## **SeniorSystems**

## **Alumni Development Release Bulletin**

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In this release bulletin, the latest enhancements to the ALUMNI **DEVELOPMENT** application are described.

### **New Options for Salutation Formatting**

There are now several new database fields available for the enhancement of salutation formatting. These salutation formats provide more features to control the appearance of the title bar in Constituent Maintenance.

Go to the Maintenance > Administration Maintenance >Address/Salutation tab.

📰 Alum	nni/Development Ad	minist	ration	
Edit				
Genera	Address/Salutation	Lette	rs <u>C</u> ustom <u>P</u> osting Options Screen Style Preferences	
	essee / Salutation Form		al Saraw Econd chrone coron chel Listeringe	
Addre	essee / Salutation Form	ats		
	Name Format		Example	▲ <u>N</u> ew
	ANONYMOUS		ANONYMOUS	
	Const-Spouse 7		Drs. James & Susan Smith	<u> </u>
	Const Sal 2		James	Delete
	Const-Spouse 21		James & Susan Ann Brown	
	Const-Spouse 3		James & Susan Smith	Constants
	Shared Const M. Sal2		James and Susan	
	o . e			
Defau	ult Formats			
		Cal	egories Constituent: (Male)	<u> </u>
	Salutations		Defaults	
A	Addressee	Mr. Ja	mes M. Smith, MD	
S	Salutation 1	Mr. Sn	ith	
S	Salutation 2	James		
S	Salutation 3	Jim		
		1		
			OK	Cancel
				NUM

The sample names in this window have been changed. Previously, if a primary constituent was referred to as Mr. Andrew Mark Smith (Smith), then the spouse would be referred to as Mrs. Susan Ann Smith (Johnson).

Due to the difficulty of differentiating the **Spouse Last Name** from the Constituent Last Name and Constituent Maiden Name, several sample values have been changed and new values have been added.

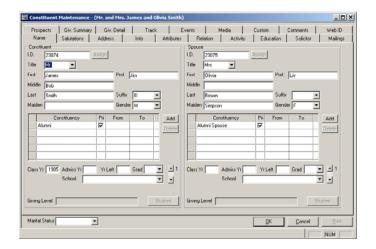
Please consult the following table for this list:

Data Field	Old	New Sample
	Sample	
Constituent Maiden Name	Smith	Jones
Spouse Last Name	Smith	Brown
Constituent First Name	Andrew	James
Constituent Preferred Name	Andy	Jim
		2.000
Spouse Maiden Name	Johnson	Miller

#### These values expand the **Constituent Maintenance** title bar capabilities:

Data Field	Old	New Sample
	Sample	
Cons 2 <sup>nd</sup> Constituency	None	GP
Abbrev.		
Cons 3 <sup>rd</sup> Constituency	None	TR
Abbrev.		
Constituent Anonymous	None	Anonymous
Constituent Lost/Deceased	None	Lost
Constituent Key Codes	None	Key
-		Codes(Cons)
Spouse 2 <sup>nd</sup> Constituency	None	FA
Abbrev.		
Spouse 3 <sup>rd</sup> Constituency	None	СР
Abbrev.		
Spouse Lost/Deceased	None	Deceased
Spouse Key Codes	None	Key
		Codes(Spouse)

In previous versions, the display of the **Constituent Maintenance** title bar was controlled by the settings enabled in **Preferences** menu.



If a 1 was entered as the value for 'What title bar format would you like to use for constituent maintenance?',

The top of the title bar would display:

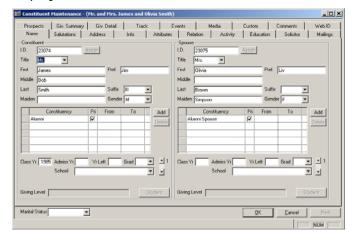
Constituent Maintenance – ({Combined Addressee})

A 2 in the value column would display:

#### ({Combined Addressee}) – {Constituent Key Code} / {Spouse Key Code}

This setting was often used to display a key piece of information in a prominent location, for example, **Constituencies**, a **Deceased** status, or **Anonymity**.

Now that this information can be added to salutation formats, the key code field can be used for any purpose and can even be displayed in a new salutation format.



Note: When in the **Preferences** tab of **Administration Maintenance**, if you type "**title bar**" into the search bar and click the **Search** button, the two preferences pertaining to the title bar appears.

	elopment Administration	
Edit		
<u>G</u> eneral Addr Search for: tit	ess/Salutation   Letters   Custom   Posting Options   Screen Style   F le bar	Preferences
App	Description	Value
AL What title	bar format would you like to use for constituent maintenance?	1
AL What name	ne format would you like to use in the constituent maintenance title bar?	Const-Spouse 4
Application:	lumni/Development	Definition Print
		<u>QK</u> <u>C</u> ancel

Enter 1 for the first value and your salutation format's name (as it appears in the upper section of the Address/Salutation tab) for the second value, and the **Constituent Maintenance** title bar will display according to the selected format.

#### **Multiple Moves Notifications**

In the Moves Maintenance area of Prospect Management, you can now notify multiple users simultaneously.

Moves Mainte	nance						×
Activity		- Noti	ficatio	ns			
Endeavor	General		Notify	Name		Notification Da	No
Moves Group	Profile	Ð		Development User 2			07-1
Date	08-09-2008	₽	V	Development User 1		01-15-2009	014
Person	Development User 2						
Туре	Research Request						
Description							
Comments	*			-			
				<u> </u>			
	<u> </u>						
Search Topic	\$						
Topic 1	<b></b>			-			
Topic 2	<b>_</b>						Þ
Topic 3	<b>X</b>				New	<u>E</u> dit <u>D</u> e	iete
Completed					<u>0</u> K	Canc	el

Click **New** to add a new notification recipient. Notification recipients will only be available for selection if they have security access to the selected Moves group. Each recipient can be assigned a different notification interval and date, which can be seen by scrolling slightly to the right. The Notification Date is the day the user is notified and

the Notify Date is the reference date entered when the notification was set up.

Notification recipients are able to modify their own Notify checkbox on a notification, and can add additional notification recipients, but cannot edit other recipients' notifications. This right is reserved to the user, listed in the Person field, who created the move activity item. The Person field is no longer editable, as it is required to match a valid user ID to establish ownership of the Move activity. This helps users from inadvertently deleting moves they did not create, mistaking their action for deleting the notification. Only the user listed in the Person field may delete a Moves Activity item.

#### **Giving Details Tab of Constituent** Maintenance Has a New Option

The Giving Details tab now has a Writeoff Amount column.

#### Grade Type Added to the Relations Tab

Grade Type has been added in the Additional Information column. This additional information can help you in Relation queries where the student's Grade Type is critical to finding the proper constituent relatives. This is also sometimes used by the Registrar for subdivisions of Kindergarten or Pre-K grade levels.

Giv. Summary	Giv. Detail	Track	Events	Media	Custom	Commen
Organization	Address	Attributes	Relation	Solicitor	Mailings	Prospect
18 Organization - (Ad	lept Automation Group)	Company		○ 8 6 5 5 5 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	dditional Information inft: Date ender chool ID tudent ID tudent ID rade rade Type lass Year dmission Yi dmission Yi dmission Yi dmission	
				H S Al	R Teacher tu Group R Group onabluency omments	
Sgilch To			<u>bói</u>	Edi <u>D</u> elete		

### Default Checkbox Added to Fund Maintenance

If you maintain funds that are not generally counted as 'Giving' (for example, event revenue funds), you can use this box to default gifts made to this fund to not be included in Consecutive Yrs. Given. Note that all gifts maintain their own settings for whether they should be included in Consecutive Yrs. Given, and this Fund-level setting acts only as a default setting.

Fund Maint	tenance							×
Number	FUND 2		Goal		\$0			
Name	Charitable G	iift Annuity	Comme	ents			~	
Туре		•						
Campaign	Capital	•					2	<u>r</u> ]
Classification	Special Rev	/enue	👻 🗹 Inc	lude In My B	ackPack			
Active Date		To		My BackPac	k Name	Charitable Gift	Annuity	
- G/L Accour	nt Numbers -							_
Gift Gift	(Stock) G	âift ( <u>I</u> n Kind ) <u>P</u> ledges						
Cash (D)		Account No. 110440400 Gift/Pledge Receivable		Sub-Ledg				
Gifts Reo'd	- (c)	[140440400 Gift Income	ð			]		
🔽 Default G	ifts to this fun	d to be Included in Conse	cutive Years Giver	1		<u>о</u> к	Cancel	1

#### Constituent Global Attributes Insert Checkbox Added

When globally inserting attributes, please note that you can insert the attribute for the spouse of the constituent retrieved by the query by checking the 'Add the Attribute to both the constituent and spouse' checkbox. Also, note that in earlier versions, a constituent could not possess an attribute in multiplicity. This restriction no longer exists. You can avoid adding an attribute to a constituent who already possesses the attribute by checking the '**Do not add duplicate attributes**' checkbox.

	Attribute	Year	From Date	To Date	Comments	N
Alumni Ball		2007			phonathor	<u> </u>
	ite to both the constitut	1	1	1	e attributes	 ance

### New Display on Name Tab

The word **Deceased** now appears next to the ID field on the **Name** tab of a constituent record if the constituent has been marked deceased. A constituent can be marked deceased by selecting '**D**' from the Lost/Dec dropdown on the **Info** tab.

# Tracking and Moves List is Now Separated

Previously, in the **Track** tab of **Constituent Maintenance**, the list of **Activity Types** that appeared was combined with the data displayed by the **Moves** sub tab on the **Prospects** tab. Now, the lists are separate from each other.