



Alumni/Development Release Bulletin

February 2013

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About Release 92_4 Alumni/Development Features

Release 92_4 for Advantage Alumni/Development introduces an assortment of smaller enhancements and fixes, including improvements to query, export, and report options. There are also some changes in Events Management to improve the ability to manage events and attendees. Please review the topics in this bulletin for more details.

Please contact Support@senior-systems.com if you have any questions about any of these new features.

Alumni/Development and Events Management Enhancements

Report Filter Sort Order - To improve usability, Constituency and Fund filters found on the Pledge Status Report by Date Range and Gift Detail/Summary Report by Date Range now display constituencies and funds in alphabetical order.

Exporting Option for Gift Detail/Summary Report by Date Range - In order to allow users to export this report in a wider variety of file types, the option to export this report is now available in the Crystal Report viewer window (rather than the report setup screen). To export this report, simply set up your options as usual, click 'Preview', then click the 'Export Report' button at the top left of the toolbar. The system will then give you a variety of options for exporting your report in the desired file format, to the desired location.

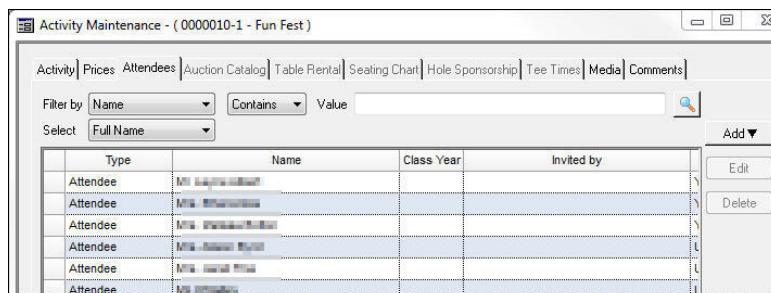
Education Node Addition - The following fields have been added to the Education node of the custom export: City, State, and Zip. The new fields are available for both query and export.

Appeals Enhancements - Appeals Maintenance now offers enhanced search and screen setting options. The 'Appeal Name' field can now accept up to 30 characters. The 'Appeal Description' field has been added to the Appeals node. The new field is available for both query and export.

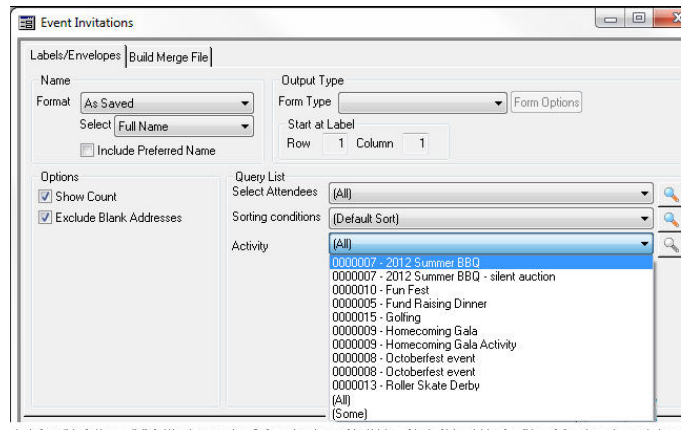
Include Email Checkbox on Gift Summary/Detail by Date Range - There is now a checkbox on the 'Address' tab of this report's setup screen. Check to include email addresses on the report.

Constituent ID Available on Events Reports - In Events, Constituent ID is now available on the Attendee List, table Rental List, Underwriting Report, and the Name Tag list.

Search Attendees Function in a Scheduled Event - In Events, workflow has been streamlined so that now, when updating attendees for an event (such as adding RSVP information), once you have saved your changes for an attendee, you are returned to the attendee list where you can immediately search for the next record. You no longer have to re-open the attendee screen to continue working.



Event IDs Added to Activity Filter for Mailings - To assist you when selecting activities when creating mailings, the event ID number now prefixes each activity listed. This will help you to select the correct activity, since many activities can be repeated.



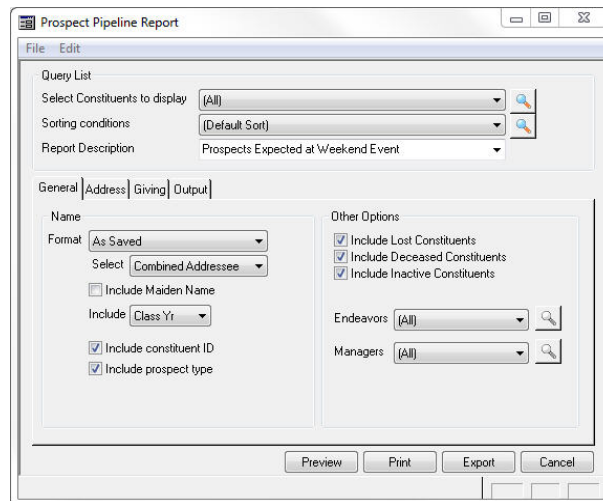
Prospect Pipeline Report

A new Prospect Pipeline report is now available in Advantage Alumni/Development. This report is designed to give you quick and easy access to prospect data. The new report is available in the Reports menu, under the 'Prospect Lists/Reports' sub-menu. Upon database update, all users (and user groups) with the Prospect Sheets security key will have access to the new report automatically.

| Prospect Pipeline Report | | | | | | |
|--|--|--|----------|---|-----------------------------|--|
| March 21, 2013 4:32 PM | | The Senior Academy | | | Page: 1 | |
| Prospects Expected at Weekend Event | | | | | | |
| NAME AND ADDRESS | Endeavor Current Stage Active From | Managers | Class Yr | Constituency | Rating Rating Date | Lifetime Giving Consec Yrs Giving |
| Mr. Pierre Hardy 4655 Meadowood Road West Haven, VT 05688 802-555-6960 Pierre.Hardy@senior-systems.com 18264 | Special Events Discovery 01/19/2013 | (P) Ms. Magdalena K. Vincent | | (P) Board Member Duplicate Parent Alumni Parent | | \$802,353.52 9 |
| Noemi Spears 505 Val Oaks Court Lowell, MA 02174 617-555-0738 Noemi.Spears@senior-systems.com 08882 | Special Events | (P) Mr. Pierre A. Hardy | 2013 | (P) Faculty/Staff | | \$250.00 11 |
| Mr. and Mrs. Rex Hanson 5103 Southbrook West Haven, VT 05688 802-555-4404 Rex.Hansons@senior-systems.com 15573 | Wellsess for Life Prospect Active Prospect | (P) Mr. Jerrill Shoemaker Mr. Pierre A. Hardy | | (P) Current Parent | Ultra Wealthy 01/01/2013 | \$106,000.00 5 |
| Mr. and Mrs. Rex Hanson 5103 Southbrook West Haven, VT 05688 802-555-4404 Sidney.Hansons@senior-systems.com 15574 | Wellsess for Life Prospect Active Prospect | (P) Mr. Jerrill Shoemaker | | (P) Current Parent | Ultra Wealthy 01/01/2013 | \$0.00 0 |
| Total Number in List: 4 | | | | | | |

Report Options

Along with the standard query and sorting options, and the standard options on the Address tab, there are some new filtering for this report. These options are designed specifically for working with Prospect data.



| Field | Usage/Remarks |
|------------------------|---|
| Include constituent ID | Check to include constituent IDs on the report. |
| Include prospect type | Check to include 'Prospect Type' on the report. |
| Other Options | Use these boxes to include or exclude constituents of a certain status. |
| Endeavors | Use this filter to select a specific endeavor you want to report on, report on 'All' endeavors, or select 'Some' and choose multiple endeavors. |
| Managers | Use this filter to select a specific prospect manager you want to report on, report on 'All' managers, or select 'Some' and choose multiple managers. Note that this filter will show results based on both primary and secondary managers. |