system preference was properly set.

During certain times of the year, your organization may close the fiscal month after the calendar end-of-the-month (i.e., the month ends on the 30th but you don't complete entry of your cash receipts for the month until the 4th of the following month). In this situation, whenever you update an existing open batch or create a new batch, TA displays the message "Deposit date, fiscal month and year differ from system fiscal date." This message indicates that the values for the Current Fiscal Month and Current Fiscal Year system preferences point to a different fiscal month and year from the one TA calculates based on the Fiscal Year Offset system preference.

For example, suppose the Fiscal Year Offset system preference is set to "6" because your organization's fiscal year starts on July 1st, (i.e., 6 months after January). In April, the Current Fiscal Month system preference is set to "10." Suppose your organization doesn't complete entry of April's receipts by the 30th of the month so your organization doesn't run the End of Month Processing operation. On May 1st, you create a new batch to enter more of April's receipts. TA figures out that the fiscal month is "11" based on the Fiscal Year Offset system preference and the system date. TA compares this information to the Current Fiscal Month system preference which remains set to "10." Since these values are different, TA displays the message. Once you complete entry of April's receipts and run the End of Month Processing operation, TA will update the Current Fiscal Month system preference, setting it to "11" and no longer display the message during the rest of the month of May.

Note: You can manually set this system preference but generally the system preference should be set by the End of Month Processing operation.

See "[Fiscal Year Offset](#)" for more information about that system preference.

This system preference must be set; it cannot be left blank.

Current Fiscal Year

When your organization wants to "close" a month, your organization runs the End of Month Processing operation. "Closing a month" means that your organization has entered all pledges, pledge payments, and gifts for the fiscal month and wants to "close the books" for that fiscal month. If the month being closed is the last one in the fiscal year, the End of Month procedure increments the value of this system preference (under Background/Gifts) by 1.

Note: When your organization went "live" with TA, your organization ensured that the Current Fiscal Year system preference was properly set.

The current fiscal year is used on reports and to determine which gifts should be included in the account activity fiscal information. The current fiscal year is also used in conjunction with the [Current Fiscal Month](#) system preference to set the fiscal year and month when creating batches for entry of gifts and pledges.

Note: You can manually set this system preference but generally the system preference should be set by the End of Month Processing operation.

TA uses the Current Fiscal Month and [Fiscal Year Offset](#) system preferences together and keeps them synchronized with the Fiscal Year Offset system preference.

This system preference must be set; it cannot be left blank.

Fiscal Year Offset

The Fiscal Year Offset system preference (under Background/Gifts) contains the number of months from January to the first month of the fiscal year. For example, if your organization's fiscal year starts on July 1st, this system preference should be set to "6." This system preference is referenced

- When you create a batch using the Batch Summary Entry screen,
- For month-end reports generated at the end of each fiscal month, and
- By the End of Month Processing operation to update account activity information.

This system preference can be a number from 0 to 11. Your organization cannot change this system preference without consulting TSI.

See "[Current Fiscal Month](#)" and "[Current Fiscal Year](#)" to learn how they work with the Fiscal Year Offset system preference to check the fiscal information entered during the batch entry.

Giving Level Calculation Method

TA references the Giving Level Calculation Method system preference (under Background/Gifts) during account activities processing. The giving level is the dollar amount given by a donor over a period of time. The giving level is used to group accounts (e.g., Annual Giving Basic Membership is \$40 to \$99.99 annually). Your organization sets up the rules to define which gifts (based on gift type) to include in a giving level. As TA processes pledges and gifts, TA migrates an account from one activity to another (within an activity type) based on the account's giving level as compared to the giving levels for each activity and within the account category.

You can press the [F9] key to view the list of values for this system preference.

- **BENEFIT PACKAGE:** TA sets the giving level of the most recently awarded, but not necessarily delivered, active **membership** benefit.

- HIGHEST PREVIOUS CONTRIBUTION: TA sets the giving level field on each account activity record (including the * record) based on the Largest Amount field in the record.

You do not have to set this system preference; you can leave it blank.

Related System Preference:

[Summary Giving Level Calculation Method](#)

GL Account to Exclude from GL Download

TA references the GL Account to Exclude from GL Download system preference (under Background/Gifts) when the General Ledger Interface procedure runs. The General Ledger Interface procedure compares the credit account and debit account for each transaction pulled to the value for this system preference. If either account is the same as the value of the system preference, the transaction is not included in the file created by the General Ledger Interface procedure. TA performs an error check process to prevent one side of a transaction (e.g., debit or credit) from hitting the GL while the other side is excluded.

You should set this system preference to a valid general ledger account. You can press the [F9] key to view the list of general ledger accounts.

You do not have to set this system preference; you can leave it blank.

Largest Recent Calculation Method

This system preference (under Background/Gifts) allows the Largest Recent field in Account Activities to be calculated based on a recent number of years from the donor's last gift or based on today's date. The options are:

- From Today: TA calculates the donor's highest previous (i.e. largest recent) contribution X number of years from today's date.
- From Last Payment Date: TA calculates the donor's highest previous (i.e. largest recent) contribution X number of years from the donor's last payment date. The last payment date considers pledge payments and gift (GF) transactions only.

X is the number of years set in the "[Recent Years](#)" system preference.

Your organization cannot change this system preference without consulting TSI.

Period Date Setting

This system preference (under Background/Gifts) determines how period dates on activity records are updated when End of Month processing is run.

Period End updates the periods based on the number of months between the start and end of the current period and adding that number of months to each period.

For example, if the Current Fiscal Month is set to 10, the Fiscal Year Offset is set to 6, and the period dates were set as follows: (TA believes the calendar month is currently April.)

start date	end date
4/1/02	3/31/03
4/1/01	3/31/02
4/1/00	3/31/01
4/1/99	3/31/00

Month End updates the period dates based on the start date and end date of the current period and update it to 12 months prior to the current month.

For example, when End of Month runs to update the current fiscal month from 10 to 11 (April to May) the fields would be updated as follows:

5/1/02	4/30/03
5/1/01	4/30/02
5/1/00	4/30/01
5/1/99	4/30/00

Post Preferred Currency Amounts to Account Activities

TA references the Post Preferred Currency Amounts to Account Activities system preference (under Background/Gifts) when displaying an account's activities. If the system preference is set to "Y" for yes, the account's activities including current activity, giving level, and ask amounts will be based on the preferred currency for the account as indicated by the value in the Default Currency field on page two of the Account Overview screen. The account's default currency should be the same as the Preferred Foreign Currency system preference.

You can set this system preference to "N" for no if you do not want to use this functionality.

Your organization should contact TSI to change this system preference.

Preferred Foreign Currency?

If your organization is likely to process transactions made in foreign currencies, you can indicate the preferred foreign currency for your organization. You can press the [F9] key to view a list of countries. This system preference (under Background/Gifts) is related to the Award Benefits Using Account's Preferred Currency and the Post Preferred Currency Amounts to Account Activity system preferences.

You do not have to set this system preference; you can leave this field blank.

Recent Years

TA references the Recent Years system preference (under Background/Gifts) each time TA updates the account activity information for an account. Set this system preference to the number of years prior to the current year which should be used to determine selected account activity information. You can enter a number up to nine digits in length.

TA references this system preference when updating the following account activity information.

- Largest Recent Gift Amount
- Largest Recent Gift Date
- Largest Recent Gift Source

TA updates the account activity information

- Each time the Post Gift Batches procedure runs. TA updates the account activity information for each account included in the batches processed.
- Each time the End of Month Processing operation runs. TA updates the account activity information for every account.

See the [Viewing Transactions, Benefits, and Interactions chapter](#) for an explanation of the account activity information.

You must set this system preference; you cannot leave it blank.

Should Expiration Dates Be First or Last of Month

TA references the Should Expiration Dates Be First or Last of Month system preference (under Background/Gifts) to determine how to set the expiration date for renewable benefits and the account activity record for a membership-based activity type. If the Should Expiration Dates Be First or Last of Month system preference is set to "F" for the first of the month

- The expiration date for a renewable benefit is set to the first day of the month. If you enter a donor's gift and, using the Benefits Requested window from the Batch Detail Entry screen, set the end date on a renewable benefit awarded for that gift to 3/15/98, TA resets the date to 3/1/98. If you let TA set the end date of a renewable benefit during transaction processing, TA sets the date to the first of the appropriate month. Finally, if, using the Benefits Awarded screen, you change the expiration date on a renewable benefit to a date that isn't the first day of a month, (e.g., 3/15/98), TA resets the date to the first day of that month (e.g., 3/1/98) TA displays a message warning you of the change.
- The expiration date on the account activity record for a membership-based activity type and a membership-based activity is set to the first day of the month when the date is set by TA through transaction processing. If, using the Account Activity screen, you change the expiration date on a membership-based activity type to a date that isn't the first day of a month (e.g., 3/15/98), TA resets the date to the first day of that month (e.g., 3/1/98) TA displays a message warning you of the change.
- The start date used to calculate the expiration date for a membership-based activity type and a membership-based activity is set to the first day of the month when the date is set by TA using the Update Current Start Date update procedure. If you manually set the start date to a date that isn't the first day of a month (e.g., 3/15/98), on either the Activity Type Entry screen or on the Activity Entry screen, TA resets the date to the first day of that month (e.g., 3/1/98) TA displays a message warning you of the change.
- The calculated fields MONTHS TO ACTIVITY EXPIRATION DATE and MONTHS TO BENEFIT EXPIRATION DATE use the first day of the month for the calculation. For example, if you enter the criterion "MONTHS TO ACTIVITY EXPIRATION DATE = 3" on a query and the system date is 3/9/98, the query will select all records with an account activity expiration date of 6/1/98.

If you set the Should Expiration Dates Be First or Last of Month system preference to "L" for the last day of the month

- The expiration date for a renewable benefit is set to the last day of the month. If you enter a donor's gift and, using the Benefits Requested window from the Batch Detail Entry screen, set the end date on a benefit awarded for that gift to 3/15/98, TA resets the date to 3/31/98. If you let TA set the end date of a renewable benefit during transaction processing, TA sets the date to the last of the appropriate month. Finally, if, using the Benefits Awarded screen, you change the expiration date on a renewable benefit to a date that isn't the last day of a month (e.g., 3/15/98), TA resets the date to the last day of that month (e.g., 3/31/98). TA displays a message warning you of the change.
- The expiration date on the account activity record for a membership-based activity type and membership-based activity is set to the last day of the month when the date is set by TA through transaction processing. If, using the Account Activity screen, you change the expiration date on a membership-based activity type to a date that isn't the last day of a month (e.g., 3/15/98), TA resets the date to the last day of that month (e.g., 3/31/98). TA displays a message warning you of the change.
- The start date used to calculate the expiration date for a membership-based activity type and a membership-based activity is set to the last day of the month when the date is set by TA using the Update Current Start Date update procedure. If you manually set the start date to a date that isn't the last day of a month (e.g., 3/15/98), on either the Activity Type Entry screen or on the Activity Entry screen, TA resets the date to the last day of that month (e.g., 3/31/98). TA displays a message warning you of the change.
- The calculated fields MONTHS TO ACTIVITY EXPIRATION DATE and MONTHS TO BENEFIT EXPIRATION DATE use the last day of the month for the calculation. For example, if you enter the

criterion "MONTHS TO ACTIVITY EXPIRATION DATE = 3" on a query and the system date is 3/9/98, the query will select all records with an account activity expiration date of 6/30/98.

Your organization should not change this system preference without consulting TSI.

Solicitation Cycle Calculation Method

This system preference (under Background/Gifts) determines whether Recency/Frequency values can be stored in the Solicitation Cycle field (set this preference to ADA Rule, SOI Rule, or Solicitation Cycle Custom Calculation) or if TA uses the solicitation cycle field to segment accounts based on the number of times the account contributes to an activity type each year. (Standard)

Click here to view how the [Solicitation cycle field](#) would be updated based on the customized options (either the ADA or SOI Rule or the custom calculation method.)

Your organization cannot change this system preference without consulting TSI.

Summary Giving Level Calculation Method

This system preference (under Background/Gifts) determines whether account activity processing sets the Giving Level field on the cumulative account activity record (*) to the minimum value that is on the account activity records. Set this system preference to MINIMUM VALUE to use this feature. Otherwise, leave the field set to NONE.

Track Calculation Method

This system preference (under Background/Gifts) determines how the Track field is updated:

- GIFT TYPE/TECHNIQUE - the gift type combined with the technique of the transaction sets the track for the account activity record. (This is the standard setting of this system preference.)
- GIVING LEVEL/SOLICITATION CYCLE – sets the track field based on giving level and Recency/Frequency values. Click here if you'd like to [see a chart on the logic of how the field is updated based on this rule](#).
- ADA RULE - If an account has an interest code of 'RES DM', set the track to 'RP'.

If track is not yet set, and an account has an active classification code that starts with 'DB %', set the track to 'DD'.

If track is not set, and an account has an active interest of PREMIUM, set the track to 'NP'.

Use Met Award Criteria for Delivery

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. TA sets the Met Award Criteria flag 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 references the Use Met Award Criteria for Delivery system preference (under Background/Gifts) to evaluate benefits for delivery when benefits are assigned to a batch item and when benefits assigned to a pledge are rechecked after a pledge payment is applied to the pledge. Set this system preference to "N" for no if TA should evaluate all benefits for delivery, even if the benefit did not meet the award criteria (i.e., the Met Award Criteria flag is set to "N" for no). Set this system preference to "Y" for yes if TA should not evaluate for delivery benefits for which the Met Award Criteria flag is set to "N" for no. You can press the [F9] key to view the list of valid options.

See the [Understanding Benefits chapter](#) for an explanation of award and delivery criteria for benefits.

You must set this system preference; you cannot leave it blank.

Anonymous Account ID

TA references the Anonymous Account ID system preference (under Background/Upload/Download) when a Batch Upload procedure runs. This system preference stores the Account ID of the "anonymous account," an account for which the account's Account ID is unknown. If an account in the upload is assigned the Anonymous Account ID, TA marks the batch item in error.

Archive Data in Tables Updated by Uploads

TA references the Archive Data in Tables Updated by Uploads system preference (under Background/Upload/Download) when the Account Data Upload runs. This preference identifies the table(s) for which you want to archive data (i.e., keep a copy of the old data).

You can press the [F9] key to select from the following tables:

- Names
- Addresses
- Telephones
- E-mails

You can enter a single table name or a comma-separated list of tables. For example, if you indicate that the Account Data Upload should archive data in the Names table, if the Account Data Upload updates an existing name with new information, TA archives the old name.

Note: This preference works in conjunction with the Archive Status for Archived Data preference.

You must set this system preference; you cannot leave it blank.

Archive Status for Archived Data

TA references the Archive Status for Archived Data system preference (under Background/Upload/Download) when the Account Data Upload runs. This preference determines the status to apply to data archived by the Account Data Upload. You can press the [F9] key to select one of the following statuses:

- Old
- Inactive
- Delete

This preference works in conjunction with the Archive Data in Tables Updated by Uploads preference. For example, if you indicated in that preference that TA should archive data in the Names table, and set the Archive Status for Archived Data system preference to Old, if the Account Data Upload updates an existing name with new information, TA archives the previously existing name with a status of Old.

You must set this system preference; you cannot leave it blank.

Archive ZIP Updates of Addresses

Set the Archive ZIP Updates of Addresses system preference (under Background/Upload/Download) to "Y" for yes if the NCOA Upload should archive the old address when a new address is uploaded for an account and only the ZIP Code has changed for the address. Set this system preference to "N" for no if the upload should overwrite the ZIP Code on the old address without archiving the old address and creating a new address record to reflect the change in ZIP Code.

Are Acquisition IDs Reused?

This system preference (under Background/Upload/Download) is applicable to organizations that upload acquisition prospect names and addresses. TA references this system preference during Batch Upload and Account Data Upload and when a transaction is entered on the Batch Detail Entry screen using an Acquisition ID.

If this system preference is set to "N" for no, TA searches the Acquisitions table to determine if an account already exists in TA for an uploaded transaction or a transaction entered on the Batch Detail Entry screen using an Acquisition ID. If no record is found in the Acquisitions table, TA searches the Accounts table to see if that Acquisition ID has been set as the Alternate Account ID for a TA account (i.e., an account has already been created for that Acquisition ID).

If the system preference is set to "Y" for yes, TA does not search the Accounts table after searching the Acquisitions table. This prevents TA from assigning the wrong Account ID to a transaction when the organization's vendor reuses Acquisition IDs.

If your organization's acquisition vendor reuses ID numbers, you should set this system preference to "Y." If your organization's acquisition vendor does not reuse ID numbers or if you do not upload acquisition accounts, you should set this system preference to "N."

You must set this system preference; you cannot leave it blank.

Check for ZIP-City Matches in Uploads?

TA references the Check for ZIP-City Matches in Uploads? system preference (under Background/Upload/Download) when the Account Upload, Batch Upload, and Account Data Upload procedures run. You can set the system preference to "Y" for yes if you want TA to double-check that the city and the ZIP Code match on the uploaded data. If they do not match, the account is not created. You can set the system preference to "N" for no if you do not want to use this functionality.

You do not have to set this system preference; you can leave it blank.

Combine Inside Salutation if Same Title/Last Name?

Set the Combine Inside Salutation if Same Title/Last Name? system preference (under Background/Upload/Download) to "Y" for yes if you want to combine the names of individuals who share the same title and/or last name in the inside salutation.

For example, the inside salutation for an account with names "Dr. Smith" and "Mr. Smith" appears as "Dr. and Mr. Smith" in the inside salutation. "Dr. Smith and Dr. Smith" appears as "Drs. Smith."

To use this functionality to combine same titles, your organization needs to customize the Plural Title field on the Title Code Entry screen. Use this free-text field to enter how your organization would like the plural title to appear in the salutation. In the example above, the plural title for the "DR" title code would be "Drs."

Note: If this system preference is set to "Y," this functionality overrides the functionality used by the Marital Status Title system preference.

Your organization must set this system preference; you cannot leave it blank.

Convert \$1 Pledges to Hedges?

TA references the Convert \$1 Pledges to Hedges? system preference (under Background/Upload/Download) when the Pledge, Batch, and Account Data Upload procedures run. You should use this system preference if your organization maintains the practice of having outside vendors take pledges for your organization and enter a pledge amount of \$1.00 when a potential donor agrees to pledge but isn't sure of the amount (e.g., "Please send me a pledge bill but I don't know how much I will give."). In this situation, the system preference indicates that when a \$1.00 pledge is uploaded, TA should create a pledge with a \$0 amount and mark it as a hedge. You can press the [F9] key to view the list of options.

Note: If you use this system preference, you need to set up your pledge bill query to account for donors who hedge.

You must set this system preference; you cannot leave it blank.

Create Formal Inside Salutation?

Set the Create Formal Inside Salutation? system preference (under Background/Upload/Download) to "Y" for yes if TA should include a person's last name as part of the inside salutation when creating the person's default salutation and the account's default salutation. If the person's name is included; **TA only applies this formatting if no title is entered for the name.** If you set this system preference to "N" for no, TA does not include the person's last name. You can press the [F9] key to view the list of options.

Note: If you enter a person's title in addition to the person's first name and last name, TA sets the inside salutation to the person's title and last name *regardless* of how this system preference is set.

For example, suppose your organization sets up an account for Bob Jones and Sally Smith; no title is entered for either person. The following table shows how TA formats the inside salutation for the default salutations TA creates based on the Create Formal Inside Salutation system preference setting.

Create Formal Inside Salutation	The inside salutation (Dear ...) for the default salutation for:		
	Bob Jones	Sally Smith	The account
When set to yes	"Bob Jones"	"Sally Smith"	"Bob Jones and Sally Smith"
When set to no	"Bob"	"Sally"	"Bob and Sally"

This chapter includes [an appendix that explains the salutation rules](#) TA uses when creating each default salutation.

You must set this system preference; you cannot leave it blank. This system preference affects only online creation of accounts and names (i.e., TA does not reference it for accounts and names created during an upload).

Current Activities with Pending Address Updates

You can use the Current Activities with Pending Address Updates system preference (under Background/Upload/Download) to prevent the Change of Address Upload, Batch Upload, and Account Data Upload from automatically updating the addresses for donors that have a current activity indicated by this system preference.

Specifically, you use this system preference to indicate one or more current activities for which donors' addresses should be loaded with a status of "P" for pending.

This system preference accepts a comma-separated list of current activities. You can press [F9] to access a list of current activities.

After you run the upload, TA includes a list of all addresses that were loaded with a status of pending in the relevant upload report. Then, you can view the original addresses and the pending address updates on the Address Entry screen, and decide whether a given address should be replaced by the update. Use the <Activate> button on the

Address Entry screen to view the original and pending address information and decide which addresses should be active.

You can leave this system preference blank if you do not want to use this functionality.

Default Source Code During Uploads

TA references the Default Source Code During Uploads system preference (under Background/Upload/Download) when a Pledge, Gift, Account Data, or Batch Upload procedure runs. TA uses the source code from this system preference as the source for any pledge or gift without a source. Enter a valid source code.

You do not have to set this system preference; you can leave it blank.

Delete Old Address In Change of Address Upload?

Set the Delete Old Address In Change of Address Upload? system preference (under Background/Upload/Download) to "Y" for yes if TA should mark for deletion an account's address when the address is replaced by one from the Change of Address Upload procedure. If you set this system preference to "N" for no, TA adds the new address and archives the old address. You can press the [F9] key to view the list of options.

Note: When your organization runs delete processing, those addresses marked for deletion are deleted.

See the [Managing Account Information chapter](#) for an explanation of how TA archives an address.

You do not have to set this system preference; you can leave it blank. Leaving this system preference blank is the same as setting it to no.

If No Gift Kind in Upload Print Message on Report

TA references the If No Gift Kind in Upload Print Message on Report system preference (under Background/Upload/Download) when the Pledge, Gift, or Batch Upload procedures run. If one of these procedures runs and the gift kind is blank for a pledge or gift being imported, TA sets the gift kind to "OP" for one-time payment.

- Set this system preference to "Y" for yes to have TA write an error message for the item on the import's associated error report indicating that the gift kind was blank and that TA set the gift kind to "OP."
- Set this system preference to "N" for no if TA shouldn't write an error message for the item on the import's associated error report.

You do not have to set this system preference; you can leave it blank.

Length of Old Source Codes

TA references the Length of Old Source Codes system preference (under Background/Upload/Download) when a Pledge, Gift, or Batch Upload procedure runs. You should set this system preference to the length of the source code equivalent in your legacy system. By referencing this system preference, TA identifies those source codes in the upload which were created in your legacy system. For example, suppose you set up the Annual Giving source codes in TA to be 12 characters in length. If the source codes (motivator or campaign codes) in your legacy system were 8 characters in length, set this system preference to "8." When you run an upload, TA identifies your legacy codes by their length (i.e., if the source code is 8 characters in length, it is from your legacy system whereas those source codes 12 characters in length are from TA).

Note: If the length of the source codes from your legacy system vary, consult your TSI Project Manager to determine how best to set this system preference.

Once a source code is identified as a legacy source code (i.e., one not created by TA, TA references the [Prefix for Converted Source Codes](#) system preference).

Note: This system preference is important during the first year your organization is "live" on TA and only if you use TA's Pledge, Gift, and Batch Upload procedures.

Maximum Batch Size for Default

TA references the Maximum Batch Size for Default system preference (under Background/Upload/Download) when a Pledge, Gift, Batch, or Account Data Upload procedure runs. Set this system preference to the maximum number of items to include in an acquired batch (e.g., if the pledge upload file contains 400 pledges and you set this system preference to "50," TA creates 8 batches for these pledges). You can enter a number up to four digits in length.

Note: For the Gift Upload, Batch Upload, and Account Data Upload procedures, if your vendor entered a batch number for each record in the upload file, and you choose to conserve vendor batches, then TA ignores this system preference. Instead, TA creates batches that mirror the vendor batches, setting the acquired batch number for the TA batch to the vendor's batch number.

You do not have to set this system preference; you can leave it blank.

Prefix for Converted Source Codes

The setting for this system preference (under Background/Upload/Download) is standard for TA. **Your organization should not change this system preference without consulting TSI.**

TA references the Prefix for Converted Source Codes system preference to validate the source codes from the upload file when a Pledge, Gift, or Batch Upload procedure runs. When TSI converted from your legacy system the equivalent of the TA source code, conversion prefixed the code with the value of this system preference. For example, if your legacy system contained a "motivator" or "campaign" code of "R9605" representing May 1996 renewals and this system preference is set to "X," the legacy code stored in TA is "XR9605." If you access the Source Entry screen, you can view this code by entering "XR9605" in the Source field on the Find Sources window.

When the Pledge, Gift, or Batch Upload procedure runs, if the upload file includes source codes from your legacy system, TA prefixes those source codes with the value from this system preference. TA then validates the source code by ensuring it is stored in the TA source file. If the code is not stored in TA, the pledge or gift is included in the error report associated with the upload procedure.

For example, you run the Batch Upload procedure and the file contains a gift with the source code "R9605" from your legacy system. TA references this system preference and changes the code to "XR9605." TA then compares XR9605 to the source codes stored in TA. If XR9605 is in TA, no error is reported for the gift. If XR9605 is not stored in TA, this gift is included in the error report associated with the Batch Upload procedure.

Note: TA identifies a source code as one from your legacy system based on its length. See "[Length of Old Source Codes](#)" for more information.

Soft Credit Relationship

TA references the Soft Credit Relationship system preference (under Background/Upload/Download) when the Batch Upload or Account Data Upload procedure is run, if the upload vendor file is set to create soft credit relationships. The Batch Upload and Account Data Upload use the soft credit relationship entered in this system preference to create the indicated relationship for the hard credit Account ID (and also the reverse relationship for the soft credit Account ID) if the relationship doesn't already exist. You can press the [F9] key to select from a list of valid relationship types.

You do not have to set this system preference; you can leave it blank.

Unknown Member Name

TA references the Unknown Member Name system preference (under Background/Upload/Download) when the Pledge, Gift, Batch, or Account Data Upload procedure runs. This system preference stores the name the vendor

uses to identify an unknown member in the upload file. If an account in the upload is assigned the unknown member name, TA marks the batch item in error.

Use Break Date as Gift Date for Pledge Uploads?

TA references the Use Break Date as Gift Date for Pledge Uploads? system preference (under Background/Upload/Download) when the Pledge, Batch, and Account Data Upload procedures run. This system preference is specific to organizations that set up pledge break source codes (e.g., for television or radio pledge drives). If this system preference is set to "Y" for yes, TA sets the gift date for each pledge to the break date from the pledge break source code for the gift. If you enter "N" for no, TA uses the uploaded gift date. You can press the [F9] key to view the list of valid options.

You must set this system preference; you cannot leave it blank.

Marital Status Title

The Marital Status Title system preference (under Background/Salutations) contains the code TA uses to determine which format, the standard format or the marital exception format, to use for an account's name and default salutation.

This system preference is referenced during online creation and update of accounts, during online creation and update of names, and by TA uploads that create accounts and names.

Suppose this system preference is set to "M." If you create an account for Dr. Paul Jones and his wife Mary, then TA formats the account's name and default salutation as follows:

- If you enter the title code "M" (which is the same code as in the Marital Status Title system preference) when you enter Mary's name, TA creates the account name and default account salutation as "Dr. and Mrs. Paul Jones" which is the standard format.
- If you enter the title code "MRS" (which is not the same code as in the Marital Status Title system preference) when you enter Mary's name, TA creates the account name and default account salutation as "Dr. Paul Jones and Mrs. Mary Jones" which is the marital exception format.

Note: The Title table is delivered with two codes, "M" and "MRS," for the title "Mrs." This title is the only one with two codes in the Title table; the two codes exist in order for your organization to use the formatting feature controlled by the Marital Status Title system preference.

This system preference must be a valid title code. Your organization cannot change this system preference without consulting TSI.

Non-Individual Inside Salutation

The Non-Individual Inside Salutation system preference (under Background/Salutations) guides the creation of inside salutations for non-Individual accounts (e.g., corporations, foundations) with no primary contact information. The default value for this system preference is "Sir or Madam." Your organization can customize this value (e.g., "Friends").

Your organization must set this system preference; you cannot leave it null.

Salutation and Name Join

The Salutation and Name Join system preference (under Background/Salutations) contains the text (e.g., "&" or "and") TA uses when TA combines two names (e.g., creates the full name for the account or composes the account's default salutation). This system preference is referenced by TA when creating or updating an account name and by TA uploads that create accounts and names.

Your organization cannot change this system preference without consulting TSI.

Suffix Separator

This system preference (under Background/Salutations) determines the character that is used to separate salutation codes if multiple codes are entered for an individual (on the Name Entry screen). Press [F9] to select how you want TA to output the Suffix field.

Default Tablespace

TA references the Default Tablespace system preference (under Background/User Creation) when you create a user in TA. This system preference must be set to a tablespace in the database, otherwise the user will be created in error.

Your organization should not change this system preference without consulting the TA Database Administrator at your organization or contacting TSI.

You must set this system preference; you cannot leave it blank.

Default User Role

TA references the Default User Role system preference (under Background/User Creation) when you create a new user in TA. You can press the [F9] key to view the list of options.

A role is a group of operations. You can use a role to assign or deny a user access to those operations. When you create a new user in TA, TA references the Default User Role system preference to determine the group of operations to which the user should have access. You can view and update the role(s) assigned to a user on the User Privileges Entry screen.

You must set this system preference; you cannot leave it blank.

Temporary Tablespace

TA references the Temporary Tablespace system preference (under Background/User Creation) when you create a user in TA. This system preference must be set to a tablespace in the database, otherwise the user will be created in error.

Your organization should not change this system preference without consulting the TA Database Administrator at your organization or contacting TSI.

You must set this system preference; you cannot leave it blank.

General System Preferences

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Browse Start-in Location

Use the Browse Start-in Location preference (under General/File Locations) to determine the starting place when a user attaches a file using the Attachments button. (This button is available on many data entry screens if your organization has chosen to enable it). Set this preference to the path representing the start location for the browse window launched by Windows.

Note: In addition to setting this preference at the system level, you can also set it at the user level. If you leave this preference blank at the user and system level, the browse window starts at the Windows default location.

Related System Preference:

[Enable Attachments?](#)

Davox Files

TA references the Davox Files system preference (under General/File Locations) when the Davox Download procedure runs. TSI set this system preference during the installation of TA to indicate the pathname for the directory

that stores the Davox files associated with the application. **Your organization should not change this system preference without consulting TSI.**

Download Files

TA references the Download Files system preference (under General/File Locations) when any non-Davox download procedure runs. TSI set this system preference during the installation of TA to indicate the pathname for the directory that stores the files associated with the download files created by the application. **Your organization should not change this system preference without consulting TSI.**

Executable Files

TA references the Executable Files system preference (under General/File Locations) when TA runs. TSI set this system preference during the installation of TA to indicate the pathname for the directory that stores the executable files associated with the application. **Your organization should not change this system preference without consulting TSI.**

Forms

TA references the Forms system preference (under General/File Locations) when TA runs. TSI set this system preference during the installation of TA to indicate the pathname for the directory that stores the files associated with the Oracle® Forms used for the application. **Your organization should not change this system preference without consulting TSI.**

Log Files

TA references the Log Files system preference (under General/File Locations) when TA runs. TSI set this system preference during the installation of TA to indicate the pathname for the directory that stores the log files associated with the application. **Your organization should not change this system preference without consulting TSI.**

Operating System Scripts

TA references the Operating System Scripts system preference (under General/File Locations) when TA runs. TSI set this system preference during the installation of TA to indicate the pathname for the directory that stores the files associated with the operating system utilities required to run TA. **Your organization should not change this system preference without consulting TSI.**

Output Files

TSI set this system preference (under General/File Locations) during the installation of TA to indicate the pathname for the directory that stores the output files from queries processed by the application. TA references the Output Files system preference when TA creates output directories for users.

Each time you create a user in TA, TA creates an output directory on the database server for that user. When TA creates the directory for the user, TA adds a subdirectory to the path indicated by this system preference; if the path for this system preference is "/disk10/pbds/output/", then, for each user, TA creates the output path "/disk10/pbds/output/XXXXXXXX/" where "XXXXXXXX" is the user name. **Your organization should not change this system preference without consulting TSI.**

Note: TA creates the output directory for a user to store the output files created by the user. A user creates an output file by scheduling a user-defined output to run with a query. When the user schedules the user-defined output to run with a query, TA defaults the directory path for the output file to be created.

Reports

TA references the Reports system preference (under General/File Locations) when TA processes a report. TSI set this system preference during the installation of TA to indicate the pathname for the directory that stores the files

associated with the Oracle® Reports used for the application. **Your organization should not change this system preference without consulting TSI.**

Scratch Directory

TA references the Scratch Directory system preference (under General/File Locations) when TA processes queries and outputs. TSI set this system preference during the installation of TA to indicate the pathname for the directory that stores the working files created by the application. **Your organization should not change this system preference without consulting TSI.**

Team Approach Home

TA references the Team Approach Home system preference (under General/File Locations) when TA runs. TSI set this system preference during the installation of TA to indicate the pathname for the directory into which the application is installed. **Your organization should not change this system preference without consulting TSI.**

Upload Files

TA references the Upload Files system preference (under General/File Locations) when any non-Davox upload procedure runs. TSI set this system preference during the installation of TA to indicate the pathname for the directory that stores the files associated with the uploads for the application. **Your organization should not change this system preference without consulting TSI.**

Utilities

TA references the Utilities system preference (under General/File Locations) when TA runs. TSI set this system preference during the installation of TA to indicate the pathname for the directory that stores the utility files associated with the application. **Your organization should not change this system preference without consulting TSI.**

User-Defined Paths (1, 2, and 3)

There are three system preferences (User-Defined Path 1, User-Defined Path 2, and User-Defined Path 3)-under General/File Locations- that allow you to define paths to site-specific files (such reports created outside of TA), so that you can reference those paths in your custom, site-specific scripts or procedures rather than hard coding the paths. This could be done using TA-defined paths, so the purpose of using user-defined paths is to allow your organization to keep the TA system directories such as Utility Path, OS Path, Executables Path, etc. free of custom, site-specific files.

Additional Information for Window Title

TA references the Additional Information for Window Title system preference (under General/Miscellaneous) each time a user logs on to TA. You can set this system preference to any text you would like to appear in the Team Approach® title bar; the text appears to the right of the application's name. For example, if your organization maintains multiple TA databases, in each database, you can set this system preference to the name of the database.

Note: If you change the text of this system preference, you will not see the change until you log off TA and then log on to TA.

You do not have to set this system preference; you can leave it blank.

Last Closed Deposit Date

You can enter the last deposit date for which all batches have been processed to prevent users from entering transactions to a date that should be "closed." Enter the date in the MM/DD/YY format. This variable must be manually maintained. When a value is entered (i.e., the system preference is set), TA references that date when

attempting to release a batch. A batch with a deposit date that is less than or equal to the value you entered in the Last Closed Deposit Date field, will not be released and the batch will be returned in error when processed.

If the value for this system preference (under General/Miscellaneous) is null, this functionality is disabled and no checks are performed.

You do not have to set this system preference.

Last Processed Batch Date

TA sets the Last Processed Batch Date system preference (under General/Miscellaneous) when the Post Gift Batches procedure runs. TA sets this system preference to the processed date for the last batch processed. If you run the Post Gift Batches procedure daily, this date is updated daily.

Message to Display when System Is Disabled

The Message to Display when System Is Disabled system preference (under General/Miscellaneous) should be blank unless you want TA to be inaccessible. When TA is disabled, the text for this system preference appears in a message when any user tries to log on to TA. Non-manager users click <OK> from the message and return to their computer desktops. Only users with a user name identified as that of a manager can access TA when they click <OK> from the message.

This system preference can be set in one of two ways.

- You manually set this system preference to the message you want to appear to let users know that TA is inaccessible. Any users currently working in TA can continue to work in TA; once they exit TA, these users won't be able to access TA. TA is inaccessible to users until the message is deleted from this system preference. **Only a user with a user name identified as that of a manager can log on to TA to delete the message to make TA accessible to all users.**
- TA sets this system preference to the message you want to appear to let users know that TA is inaccessible. TA sets this system preference when the Disable System Menu operation runs. When you schedule the Disable System Menu operation to run, you can enter the message TA will use. When the Enable System Menu operation runs, TA deletes the message. If you choose, you can set up the Disable System Menu procedure and the Enable System Menu operation to run daily.

Server Operating System

The Server Operating System system preference (under General/Miscellaneous) identifies the operating system for the server. TSI set this system preference during the installation of TA. **Your organization should not change this value without consulting TSI.**

TA Database Name

The TA Database Name system preference (under General/Miscellaneous) identifies your TA database and allows TSI to monitor usage and performance through the System Usage Download. This system preference allows reporting back database-specific information such as "ABC PROD has a recurring error" or "ABC TRN is missing a critical patch." You can enter up to 14 characters for this system preference. You are required to enter this system preference if you want to use the System Usage Download procedure.

Here are suggested naming conventions:

- For a production database, combine an abbreviation for your organization's name with PROD
- For a test database, combine an abbreviation for your organization's name with TEST
- For a training database, combine an abbreviation for your organization's name with TRAIN

- If you have multiple production, test, or training databases, append a number to them such as 'ABC TEST2'

Web Server

This system preference (under General/Miscellaneous) determines where TA looks to find the TA Web Help environment. If your organization uses the web version of TA, enter the name of your web server in this field. Your TA web users will not be able to access the help if you do not enter this system preference.

Note: TAHelp.htm is the file that calls the web version of TA Help. The content of this help system is the same as the client server version of TAHelp.hlp.

Add Timestamp to Output Files?

TA references the Add Timestamp to Output Files? system preference (under General/Reports/Outputs) when creating report files, error files, and output files. Your organization can decide to include a timestamp at the end of the file name. You can set this system preference to "Y" for yes to use this functionality. TA inserts the timestamp *before* the file extension (i.e., at the end of the file name). If the file name contains any periods, TA inserts the timestamp before the *last* period in the file name. The format of the timestamp is "YYYYMMDDHH24MISS."

If you do not want to use this functionality, you can set the system preference to "N" for no.

You do not have to set this system preference; you can leave it blank.

Default Line Padding?

This system preference (under General/Reports/Outputs) determines whether the Enable Line Padding? checkbox on the Query and Output Schedule is marked or unmarked by default. (Users can mark or unmark the checkbox regardless of the default that is defined by this system preference.)

Line padding involves reserving space for output information at the start of the record building process. Enabling line padding speeds up the creation of output files, but it uses more temporary table space. If you run out of temporary table space, the query/output schedule record will end in error. If you do not enable line padding, Oracle creates the shortest possible record, which is later added to. This process takes longer to create the file but uses less temporary table space.

Set the Default Line Padding? system preference to "Y" to have TA mark the Enable Line Padding? checkbox by default when you create a query/output schedule record. Set this system preference to "N" to have TA leave the checkbox unmarked when you create a query/output schedule record.

You must set this system preference; you cannot leave it blank. Your organization cannot change this system preference without consulting TSI.

Default Output Destination

TA references the Default Output Destination system preference (under General/Reports/Outputs) when a user submits a report for immediate processing or schedules the report. You can set this system preference to one of the following three values.

- FILE
- PREVIEW
- PRINTER

You can press the [F9] key to view the list of options.

TA defaults the value from this system preference to the Output Destination parameter on the Request an Operation window when a user submits or schedules a report.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Default Print Format

TA references the Default Print Format system preference (under General/Reports/Outputs) when a user submits a report for immediate processing or schedules the report. You can set this system preference to one of the following three values.

- "DFLT" for default (i.e., the default format for the operating system, for example, Postscript)
- "PDF" for portable document format
- "QQLABEL_EPS" for mainframe label format

You can press the [F9] key to view the list of options.

The default value is null, in which case Oracle® will use the default for the current operating system.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Default Report Extension

TA references the Default Report Extension system preference (under General/Reports/Outputs) when a user submits a report for immediate processing or schedules the report. You can set this system preference to one of the following three values.

- "PS" which is the system default
- "PDF" for portable document format
- "LIS" for mainframe label format

You can press the [F9] key to view the list of file extensions.

This system preference indicates the extension to append to reports. If the system preference is set to null for the submitted job, and the Default Report Extension system preference is also null, the system uses the default extension (i.e., "PS").

Default Report Extension from Format

TA references the Default Report Extension from Format system preference (under General/Reports/Outputs) when a user submits a report for immediate processing or schedules the report. The default value for this system preference is "N" for no. You can set the system preference to "Y" for yes if you want the system to default the extension for the report based on the Default Print Format system preference. You can press the [F9] key to view the list of values.

Default Printer

TA references the Default Printer system preference (under General/Reports/Outputs) when TA prints a report. Set this system preference to the code for the printer to be used by TA when the printing request references the default printer.

TA includes a Printer Code table that should contain the code for each printer to which TA can print. The code for each printer should be the printer's name exactly as it appears on your server. In addition, this table contains the code "Default." When you select a report to run, "Default" is the code that TA defaults as the print destination; you can change this destination to a specific printer if you want. If you leave the destination as "Default," TA references the value of the Default Printer system preference to select the printer to which the print request should be sent.

You must set this system preference; you cannot leave it blank.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Display Paid Amounts in Account Activity

Use this system preference (under General/Reports/Outputs) to determine whether pledge amounts or paid amounts are displayed on the Account Activity screen. Set the system preference to "Y" for yes if you want TA to display donors' paid amounts and display these field to the Account Activity screen: Largest Recent Payment Amount, Largest Recent Payment Date, and Largest Recent Payment Source. Set this system preference to "N" for no if you want TA to display donors' pledge amounts on the Account Activity screen.

Note: If your organization's fundraising is centered on quasi-sustaining gifts (i.e., monthly pledges that are never considered fulfilled and are entered with a sustaining pledge gift kind), it is recommended that you set this system preference to "Y" so you can view actual paid amounts rather than pledged amounts.

Related System Preference:

[Largest Recent Calculation Method](#)

Organization Full Name

Enter the name of your organization. You can enter up to 60 characters. The name that you enter appears on all reports generated by TA.

Note: When TA was installed at your organization, TSI set this system preference (under General/Reports/Outputs). You can change it.

User Directory

The User Directory system preference (under General/Reports/Outputs) indicates where on the database server TA should save the following:

- user-defined outputs
- reports

When you create a user, TA automatically creates a directory on the database server to be used as the default output directory for that user. The complete path for that directory is specified in the User Directory user preference.

Note: You do not need to set the User Directory user preference for your users; TA sets the user preference based on the path contained in the User Directory system preference and the user's brief name.

You can update the directory but **TA does not ensure** that the updated directory exists. Also, TA **does not create** the directory. You would need to check the server to ensure that the new directory exists.

You must set this system preference; you cannot leave it blank.

Batch Access Privilege

TA references the Batch Access Privilege system preference (under General/Security) when you try to access, release, or post a batch. This system preference affects the following screens and operations:

- Batch Summary Entry

- Batch Detail Entry
- Unlock Batches
- Release Open Batches
- Post Gift Batches

You can set this system preference to "Owner" to allow only the owner of a batch or a batch manager to access, release, or post a given batch. You can set this system preference to "All" to allow any user to access, release, or post any batch.

Note: The batch owner is identified by the value in the Owner field on the Batch Summary Entry screen. If a batch does not have an owner, all users can access, release, or post the batch regardless of this system preference. Batch managers can update the Owner field on the Batch Summary Entry screen in order to reassign batches.

TA defaults this system preference to "All." You must set this system preference; you cannot leave it blank.

Credit Card Number Access

TA references the Credit Card Number Access system preference (under General/Security) in situations where TA displays a Credit Card Number field, such as on the Giving History Detail screen, the Find Transactions window, and various gift reports.

Set this preference to "Y" for yes if you want TA to display the credit card number, and if you want to enable users to search for transactions by credit card number. Set this preference to "N" for no if you want TA to display a series of x's instead of the credit card number, and if you want to prevent users from using a credit card number to search for transactions.

You must set this system preference; you cannot leave it blank.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Override Derivation Rule Security Level

The Override Derivation Rule Security Level system preference (under General/Security) indicates the minimum security level a user must have in order to override the derivation rules that determine the GL credit account and fund for a batch item. Note that TA applies rules to determine the GL credit account and fund only if your organization sets the [Derive Credit Account and Fund? system preference](#) to "Y" for yes.

To override the derivation rules for a particular batch item, the user must mark the Override Derivation Rules? check box on the Source Information window on the Batch Detail Entry screen. If a user entering batch information has a [security level](#) lower than the value entered for this system preference, then that user cannot mark the checkbox.

You must set this system preference; you cannot leave it blank. The default value for this system preference is "99" (meaning only users with the maximum security level allowed can override the derivation rules).

Security Level

TA uses the Security Level system preference (under General/Security) to set the default security level for your organization's users. Note that you must logout (and log back into TA) for any changes to take effect if you make changes to this system preference.

A user security level has two purposes:

- It determines which classifications a user can view in TA. If this field is set, the user can view only classifications that are at or below the user's classification security level for all screens and reports that display classifications. Your organization can set the security level for a classification code on the Classification Code Entry screen. For example, if your organization assigns a classification security level of "5" to a certain classification code, and a user's classification security level is set to "4," the user cannot view that classification on screens or reports in TA.
- If your organization uses derivation rules to set the GL credit account and fund for batch items, the Security Level preference works in conjunction with the [Override Derivation Rule Security Level system preference](#) to determine if a user has privileges to override the derivation rule process. A user who has such privileges can override the derivation rules for a batch item by marking the Override Derivation Rules? checkbox on the Source Information window.

You can set the security level to a number from 0-99, with 0 being the minimum security-level and 99 being the maximum security-level.

You do not have to set this system preference; you can leave it blank.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Related Topic:

[Limiting Classifications by Security Level](#)

Screen-specific System Preferences

Account Diary Entry

[Default Staff](#)

Batch Detail Entry

[Additional Field for Transactions Pop-ups](#)

[Default Credit Account on Split Gifts](#)

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Batch Summary Entry

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Shipment Entry

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[Default status for Find](#)

[Start-in tab or Window](#)

Survey Response Entry

[Default Survey Classification Category](#)

ZIP Code Entry

[ZIP Code Defaults Precision Level](#)

Default Staff

This system preference (under Screens/Account Diary Entry) determines how the Staff field defaults on the Account Diary Entry screen when a user creates a new interaction. This preference is also available on the user-level so that you can set up specific users with specific defaults.

- If you leave this preference to <Current User> then the field defaults to the corresponding User ID who creates the interaction.
- If you leave this field blank, then the field does not default any User ID and when the user exits the screen, TA provides an alert offering the choice to enter the field to exit the screen.
- Avoid leaving this system preference blank for users who regularly create interactions using the Account Diary Entry screen because the alert adds an extra keystroke.
- For temporary users, volunteer users, or anyone who regularly creates interaction records on behalf of another user, set this preference on the user-level and have it set to the specific User ID for whom they enter interaction records.

- Another option: You can make a copy of the Account Diary Entry screen and have this preference default to your choice. Then you can assign the customized screen to those users (or a generic user ID...such as TEMP1) who need to use this version of the screen.

Additional Field for Transactions Pop-ups

TA references the Additional Field for Transactions Pop-ups system preference (under Screens/Batch Detail Entry) when displaying either the Open Pledges window or the Transactions to Adjust window on the Batch Detail Entry screen. (TA displays the Open Pledges window when users enter a pledge payment, and TA displays the Transactions to Adjust window when users enter an adjustment.)

You can set this preference to "Event" to include the event code as an additional field in the window. If you do not want to include the event code, leave this preference blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Batch Detail Entry screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

Default Credit Account on Split Gifts

Set the Default Credit Account on Split Gifts system preference (under Screens/Batch Detail Entry) to "Y" for yes if you want TA to default the GL Credit Account field from the first page of a split gift on the Batch Detail Entry screen to each subsequent page of the split gift. If you want TA to leave the GL Credit Account field on the Batch Detail Entry screen blank on subsequent pages of a split gift, set this system preference to "N" for no.

Your organization must set this system preference; you cannot leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Batch Detail Entry screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

Default Header Info on Adjustments?

TA references the Default Header Info for Adjustments? system preference (under Screens/Batch Detail Entry) during entry of adjustments on the Batch Detail Entry screen. Set this preference to "Y" for yes if the batch defaults should be defaulted when entering an adjustment. Set this preference to "N" for no if the batch defaults should not default when entering an adjustment (when entering the adjustment, the values from the transaction being adjusted default). You can press the [F9] key to view the list of options.

For example, you create a batch that contains only adjustments where the information you need to correct on each item is the source code and the correct source code is the same for all. If this system preference is set to yes, you can enter the correct source code as the batch default source code. On the Batch Detail Entry screen, each time you select the transaction to be adjusted, TA displays all of the information for the transaction on the Batch Detail screen but overwrites the source from the transaction with the source you entered as a batch default source code.

Note: If you lock the batch default, you can't change the information on the batch detail record. If you are entering a batch of adjustments for which the information to correct is the same for all but a few of the transactions to be adjusted, you can set the lock to no so that you can manually enter the correct information on the Batch Detail Entry screen for the particular transactions to which the batch default information does not apply.

This system preference facilitates the entry of adjustments by enabling you to default the correct information onto each transaction being adjusted instead of having to enter that information manually on each one.

You must set this system preference; you cannot leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Batch Detail Entry screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

Notify Open Pledge?

TA references the Notify Open Pledge? system preference (under Screens/Batch Detail Entry) when you enter a gift or pledge payment from a donor on the Batch Detail Entry screen. Set this system preference to "Y" for yes if TA should

- Automatically display the Open Pledges list of values when a *pledge payment* is entered for an account with open pledges, and
- Beep and display a hint in the status bar that the account has open pledges when a *gift* is entered for such an account.

TA considers a pledge open if its pledge status is unfulfilled or partially fulfilled.

Set this system preference to "N" for no if you do not want TA to inform you of a donor's open pledges when a gift or pledge payment is entered for the donor. You can press the [F9] key to view the list of valid options.

You must set this preference; you cannot leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Batch Detail Entry screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

Pledge Status Codes to List

TA references the Pledge Status Codes to List system preference (under Screens/Batch Detail Entry) when generating the Pledge Number list of values in the Batch Detail Entry screen. TA defaults this system preference to "PF, UF" which indicates that the Pledge Number list of values should only display partially fulfilled and unfulfilled pledges.

If your organization wants to include other pledge status codes in the Pledge Number list of values, you can press the [F9] key to select from a list of valid options. For example, if you want to include fulfilled pledges in the Pledge Number list of values (e.g., in order to generate additional pledge payments for them) you can set this system preference to "PF, UF, DF, FF."

This system preference only governs the type of pledges you see when you view the Pledge Number list of values on the Batch Detail Entry screen. You can manually enter a pledge number that has a status not contained in the system preference in the Pledge Number field on the Batch Detail Entry screen.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Batch Detail Entry screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

Allow User Access to Batch Status Only

This user preference (under Screens/Batch Summary Entry) determines whether a user has limited access to the Batch Summary Entry. Set this preference to Y if you want the user to be able to edit the Status field on the Batch Summary Entry screen and not be able to edit any other field. (Make sure that you have provided access to the whole screen if you plan to set this field to Y.) Set this field to the default of N if you want the user to be able to edit any field on the Batch Summary Entry screen.

Default Deposit Date Value

TA references the Default Deposit Date Value system preference (under Screens/Batch Summary Entry) when you create a batch summary record on the Batch Summary Entry screen to determine how to default the Deposit Date field.

You can set this system preference to "None" to cause TA to leave the Deposit Date field blank when you create a batch summary record.

You can set this system preference to "Gift Date" to cause TA to set the Deposit Date field to the value in the Gift Date field when you create a batch summary record.

Note: When users create a batch, they must enter a valid deposit date before TA will allow them to release the batch. Also note that this system preference does not affect any processes that create batches, such as Batch Upload.

You must set this system preference; you cannot leave it blank.

Default Gift Date Value

TA references the Default Gift Date Value system preference (under Screens/Batch Summary Entry) when you create a batch summary record on the Batch Summary Entry screen to determine how to default the Gift Date field.

You can set this system preference to "None" to cause TA to leave the Gift Date field blank when you create a batch summary record.

You can set this system preference to "System Date" to cause TA to set the Gift Date field to the current system date when you create a batch summary record.

Note: When users create a batch, they must enter a valid gift date before TA will allow them to release the batch. Also note that this system preference does not affect any processes that create batches, such as Batch Upload.

You must set this system preference; you cannot leave it blank.

Amount of Cost or Pledge to Send Benefit

TA references the Amount of Cost or Pledge to Send Benefit system preference (under Screens/Benefit Entry) when you set up the delivery criteria for a premium benefit only. The delivery criteria for a benefit define the payment rules to apply for TA to mark the benefit ready for delivery. When a donor awarded a benefit meets the payment rules for that benefit, TA marks that benefit ready for delivery to the donor. When a benefit is marked ready for delivery, the benefit is included in the benefit pull. This system preference enables you to have TA automatically default the appropriate delivery criterion for all premiums based on your organization's business practice.

This system preference can indicate that TA should set the delivery criterion for a premium in one of the following two ways.

- Set the percent of pledge for all premiums to the one entered as the system preference when you create a premium. For example, you can set this system preference to "P100" which indicates that for each premium, TA should set the percent of pledge to "100" requiring a donor to pay 100% of the pledge to be delivered the premium.
- Set the minimum payment amount for each premium to the cost of the premium when you create a premium and when you update the cost information. TA calculates the cost of a premium by totaling the unit cost, the shipping cost, and the handling cost you enter for the premium. For example, you

can set this system preference to "C100" which indicates that for each premium, TA should set the minimum payment amount to 100% of the cost of the premium. Each time you update the unit cost, the shipping cost, and the handling cost for a premium, TA updates the minimum payment amount.

You can press the [F9] key in this system preference to see the list of percentages and costs from which you can select.

You do not have to set this system preference; you can leave it blank. If you leave this system preference blank, you must manually set up the delivery criteria for a premium.

Default Activity Type (Benefit Entry)

TA references the Default Activity Type system preference (under Screens/Benefit Entry) when you create a new benefit on the Benefit Entry screen. Set this system preference to the activity type that should default for the new benefit. You can press this [F9] key to view the list of activity types.

Note: You can change the activity type at the time you create the benefit. Not every benefit you create needs to be assigned to an activity type. For example, your premiums or "thank-you gifts" don't need to be associated with an activity type if your organization makes those premiums available to donors for all activity types (e.g., Annual Giving, Capital Campaign, and Planned Giving). Your membership benefits should be associated with the activity type to which the donor becomes a member (e.g., the "A" activity type for Annual Giving).

You do not have to set this system preference; you can leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Benefit Entry screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

Default Inventory Location

TA references the Default Inventory Location system preference (under Screens/Benefit Entry) when you create a new benefit that is a premium on the Benefit Entry screen. Set this system preference to the inventory location that should default for premiums only. You can press the [F9] key to view the list of locations.

You do not have to set this system preference; you can leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Benefit Entry screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

Display Active Records Only

This system preference (under Screens/Classification Entry) determines whether 'A' (for active) defaults in the Find Classification Entry screen. Set this field to Y (for yes) or N (for no) depending on your organization's business practices. The user can override the default and search regardless of status.

This preference is also available on the user-level.

Related System Preference:

[Tab Labels 1-8](#)

Tab Labels 1-8

These system preferences (under Screens/Classification Entry) determine the names of up to 8 tabs that display in the Classification Entry screen and the specific classifications that users can add or edit. This preference is available on

the user-level in addition to the system-level. This means that you can configure TA so that specific users see and can enter (or update) specific classifications.

- If you leave these preferences blank TA automatically displays the classifications in a tab named **All**.
- If you choose to organize classifications into different tabs, be aware that if you do not have one of your tabs called **All**, then the user can only view (or add or edit) the classifications that are mapped to the tabs that you create. Name one of your tabs 'All,' if you want users to see the specific classifications organized into your tabs and a listing of all classification. If you want to limit the classifications that as user sees, then do not name one of your tabs 'All.'
- Determine the tab order from left to right by using Tab Label 1 for the left, use Tab Label 2 to display to right of the Label 1 field, etc. Enter the exact text as you want it displayed on the Classification Entry screen.

Mapping the Classifications that Display in Your Custom-Named Tabs

You configure the classifications under each of your tabs according to Classification Code (not the Value):

- Go to the Classification Code Entry screen and find a specific classification code.
- Enter the **Tab Label** field using the *same exact name* that you entered for the Tab Labels 1-8 system preference fields.
- Note that the Value Label field is reserved for future functionality; do not enter anything in this field.

Other configuration options for classifications on the Classification Code Entry screen:

Duration: use this field if you want to TA to automatically insert a date into the **End Date** field on the Classification Entry screen when the user adds a new classification. The date inserted will be the number of days in the future that you specify. For example, if you specify 365, TA inserts a date one year from the date that the user creates the new record. Note that TA does not set classification to 'I' (for inactive) when the End Date is reached.

Account Restriction: use this field if you want to control how the user can set the classification in the Name field on the Classification Entry screen:

Account level (A): The user is not permitted to set the classification to the name-level

Name-level (N): The user can specify the name on the account that the classification pertains to and cannot set it to the account-level name. If there is only one person on the account, then TA automatically sets it to the name on the account. If there is more than one name on the account, TA sets the classification to the first name on the account. The user can press [F9] and set it to another name on the account.

Both (B): The user can choose to set the classification to either the account-level name or to a specific person on the account. The classification defaults to the account-level name.

Security Level: If this field is set, the user can view only classifications that are at or below the user's classification security level for all screens and reports that display classifications. See the link below for further information.

Related Classification Configuration System Preferences:

[Display Active Records Only](#)

[Require Comment for Classification?](#)

[Security Level](#)

Default Benefit Selection Type

This system preference (under Screens/Event Overview) determines how the Selection field defaults when you add a new benefit on the Benefits tab in the Event Overview screen. Leave this preference blank or set it to 'Standard' or 'Alternate' according to how you want the field to default.

- Leave this field blank if your organization does not use the Registration Entry screen (Details tab) to track a registrants benefit request. Also, leave this field blank if your organization does not offer 'standard' or 'alternate' prize or benefit choices within amount ranges.
- See [Benefits Tab \(Event Overview\)](#) for more information about setting up event-related benefits.

Ask to Save Changed Settings

TA references the Ask to Save Changed Settings? system preference (under Screens/Find an Account) when users make a change to the Limit to field on the Find an Account window. (This field controls the types of accounts included in the search, such as corporate accounts, planned giving accounts, and all accounts.)

If you want TA to display an alert asking users if they would like to use the value they have just chosen as the default value for the Limit to field in the future, set this preference to "Y" for yes. If you do not want TA to display such an alert, set this preference to "N" for no.

Note: The alert includes an option for users to indicate that they do not want to receive the alert again.

You must set this system preference; you cannot leave it blank.

Note: In addition to setting this preference at the system level, you can also set it at the user level.

Related System Preferences:

[Ask to Save Changed Settings on Giving History?](#)

[Default Transactions to Include](#)

Giving History Layout

TA references the Giving History Layout system preference (under Screens/Giving History Summary) when you access the Giving History Summary screen. The layout of the screen that you see depends upon what is setup as your default. TA is delivered with three standard layouts: Layout A, Layout B, and Layout C. Your organization can create customized views using the Screen Layout Customization screen. (See "[Customizing Screens](#)" for more information.) You can assign different Giving History layouts for your users by changing the setting of the Giving History Layout user preference. If a layout is specified as a user preference, TA uses it instead of the layout specified in this system preference. You must set this system preference; you cannot leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Giving History Summary screen (if applicable). You can also allow users to change the value of this preference on the User Preferences screen.

Layouts A, B, and C

For each of these layouts, the top portion of the Giving History Summary screen displays the following information: Account ID, name line, batch number, batch sequence number, fund description, and premiums awarded to the transaction

Below the top portion, the Giving History Summary screen contains a multi-row block with multiple columns. The stationary columns in this block are: Date, number, page, pledge amount, and payment amount.

The remaining columns are displayed to the right of the stationary fields. (You can access these fields by using your horizontal scroll bar.) These columns vary depending on your Giving History layout. The layouts delivered with TA are:

- "A" Select this layout to view the Account ID, Payment Method, Gift Kind, Gift Type, Source Code, Affiliation, Transaction Type, Pledge Number, and Adjustment Code for the transaction.
- "B" Select this layout to view the Office, Source Code, Account ID, Credit Account, Debit Account, Payment Method, Gift Type, Affiliation, Transaction Type, Pledge Number, Gift Kind, and Adjustment Code for the transaction.

- "C" Select this layout to view the Office, Fund, Source Code, Account ID, Transaction type, Pledge Number, Gift Type, Payment Method, Adjustment Code, Total Payment Amount, and Soft Credit Code for the transaction.
- "D" This option has *not* been configured for every client. Please consult with your TSI project manager for more information about this option.

Customizing Screens

You (or your system administrator) can determine the fields that display on the Giving History Summary and Interaction History screens. You can select from most of the fields that are available in the respective detail screens. For example, if a particular field is available only by zooming (such as Pledge Status on Giving History Detail), you can now adjust the layout and place that field directly on the summary screen.

View and create new layouts on the Screen Layout Customization screen. Access this screen from either the System Preference Administration or User Preference Administration screens (Screens tab). Select either Giving History Summary or Interaction History in the Operation field. Click the <Customize> button.

From Screen Layout Customization:

- Click <New> to create a new layout.
- Click <Find> to edit or view a previously created layout.
- When you edit or create a new layout, TA automatically sets the status of the layout to inactive. You must click <Activate> when you have finished the screen design in order for the layout to be available to any user.
- If you choose to modify an existing layout that has been assigned to one or more users, TA displays an alert warning you that a layout with an Inactive status cannot be used by those who have been assigned the layout. If you want to edit the layout, click <Yes> at this alert.

See Also:

[Specific Notes on Customizing Giving History Summary and Interaction History](#)

Specific Notes on Customizing Giving History Summary and Interaction History

Giving History

TA is delivered with three standard Giving History Summary layouts: [Layout A](#), [Layout B](#), and [Layout C](#). These layouts have a restricted status, and cannot be customized. However, we deliver a fourth layout that you can customize, called Customizable Layout. This layout is based on Layout A. Once you modify the Customizable Layout, if you need other layouts to assign to another person or group, you must create additional custom layouts from scratch (you cannot copy or base additional layouts on your version of Customizable Layout).

Interaction History

TA references the **Interaction History Layout system preference** (under Screens/Interaction History) when you access the Interaction History screen. The layout of the screen that you see depends upon what is setup as your default. TA is delivered with one Interaction History layout (Layout A). It includes the same fields that were previously delivered with your system. You can assign different layouts for your users by changing the setting of the Interaction History Layout user preference. If a layout is specified as a user preference, TA uses it instead of the layout specified in this system preference.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Interaction History screen (if applicable). You can also allow users to change the value of this preference on the User Preferences screen.

If you want to create new views based on Layout A, use the fields below as your basis and add/remove fields according to your own design. These are the fields in Layout A for the Interaction History screen:

Screen Section	Layout Field Name
TOP_LEFT	RESPONSE CATEGORY
TOP_LEFT	RESPONSE TYPE
TOP_LEFT	RESPONSE DATE
TOP_RIGHT	SOURCE (INTERACTIONS)
TOP_RIGHT	SOURCE ANALYSIS CODE (INTERACTIONS)
TOP_RIGHT	COMMENTS (INTERACTIONS)
STATIC	ACCOUNT ID (INTERACTIONS)
STATIC	INTERACTION DATE (INTERACTIONS)
STATIC	PAGE (INTERACTIONS)
STATIC	INTERACTION TYPE DESCRIPTION
SCROLLING	TECHNIQUE (INTERACTIONS)
SCROLLING	SUMMARY LINE (INTERACTIONS)
SCROLLING	STAFF (INTERACTIONS)
SCROLLING	STATUS (INTERACTIONS)
SCROLLING	SOLICITOR (INTERACTIONS)

See Also:

[Customizing the Top Portion of the Layout](#)

[Customizing the Multi-Row Portion of the Layout](#)

[Previewing, Fine-tuning, and Activating the Customized Layout](#)

Customizing the Top Portion of the Layout

Choose the Fields to Display

The left list block lists all of the fields that you can choose from to display on the Top portion of the screen (you later select whether they should display on the right or left top portion of the screen); The right list block lists the fields you have selected to be on the top portion of the screen. Fields are listed alphabetically, with calculated fields (any field that begins with) at the top of the list. To move a field to the Selected Fields block, highlight the field in the Available Fields block and click the arrow pointing to the Selected Fields block.

Important: the <Cancel> button returns you to the Screen Layout Customization screen. Clicking this button does not undo the last keystroke.

- You can select a maximum of 50 fields to display.
- When a field has been moved to the Selected Fields column, it no longer appears in the list of available fields.
- To move a field from the Selected Fields block back to the Available Fields block, you can highlight the field in the Selected Fields block and click the arrow pointing to the Available Fields block.
- Click the <Next> button when you have finished selecting fields.

Note: The double arrows (>>) permit you to move all of the fields at once. However, since there are over 200 fields in the global list, you will then need to move most fields back. Therefore, consider not using this button until a future release allows you to have a subset of fields (rather than only having a global list) on the left side. To move all fields back to the Available Fields block, click the double arrows pointing to the Available Fields block.

Fine Tuning the Top Portion of the Screen

Among the fields you have selected to be on the top portion of the screen, you can determine if they display on the top left or right of the screen. Also use this part of the Layout Wizard to adjust the order of fields.

- Use the right, left arrows to move fields to the right or left side of the screen.

- Use the <Up> and <Down> buttons to determine the order that fields are listed on either side of the screen.
- Click <Back> if you want to add or remove a field.
- Click <Next> if you want to add or remove fields on the bottom, multi-row portion of the screen.
- Click <Finish> if you do not want to change the bottom portion of the screen.

Customizing the Multi-Row Portion of the Layout

Adding fields to the bottom, multi-row block uses the same structure as adding field to the top portion of the screen: the left side lists fields that you can add, and the right side contains the field that you have selected. See "[Customizing the Top Portion of the Giving History Summary Layout](#)" for information about moving fields between the Available Fields block and the Selected Fields block.

Once you have moved the fields you want to display to the Selected Fields block, click the <Next> button. TA displays the next page of the Wizard where you determine the fields (and display order) that make up the non-scrollable and scrollable regions of the Multi-row block.

Important: the <Cancel> button returns you to the Screen Layout Customization screen. Clicking this button does not undo the last keystroke.

Indicate Which Fields are Stationary and Which are Scrollable, and Set the Field Order

By default, TA places the first field you selected in the Static Section block, and all other fields in the Scrolling Section block. You can move fields between the sections by clicking the arrow buttons. You can change the field order by using the <Up> and <Down> buttons.

Set the Field Widths

TA displays the width of each field next to the field name. The width of the static section must be exactly 280 pixels. The width of the scrolling section must be at least 300 pixels. If the width of either section does not meet these specifications, TA displays a red indicator light notifying you of the problem.

You can then click the <Fix Static> or <Fix Scrolling> button and TA will adjust the width of the fields so that the requirements are met. You may also edit the width field for any field if you want to control the exact width.

You may find it easier to visually adjust the width of fields by dragging the column lines in the Screen Layout Customization screen. Click the <Finish> button to access this screen. See "[Previewing, Fine-tuning, and Activating the Customized Layout](#)" for instructions.

Previewing, Fine-tuning, and Activating the Customized Layout

When you have designed your layout, you can click the <Finish> button to see how your layout looks. The Screen Layout Customization screen shows you what your layout looks like, and enables you to change the order of your fields in the Multi-row section by "dragging" and "dropping" the fields into their new positions and by resizing the columns.

Changing the Field Order (Drag and Drop)

You can move fields around within both the static and the scrolling sections of the Multi-row block. You cannot move fields between the two sections. To re-order field, **position your cursor in the field under the column** that you want to move. Click your mouse button, and continue to keep the button clicked as you move the column to the new location. When you reach the desired location, release the mouse button.

Visually Resizing the Columns

You can make a column wider or narrower. To resize the column, position your cursor at the edge of the column line you want to resize so that the cursor becomes a crosshair. Click your mouse button to select the edge of the column, and continue to keep the button clicked as you move the edge of the column to the left or right. When you reach the desired location, release the mouse button.

Returning to the Wizard to Make Changes

To update the Top section of the layout, click <Modify Top>. To update the Multi-row section of the layout, click <Modify Multi-row>.

Activating the Layout

Once you have finished designing the Layout, click <Activate>. Your organization can now use this layout as either the [preferred one for the organization](#), or as an option when you assign user-level defaults.

Matching Gift Company Transaction Gift Types

This system preference (under Screens/Matching Gift Reconciliation) permits your organization to control the transactions from matching gift companies that can be chosen (or reconciled) while using the Matching Gift Reconciliation screen. The default value is set to 'ALL' which allows any gift from an organization that matches gifts to be reconciled with those who submitted matching gift forms. Set this system preference to 'MG' if you want only transactions with a gift type of MG to be displayed when you press [F9] in the Gift Date field (after specifying the particular matching gift organization). You can specify multiple gift types in this field if you want the option to reconcile gifts with different gift types.

Default Trustee

TA references the Default Trustee system preference (under Screens/Planned Gift Information Entry) during the creation of a planned gift record using the Planned Gift Information Entry screen. Set this preference to the trustee's brief name that should default into the Trustee field on the Planned Gift Information Entry screen when a trust is created. You can press the [F9] key to view the list of brief names.

You do not have to set this system preference; you can leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Planned Gift Information Entry screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

Append/Replace/Create New Output File

TA references the Append/Replace/Create New Output File system preference (under Screens/Query and Output Schedule) when you schedule a user-defined output to run with a query. When you schedule a user-defined output to run with a query, you can set up processing options for the output file that is created based on the user-defined output. Two of the processing options are the name of the output file and how those records should be added to that output file. You can set this system preference to default the value for how the records should be added to the output file; the person scheduling the user-defined output with the query can change the defaulted value.

The three values that control how records are added to an output file are

- "A" for append if the records of data pulled from the database when the query and user-defined output runs should be appended to the existing output file identified by filename,
- "C" for create if a new output file should be created for the records of data pulled from the database when the query and user-defined output runs, and

- "R" for replace if the records in the existing output file identified by filename should be replaced with the records of data pulled when the query and user-defined output runs.

You must set this system preference; you cannot leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Query and Output Schedule screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

Default Copy Query

TA references the Default Copy Query system preference (under Screens/Query Entry) when you create a new query using the Query Entry screen. Set this system preference to the name of the query that should default in the Copy Existing Query field on the Create New Query window. You can press the [F9] key to view the list of queries.

See the [Understanding Queries chapter](#) to learn how to create a new query by copying an existing query.

You do not have to set this system preference; you can leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Query Entry screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

Prohibit Credit Card Payments

This system preference (under Screens/Registration Entry) determines if users are permitted to enter payment amount for credit card transactions on the Gifts & Pledges tab of the Registration Entry screen. Set this field to Y if you do not want users to be able to enter credit card transactions on the Gifts & Pledges tab. (TA will let the user enter Pledge Amount, but not Paid amount if the payment method field includes a charge card code.) Set this field to N if you want the user to be able to enter the Paid Amount field for charge card transactions.

Default Time for Scheduled Jobs

TA references the Default Time for Scheduled Jobs system preference (under Screens/Schedule Administration) when you schedule an operation using the Schedule Administration screen. When you schedule an operation to run, e.g. a report or the End of Day Processing operation, you can set the date and time at which TA should run that operation. When you schedule an operation, TA defaults the time to the value of this system preference; you can change the time. Enter the time in the military format "HH:MM:SS" where "HH" refers to the hour based on a 24-hour clock, "MM" refers to the minutes, and "SS" refers to the seconds.

You do not have to set this system preference; you can leave it blank. If you leave this system preference blank, TA will default the time to "19:00:00" (which equates to 7:00 p.m.) when you schedule an operation.

Allow user to confirm shipment receipt

This user preference (under Screens/Shipment Entry) determines whether users are permitted to mark any of the confirmed checkbox fields on the Shipment Entry screen. If you do not want the user to be able confirm receipt of a shipment (marking a shipment received is distinct from marking it confirmed), set this preference to N. Set this field to Y if you want the user to be able update submittal records to a confirmed status.

See [Tracking the Shipment: Updating Received Date and Confirmed Receipt](#) for more information about using this functionality.

Default status for Find

This user preference (under Screens/Shipment Entry) determines how the status field defaults in the Find Shipment window. Users may override the default and search for any shipment record that has been created. Enter this default according to the main job function of the user. You can leave this system preference blank if a default is not helpful.

Set this system preference to R (for Received), for example, if the user's main job function with regard to shipments is to confirm receipt of shipments; leave the preference blank if the user regularly reviews shipment records across different status's.

Start-in tab or Window

This user preference (under Screens/Shipment Entry) determines whether the Create New Shipment window or the Find Shipment window automatically displays when you access the Shipment Entry screen. Set this field to N (for New) if the user primarily creates new shipment records. Set this field to F (for Find) if the user primarily confirms shipments that have been received. If you leave this preference blank, the Create New Shipment window is displayed automatically. Users can access the Find Shipment window from the Create New window or create a new shipment from the Find Shipment window.

Default Survey Classification Category

The Default Survey Classification Category system preference (under Screens/Survey Response Entry) indicates the survey that TA should default on the Find/Create Survey Responses window.

You do not have to set this system preference; you can leave it blank. See the [Customer Service chapter](#) for more information about the Survey Response Entry screen.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Survey Response Entry screen (if applicable). You can also allow users to change the value of this preference for themselves on the User Preferences screen.

ZIP Code Defaults Precision Level

TA references the ZIP Code Defaults Precision Level system preference (under Screens/ZIP Code Entry) if the [Set Transaction Level Affiliation](#) system preference is set to ZIP or Source/ZIP, to indicate the maximum precision with which ZIP Code defaults can be specified (i.e., how precisely transaction-level affiliation should be set from the ZIP Code). This system preference determines what level of information users can set on the ZIP Code Defaults window, which is accessible through the ZIP Code Entry screen. You can set the ZIP Code Defaults Precision Level system preference to

- "ZIP" to ensure that one transaction-level Zip Code Defaults record may be specified per ZIP Code. (Note that TA automatically sets the Activity Type and Activity fields to ALL, indicating that the settings apply to all transactions for accounts of that ZIP Code. TA does not display the Activity Type and Activity fields on the Zip Code Defaults window when this system preference is set to ZIP.)
- "ACTIVITY TYPE" to ensure that one transaction-level Zip Code Defaults record may be specified per ZIP Code/activity type combination. (Note that TA automatically sets the Activity field to ALL, indicating that the settings apply to all transactions for a source with the specified activity type for accounts of that ZIP Code. TA does not display the Activity field on the Zip Code Defaults window when this system preference is set to ACTIVITY TYPE.) You can set activity type to ALL on the Zip Code Defaults window if there are ZIP Codes for which you wish to set transaction-level affiliation similarly regardless of activity type.
- "ACTIVITY" to ensure that one transaction-level Zip Code Defaults record may be specified per ZIP Code/activity combination. You can set the Activity field to ALL on the Zip Code Defaults window if there are ZIP Codes for which you wish to set transaction-level affiliation similarly regardless of activity. Likewise, you can set the Activity Type field to ALL on the Zip Code Defaults window if there

are ZIP Codes for which you wish to set transaction-level affiliation similarly regardless of activity type.

Your organization must set this system preference if you have set the Set Transaction Level Affiliation system preference to either ZIP or SOURCE/ZIP.

Report-specific System Preferences

Use the report-specific system preferences to determine the how TA defaults parameters. Also for any report, you can remove parameters so that the user does not see parameters that your organization does not use. If you want to limit what a user can enter for a particular parameter, you can lock a specific default and make it so the user cannot change it.

There are some reports that contain parameters that are set only once for the system. For example, the [Display Charge Card Number on Report?](#) is available to set on the Charge Download Detail report, however you set this preference once and all copies of the report that you might make must use this setting.

See [Setting Processing Options for a Report or Procedure](#) for information about the parameters you set that determine how the report is processed.

Display Charge Card Number on Report?

TA references the Display Charge Card Number on Report? system preference (under Reports/Charge Download Detail Report) when the Charge Download procedure runs. If this system preference is set to "Y" for yes, TA prints the charge card number on the reports associated with this download procedure. If you enter "N" for no, TA does not print the charge card number.

You must set this system preference; you cannot leave it blank.

Procedure-specific System Preferences

Use the procedure-specific system preferences to determine the how TA defaults parameters. When you set these parameters, you indicate whether users can update their values (or even view them) when scheduling the procedure. In addition, there are some procedures that contain parameters that are set only once for the system. Below is a list of each of the procedures and the corresponding system preferences that is set once for your TA environment.

Note: See [Setting Processing Options for a Report or Procedure](#) for information about the parameters you set that determine how the procedure is processed. You can view details about the rest of the parameters for a given procedure by looking up the procedure in the relevant section of the documentation.

Charge Download

[Always Update Charge Verification Information?](#)

[Charge Card Retry Delay](#)

[Charge Download Limit](#)

[Pull Charge Installments on First of Month?](#)

Charge Upload

[Maximum Number of Charge Rejections](#)

EFT Generation and Download

[Bank EFT Routing Number](#)

[EFT Bank Name \(for header record in EFT file\)](#)

[EFT Entry Description \(for batch header\)](#)

[EFT Site Name \(for header record in EFT file\)](#)

[EFT Source Name \(for company/batch header\)](#)

[Site EFT Routing Number](#)

End of Day Processing

[Days Until Queried Records Expire](#)

[Number of Days to Keep Schedule Records](#)

[Years to Retain Credit Card Numbers](#)

End of Month Processing

[Months to Archive Listener Logs system preference](#)

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Fund Upload

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[Fiscal Month](#)

[Fiscal Year](#)

[GL Rule for Setting Accounting Batch](#)

[GL Source \(MKTG or NONM\)](#)

[Method of Setting Accounting Date](#)

Generate Target Tags

[Target TAGs™ Password](#)

Merge Processing

[Account Affiliation Merge Rule](#)

Post Gift Batches

[Auto Adjust Pledge on Change of Source](#)

[Final Pledge Status Codes](#)

[Fulfill Partially Paid One-time Pledges?](#)

[Set Membership Sent Date in Gift Processing](#)

Always Update Charge Verification Information?

TA references the Always Update Charge Verification Information? system preference (under Procedures/Charge Download) when the Charge Download procedure runs to determine whether to include name and address information in the file created by the download. Set this system preference to "Y" for yes if the name and address information should be included in the file your organization sends to the credit card processing vendor. Set this system preference to "N" for no if the name and address information should not be included in the file. You can press the [F9] key to view the list of options.

You must set this system preference; you cannot leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Charge Download procedure (if applicable). You can also allow users to change the value of this preference when running the procedure.

Charge Card Retry Delay

TA references the Charge Card Retry Delay system preference (under Procedures/Charge Download) when the Charge Download procedure runs. This system preference indicates the number of days the procedure should wait before pulling a credit card pledge that has been rejected by the bank.

When the Charge Download procedure runs, TA selects pledges paid by credit card for which each pledge's status is unfulfilled or partially fulfilled. For each pledge selected, TA checks the pledge's bank approval status to determine whether to include the pledge in the download.

- If the bank approval status is never sent, TA includes the credit card pledge.
- If the bank approval status is pending, TA does not include the credit card pledge.
- If the bank approval status is approved, TA includes the credit card pledge if the pledge's status is partially fulfilled and a payment is due (i.e., this pledge is an installment pledge being paid by an approved credit card and the next installment payment is due).
- If the bank approval status is reject and retry, TA compares the date on which the credit card pledge was last pulled to the date on which the procedure runs. If the number of days is equal to or greater than the number of days indicated by this system preference, TA includes the credit card pledge in the export.
- If the bank approval status is no retry, TA does not include the credit card pledge.

For a new credit card pledge, TA sets the bank approval status to never sent when the pledge is processed (i.e., when the Post Gift Batches procedure runs for the batch containing the pledge). TA resets the bank approval status to pending for this credit card pledge when the Charge Download procedure runs.

When the Charge Upload procedure runs, TA resets the bank approval status again based on the bank's action for the pledge.

- If the bank approved the credit card, TA sets the bank approval status to approved.
- If the bank has rejected the credit card, TA checks the bank rejection count for the pledge.
 - If the number of rejections is less than the value for the [Maximum Number of Charge Rejections](#) system preference, TA sets the bank approval status to reject and retry for the credit card pledge.
 - If the number of rejections is equal to the value for the Maximum Number of Charge Rejections system preference, TA sets the bank approval status to no retry for the credit card pledge and changes the payment method to check to enable your organization to include the pledge in the next set of pledge bills you send.

You must set this system preference; you cannot leave it blank. However, you can set this preference to "0" to indicate zero days, which enables you to pull new charges immediately.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Charge Download procedure (if applicable). You can also allow users to change the value of this preference when running the procedure.

Charge Download Limit

TA references the Charge Download Limit system preference (under Procedures/Charge Download) when the Charge Download procedure runs. This system preference identifies the number of transactions to pull for the file created by the download.

Note: If you use this system preference to limit the size of the file created by the Charge Download procedure, you may need to schedule the Charge Download procedure to run multiple times to pull all appropriate transactions.

You do not have to set this system preference; you can leave it blank. If you leave this system preference blank, the Charge Download procedure creates one file with all of the transactions pulled by the procedure.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Charge Download procedure (if applicable). You can also allow users to change the value of this preference when running the procedure.

Pull Charge Installments on First of Month?

TA references the Pull Charge Installments on the First of Month? system preference (under Procedures/Charge Download) when the Charge Download procedure is run. Set the system preference to "Y" for yes if you want charges to be pulled immediately and then to standardize charges to the first of the month. The charges are pulled as soon as the download is run after the charges have been posted for the first payment. For all subsequent payments in the schedule, the charges are pulled on the first of the month, or the first time the download is run after the first of the month.

- Set this system preference to "Y" if your organization wants to pull all installment pledges on the first of the month, rather than basing the pull on the number of days since the last time the charge was pulled and the number of days in the pledge's frequency.
- Set the system preference to "N" for no if you want to base the pull on the number of days since the last time the charge was pulled and the number of days in the pledge's frequency. (Leaving this field blank is the same as setting it to "N" for no.)

Example with the system preference set to "Y": A donor makes a monthly installment pledge of \$120 which is posted April 19th; the first \$10 installment is pulled for payment as soon as the download is run after the posting on April 19th. The second installment of \$10 is pulled as soon as the download is run on or after May 1st. In other words, TA does not wait until after May 19th to pull the second installment payment, and each subsequent installment is pulled when the download is run on or after the first of the month.

If the system preference is set to "N": The second installment payment is pulled on May 19th.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Charge Download procedure (if applicable). You can also allow users to change the value of this preference when running the procedure.

Maximum Number of Charge Rejections

TA references the Maximum Number of Charge Rejections system preference (under Procedures/Charge Upload) when the Charge Download procedure runs. This system preference indicates the maximum number of rejections your organization allows from the bank for a credit card pledge.

TA updates the bank rejection count for a credit card pledge each time the bank rejects the pledge (i.e., when the Charge Upload procedure runs, TA updates the bank rejection count for each rejected pledge). When the bank rejection count equals the value of this system preference, TA does not include the pledge in the download.

TA sets the bank approval status for a credit card pledge when the Charge Card Upload procedure runs. If the bank has rejected the credit card, TA checks the bank rejection count for the pledge.

- If the number of rejections is less than the value for the Maximum Number of Charge Rejections system preference, TA sets the bank approval status to reject and retry. The reject and retry status indicates to TA that the credit card pledge can be resubmitted.
- If the number of rejections is equal to the value for the Maximum Number of Charge Rejections system preference, TA sets the bank approval status to no retry for the credit card pledge and changes the payment method to check to enable your organization to include the pledge in the next set of pledge bills you send.

You must set this system preference; you cannot leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Charge Upload procedure (if applicable). You can also allow users to change the value of this preference when running the procedure.

Bank EFT Routing Number

TA references the Bank EFT Routing Number system preference (under Procedures/EFT Generation and Download) when the EFT Generation and Download procedure is run. Enter the transit routing number of the financial institution receiving the file.

You do not have to set this system preference; you can leave this field blank.

EFT Bank Name (for header record in EFT file)

TA references the EFT Bank Name (for header record in EFT file) system preference (under Procedures/EFT Generation and Download) when the EFT Generation and Download procedure is run. When this system preference is set, it enables the system to use an EFT vendor (e.g., "ACH"). You can enter the name of the financial institution receiving the EFT files.

You do not have to set this system preference; you can leave it blank.

EFT Entry Description (for batch header)

TA references the EFT Entry Description (for batch header) system preference (under Procedures/EFT Generation and Download) when the EFT Generation and Download procedure is run. Your organization can enter a batch record header (up to 10 characters in length) to describe the entries in the batch (e.g., pledge payments). When this system preference is set, the header is attached to the EFT file and is used by the bank.

You do not have to set this system preference; you can leave it blank.

EFT Site Name (for header record in EFT file)

TA references the EFT Site Name (for *header record* in EFT file) system preference (under Procedures/EFT Generation and Download), of which there is one per file, when the EFT Generation and Download procedure is run. When this system preference is set, it enables the system to use an EFT vendor (e.g., "ACH"). You can enter your specific site name (up to 23 characters).

You do not have to set this system preference; you can leave it blank.

EFT Source Name (for company/batch header)

TA references the EFT Source (for company/batch header) system preference (under Procedures/EFT Generation and Download), of which there is one per batch, when the EFT Generation and Download procedure is run. When this system preference is set, it enables the system to use an EFT vendor (e.g., "ACH"). You can enter the source of the batch entries (up to 16 characters).

You do not have to set this system preference; you can leave it blank.

Site EFT Routing Number

TA references the Site EFT Routing Number system preference (under Procedures/EFT Generation and Download) when the EFT Generation and Download procedure is run. When this system preference is set, it enables the system to use an EFT vendor (e.g., "ACH"). You can enter your site EFT routing number.

You do not have to set this system preference; you can leave it blank.

Days Until Queried Records Expire

TA references the Days Until Queried Records Expire system preference (under Procedures/End of Day Processing) in the query retrieved record set. The End of Day procedure deletes any query retrieved records if an expiration date less than the date it runs. Page 2 of the Query Entry screen displays the expiration date of these records if the query has been run.

For any query, you can

- At the time you set up the query, set the expiration date for the records saved by the query when the query runs.
- At the time you schedule the query to run, indicate whether the records retrieved by the query should be saved.

If you don't set the expire date on the query but you do indicate that the records should be saved when you schedule the query to run, TA keeps the records for the number of days indicated by this system preference. Set this system preference to the number of days TA should keep saved records.

You should set up the End of Day Processing operation to run daily using the Schedule Administration screen.

You must set this system preference; you cannot leave it blank.

Number of Days to Keep Schedule Records

TA references the Number of Days to Keep Schedule Records system preference (under Procedures/End of Day Processing) when the End of Day Processing operation runs. Set this system preference to the number days the schedule records should be kept until purged by the End of Day Processing operation.

Note: You should set up the End of Day Processing operation to run daily using the Schedule Administration screen.

You must set this system preference; you cannot leave it blank.

Years to Retain Credit Card Numbers

TA references the Years to Retain Credit Card Numbers system preference (under Procedures/End of Day Processing) when the End of Day Processing operation runs. The End of Day Processing operation replaces the actual credit card number with the appropriate dummy credit card number (TA requires a credit card number for a credit card transaction) for credit card transactions for which your organization has completed billing.

For each transaction selected, TA determines whether the transaction is old enough to replace the credit card on the transaction with the appropriate dummy credit card number. TA references the Years to Retain Credit Card Numbers system preference to determine whether the gift date of the transaction is equal to or greater than the date that results from subtracting the value of the system preference from the current run date. If the transaction is older than the resulting date, then End of Day Processing operation replaces the credit card number on the transaction with the appropriate dummy credit card number.

Months to Archive Listener Logs system preference

TA references the Months to Archive Listener Logs system preference (under Procedures/End of Month Processing) when the End of Month Processing operation runs. Set this system preference to the number of months to keep archived listener logs in TA. TA defaults this value to "2."

See the [System Administration chapter](#) for more information about listener logs.

You must set this system preference; you cannot leave it blank.

Months to Keep Guide Interaction

TA references the Months to Keep Guide Interaction system preference (under Procedures/End of Month Processing) when the End of Month Processing operation runs. Set this system preference to the number of months during which to keep the interaction records that represent your organization's publication. TA deletes the correct interactions by selecting only those interactions with the Interaction Category set to "BE" for Benefit Sent and the Interaction Type set to "GDE" for Guide.

You must set this system preference; you cannot leave it blank.

Temporary Fund Table

TA references the Temporary Fund Table system preference (under Procedures/Fund Upload) when the Fund Upload procedure runs. This upload is built specifically to upload data from an Oracle table rather than from a text file. You should set this system preference to the name of the Oracle table from which the Fund Upload procedure will be importing the data.

You do not have to set this system preference; you can leave it blank.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the Fund Upload procedure (if applicable). You can also allow users to change the value of this preference when running the procedure.

Fiscal Month (GL Interface)

TA references the Fiscal Month system preference (under Procedures/General Ledger Interface) when the General Ledger Interface procedure runs. Set this preference to the fiscal month for which processed batches should be pulled. You can use absolute or relative dates. You do not have to set this preference; you can leave it blank to not limit by fiscal month.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the General Ledger Interface procedure (if applicable). You can also allow users to change the value of this preference when running the procedure.

Fiscal Year (GL Interface)

TA references the Fiscal Year system preference (under Procedures/General Ledger Interface) when the General Ledger Interface procedure runs. Set this preference to the fiscal year for which processed batches should be pulled. You can use absolute or relative dates. You do not have to set this preference; you can leave it blank to not limit by fiscal year.

Note: This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the General Ledger Interface procedure (if applicable). You can also allow users to change the value of this preference when running the procedure.

GL Rule for Setting Accounting Batch

Set the GL Rule for Setting Accounting Batch system preference (under Procedures/General Ledger Interface) to "V" if your organization wants TA to set the Accounting Batch field on the Batch Summary Entry screen to the vendor process ID of the GL Download. If your organization leaves this system preference set to "S," TA uses the default system rule to set the accounting batch for processed batches pulled by the GL Download.

Note: The default rule for setting the accounting batch is as follows: For each batch, unless an accounting batch is entered as a parameter to the operation, the accounting batch depends on the fiscal month, fiscal year, and

date inserted of the batch. If the user does enter an accounting batch number as a parameter, then records from *all* batches in the download are put into this accounting batch, regardless of the fiscal date on the batch.

This preference is at the operation level rather than at the system level, which means that you can have more than one setting for your system. You can give this preference a different value for each copy of the General Ledger Interface procedure (if applicable). You can also allow users to change the value of this preference when running the procedure.

GL Source (MKTG or NONM)

TA references the GL Source system preference (under Procedures/General Ledger Interface) only when the TNC General Ledger Download runs. You can set this system preference to "MKTG" or to "NONM." This system preference indicates from which database, MKTG or NONM, the transactions are being exported.

Your organization should not set this system preference without consulting TSI.

Method of Setting Accounting Date

TA references the Method of Setting Accounting Date system preference (under Procedures/General Ledger Interface) when the General Ledger Interface procedure runs. You can set this preference to one of two values.

- **Deposit Date.** TA sets the accounting date equal to the deposit date of the batch summary record associated with the transaction.

Note: If the deposit date does not fall within an open fiscal month (the current fiscal month or two months afterwards), TA sets the accounting date to the last date of the current fiscal month.
- **Fiscal Month and Year.** TA sets the accounting date to the last day of the month in the fiscal year and month on the batch summary record associated with the transaction.

You must set this system preference; you cannot leave it blank.

Target TAGs™ Password

The Target TAGs™ Password system preference (under Procedures/Generate Target Tags) is used by the Target TAGs™ module, which is licensed by Target Analysis Group, Inc. For information about this module, contact Target Analysis Group.

Account Affiliation Merge Rule

TA references the Account Affiliation Merge Rule system preference (under Procedures/Merge Processing) during merge processing. You can set this system to one of the following two values:

- **Retained Account:** During merge, always keep the affiliation and lock information that is on the retained account.
- **Locked Affiliation:** During merge, if both accounts or neither of the two accounts has the Lock Affiliation? checkbox marked, then keep the affiliation and lock information that is on the retained account. However, if either the retained or deleted account has Lock Affiliation? checkbox marked (but not both accounts), then retain the affiliation and lock information that is on the account where the Lock Affiliation? checkbox is marked.

You must set this system preference; you cannot leave it blank. **Your organization cannot change this system preference without consulting TSI.**

Auto Adjust Pledge on Change of Source

TA references the Auto Adjust Pledge on Change of Source system preference (under Procedures/Post Gift Batches) when you enter the first pledge payment for a donor, and the source code and related source information (e.g., debit and credit accounts) on the pledge payment is different from the source code and related source information on the pledge. Set this system preference to "Y" for yes if TA should automatically adjust the original pledge to make the source code and related source information on the pledge the same as the source code and related source information on the pledge payment. Set this system preference to "N" for no if TA should not automatically adjust the source code and related source information on the pledge; that is, the source code and related source information on the pledge should be different from the source code and related source information on the first pledge payment. You can press the [F9] key to view the list of options.

Note: TA references this system preference on the first pledge payment only; that is, if you enter a pledge payment that is not the first payment for the pledge, and the source code and related source information is different from the source code on the pledge, TA does not automatically adjust the pledge even if the Auto Adjust Pledge on Change of Source system preference is set to yes.

You must set this system preference; you cannot leave it blank.

Final Pledge Status Codes

The Final Pledge Status Codes system preference (under Procedures/Post Gift Batches) enables your organization to indicate that pledges with certain statuses should not be reevaluated by gift processing when a payment is posted to the pledge. The default value for this system preference is "UC, PC, PH." Your organization may add other pledge statuses that it considers final; the system preference accepts a comma-separated list of pledge statuses. For example, you may manually set a partially paid pledge to "DF" for default fulfilled, but you may still want to apply a payment to it without re-activating the pledge. In this case, you can add "DF" to the value for the system preference so the pledge status is not reevaluated when the payment is posted.

Fulfill Partially Paid One-time Pledges?

TA references the Fulfill Partially Paid One-time Pledges? system preference (under Procedures/Post Gift Batches) when the Post Gift Batches procedure runs. You can press the [F9] key to view the list of options.

TA references this system preference when processing a one-time pledge. A one-time pledge refers to a pledge which you expect the donor to fulfill in one payment. When you enter such a pledge, you set the gift kind to "OP" for one-time payment. The pledge is then processed in TA, and your organization sends the donor a bill for the pledge. When you receive the donor's payment, if the payment is less than the amount pledged and this system preference is set to "Y" for yes, TA sets the pledge status in one of two ways.

- "PC" for partially collected to indicate the payment is considered complete even though the pledge was not fulfilled.
- "DF" for default-fulfilled only if the activity, campaign, or initiative information for the pledge payment is different from that for the associated pledge. This status indicates the payment is being fulfilled using a different marketing solicitation.

Setting the pledge status to one of these two codes ensures that the pledge is not included in the next pledge bill pull.

Note: At the time you enter the donor's payment for a one-time pledge, if the donor didn't pay the pledge in full, you can change the pledge to an installment pledge. You can then try to collect the remainder of the pledge using installment bills instead of considering the pledge fulfilled.

If you do not want TA to automatically set a pledge's status to partially collected or default fulfilled when the pledge you expect to be paid with one payment isn't paid in full by that payment, set this system preference to "N" for no. You can then include these pledges in future pledge bill runs.

You must set this system preference; you cannot leave it blank.

Set Membership Sent Date in Gift Processing

Set the Set Membership Sent Date in Gift Processing system preference (under Procedures/Post Gift Batches) to "N" for no if your organization does not want the Last Sent field on a membership benefit automatically set when gift processing marks a membership benefit OK to deliver. The default value for this system preference is "Y," which means that TA should set the Last Sent field on the membership benefit when the benefit is marked OK to deliver.

Your organization may want to set this system preference to "N" if it wants to use the membership benefit (i.e., "MEM") to select all items in a membership package for fulfillment at once. Your organization can schedule the Update Benefit Sent update procedure with the benefit fulfillment query to set the Last Sent field.

Your organization must set this system preference; you cannot leave it null.

Setting Processing Options for a Report or Procedure

The following table lists each processing option you can set for reports and procedures on the System Preference Administration screen.

Field or Checkbox	Option
Schedule Order	The order number for a report or procedure.
Schedule Flag	Whether the report or procedure can be scheduled, including the number of times it can be scheduled.
Continue After Error?	Whether TA should process operation(s) scheduled to follow the current report or procedure if the current report or procedure runs in error.
Queue Number	The default processing queue for the report or procedure.
Server Exclusive?	For reports only. Indicates whether TA should always process the report on the database server.

See Also:

[Setting the Schedule Order](#)

[Setting the Schedule Flag](#)

[Setting the Continue After Error? Parameter](#)

[Setting the Queue Number](#)

[Setting a Report to Always be Processed on the Server](#)

Setting the Schedule Order

You can set the default order number for a report or procedure on the System Preference Administration screen by setting the Schedule Order parameter to a number from 1 to 9999. This number represents the order number TA defaults in the Order Number field on the Create New Schedule Request window when the report or procedure is scheduled using the Schedule Administration screen, and determines the order in which TA processes operations scheduled for the same time. You can leave this field blank.

Setting the Schedule Flag

On the System Preference Administration screen, you must indicate whether a report or procedure can be scheduled, and, within a queue, how many times the report or procedure can be scheduled by setting the Schedule Flag parameter. You cannot leave this parameter blank.

You can set this parameter to one of the following three values.

- "M" for schedule multiple times, meaning the operation can be scheduled more than once
- "N" for unable to schedule operation, meaning the operation cannot be scheduled at all (e.g., an update procedure that runs with a query and output schedule record)
- "U" for unique in schedule, meaning the operation can be scheduled only once (e.g., Post Gift Batches)

Note: If you set the flag to unique in schedule and the operation is scheduled (its status is pending), you can't schedule the operation again. Once the operation has been processed, you can schedule the operation to run again. Do not confuse the schedule flag with setting a rescheduling frequency for the operation to have TA automatically reschedule the operation. See "[Adding an Operation to the Schedule](#)" to learn how to assign the rescheduling frequency (e.g., monthly or daily, to an operation).

Setting the Continue After Error? Parameter

You must set the Continue After Error? parameter for each report and procedure on the System Preference Administration screen. You cannot leave this field blank. You can set this field to

- "Y" for yes if TA should continue processing subsequent scheduled operations if the current operation runs in error, or
- "N" for no if TA should stop all processing if the current operation runs in error.

For example, you can set this field to no for the End of Month Processing operation. If you scheduled a series of month-end reports to run after the End of Month Processing operation, TA will not process the reports if the End of Month Processing operation runs in error.

Setting the Queue Number

For each operation, you must set the Queue Number parameter on the System Preference Administration screen. When a user schedules the operation or submits the operation for immediate execution (e.g., the user submits a report from the menu), TA processes the operation on the default listener queue unless the user changes the queue on the Schedule Administration screen before processing begins. Press the [F9] key to select a default queue from the list of queues.

Note: Generally, you will set this field to one of the processing queues. However, you could also set the Default Queue field to a virtual queue if you want the operation to be assigned to a processing queue on an "as available" basis. See "[Organizing Queues](#)" for more information.

Setting a Report to Always be Processed on the Server

For report operations only you can set the Server Exclusive? parameter to "Y" for yes if the report should always be processed by the server and not by the user's computer. When this parameter is set to "Y" for yes, the <View> button is removed from the Request an Operation window, which appears when a user selects the report. To enable the <View> button on the Request an Operation window, set the Server Exclusive? parameter to "N" for no.

