

# 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 <u>Support@senior-systems.com</u> 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.

	1003	ees Auction Catalog Tab	le Rental Seating Chart Hole Sponsor	ship Tee Times Media Commen	lts	
Filter by	Name	▼ Contains	▼ Value			
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**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.

.abels/E	nvelopes Build Merge File	i i i i i i i i i i i i i i i i i i i				
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	Select Full Name	✓ Start al	Start at Label			
	Include Preferred Nam	e Row	1 Column 1			
	s w Count uude Blank Addresses	Query List Select Attendees Sorting conditions Activity	[All] [Default Sort] [All] 0000007 - 2012 Summer BB0 0000007 - 2012 Summer BB0 - silent auction 0000010 - Fund Rasing Dinner 0000005 - Goling 0000005 - Homecoming Gala 0000009 - Homecoming Gala Activity 0000008 - Octoberfest event 0000008 - Octoberfest event 0000003 - Roller Skate Derby (All			

### **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 R	eport			
March 21, 2013 4:32 PM		The Se	nior Academ	у		P	ige: 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 05683 802-555-6660 Pierre Hardys@east 18264	Special Events Discovery 01/19/2013	(P) Ms. Magdalena K. Vincent		(P) Board Member Duplicate Parent Alumni Parent		\$802,353.52	ş
Noemi Spears 505 Val Oaks Court Lowell, MA 02174 617-555-0738 Noemi.Spearss@ 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 802-555-4494 Rex Hansons@ 15573	Wellness for Life Prospect Active Prospect	(P) Mr. Jerrell 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 802-555-449 Sidney Hanson @e	Wellness for Life Prospect Active Prospect	(P) Mr. Jerrell Shoemaker		(P) Current Parent	Ultra Wealthy 01/01/2013	\$0.00	C
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.

Query List			
elect Constituents to display	(All)		•
orting conditions	(Default Sort) Prospects Expected at Weekend Event		
leport Description			
eneral Address Giving Out	put	Other Option	ns
Format As Saved	•		Lost Constituents
Select Combined	ddressee 🔻	<ul> <li>Include Deceased Constituents</li> <li>Include Inactive Constituents</li> </ul>	
🔲 Include Maiden N	ame	M Include	mactive constituents
Include Class Yr	-	Endeavors	
🔽 Include constituer	nt ID	Managers	
📝 Include prospect	type		<u></u>

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 cer- tain 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.