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Understanding Update Procedures

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Accounts and Account Activities Procedures
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Event Registration Procedures
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Overview of Update Procedures

About Update Procedures
How the Update Procedure Sets the Audit Fields
Running Update Procedures with Queries
Viewing Updated Information

About Update Procedures

In Team Approach® (TA), an update procedure makes changes to the data for selected records in your database. You perform an update procedure by completing the following steps.

1. To select the records that you want to change, you create a query and link it to the update procedure that you want to run or you link an existing query to the update procedure that you want to run.

2. To define the changes that you want to make to the selected records, you enter values in the update procedure's parameters.

3. Schedule the query and the update procedure. See "Running Update Procedures with Queries" for a list of query types you can run with each procedure. See the Scheduling Queries and Viewing Records Retrieved chapter for information on how to schedule an update procedure to run with a query.

For example, suppose your organization mails a renewal solicitation. In order to pull the information for the mailing labels, your organization creates one or more queries to select the accounts that should receive the renewal solicitation. With each query, you can run the Create Interaction procedure. When you schedule the Create Interaction procedure, you enter selected information about how the interaction record should look (e.g., what interaction type to assign to each interaction created, which source code you used for the renewal mailing, etc.). The procedure creates an interaction record, which indicates that each account was mailed the renewal solicitation.

How the Update Procedure Sets the Audit Fields

When you run an update procedure, TA sets the audit fields as follows.

- If the update procedure created a new record, TA sets the User Created field and the User Last Updated field to the name of the user who scheduled the update procedure to run. TA sets the Date Created field and the Date Last Updated field to the date and time when TA created the record.If the update procedure updated an existing record, TA sets the User Last Updated field to the name of the user who scheduled the update procedure to run. TA sets the Last Date Updated field to the date and time when TA updated the record.

Running Update Procedures with Queries

You can run each of the following procedures with the query types listed to the right of the procedure name in the table below. See the Understanding Queries chapter for an explanation of query types.

Procedure	Query Type	Purpose
Award Complimentary Benefits	Accounts Names	Create a batch of $0 transactions with a benefit for the accounts (or names) selected by the query.
Award Event Benefits	Registrations	Evaluate if an event registrant is qualified to receive the requested benefit.
Mark Benefits as Backordered	Benefits	Pull awarded benefit records that are marked OK to Deliver based on number of items in inventory, mark the remaining transaction benefit records as backordered, and prioritize which donors should receive the benefits first.
Create Classification	Accounts Benefits Interactions Names Transactions	Create a classification for selected accounts or names within accounts.
Create Registrations Update	Accounts Registrations	Create event registrations for the selected accounts.
Create Interaction	Accounts Benefits Interactions Names Transactions Tributes	Create interactions or delete existing interactions for selected accounts.
Create Prospect	Accounts Benefits Interactions Names Transactions	Create account activity, account project or both types of prospect records for selected accounts.

Procedure	Query Type	Purpose
Update Acknowledgement	Benefits Transactions	Indicate the acknowledgment letter and date the letter was sent for selected transactions.
Update Adjustment Notice	Benefits Transactions	Set the date adjustment notification letters for selected transactions were sent to your organization's accounting department. This procedure should be used for queries constructed to select adjustments for reporting.
Set Backorder Notice Date	Benefits	Set the date the backorder notice letters were sent to the donors for selected backordered benefits.
Update Benefit Sent	Benefits Interactions	Set the date the selected benefits were sent to donors. This procedure should be used for queries that select benefits that have been awarded but not yet delivered or interactions that represent a donor's request for a benefit.
Update Credit Card Rejection Notice Date	Benefits Transactions	Indicate the date that credit card rejection letters were sent to donors for selected transactions. This procedure should be used for queries that select rejected credit card transactions.
Update Current Start Date	Benefits	Reset the start date for specified activities and activity types (e.g., in order to ensure that your donors receive the correct number of membership publications). This procedure should be run with the query for the benefit your organization will use to set the membership start date.
Update Exchange Date	Accounts Benefits Interactions Names Transactions	Set the date that the account's contact information was last exchanged with another organization.

Procedure	Query Type	Purpose
Update Pledge Bill	Benefits Transactions	Set the date the most recent pledge bills were sent to the donors for selected pledges, and increment the number in the Number of Bills Sent field by 1. This procedure should be used with pledge bill queries.
Update Pledge Status	Benefits Transactions	Set the status of selected pledges (e.g., set a group of pledges to uncollectible). This procedure should be used with queries that select pledge transactions.
Update Registrations	Registrations	Update attendance or the Benefit Selected Date for a group of event registrants.
Update Reminder Date	Benefits Transactions	Set the date the most recent pledge reminders were sent to the donors for selected non-standard installment pledges. This procedure should be used with queries that select transactions with payment schedules.
Update Response	Interactions	Set the date your organization responded to selected interactions (e.g., the date your organization mailed out general organization information to people who requested it.
Set Tribute Acknowledgment Date	Tributes	Set the date that your organization last sent a letter to the notification recipients to inform them of gifts made toward a specific tribute.
Update Account Activities Working Fields	Benefits Transactions	Set fields on the Account Activity screen in order to view giving information for donors' selected transactions. This procedure should be run with transactions queries you want to use for segmentation purposes.

Viewing Updated Information

When you run an update procedure, TA sets fields in the database according to the parameters you set. You can view the information that TA updates for each procedure on select screens in TA.

Procedure	Screen

Mark Benefits as Backordered	Benefits Awarded
Create Classification	Classification Entry
Create Interaction	Account Diary Entry, Customer Service Entry, Interaction History
Create Prospect	Account Project Entry, Account Activity
Update Acknowledgement	Giving History Detail
Update Adjustment Notice	Giving History Detail
Set Backorder Notice Date	Benefits Awarded
Update Benefit Sent	Benefits Awarded, Benefit Entry
Update Credit Card Rejection Notice Date	Giving History Detail
Update Current Start Date	Activity Entry, Activity Type Entry
Update Exchange Date	Account Overview (Page 2)
Update Pledge Bill	Giving History Detail
Update Pledge Status	Giving History Detail
Update Reminder Date	Giving History Detail
Update Response	Account Diary Entry, Customer Service Entry, Interaction History
Set Tribute Acknowledgment Date	Tribute Entry, Giving History Detail
Update Account Activities Working Fields	Account Activity

Accounts and Account Activities Procedures

Create Classification
Create Interests
Create Prospect
Create Relationship
Update Current Start Date
Update Exchange Date
Update Account Activities Working Fields
Update Legislative Districts

Create Classification

The Create Classification procedure enables you to create a classification for each account or name selected by the query with which the procedure is run. For example, suppose your organization ran a query to select a group of

accounts to which your organization sent a survey. Included in this survey was a question asking if the accounts would prefer not to be solicited by telephone. After getting this response, you ran a query to select the accounts who prefer not to be solicited, saved the results of the query and then ran the Create Interaction procedure to record the survey responses. Your organization could then rerun the query with the Create Classifications procedure to update each account with a no telemarketing solicitation classification. See the Scheduling Queries and Viewing Records Retrieved chapter for an explanation of how to save the records for a query you run.

See Also:

Identifying Which Classification To Create

Viewing the Created Classifications

Identifying Which Classification to Create

When you schedule the Create Classification procedure, you can set the following parameters.

Parameter	Description
Classification Code	Enter the classification code for the classification you want to create. You can press the [F9] key to view a list of classification codes. You must set this parameter.
Classification Value	Enter the classification value for the classification you want to create. You can press the [F9] key to view a list of all classification values. You do not have to enter a classification value.

Viewing the Created Classifications

The Create Classification procedure sets the following fields on each classification. You can view the classifications on the Classification Entry screen.

Field	Set to:
Classification Code	The classification code you entered for the Classification Code parameter.
Classification Value	The classification value you entered for the Classification Value parameter. If you entered a classification value that was not valid for the classification code, no record is created.
Display Sequence Number	The default display sequence number assigned to the classification code. See the Control Codes chapter for an explanation of how to set the default display sequence number.
End Date	The date that is the result of adding the number of days from the default duration of the classification code to the start date if a default duration is entered for the classification code. See the Control Codes chapter for more information about classification codes and the default duration.

Field	Set to:
Name	The name from the record pulled by the query. This can be the account name or a name within the account.
Start Date	The effective date of the query, which is usually the date the query is run. See the Understanding Queries chapter for more information about the effective date of a query.
Status	"A" for active.

Unique Classifications

Your organization can mark a classification code as "unique" in TA by setting the Unique checkbox on the Classification Code Entry screen for that classification code to "Y" for yes. This prevents TA from assigning the same classification code more than once to any name or account that has three or more names associated with the account. If you enter a unique classification code in the Classification Code parameter and your linked query selects accounts with three or more names associated with it, the Create Classification procedure does not create a new classification if one exists for the account or name selected by the query. See the Control Codes chapter for more information on how to use the Unique checkbox.

Create Interests

The Create Interests update procedure enables you to create an interest record for each account or name selected by the query with which the procedure is run. This procedure can be scheduled with all query types except the Source Query type.

Parameter	Values	Description
Interest	A single active Interest Code or a comma separated list of codes.	This specifies the interest to create. For the Create Program Interest update procedure interests are created based on the program that is on the selected interaction(s).
Apply Interest to which Name?	Account Name, Name	If set to Account Name, create interests attached to the account name of the accounts returned by the query. If set to Name, create interests attached to the names selected in the query.
Interest Source/Origin	A single active Origin Code, or null.	Specify this field if you want to this on the interest record.
Interest Expressed Date	MM/DD/YY	Enter a date that you want set in the Most Recent Hit date field. If this field is blank then TA uses the Effective date on the query and output schedule record.
Hit Update Method	Once per Account Once per Query Retrieved Record	If set to Once per Account, increment the Hits field once for each account pulled by the query. If set to Once per Query Retrieved record, increment the Hits field once for each record pulled by the query. Note: if the Apply Interest to which Name? Parameter is set to Name, and if the name is pulled twice then Hits is incremented by 2.
Update Confirmed/Implied?	C, I, No Change	Specify this field according to how you want to set the Confirmed/Implied flag on the interest.

Parameter	Values	Description
		If set to No Change, then TA does not update the field.
Update End Date	Any valid date, No Change, NULL	Specify this field if you want to set the End Date field on the interest. If set to NULL, the end date will be removed. If set to No Change, then TA does not update the field.
Update Comments	free text field	Specify according to how you want to set the comments field. If the interest already exists, this text will be added to any existing text.

Create Prospect

The Create Prospect procedure enables you to create prospect records for each account selected by the query. You can create an account projects prospect record, an account activity prospect record, or both.

See Also:

Creating Prospects for a Project

Creating Prospects for an Account Activity

Viewing the Updated Account Project Prospect Information

Viewing the Updated Account Activity Prospect Information

Creating Prospects for a Project

When you schedule the Create Prospect procedure, you set the following parameters to create a prospect record for a project.

Parameter	Description
Create Projects	Enter "Y" for yes to create prospect records for a project. You must enter the project code in the Project Code parameter. Enter "N" for no if you don't want to create prospect records for a project.
Project Code	Enter the project for which you want to create account project prospect records. You can press the [F9] key to view a list of project codes. If an account project record already exists for an account selected by the query, TA does not create a new project record or update the existing one.
Default Account Manager From	Enter the method TA should use to set the Account Manager field on each account project record created. If TA should set the account manager to the default account manager specified on the project (on the Project Code Entry screen), enter "PROJECT." If TA should set the account manager to the staff person assigned overall responsibility for the account (i.e., the brief name that appears in the Staff field on the Account Overview screen), enter "ACCOUNT."

Note: If you want to create an account activity prospect record for the account activity associated with the project, you must also set the Create Account Activity Record parameter to "Y" for yes and set the Activity Type parameter to the activity type associated with the project.

Creating Prospects for an Account Activity

When you schedule the Create Prospect procedure, you set the following parameters to create a prospect record for an account activity.

Parameter	Description
Create Account Activity Record	Enter "Y" for yes to create prospect records for an account activity. You must enter the activity type in the Activity Type parameter.
Activity Type	Enter the activity type for which you want to create account activity prospect records. You can press the [F9] key to view a list of all activity types. If an account activity record already exists for an account selected by the query, TA does not create a new account activity record or update the existing one.

Viewing the Updated Account Project Prospect Information

The Create Prospect procedure sets the following fields for each account project record created. You can view this information using the Account Project screen. You can view the marketing-related information by clicking <Marketing>; you can view the staff-related information by clicking <Page 2>.

Field	Set to:
Account ID	The Account ID of the record selected by the query.
Name	The name of the account as a whole.
Project	The project you entered in the Project Code parameter.
Stage	"ID" for identification.
Status	"A" for active.
Account Manager	The account manager for the account for this project. This field is set in one of two ways: to the default account manager specified on the project, or to the staff person assigned overall responsibility for the account (as specified in the Staff field on the Account Overview screen). TA sets this field based on how you set the parameters of the Create Prospect procedure. See "Creating Prospects for a Project" for more information.
Primary Solicitor	The primary solicitor for the project you entered in the Project Code parameter.

Field	Set to:
Additional Solicitor	The additional solicitor for the project you entered in the Project Code parameter.
Additional Staff	The additional staff for the project you entered in the Project Code parameter.
Steward	The steward for the project you entered in the Project Code parameter.
Activity	The activity for the project you entered in the Project Code parameter.
Activity Type	The activity type for the project you entered in the Project Code parameter.
Campaign	The campaign for the project you entered in the Project Code parameter.

Viewing the Updated Account Activity Prospect Information

The Create Prospect procedure sets the following fields on each account activity record created. You can view this information on the Account Activity screen.

Field	Set to:
Account ID	The Account ID of the record selected by the query.
Activity Type	The activity type you entered in the Activity Type parameter.
Current Activity	The current activity is left null.
Status	"P" for prospect.

Create Relationship

Use this update procedure with an accounts-level query type. It can be used to create relationships en masse between one account and a group of queried accounts. For example, it could be used to create a relationship between a Prospect Director and a group of prospect accounts.

Similar to Relationship Entry, the Create Relationship procedure creates relationships and reverse relationships, carrying over Start and End Date to the reverse.

Parameter	Description
Relationship Type	You can press the [F9] key to view a list of types. This is a required parameter.
Related Account ID	TA will create a relationship record between the account specified here and each of the accounts selected by the query. This is a required parameter.

Parameter	Description
Related Name ID	Press [F9] to select the particular name in the above account for which TA should create relationship records. You can leave this field set to the account-level.
Start Date and End Date	Enter these dates if you want the relationship record to include either Start or End Date or a date range.
Soft Credit	Enter A or P depending on if you want TA to automatically assign soft credit or prompt the Batch Detail Entry user to create soft credit on the related account when processing a pledge or payment from the corresponding account. This parameter defaults to Null. Leave it blank if you do not want to create a soft credit relationship.
Company Match	If the Related Account (specified above) is an organization that matches gifts for the corresponding accounts for which you are creating relationship records, set this parameter to Y. Otherwise, leave this field to the default setting of N.
Comments	Enter text information that want to be displayed on the relationship records that are created as a result of running the procedure.

Update Current Start Date

The Update Current Start Date procedure enables you to reset the Start Date for specified activities and activity types. For example, you can run this procedure each month with queries that select your organization's membership publication in order to ensure that new or rejoining members get a sufficient number of issues. This procedure should only be run once a month, after the last publication pull of the month.

Suppose your organization sets membership expiration dates to the first day of the month. The membership activity start date is an important field since it is referenced when TA calculates the expiration date of a donor's membership and the donor's current activity record.

For example, suppose the current start date for all the activities within your renewable membership activity type is March 1, 2000. New or rejoining members will get an expiration date of March 1, 2001. Members that have a "NW" or "RJ" transaction with a gift date before the March publication pull will get the right number of publications, because they are pulled in the March pull. For donors who join after the March pull, if their expiration date is not adjusted to April 1, they will not get 12 publications because they are not part of the March pull. So the monthly publication pull should set the current start date one month ahead. In this example, when you run your query for the March publication pull, you can schedule the Update Current Start Date procedure to update the Start Date field so that new or rejoining members get an April 1, 2001 expiration date.

Note: If you don't want to limit the number of publications based on the membership year, you can run this procedure standalone rather than with a benefits-level query (however, this would cause the membership start date and current activity start date to be out of synch). When you run this procedure standalone through the Benefit Management module, updates are only performed on activities and activity types that have start dates. This procedure resets the start date for the specified activity and/or activity type based on the "Should Expiration Dates be First or Last of Month" system preference.

See Should Expiration Dates Be First or Last of Month for more information on setting membership expiration dates to the first or last day of the month.

See Also:

Updating Activity or Activity Type
Viewing the Updated Activity Start Date

Updating Activity or Activity Type

When you schedule the Update Current Start Date procedure, you can set the following parameters.

Please note these scenarios about using the Activity and Activity Type parameters:

- If you enter a specific Activity Type and a specific Activity: The Activity alone is updated to the value you specified in the Start Date parameter.
- If you enter a specific Activity Type and ALL for Activity: - All Activities for that Activity Type are updated, as well as the Activity Type, to the value you specified in the Start Date parameter.
- If you enter ALL for Activity Type and ALL for Activity: All Activities and Activity Types that have a non-null Current Start Date are updated to the value you specified in the Start Date parameter.

Parameter	Description
Activity	Enter the activity for which you want to update the start date. You can press the [F9] key to view a list of activities. This is a required parameter.
Activity Type	Set this parameter to update the start date for all current activities within this activity type. For example, if you enter "A" for Annual Giving, TA updates the start date for all activity types that start with "A", including "AM," "AI," etc.. Enter the activity type for which you want to update the start date. You can press the [F9] key to view a list of activity types. This is a required parameter.
New Start Date	Enter the date to use to set the start date for the activities and activity types that you specified in the above parameters. You can enter an absolute date (use the format of , MM/DD/YY or MM/DD/YYYY) or you can enter a relative date. Relative date examples: T+1M - TA sets the date to one month in the future from today. You can use F or L to set the date to the first or last day of the month in the future (F+1M or L+ 1M)

See Also:

Does TA Use the First or Last Day of the Month?

Does TA Use the First or Last Day of the Month?

Your organization set the Should Expire Dates Be First or Last of Month system preference to determine whether the start date for the activity or activity type should be set to the first day of the month or the last day of the month. TA references the start date for an activity when calculating expiration dates on renewable benefits (e.g., for a

membership). For the activities and the activity types you enter as parameters for the Update Current Start Date procedure, TA sets the start date to:

- The first day of the month if your organization set the Should Expire Dates Be First or Last of Month system preference to "F" for first.
- The last day of the month if your organization set the Should Expire Dates Be First or Last of Month system preference to "L" for last.

TA sets the date in this manner regardless of whether you enter a relative date or an absolute date. For example, if you enter "3/15/98" as the start date and the system preference is set to first, TA sets the start date for 3/1/98. If you enter "3/15/98" as the start date and the system preference is set to last, TA sets the start date for 3/31/98.

Viewing the Updated Activity Start Date

If you set the Activity Type parameter only, the Update Current Start Date procedure updates the start date for each activity with the activity type you entered. If you set the Activity parameter only, TA updates the start date for only the activity you entered. You can view the updated information in the Start Date field on the Activity Type Entry or Activity Entry screen.

Update Exchange Date

The Update Exchange Date procedure enables you to set the last exchange date for each account selected by the query. This procedure should be used for queries that exchange names.

When you schedule the Update Exchange Date procedure, you do not need to set any parameters.

Viewing the Exchange Date

For each account selected by the query, the Update Exchange Date procedure sets the Last Exchange Date field on the Account Overview screen to the effective date of the query. The effective date of a query is usually the date the query is run. See the Understanding Queries chapter for more information about the effective date of a query.

Update Account Activities Working Fields

The Update Account Activities Working Fields procedure enables you to set the working fields on an account activity record you select for each account associated with the transactions selected by the query. The working fields are: the amount from the transaction, the date of the transaction, the sequence number of the transaction, the source for the transaction, and the amount paid for the transaction.

You should use this procedure for "pre-segmentation" transaction queries constructed specifically to update the working fields with a specific transaction (e.g., a gift in response to a particular campaign). These fields can then be used for advanced segmentation in subsequent solicitation queries (e.g., to segment the audience by the amount of this gift).

See Also:

Replacing Information in the Working Fields
Replacing or Adding to the Working Amount field
Viewing the Updated Account Activity Information
Viewing the Updated Working Amount Field

Replacing Information in the Working Fields

When you schedule the Update Account Activities Working Fields procedure, you can set the parameters to perform the following functions for the account whose account activity record you specify in the Activity Type parameter:

- You can replace the values in all of the working fields or

- You can update only the value in the Working Amount field without updating the values in the remaining working fields (i.e., Date, Source, etc.).

Parameter	Description
Initialize?	Enter "Y" for yes if the procedure should replace all the values in the working fields on the account's account activity record with the new values calculated by the query and the update procedure. Enter "N" for no if you are going to update only the value of the Working Amount field on the account's account activity record.

Replacing or Adding to the Working Amount field

You can set the Replace or Add? parameter to either replace the value in the Working Amount field or to add to the value in the Working Amount field. For example, you can run the Update Account Activities Working Fields procedure to replace last year's donation to your annual event with this year's donation. In this example, you set the Replace or Add? parameter to replace.

Suppose, however, that your working fields currently show last year's donoation to a special event. You can run the Update Account Activities Working Fields procedure with a query to select this year's donation to the special event. You set the Replace or Add? parameter to add, and TA adds this year's event donation to last year's donation.

Parameter	Description
Replace or Add?	This parameter applies only to the Working Amount field and works in conjunction with the Pledge (PL) or Payment (PY) parameter. Enter "R" for replace if the Working Amount field for the account activity record to be updated should be **set to** the amount of the transaction selected by the query. Enter "A" for add if the Working Amount field for the account activity record to be updated should be **incremented by** the amount of the transaction selected by the query. **Note:** If the query selects multiple transactions, TA adds the sum of the transactions to the Working Amount field if you set this parameter to replace. If you leave this parameter blank, TA adds to the value currently in the Working Amount field for the account activity record you identify.
Pledge (PL) or Payment (PY)	Enter "PL" for pledge if the Working Amount field for the account activity record to be updated should be updated with the pledge amount from the transaction(s) selected by the query. Enter "PY" for payment if the Working Amount field for the account activity record to be updated should be updated with the payment amount from the transaction(s) selected by the query.

Parameter	Description
Activity Type	Enter the activity type of the account activity record which you want to update. You can press the [F9] key to view a list of activity types. **Note:** The activity type of the source code for the transactions selected by the query does not need to be the same as the one you enter in the Activity Type parameter (e.g., you can set the working fields for the Annual Giving activity type with transactions posted to capital campaign activity type).

Viewing the Updated Account Activity Information

The Update Account Activities Working Fields procedure sets the working fields on the account activity record for the account selected by the query. These fields are set based on the transaction selected by the query. You can view this information on page three of the Account Activity screen.

Note: TA sets the following fields only if you set the Initialize? parameter to "Y" for yes. If you set this parameter to "N" for no, TA does not update these fields. In addition, if the query selects multiple transactions, these fields are set to account's most recent transaction.

Field	Set to:
Date	The gift date from the transaction.
Sequence Number	The sequence number from the transaction.
Source	The source code from the transaction.
Paid	The amount paid from the transaction. For a gift, this equals the payment amount; for a pledge, it equals the amount paid-to-date for the pledge.

Viewing the Updated Working Amount Field

The Update Account Activities Working Fields procedure sets the Working Amount field on the account activity record for the account selected by the query. If you set the Pledge (PL) or Payment (PY) parameter to "PL" for pledge, TA uses the pledge amount to calculate the value it places or adds into the Working Amount field. If you set this parameter to "PY" for payment amount, TA uses the payment amount. You can view this information on page three of the Account Activity screen.

Field	Set to:

Field	Set to:
Amount	If you set the Replace or Add? parameter to replace, TA sets the Amount field to either the pledge amount or the payment amount of the account's most recent transaction selected by the query. If you set the Replace or Add? parameter to add, TA increments the Amount field by either the sum of the pledge amounts or the sum of the payment amounts of the account's transaction(s) selected by the query. **Note:** If you set the Initialize? parameter to yes, and the Replace or Add? parameter to add, TA first blanks the Amount field and then increments it. If you set the Initialize? parameter to no, and the Replace or Add? parameter to add, TA increments this field starting at the value that was in the Amount field prior to running this procedure.

Update Legislative Districts

Note: Only users who have a license for the Political Registry module can run this update procedure.

This procedure updates address fields (legislative district fields on the Census tab) for existing accounts based on the information from the Legislative District Upload. Click here to see a summary of how to use the Political Registry module.

Note that TA will not update the address fields if the 4-digit extension is blank on the address record. (Below you can specify the full range of extensions but you cannot specify 'blank.')

Parameter	Description
State(s) to Update	For all address records in the states specified in this parameter, TA sets the congressional district from the congressional district data that was most recently uploaded into the ZIP Congressional District table. TA defaults this parameter to ALL, and you can change it to one state or a list of states, separated by commas. You must enter a value in this field.
ZIP + Extension Range Start	TA selects all the address records whose ZIP Codes and ZIP Code extensions start with this value. You must enter a value in this field. Enter ZIP code and the 4-digit extension. For example enter '021561111'.
ZIP + Extension Range End	TA selects all the address records whose ZIP Codes and ZIP Code extensions start with this value. You must enter a value in this field. Enter ZIP code and the 4 digit extension. For example enter '021569999'.

Benefits Procedures

Award Complimentary Benefits
Query and Output Set-up for Benefits
Mark Benefits as Backordered
Set Backorder Notice Date
Update Benefit Sent

Award Complimentary Benefits

Use this update procedure if you want to create a batch of $0, GF transactions that include a benefit (item or package) of your choice. You can use this procedure with a Names or Accounts query type. Note that if you want to query on fields in the Volunteer Schedule table (fields such as Hours Worked), then you have to create a query using the Volunteer Schedule query type. Make sure to mark this query as an Include. Use the volunteer schedule query as an Include on a Names query type.

- When running Award Complimentary Benefits procedure, the benefit awarding DOES reference the benefit configuration (such as award, delivery, required and disqualifying information) set up for the benefit. For example, if the benefit setup includes that you must pay $100 and you try to have the procedure award this benefit to volunteers, TA does NOT award it, since the transactions created by this procedure are $0 transactions; thus the transaction does not meet minimum award and delivery criteria.

- That batch that is created as result of this procedure is set to Open. It needs to be released and posted before the transactions and benefits are applied to the account (or a name within the account).

- The fields on the batch detail records that are created as a result of this procedure default using the parameters below. The Credit Account field defaults according to the Source code and the Debit Account field defaults based on payment method. Gift Kind is set to OP (for one payment).

- You cannot create $0 pledge or pledge payment transactions using this procedure.

Parameter Value	Description
Batch Owner	Press [F9] to select the user that you want specified as the batch owner. If you leave this field blank TA uses the User ID that is on the QOS record.
Gift Date	Enter the date that you want on the transactions. If you leave this field blank, TA uses the effective date on the QOS record.
Source *Make sure that you enter a source here or on the QOS record*	Enter the Source code that you want on the $0 transactions. If you leave this field blank, TA uses the source that is associated with the QOS record. You can use the Source Code to set batch defaults if they are consistent and not overridden by this procedures parameters. For example, if the source code has a gift type of 'AD' set on it, TA will set this as a batch default if you didn't set something else when specifying parameters on the procedure.

Parameter Value	Description
Gift Type	If you want the transaction to use a particular gift type then press [F9] to select the gift type. If you leave this field blank, TA uses assigns the gift type according to the gift type rule that is assigned to the activity or source code.
Payment Method	TA defaults this field to CK (for check). This is a required field on a transaction.
Benefit	Press [F9] to select a benefit item or package.
Award Duplicate Renewable Benefits	Set this field to Y or N if you selected a renewable benefit in the above field. What do you want to do if the account already has the benefit and the benefit (such as a membership) is not beyond the renewal window? Set this field to N if you do not want TA to create a $0 transaction with the benefit if the account or name already has it. Set this field Y if you do want TA to create a $0 transaction with the benefit if the account or name already has it.

Using this procedure results in creating a batch summary record with these defaults (if they are not determined by the above parameters):

Batch Summary Field	Value
Batch type	AC (Automatic by Award Complimentary Benefit)
Batch Status	O
Batch Owner	Parameter
Created by	ACB - #####
Gift Date	Parameter
Deposit Date	Gift Date
Fiscal Month./Year	Based on Gift Date
Target Totals	The Target row and the Entered row are entered so that the Differences row is 0.
Source	Parameter
Gift Type	Parameter
Payment Method	Parameter

Query and Output Set-up for Benefits

Team Approach® provides the functionality for your organization to manage its benefit mailings and track who has received a benefit, who has a backordered benefit, and who has received a notice of the backordered benefit. When you run your benefit queries, the basic procedure is as follows:

1. Schedule a Benefits query to select donors who should receive a benefit. With the query, you can schedule the Mark Benefits as Backordered procedure, a user-defined output to produce your mailing labels for the donors who should be delivered the benefit (those who aren't backordered), and the Update Benefit Sent procedure to mark the date that the benefit was pulled to send to those donors.

2. Run a separate query to find backordered benefit records so you can send the donors a notice. You can run this query with the Set Backorder Notice Date procedure.

Mark Benefits as Backordered

The Mark Benefits as Backordered procedure enables you to run a benefits query and pull only as many awarded benefit records that are marked OK to Deliver (transaction benefit records) as there are benefit items in inventory and to mark the remaining transaction benefit records as backordered. In addition, the Mark Benefits as Backordered procedure enables you to prioritize which donors should receive the benefits first. For example, if you have 100 mugs in the TA inventory, and there are 103 transaction benefit records marked as OK to Deliver, TA limits the number of transaction benefit records pulled to 100, and the three surplus records that cannot be fulfilled by the current inventory are marked as backordered. TA selects these 100 transaction benefit records based on the parameters you set in the Delivery Order fields.

See Also:

Setting the Delivery Order

Setting the Delivery Order

When you schedule the Mark Benefits as Backordered procedure, you can set the Delivery Order 1 through Delivery Order 3 parameters to indicate which criteria should be used to prioritize which donors should receive benefits. In each of these fields, you can enter the following values:

Parameter Value	Description
P	Delivery priority from the transaction benefit record
D	Gift date on the transaction benefit record
A	Account ID on the transaction benefit record

For example, if you enter "P" in Delivery Order 1, "D" in Delivery Order 2, and "A" in Delivery Order 3, TA selects the transaction benefit records first by delivery priority, then by gift date, then by Account ID on the transaction benefit record. Setting this order ensures that the transaction benefit records that are marked with a delivery priority are sent first, in the order indicated in the Delivery Priority field. If there are multiple transaction benefit records with the same delivery priority, TA compares the gift dates for the transaction benefit records. If they are different, TA selects the transaction benefit record that has the least recent gift date. If the gift dates are the same, TA then compares the Account ID and selects the transaction benefit record for the donor with the lower Account ID first. Entering values in these parameters ensures that the transaction benefit records with the highest delivery priority are pulled first for fulfillment and then that the records are fulfilled on a first-in first-out basis of the gift date.

For each benefit record in the queried set, the Mark Benefits as Backordered procedure determines the inventory level. If there are more donors due this benefit than there are items in inventory, the procedure deletes the backordered benefit records from the queried set, and sets the Date Backordered for these records to the run date of the procedure. The procedure uses the Delivery Order values you entered to determine which donors should receive the benefits and which should be backordered.

Note: When you enter the Delivery Order on the Benefits Requested window during gift processing or on the Benefits Awarded screen after gift processing, a lower number (1) signifies a higher delivery priority than a higher number (5). Thus, the Mark Benefits as Backordered procedure gives higher priority to a transaction benefit record entered with delivery priority of "1" than with a "2."

When you run the Mark Benefits as Backordered procedure and other outputs with a query, make sure the Mark Benefits as Backordered procedure has the lowest schedule order so it will run first. (The Schedule Order field on the System Preference Administration screen should be set to "1"). For example, along with the Mark Benefits as Backordered procedure, your organization can set TA to run the Update Benefit Sent procedure and to create an output file you can use to print mailing labels for the benefit packages. As long as the Mark Benefits as Backordered procedure has the lowest schedule number, TA runs the Mark Benefits as Backordered procedure before running the Update Benefit Sent procedure and mailing labels so that only the appropriate records are updated with a benefit sent date and are pulled to have mailing labels printed.

Viewing the Backordered Date

For each transaction benefit record selected by the procedure to be backordered, TA sets the Backordered Date to the date you run the procedure.

Set Backorder Notice Date

The Set Backorder Notice Date procedure enables you to set the backorder notice date on the Benefits Awarded screen when you mail a backorder notice to a group of donors. This procedure should be run with queries that select awarded benefit records that are marked OK to Deliver (transaction benefit records) that have been backordered, but for which a backorder notice has not yet been sent to the donor.

Note: Be sure to run the Set Backorder Notice Date procedure with a different query than you used for the Mark Benefits as Backordered procedure.

When you schedule the Set Backorder Notice Date procedure, you do not need to set any parameters.

Viewing the Backorder Notice Date

For each transaction benefit record selected by the query, TA sets the Backorder Notice Date field on the Benefits Awarded screen to the effective date of the query, as entered on the query and output schedule record. If the effective date is blank, TA sets the Backorder Notice Date to the scheduled date of the query and output schedule record.

Update Benefit Sent

The Update Benefit Sent procedure enables you to set the last pulled date for each awarded benefit that is marked OK to deliver and to update the inventory balance for each benefit selected by the query. In addition, if your organization awards a publication benefit with a number of issues, this procedure allows you to update the number of issues remaining to be sent to the benefit recipient. Finally, the Update Benefit Sent procedure allows you to decrement the inventory for benefit items that are not awarded through transaction processing. These benefits are tracked using the special benefit category of "V" for inventory item.

For example, you can run the Update Benefit Sent procedure with queries that select transaction benefit records (e.g., your monthly membership publication or a premium awarded through transaction processing). TA sets the date you sent the benefit on each transaction benefit record selected by the query and updates the inventory balance for each benefit selected by the query. You can also run this procedure with queries that select interactions representing a donor's request for an inventory item that is not awarded through transaction processing (e.g., a membership or volunteer information packet). TA decrements the inventory for each item in your membership or volunteer information packet based on the number of interactions selected by the query.

See Also:

Identifying the Benefit Item To Update
Viewing the Updated Transaction Benefits
Viewing the Updated Inventory Balance

Identifying the Benefit Item To Update

You can use the Update Benefit Sent procedure to update inventory in any of the following ways:

- You run a query to pull transaction benefits for delivery, and you want to decrease the inventory and set the sent date for each benefit record pulled by the query.
- Your organization has pre-boxed sets of benefits. That is, a TA benefit package may consist of one or more shipping boxes of benefits. It is more convenient for your organization to run a query for a single benefit from the benefit package (e.g., the membership benefit) while updating the inventory and sent date for all the items in the benefit package that are in the same shipping box.
- Your organization wants to track inventory for items that accounts request that are not awarded with transactions (e.g., an information packet that is entered as a benefit on the interaction that represents the request). See "Tracking Inventory and Value for Benefits Not Tied to a Gift."

See Also:

Running the Update Benefit Sent Procedure for Single Transaction Benefits

Running the Update Benefit Sent Procedure for Boxed Benefits

Running the Update Benefit Sent Procedure for Inventory Items

Running the Update Benefit Sent Procedure for Single Transaction Benefits

Your organization can run the Update Benefit Sent procedure with a Transaction Benefits query to update the Last Pulled date and inventory only for the specific benefit on the transaction benefit record selected by the query. To run the procedure in this manner, schedule the Update Benefit Sent procedure with the Transaction Benefits query, and set the Method of Updating Inventory parameter to "USE QUERIED BENEFITS."

Running the Update Benefit Sent Procedure for Boxed Benefits

If your organization has pre-boxed sets of benefits, you can run a query for a single benefit from the benefit package (e.g., the membership benefit) while updating the inventory and sent date for all the items in the benefit package that are in the same shipping box.

To use this functionality, you must create codes for your organization's shipping boxes on the Shipping Box Code Entry screen. On the Benefit Entry (Package) screen, select the shipping box for each item in the benefit package by setting the Shipping Box field.

When you run your query to select benefits to be delivered, you can run the query for a single benefit in your TA benefit package, but track the delivery and inventory information for all the benefits in that benefit package that are in the same shipping package. To run the procedure in this manner, schedule the Update Benefit Sent procedure with the Transaction Benefits query that selects the single benefit, and set the Method of Updating Inventory parameter to "USE BOXED BENEFITS." TA sets the Last Pulled date and decrements the inventory for all benefits awarded on the same transaction that are in the same TA benefit package as the queried benefit and have the same shipping box.

Note: You can use the Boxed Benefits functionality without setting up shipping boxes. If you do not set up shipping boxes or you do not specify shipping boxes on the benefit package items, but you do set the Method of Updating Inventory parameter to "BOXED BENEFITS," TA sets the Last Pulled date and decrements inventory for all benefits that are in the same package as the queried benefit.

Running the Update Benefit Sent Procedure for Inventory Items

Your organization can use the Update Benefit Sent procedure to track inventory for items that accounts request that are not awarded with transactions (e.g., an information packet that is entered as a benefit on the interaction that represents the request).

In this situation, you run a query to select the interactions associated with the benefit item and schedule the Update Benefit Sent procedure with the Interactions query. To decrement the inventory for the benefit item, set the Method of Updating Inventory parameter to "USE QUERIED BENEFITS."

Running the Procedure for the Queried Transaction Benefit and Other Inventory Items

The Update Benefit Sent procedure allows you the flexibility to decrement one or more benefit inventory items along with the inventory for a benefit awarded to a transaction. For example, if you want to decrease the inventory for one or more benefit items that you deliver along with a benefit awarded through transaction processing, you can run a Transaction Benefits query to select the donors who should receive the awarded benefit, while at the same time decreasing the inventory for the other benefit items.

To use this procedure, run a query to select the transaction benefits that were awarded and schedule the Update Benefit Sent procedure. To decrement the inventory for both the awarded benefit and the other benefit(s), set the Method of Updating Inventory parameter to "USE BENEFITS LISTED BELOW" and set the Inventory Benefit Item(s) parameter to the other benefits that should have the inventory decreased. You can press the [F9] key for a list of your organization's inventory items, and you can enter a comma-separated list of values in this parameter.

Note: Only benefits with the benefit category of "V" for inventory items can be entered in the Inventory Benefit Item(s) parameter.

Viewing the Updated Transaction Benefits

For each transaction benefit record updated by the procedure, the Update Benefit Sent procedure sets the last date on which the benefit was sent (pulled) and the number of issues remaining. You can view the Last Pulled field on the Benefits Awarded screen. You cannot view the Issues Remaining field on the Benefits Awarded or Benefit Entry screens. It is used to track the number of remaining issues of your organization's publication that a donor should receive before the donor's membership expires.

Field	Set to:
Last Pulled	The effective date of the query, which is usually the date the query is run. See the Understanding Queries chapter for more information about the effective date of a query.
Issues Remaining	The number in the Issues Remaining field minus one if the field is set to a value greater than zero.

Viewing the Updated Inventory Balance

For each benefit record updated by the procedure, TA decrements the number in the Inventory Balance field on the Benefit Entry screen by one. If the number of benefit records to be delivered is greater than the number in the Inventory field, the procedure will set the balance to a negative number. You can view the inventory balance for the benefit by clicking <Inventory> on the Benefit Entry screen.

For example, you run a query that pulls 80 premiums which are ready to be delivered. Of these awarded premiums, 30 are for your organization's coffee mug and 50 are for your organization's tote bag. When this procedure runs:

- The procedure decrements the inventory balance by one for each of your organization's coffee mugs being delivered; it results in the inventory balance for your organization's coffee mug being reduced by 30.
- The procedure decrements the inventory balance by one for each of your organization's tote bags being delivered resulting in the inventory balance for your organization's tote bag being reduced by 50.

Note: If the inventory balance for the benefit is blank, the inventory is not updated.

Note: TA does not set any sent date for benefit inventory items not awarded through transaction processing, because they do not have a transaction benefit record associated with them. However, if you are using interactions to track a donor's request for an inventory item (e.g., a membership information packet), you can use the Update Response procedure to set the date you sent the packet for the interaction selected by the query.

Event Registration Procedures

Award Event Benefits
Create Registrations
Update Registrations

Award Event Benefits

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

- This procedure does not create a transaction benefit on the account. That is, you cannot view benefits that have been awarded with this procedure by using the Giving History Detail or Benefits Awarded screens.

If the registrant qualifies for the benefit (based upon your choice of Pledged, Paid, and Soft Credits and the minimum and maximum amount of the benefit setup), TA updates the **Awarded** and **Awarded Date** fields on the Details tab in the Registration Entry screen. The Awarded field represents the specific benefit that was awarded. And the Awarded Date field represents when the benefit was reviewed for awarding.

- Running this procedure automatically generates a report that details the Event, Registrant, Benefit Requested, Benefit Awarded, and optionally, those registrants where the benefit was not awarded because of underpayment.

Event benefits are identified on the Benefits tab in the Event Overview screen where in addition to minimum and maximum amounts, a benefit can be designated as 'Standard' or 'Alternate'. If you enter the keywords 'Standard' or 'Alternate' on the Details tab in the Registration Entry screen, then Award Event Benefits procedure finds the actual benefit code and then evaluates whether the registrant qualifies. (The Awarded field is updated with the specific benefit.)

- If the keyword 'None' (meaning that the registrant declined any benefits) is entered in the Requested field, the TA only updates the Awarded Date field to indicate that the benefit setting has been reviewed for awarding.

- If the keyword 'Exception' (meaning that you are manually handling the benefit awarding) is entered in the Requested field, then this procedure skips the record and will not update the Awarded Date field.

Parameter	Description
Event	Enter the Event code for which you want to run the procedure. You may press [F9] to select codes or enter codes using the wildcard character if your organization uses naming conventions for this code.
Reevaluate Previous Awards?	If set to N, the procedure selects only those registrations where there is a blank in the Awarded Date field. If set to Y, the procedure select all registrations.

Parameter	Description
Amounts to Evaluate	Specify the criteria by which you want the procedure to evaluate the benefit awarding. Your choices are any combination of Pledged, Paid, and Soft Credits. TA compares the Minimum/Maximum Amounts of the benefits with the amount that the registrant has paid, pledged, or the amount based on soft credit transactions.
Always Award Request	Set this field according how you want the procedure to handle those registrants where the benefit does not qualify. Select 'N' if you do not want TA to update the Awarded and Awarded Date fields. The procedure skips this record. No further action occurs (that is TA does not update any field to 'reject') and the benefit will be awarded the next time you run the procedure if the registrant pays or pledges the minimum required. Select 'Y' if you want TA to award these benefits even if the registrant has underpaid according to the benefit's Minimum Amount setting.
Report Parameters	
Include Underpayments on Report?	Select Y or N depending upon whether or not underpayments should be flagged on the report.
Sort Order 1 Sort Order 2 Sort Order 3	You can choose up to three sorting levels. Your choices are: Event, Registrant Alpha Name, Benefit Requested, Benefit Awarded

Create Registrations

Use this update procedure if you want to add a group of accounts (those selected by your query) to the Participant's tab in the Registration Entry screen. The registrants that you add using this procedure can be set to a specific stage or you can leave the Stage field blank (and let users of the Registration Entry screen set this field.)

Use this procedure with queries that have an Accounts or Registration Query Type.

Parameter	Description
Event	Enter an Event code for which you want to run the procedure. You can press [F9] to select a code. This is a required parameter.
Stage	Leave this field blank if you do not want the registrants to have a stage. You can press [F9] to select from the list of your stage codes. The registrations will be set to the stage that you enter in this field.

Parameter	Description
Copy Team Information?	If your query includes past registrants who were associated with a Team, you can set this field to Y and TA will copy the team code into the registrant information. Set this field to N if you do not want TA to copy team codes from the registrants selected in your query.

Update Registrations

Use this procedure if you want to update attendance and/or the benefit Selected Date on a group of event registration records that are selected by a registration query. The benefit Selected Date field represents when the benefit was selected for fulfillment. If you use this procedure to update the Selected Date field TA also decrements the inventory count for the corresponding benefit item.

Parameter	Description
Benefit Selected Date	Enter the date that you want TA to enter in the Selected Date field (Details tab on the Registration Entry screen) for the registration records selected by the query. Enter the date, in MM/DD/YY format or enter a relative date value such as T (for Today). Leave this field blank if you do not want TA to update the date.
Update Attendance?	Set this field to Y or N depending upon if you want the procedure to update the attendance field on the registration records selected by the query.

Interactions Procedures

Create Interaction
Update Response

Create Interaction

The Create Interaction procedure enables you:

- To create an interaction for each account or name selected by the query with which the procedure is run. You run this procedure most often with your solicitation queries.
- To delete existing interactions for each account or name selected by the query with which the procedure is run.

If you create interactions, you can identify:

- The source-related information to update such as the number of solicitations for a renewal mailing
- Whether to create source analysis codes and source analysis records

- Whether to set transaction information on the interaction when the query selects transactions if the interaction represents an acknowledgement
- Whether to set benefit and transaction information on the interaction when the query selects benefits such as the benefit code for interactions that represent the mailing of a premium
- Whether to attach an external file to the interaction

See Also:

Choosing to Create or Delete Interactions
Setting Information for Interactions
Viewing Updated Interaction Fields

Choosing to Create or Delete Interactions

If you make a mistake when you run the Create Interaction procedure, you can re-use this procedure to delete the interactions you just created. To delete interactions, you must have specified a Source Code on the query (page 2) or on the QOS record when you originally created the interactions.

- Find the query and output schedule record that created the original interactions.
- Re-schedule the QOS record.
- Change the parameters in the Create Interactions Update procedure: Enter "N" for no in the Create Interaction Records field, and enter "Y" for yes in the Delete Existing Interaction field.

Parameter	Description
Create Interaction Records	Enter "Y" for yes to create an interaction for each account selected by the query. Enter "N" for no if you don't want to create any interactions.
Delete Existing Interaction	Enter "Y" for yes to delete an existing interaction for each account selected by the query. Enter "N" for no if TA should not delete existing interactions. TA selects the interaction to delete based on the interaction having the same source code as the one set for the query. In addition, TA decrements the number of solicitations for the source analysis code associated with the deleted interaction. For example, if you ran the Create Interaction procedure with a solicitation query and realized you shouldn't have, you can re-run the query with this procedure, setting this parameter to yes to delete those interactions and to revert to the old number of solicitations on the source analysis records. See the description of the Set Source Analysis Code parameter to understand how this procedure creates source analysis records.

Setting Information for Interactions

When you schedule the Create Interaction procedure and set the parameters to create interactions, you can identify interaction information that TA should set for each interaction this is created. For example, for an interaction that represents a mailed invitation to a gala event, you can use this procedure to set the interaction type (e.g., Event Invitation), a summary of the interaction (e.g., September, 1999 Gala Invitation Mailing) and the Output Name that is

used for the mailing labels (e.g., Sep 99 Gala). You can use the procedure to set the source analysis code so that you can analyze the results of this mailing.

See Also:

Updating General Interaction Information
Updating the Source Code Record
Updating Account Activity and Snapshot Information for the Accounts

Updating General Interaction Information

When you schedule the Create Interaction procedure to create interactions, you set the following parameters.

Parameter	Description
Interaction Type	Enter the interaction type for each interaction created. You can press the [F9] key to view a list of interaction types.
Summary	Enter the text for the summary (e.g., April 1998 membership publication) for each interaction created; TA sets the Summary field on the interaction to the text in this parameter. You can enter up to 60 characters. **Note:** TSI strongly recommends that you enter a summary line for the interaction. Without this summary information, you are less able to understand the meaning of the interaction (e.g., when looking at the Interaction History screen).
Attachment	Enter the full path and name of the file to attach to each interaction. TA stores the file path in the Attachment Name field.
Attachment Description	Enter the description of the attached file.

Parameter	Description
Classification Code	Enter the classification code you want the procedure to record on the interaction. You can press the [F9] key to view a list of classification codes. *If a classification record with this classification code already exists for the account selected by the query*, TA sets the Classification Code field and the Classification Value fields on the interaction to the code and value from the account's classification. For example, if you use a classification code to represent a demographic overlay of your donors (e.g., Target Tag: AA), you can set this parameter to the code that represents that demographic overlay. When you run the Create Interaction procedure, TA stores the account's code for that demographic overlay at the time of the mailing represented by the query. This classification code is stored on the interaction; however, you cannot view it on any interaction screens.
Set Transaction Information	Enter "Y" for yes to set the "gift pointer" fields on the interaction if you run the procedure with a Transactions query. The gift pointer fields are: the Gift Date field, the Gift Sequence field, and the Adjustment Sequence field. By setting these fields on the interaction, you tie the interaction to the transaction (e.g., you tie an acknowledgment interaction to the transaction acknowledged). Enter "N" for no if you don't want to set the gift pointer fields. You should set this parameter to no for any query not based on the Transactions query type.
Set Benefit Information	Enter "Y" for yes to set the "benefit pointer" fields on the interaction for the transaction selected by the query if the query type is Benefits. The benefit pointer fields are: the Gift Date field, the Gift Sequence field, the Adjustment Sequence field, and the Benefit Sequence field. By setting these fields on the interaction, you tie the interaction to the benefit selected by the query (e.g., you tie the benefit interaction to your organization's monthly membership publication). Enter "N" for no if you don't want to set the benefit pointer fields. You should set this parameter to no for any query not based on the Benefits query type.

Parameter	Description
Set Value of Benefit	This parameter allows you to track the value of a benefit that you have given to an account on the interaction that represents the sending of the benefit. Enter "Y" for yes to set the value of the benefit on the interaction from the value assigned to the benefit on the Benefit Entry screen. Enter "N" for no if you don't want to set the value of the benefit on the interaction. You should set this parameter to no for any query not based on the Benefits query type. **Note:** This parameter works in conjunction with the Set Benefit Information parameter.
Output Name	If your organization is creating an interaction to track a letter that you sent to donors, you can enter the name of the output used to generate that letter. You can press the [F9] key for a list of your organization's outputs. You do not have to enter an output name.
Technique	TA sets the technique of the interactions based on the source code, if a specific technique is associated with the source code. If a technique is not specified on the source code record, you can indicate the technique TA should set for the interactions. You can press the [F9] key for a list of your organization's techniques. If you leave this parameter blank and a technique is not associated with the source code, TA uses the default technique associated with the interaction type.
Solicitor	Enter the brief name of the solicitor associated with the interactions. You can press the [F9] key to view a list of solicitor brief names. If you leave this parameter blank, TA uses the solicitor on the source code if a solicitor is specified. If the solicitor isn't indicated in either place, TA leaves the Solicitor field null.
Warning	Enter the text of a warning if you want to associate a warning with this interaction each time anyone in your organization accesses each of the accounts selected by the query (e.g., "Transfer donor to a supervisor when s/he calls about the backordered benefit"). **Note:** Generally, you set this parameter if you are running the procedure with Accounts queries.

Parameter	Description
Warning Expiration Date	This parameter works in conjunction with the Warning parameter. You can set the Warning Expiration Date parameter only if you enter text in the parameter field. Enter the date, in MM/DD/YY format, on which TA should stop displaying the warning text you entered in the Warning parameter.

Updating the Source Code Record

When you schedule the Create Interaction procedure to create interactions, you can update source code information by setting the following parameters. For example, for solicitation queries you can use the Create Interaction procedure to update information on the source code for the solicitation.

Parameter	Description
Initialize Number of Solicitations	This parameter works in conjunction with the Set Number of Solicitations parameter. Enter "Y" for yes to set the Number of Solicitations field to zero for the source code associated with the query. Enter "N" for no to leave the value in the Number of Solicitations field unchanged for the source code associated with the query.
Set Number of Solicitations	This parameter works in conjunction with the Initialize Number of Solicitations parameter. If you set the Set Number of Solicitations parameter to "Y" for yes, TA increments the number of solicitations for the source code associated with the query by the number of interactions created. If you set this parameter to "N" for no, TA leaves the value in the Number of Solicitations field unchanged for the source code associated with the query (i.e., TA does not increment the number of solicitations by the number of interactions created). If you leave this parameter blank, TA runs the procedure as if you set this parameter to yes.

Updating Account Activity and Snapshot Information for the Accounts

When you schedule the Create Interaction procedure to create interactions, you can update account activity and snapshot information by setting the following parameters.

Set Last Interaction Source	This parameter works in conjunction with the Last Interaction Activity Type parameter. Enter "Y" for yes to set the Last Source Mailed field on the account's account activity record to the source code entered on the Query and Output Schedule screen. TA sets this field for the account activity record that corresponds with the activity type identified by the Last Interaction Activity Type parameter. Enter "N" for no to leave the Last Interaction Source field unchanged. The Last Source Mailed field is not displayed on the Account Activity screen.
Last Interaction Activity Type	This parameter works in conjunction with the Set Last Interaction Source parameter. If you set the Set Last Interaction Source parameter to yes, enter the activity type for the account activity record that should be updated. You can press the [F9] key to view a list of activity types.
Set Source Analysis Code	Enter "Y" for yes to run the source analysis rule specified for the query. When the source analysis rule runs, TA applies the rule to each account selected by the query, creates the source analysis code for each account, and stores that code on the interaction. In addition, TA updates the source analysis information for the source code entered on the Query and Output Schedule screen. TA creates a source analysis record for each unique source analysis code, totaling the number of solicitations (interactions) with the code. Enter "N" for no if you don't want TA to run the source analysis rule.

Viewing Updated Interaction Fields

When the Create Interaction procedure creates interactions, the procedure sets different fields on the interaction based on how you set the parameters for the procedure.

See Also:

General Interaction Information
Acknowledgment Information (Create Interaction Procedure)
Account Activity Information (Create Interaction Procedure)
Benefit Information (Create Interaction Procedure)
Source Information (Create Interaction Procedure)
Transaction Information (Create Interaction Procedure)

General Interaction Information

For every interaction created by the Create Interaction procedure, the procedure sets the following interaction fields. You can view all of this information using the Account Diary Entry screen. You can view all of this information except the output name, query name, and summary text using the Customer Service Entry screen.

Field	Set to:
Classification Code	The classification code you entered in the Classification Code parameter. This information is stored in the Interactions table but does not appear on any interaction screen in TA.
Classification Value	The classification value of the first classification record created on the account for the classification code you entered in the Classification Code parameter. This information is stored in the Interactions table and does not appear on any screen in TA.
Date Entered	The date the interaction was created (i.e., the computer's system date).
Interaction Category	The interaction category based on the interaction type you entered in the Interaction Type parameter.
Interaction Date	The effective date of the query which is usually the date the query is run. See the Understanding Queries chapter for more information about the effective date of a query.
Interaction Sequence Number	The next interaction sequence number available for the interaction date.
Interaction Type	The interaction type you entered in the Interaction Type parameter.
Output Name	The name of the user-defined output that you entered in the Output Name parameter. This field is blank if no user-defined output was run with the query.
Query Name	The name of the query with which the procedure was run.
Page	"1" for the first page of an interaction. **Note:** You can manually create multiple-page interactions to indicate that you covered many topics during one interaction with a donor (e.g., a phone call to talk about increasing a pledge and to update the donor's address). However, you can create only single-page interactions using the Create Interaction procedure.
Sender	The brief name of the sender, as specified on the linked user-defined output (i.e., for signature-specific salutations).
Staff	The brief name of the user who scheduled the query to run with this procedure.
Status	"C" for completed.

Field	Set to:
Summary	The summary text you entered in the Summary parameter. If you do not enter any summary text, TA defaults the Interaction Type into this field. **Note:** If you run this procedure with a Tributes query, TA creates an interaction for the notified party and for the donor of the tribute gift. The summary field for the notified party's interaction summarizes the information about the gift for which notification was sent.

Acknowledgment Information (Create Interaction Procedure)

For every interaction created by the Create Interaction procedure, the procedure sets the following acknowledgement-related interaction fields if the procedure was run with the Set Transaction Information parameter set to yes.

Viewing Acknowledgement Details

You can view this information using the Account Diary Entry screen. On this screen, click <Ack Dets> on the second page of the screen to access the Acknowledgement Details window.

Field	Set to:
Acknowledgement Code	The acknowledgement code from the transaction selected by the query.
Special Action Code	The special action code from the transaction selected by the query.
Special Action Comments	The special action comment from the transaction selected by the query.

Note: You can change the Special Action Code and Special Action Comment using the Query Retrieved screen. See the Scheduling Queries and Viewing Records Retrieved chapter for an explanation of the Query Retrieved screen.

Account Activity Information (Create Interaction Procedure)

For every interaction created by the Create Interaction procedure, the procedure sets the following account activity-related interaction fields for the account's account activity record for the activity type of the source code associated with the query. This information represents a "snapshot" of several of the donor's characteristics *at the time of solicitation*.

Viewing the Account Activity Details

You can view this information using the Account Diary Entry screen. Click <Snapshot> on the second page of the screen to access the Account Activity Information at Time of Interaction window.

Field	Set to:
Activity Status	The status of the account's account activity record.
Expiration Date	The expiration date from the account's account activity record.

Field	Set to:
Giving Level	The giving level from the account's account activity record.
Largest Additional Gift Amount, Date, and Source	The amount, date and source code for the account's largest additional gift from the account's account activity record.
Last Additional Gift Amount, Date, and Source	The amount, date and source code for the account's most recent additional gift from the account's account activity record.
Last Gift Amount, Date, and Source	The amount, date and source code of the account's most recent gift from the account's account activity record.
Solicitation Cycle	The solicitation cycle of the account's account activity record (e.g., "M" for multiple gift giver, "O" for one-time gift giver).
Affiliation	The affiliation from the account's account activity record (e.g., "MA" for Massachusetts, "NL" for National).
Total Renewal Count	The total renewal count from the account's account activity record.
Track	The track from the account's account activity record (e.g., "JM" for rejoin by mail, "RT" for renewal by telemarketing).

Benefit Information (Create Interaction Procedure)

The Create Interaction procedure sets the following benefit-related fields if the procedure was run with the Set Benefit Information parameter set to yes.

Viewing the Updated Benefit Details

You can view the transaction date, the benefit code, and the benefit value on the second page of the Account Diary Entry screen. You can view the remaining information from the second page of the Account Diary Entry screen by zooming from the Transaction Date field to access the Transaction Information window.

Field	Set to:
Transaction Date	The gift date of the transaction associated with the benefit pulled by the query.
Benefit/Value	The benefit code of the benefit and the value associated with the benefit.
Benefit Sequence	The benefit sequence of the benefit. **Note:** A unique benefit sequence number is assigned to each benefit.
Gift Date	The gift date of the transaction associated with the benefit pulled by the query.
Gift Sequence	The gift sequence of the transaction associated with the benefit pulled by the query.

Field	Set to:
Adjustment Sequence	The adjustment sequence of the transaction associated with the benefit pulled by the query.

Source Information (Create Interaction Procedure)

For every interaction created by the Create Interaction procedure, the procedure sets the following source-related interaction fields.

Viewing Updated Source Details

You can view all of this information using the Account Diary Entry screen. All of the information is located on the second page of this screen except the solicitor, technique, and the contact expense. The solicitor and technique are located on the first page of the Account Diary Entry screen. To view the contact expense, zoom from the Technique field to the Interaction Details window.

Field	Set to:
Activity	The activity of the source code associated with the query.
Activity Type	The activity type of the source code associated with the query.
Campaign	The campaign of the source code associated with the query.
Initiative	The initiative of the source code associated with the query.
Effort	The effort of the source code associated with the query.
Source Code	The source code from the query and output schedule record. The source code defaults from the query to the query and output schedule record at the time you schedule the query to run. You can change the source code on the Query and Output Schedule screen. See the Scheduling Queries and Viewing Records Retrieved chapter.
Ask Amount	The first ask amount from those calculated based on the ask amount rules.
Ask Amount Rules	The ask amount rules from the query and output schedule record. These ask amount rules default from the query to the query and output schedule record at the time you schedule the query to run. You can change the ask amount rules on the Query and Output Schedule screen. See the Scheduling Queries and Viewing Records Retrieved chapter.

Field	Set to:
Offer Amount	The minimum amount the donor must give in order to receive particular benefits when responding to the mail piece specified in the Source Code field on the interaction. Offer Amount is calculated based on the ask amount rules specified on the query and output schedule record. You can view the offer amount for a particular account on the Customer Service Entry screen: zoom from the Interaction Category field to the Interaction Details window.
Solicitor	The brief name of the solicitor identified in the Create Interaction procedure's Solicitor field, if one was specified. If the solicitor wasn't specified there, TA uses the brief name of the solicitor on the source code associated with the query.
Source Analysis	The source analysis code for this account based on the source code associated with the query, if the procedure was run with the Set Source Analysis Code parameter set to yes.
Technique	The technique of the source code associated with the query, if one was specified. If no technique was associated with the query, TA uses the technique specified in the Create Interaction procedure's Technique parameter. If no technique was specified, TA uses the technique set on the interaction type.

See Also:

Viewing the Number of Solicitations Associated with a Source Code

Viewing the Updated Source Analysis Information

Viewing the Number of Solicitations Associated with a Source Code

The Create Interaction procedure increments the number of solicitations in the Number Solicited field on the source associated with the query with which the procedure was run, **if you set the Set Number of Solicitations parameter to yes.** The Number Solicited field is incremented by the number of interactions created by the procedure.

Note: If you set the Initialize Number of Solicitations parameter to "Y" for yes, TA increments the Number Solicited field starting at 0 (e.g., you create 1 interaction and the number solicited was 3, TA sets the Number Solicited field to "1"). If you set the Initialize Number of Solicitations parameter to "N" for no, TA increments the Number Solicited field starting at the value in the field prior to running the Create Interaction procedure (e.g., you create 1 interaction and the value was 5; TA sets the Number Solicited field to "6").

You can view the number of solicitations for a source code associated with the query using the Source Entry screen. From the Source Entry screen, click <Results> to access the Results window. The Number Solicited field appears on this window.

Viewing the Updated Source Analysis Information

The Create Interaction procedure sets the following source analysis fields for the source associated with the query **if you set the Set Source Analysis Code parameter to yes**.

The procedure creates one record with this set of information for each source analysis code that results from the source analysis rules run with the query.

Field	Set to:
Code	The source analysis code.
Description	The source analysis code description.
Number Solicited	The number of accounts solicited with this source analysis code.
Source	The source code entered on the query and output schedule record.
Status	"A" for active.

Viewing the Updated Source Analysis Details

You can view the source analysis information for a source code associated with the query using the Source Entry screen. From the Source Entry screen, click <Results> to access the Results window. From the Results window, click <Analysis> to access the Source Analysis Information window.

Transaction Information (Create Interaction Procedure)

For every interaction created by the Create Interaction procedure, the procedure sets the following transaction-related fields if the procedure was run with the Set Transaction Information parameter set to yes or with the Set Benefit Information parameter to yes. For example, these fields can be set for an interaction that tracks either an acknowledgment letter or a benefit mailing.

When you run the Create Interaction procedure, TA sets the transaction-related fields based on

- The information from the transaction selected by the query, if the query selected transactions *and* you set the Set Transaction Information parameter to "Y" for yes.
- The information from the transaction associated with the benefit selected by the query, if the query selected benefits *and* you set the Set Benefit Information parameter to "Y" for yes.

Viewing Updated Transaction Details

You can view the transaction date information on the second page of the Account Diary Entry screen. You can view the remaining information by zooming from the Transaction Date field to access the Transaction Information window.

Field	Set to:
Transaction Date	The gift date of the transaction.
Gift Date	The gift date of the transaction.
Gift Sequence	The gift sequence of the transaction.
Adjustment Sequence	The adjustment sequence of the transaction.

Update Interaction

The Update Interaction procedure enables you to update the summary and long comments on existing interactions selected by the query. In addition, when you update interactions using this procedure, TA allows you to choose whether to recalculate the source analysis codes and/or update the number of solicitations associated with the old and new source codes. This procedure should be run with interaction queries.

When you schedule the Update Interaction procedure, you can set the following parameters.

Parameter	Description

Parameter	Description
New Summary	Enter the new text to put in the Summary field on the interactions. This text can be up to 80 characters. Leave this field blank to retain the old summary line.
New Long Comment	Enter the new text to put in the Long Comment field on the interactions. This text can be up to 2000 characters. Leave this field blank to retain the old long comments.
Recalculate Source Analysis Code?	Enter "Y" for yes to have TA generate a new source analysis code using the source analysis rule from the source code on the query and output schedule record. TA updates the counts for both the old and new source analysis codes. If you do not want the update procedure to recalculate the source analysis codes, set this parameter to "N" for no.
Recalculate Source Solicitation Count?	Enter "Y" for yes to have TA update the number of solicitations for both the original and the new source codes. If you do not want to update the number of solicitations on the old and new source codes, set this parameter to "N" for no.

You can view the updated interactions on the Customer Service Entry screen, the Interaction History screen, and on the Account Diary Entry screen.

Update Response

The Update Response procedure enables you to set the response date on each interaction selected by the query. This procedure should be run with interaction queries used to generate response letters to accounts.

Selecting the Interaction Status

When you schedule the Update Response procedure, you can set the following parameter.

Parameter	Description
Status Code	Enter the status to which the selected interactions should be set. TA defaults the status to "C" for completed; you can press the [F9] key for a list of statuses. You can also change the default on the System Preference Administration screen. See the System Administration chapter for more information on setting an update procedure's default parameters.

Viewing the Response Date Information

For each interaction selected by the query, the Update Response procedure sets the response date and status of the interaction. You can view these fields on the Customer Service Entry screen, the Interaction History screen, and on Page 1 and Page 2 of the Account Diary Entry screen.

Field	Set to:

Field	Set to:
Response Date	The effective date of the query, which is usually the date the query is run. See the Understanding Queries chapter for more information about the effective date of a query.
Status	The status you entered in the Status Code parameter. If you did not enter a status code, TA does not change the status of the interaction.

Transactions Procedures

Update Acknowledgement
Update Adjustment Notice
Update Credit Card Rejection Notice Date
Update Pledge Bill
Update Pledge Status
Update Reminder Date (for Pledge Reminders)

Update Acknowledgement

The Update Acknowledgement procedure enables you to set the Acknowledgment Code and Acknowledge Date fields for each transaction selected by the query. This procedure is used with acknowledgement queries to indicate that an acknowledgment was sent to the donor and to prevent a transaction that has already been acknowledged from being pulled for another acknowledgment.

See Also:

Updating Acknowledgement Information (Update Acknowledgement Procedure)

Updating Acknowledgement Information (Update Acknowledgement Procedure)

When you schedule the Update Acknowledgement procedure, you can set the following parameters.

Parameter	Description
Acknowledge Payments or Pledges	Enter "PL" for pledges to set the acknowledgment information on the pledge transaction. Enter "PP/GF" for pledge payments and gifts to set the acknowledgment information on the pledge payment or gift transaction. Enter "PL/GF" for pledges and gifts to set the acknowledgment information on the pledge or gift transaction.

Parameter	Description
Set Acknowledgment Date	Enter "Y" for yes to set the Acknowledgment Date field on the transaction selected by the query. Enter "N" for no if you don't want to set the Acknowledgment Date field on the transaction (i.e., if you want to set only the Acknowledgment Code field). If you leave this field blank, TA sets only the Acknowledgment Code field.
Acknowledgment Date	If you set the Set Acknowledgment Date parameter to yes, enter the acknowledgement date to use. Enter the date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year. If you leave this parameter blank, TA uses the effective date of the query as the acknowledged date. The effective date of query is usually the date the query is run. See the Understanding Queries chapter for more information about the effective date of a query.
Acknowledgment Code	Acknowledgment Codes are the user-defined output files that can run with queries. Enter the code that corresponds to the output file that the Acknowledgment Code field on the transaction should be set. You can press the [F9] key to view the list. This list contains "Y" for yes, "N" for no, the public user-defined output names owned by PBADMIN, and the user-defined output names owned by the user scheduling the procedure. See the Understanding Outputs chapter for explanations of the user-defined output and how to mark a user-defined output as public.

See Also:

Viewing Updated Acknowledgment Information (Update Acknowledgement Procedure)

Viewing Updated Acknowledgment Information (Update Acknowledgement Procedure)

The Update Acknowledgement procedure sets the following transaction fields for each transaction selected by the query. You can view this information by zooming to the Acknowledgement Information window from the Acknowledgment field on the Giving History Detail screen.

Field	Set to:

Field	Set to:
Acknowledgment Date	The date you entered in the Acknowledgment Date parameter if you set the Set Acknowledgment Date parameter to yes. If you left the Acknowledgment Date parameter blank, TA set the acknowledgement date to the effective date of the query. The effective date of the query, which is usually the date the query is run. See the Understanding Queries chapter for more information about the effective date of a query.
Acknowledgment Code	The acknowledgement code you entered in the Acknowledgment Code parameter. If you did not enter an Acknowledgment Code, TA does not update this field.

Update Adjustment Notice

The Update Adjustment Notice procedure enables you to set the adjustment notice date for each adjustment selected by the query. This procedure should be used for queries that select adjustments for reporting (e.g., reporting refund requests to your organization's business office).

When you schedule the Update Adjustment Notice procedure, you do not need to set any parameters.

Viewing the Adjustment Notice Date

For each adjustment selected by the query, the Update Adjustment Notice procedure sets the Adjustment Notification Date field to the effective date of the query. The effective date of a query is usually the date the query is run. You can view this date on the Adjustment Information window of the Giving History Detail screen by pressing the [F10] key from the Adjustment Sequence field. See the Understanding Queries chapter for more information about the effective date of a query.

Update Credit Card Rejection Notice Date

The Update Credit Card Rejection Notice Date procedure enables you to set the credit card rejection notice date for each credit card transaction selected by the query. This procedure should be used for queries that select rejected credit card transactions. Your organization may need to select these transactions in order to generate letters to the credit card donors informing those donors that the card was rejected and requesting a different payment method.

When you schedule the Update Credit Card Rejection Notice Date procedure, you do not need to set any parameters.

Viewing the Credit Card Rejection Notice Date

For each transaction selected by the query, the Update Credit Card Rejection Notice Date procedure sets the Rejection Notice field to the effective date of the query. You can view this information in the Rejection Notice field on the Credit Card Information window. To access this window, press the [F10] key from the Payment Method field on the Giving History Detail screen. The effective date of a query is usually the date the query is run. See the Understanding Queries chapter for more information about the effective date of a query.

Update Date Last Pulled

Use this procedure if your organization uses Queries and Outputs to pull charge transactions rather using the Charge Upload and Charge Download process. Use this procedure with Transactions or Benefits Query types. It updates the Date Last Pulled field on the transaction or benefit field according to the records that are pulled from your query.

Update Pledge Bill

The Update Pledge Bill procedure enables you to set the last bill date and increment the number of bills sent by 1 for each pledge selected by the query. This procedure should be used with pledge bill queries.

Note: If you run this procedure with a query that selects transactions other than pledge transactions, the procedure does not update the transactions. The procedure only updates pledge transactions.

When you schedule the Update Pledge Bill procedure, you do not need to set any parameters.

Viewing the Pledge Bill Information

For each pledge transaction selected by the query, the Update Pledge Bill procedure sets the following transaction information on the Pledge Information window. You can access the Pledge Information window by pressing the [F10] key from the Pledge Number field on the Giving History Detail screen.

Field	Set to:
Bills Sent	One more than the number previously in this field.
Last Date Billed	The effective date of the query, which is usually the date the query is run. See the Understanding Queries chapter for more information about the effective date of a query.

Update Pledge Status

The Update Pledge Status procedure enables you to "write off" old pledges by setting the pledge status for each transaction selected by the query. This procedure should be used with uncollectible or partially collected pledge queries.

Note: If you run this procedure with a query that selects transactions other than pledge transactions, the procedure does not update the transactions. The procedure updates only pledge transactions.

Selecting the Pledge Status

When you schedule the Update Pledge Status procedure, you can set the following parameter.

Parameter	Description

Parameter	Description
Default Status	TA defaults this parameter to "UC" for uncollectible; however you can change it on this screen. Enter the status you want set for each pledge transaction selected. You can press the [F9] key for a list of pledge statuses. You can also change the value that TA defaults from the System Preference Administration screen. See the System Administration chapter for more information on setting an update procedure's default parameters. If you leave this parameter blank, the update procedure runs as if the parameter were set to "UC" for uncollectible.

Viewing the Pledge Status

For each pledge transaction selected by the query, the Update Pledge Status procedure sets the pledge status on the Pledge Information window. You can access the Pledge Information window by pressing the [F10] key from the Pledge Number field on the Giving History Detail screen.

Update Reminder Date (for Pledge Reminders)

The Update Reminder Date procedure enables you to set the date on which the reminder was sent for each transaction selected by the query. This procedure should be used with transaction queries that select only non-standard installments, i.e., a pledge schedule exists for the donor with payment amounts and due dates (as opposed to standard installments where a standard payment is made on a regular basis).

Note: If you run this procedure with a query that selects transactions other than non-standard installment transactions, the procedure does not update the transactions. The procedure updates only non-standard installment transactions.

When you schedule the Set Pledge Reminder Date procedure, you do not need to set any parameters.

Viewing the Pledge Reminder Date

For each pledge transaction selected by the query, the Update Reminder Date procedure sets the Reminder Sent Date **for the earliest payment schedule record that does not yet have this date set**.

Field	Set to:
Reminder Sent Date	The effective date of the query, which is usually the date the query is run. See the Understanding Queries chapter for more information about the effective date of a query.

Tributes Procedures

Set Tribute Acknowledgment Date

Set Tribute Acknowledgment Date

The Set Tribute Acknowledgment Date procedure enables you to set the date that your organization last sent a letter to the notification recipients to inform them of gifts made toward a specific tribute.

Note: This procedure can be run only with a query that selects tribute records.

When you schedule the Set Tribute Acknowledgment Date, you can set the Acknowledgment Date parameter to the date that you send the notification letter.

Viewing the Tribute Notification Information

For each tribute notification recipient associated with the tribute records selected by the query, the Set Tribute Acknowledgment Date procedure sets the Last Acknowledged Date field on the Tribute Entry screen. The procedure also sets the Memorial Acknowledgment Date in the Transactions table for each transaction associated with the tribute records selected by the query. These date fields are set to the more recent of

- the effective date of the query,
- the date you run the query, or
- the date you entered in the Acknowledgment Date parameter.