

How do I create an appeal?

Go to Maintenance. Click on Appeals. Appeal Maintenance will open.

At top left click New. Name the Appeal. Choose the Fund Name it will be associated with. Choose the Target Campaign.

Constituents Tab – this is where you add the query of constituents you have identified will be part of the appeal and mailed to.

Appeals can roll year to year. You will see as the money comes in the fiscal year rows will populate with data.

Year	Solicited	Amt Pledged	Amt Received	Balance	Gift Received	Average Gift	

Once you have added the appeal to your target group, you can then update the appeal mailing column with the appeal date by using the Appeal Mailing function located under Mailings / Appeal Mailings / use your same query used to add the group to the appeal. Choose the Appeal from the drop down menu at bottom of window and name the mailing and add date sent. Once you click UPDATE this will stamp on the constituent MAILING tab / Appeal subtab.

IMPORTANT: When posting a gift for a donor to the Appeal the constituent must be added to the appeal for the appeal to be a choice (you can change preferences to show all appeals for every donor as well).

NOTE: There are appeal participation reports under Reports.