



Because of the inherently low resolution of screen shots, their display in this document is inferior in quality. The quality when printed is somewhat better.

The monthly feature focus highlights the capabilities and usefulness of a specific aspect of FUNDimensions. It is intended for both current users of FUNDimensions, and for those interested in a close look at how FUNDimensions performs its functions of raising money, providing the information your constituency and management expects, and helping you to communicate the value and importance of a mission.

Named Donor Acknowledgments

This month's Feature Focus explores Named Donor Acknowledgments. "Named donors" are people or organizations in whose name a gift is made: it might be a memorial gift, or simply a gift of a gift. For your fundraising software, it means generating a second thank you note to the named donor or their representative. A special case occurs when multiple gifts are made to your organization in the name of one individual or organization, because in that instance a single thank you note to them is needed, listing the separate contributors, the amount they gave (usually) , and a total amount given on behalf of the named donor.

There are several tasks involved in managing named donors:

- 1 enter the name and address of the named donor (or their representative)
- 2 associate that name and address with the appropriate gift records
- 3 for mail merge of the acknowledgment, export the names and addresses of the named donors and amounts contributed on behalf of the named donor
- 4 for mailing of the acknowledgment, print mailing labels with the names and addresses of the named donors

FUNDimensions 3.1 contains the tools for all these tasks. Here's how to use them:

Creating 2nd Recipient Records

Perform the following from within any donation, pledge or membership input window. You can do this for a new gift, or from one that is already saved:

- 1 Choose Add 2nd Thank You Note from the Records menu. The window below is an example:

Add 2nd Thank You Recipient for this Donation

Enter mailing information for a second thank you note recipient...

Donor ID number of the 2nd recipient: (optional)

Salutation

F Name MI

L Name

Title

Company

Address

Address 2

City State

Zip Code Country

Label L1

Label L2

Letter Sal

- 2 If the recipient of the 2nd thank you note is already entered as a donor record in your database, type their Donor ID number into the first field, then type the tab key; the address from their donor record is copied into the rest of the window. Click OK.
- 3 If the recipient is not already in your database, type the tab key and fill in the appropriate fields. The field layout is similar to that of the Donor Input Window, and it has the same features of auto-capitalization and auto-correction that are present in the Donor Input Window. Click OK.

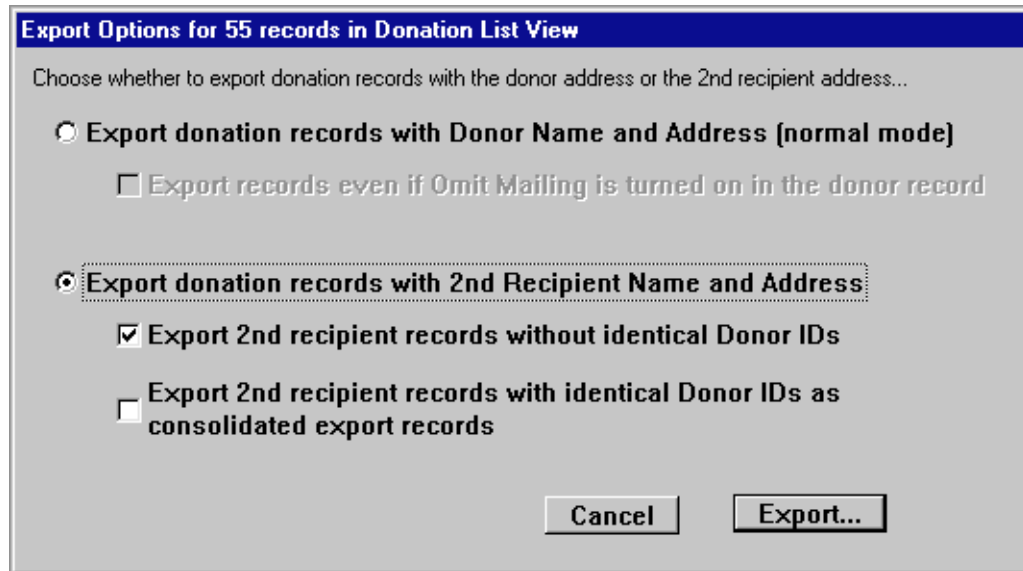
You *must* use technique #1 if you want to merge multiple gifts to the same named donor into one export record and mailing label (see below). This is because, during exports and label printing, FUNDimensions looks for matching Donor IDs to locate records that need to be merged.

That's all you need to do during entry of new gifts. When its time to send the acknowledgment to the named donor or representative, perform and export and print labels with these procedures:

Exporting 2nd Recipient Records

You should perform these steps before exporting for regular thank you notes, or if after that export, then before using the Mark Sent Flags command to mark the records as “Thank You Sent”.

- 1 Perform a query to locate the gift records needing acknowledgment, by choosing Thank Yous Needed from the Find menu. From the dialog, choose Find All from the popup menu, then click the Search button.
- 2 Choose Export from the Find menu. The dialog is shown below:



- 3 In the dialog, choose from the following options:
 - Export 2nd recipient records without identical Donor IDs. This option creates a single export record for every 2nd recipient record that does not bear a Donor ID that is identical with another 2nd recipient record, within the selection of gift records.
 - Export 2nd recipient records with identical Donor IDs as consolidated export records. This option locates all the 2nd recipient records with one or more identical Donor IDs in the selection of gift records. Each set of records with matching IDs is merged into a single export record, which will contain the total amount given in that 2nd recipient’s name, a count of the number of gifts given in their name, and the names of individual contributors and the amount of their contribution.
- 4 Click the Export button. In the next dialog window, type a name for your export file and click Save.
- 5 Open the exported file in your word processor and perform the mail merge.

Printing 2nd Recipient Mailing Labels

- 1 Choose File > Labels. This dialog is shown:

Labels for 55 records in the Donation List View

Label template choices...

Avery 5160 (1" x 2 5/8")

Avery 5161 (1" x 4")

Avery 5162 (1 1/3" x 4")

#10 envelope

Use label editor

Start printing at...

Row Column

Label typeface choices...

Print uppercase

Font Size Style

Other Options...

Print donation records with Donor Name & Address (normal mode)

Print even if "Omit Mailing" is checked in donor

Add keyword to donor record

Add note to donor record

Save records as a set

Keep a record of the mailing

Print donation records with 2nd Recipient Name & Address

Print 2nd recipient records without identical Donor IDs

Print 2nd recipient records with identical Donor IDs

- 2 Configure the lower section of the dialog as shown. Your settings from the export dialog are automatically used, so you may not need to change anything.
- 3 Click OK. The standard print dialogs appear and the labels are printed.

Conclusion

Both exports and labels are sorted by zipcode or last name, according to a setting in user preferences. Your printed letters and labels will be in exactly the same order, so assembly of your mailing will be fast and easy.

For more information, see Appendix 3 of the user manual. The current user manual can be downloaded from this site as a PDF document.