Training Guide

Data Mining

HELIX

7300 Warden Avenue, Suite 503
Markham, Ontario
Canada L3R 9Z6

Phone: 905-479-3780
Toll Free: 877-479-3780
Fax: 905-479-1047

e-Mail: info@Andar360.com
Web: www.Andar360.com

Keys to Success – Tips / Hints

Having a clear picture of the Accounts you wish to select is critical in a proper Data Mining Operation. For example, selecting all CEOs from Companies with a Gift can yield different results if you have did not specify where the Gift came from – the Company or the CEO.

You must also know what you want to accomplish. If your selection results in a list of Accounts that includes husband and wife, do you want to see both of them or just one?

So here are the things to keep in mind when planning to write your DMO:

- **Data Mining is a basically a query. Think logically.**
- **Know EXACTLY what you want.** a
- **Know where your data is stored.** It is essential that you know Andar and how your data is stored. Know that Contacts are Relationships; know that your Board of Directors is an Opportunity for your Organization, know Number of Donors is in Tracking Parameters, etc.
- **Right to left.** The left panel on the screen will be your Data Mining Steps. If it ain't there, it ain't gonna happen!
- **Patience, Persistence, Practice.**

Data Mining may be a challenge to teach or learn fully, simply because of the sheer number of possible uses. However, these key principles, coupled with a great deal of practice can result in mastering the Data Mining process.

1. Data Mining Operations

Andar Main Menu > Data Mining > Data Mining Operations

In many situations you will want to get data out of Andar – data that is not available in a canned report. A Data Mining Operation (DMO) might be the solution. Data Mining is a logical query process, which allows a selection of Accounts in the database – Accounts which have something in common.

The top portion of the window contains a User specific list of recently accessed Data Mining Operations. The number of items shown in the list is determined by your Personal Preferences (*System > Preferences > Personal Preferences > Recent Items*). The same setting is used to display the Recent Account Warehouses and Recent Mailing Lists.

You may then do many things with those selected Accounts.

- ➪ **Account Warehouse.** An Account Warehouse contains Account Names and Account Numbers only. It can be used for running reports, mass assigning Event Attendance, etc.

- ➪ **Mailing List.** A Mailing List groups Accounts together in a Mailing List, which will then allow you to create a Mailing List Usage and Download the Names, Addresses, etc. The resulting spreadsheet becomes the Data Source for a Mail Merge.

- ➪ **Custom Spreadsheet (Extract Data).** This feature allows you to specify the data that you want to be included in your spreadsheet.

- ➪ **Create A Custom PDF Report.** There are times that a canned report does not contain the information you need. When this is the case, you can create your own custom PDF report.

- ➪ **Create A PDF Letter.** Andar gives you the ability to create a list of Recipients and a Letter Template then merge the two together to produce a finished PDF Letter ready to be printed.

- ➪ **Mass Assign.** This option allows you to perform a Mass Assignment to all the Accounts selected in a DMO.

- ➪ **Run Reports.** This option allows you to run any canned report for the Accounts selected in the DMO without having to go back to the Andar Main Menu to do so.

- ➪ **Send e-Mails.** There are several ways to use Andar to send e-Mails. One way is to send it from within the Data Mining Operation

A Data Mining Operation can be created and saved then can be used repeatedly.

Data Mining List Details

Andar Main Menu > Data Mining > Data Mining Operations

- *Name*
- *Description*
- *Changed User*
- *Changed Date / Time*
- *Create User*
- *Create Date / Time*
- *In Use By*
- *Last Run User*
- *Last Run Date / Time*

Actions

- ➪ **Submit.** Opens the Job Scheduler window, enabling the DMO to be submitted immediately or to be scheduled to run at a later date.

- ➪ **Authority.** Allows View / Update / Delete authority for the selected DMO to be managed.

- ➪ **Mailing Lists.** Provides a shortcut to the list of Mailing Lists.

- ➪ **Warehouses.** Provides a shortcut to the list of Account Warehouses.

- ➪ **Design New.** Opens the Data Mining Operation Designer window where the steps of a new DMO can be added.

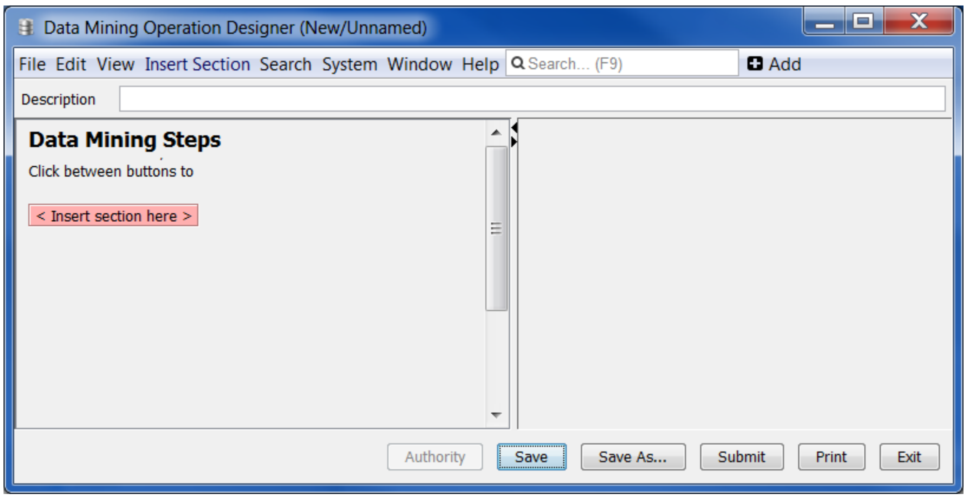
- ➪ **Work With.** Allows the selected DMO to be modified.

1.1. Data Mining Operation Designer

Andar Main Menu > Data Mining > Data Mining Operations > Design New / Work With

Andar Main Menu > Data Mining > Account Warehouses > highlight desired Account Warehouse > Work With DMO

Andar Main Menu > Communications > Mailing List Management > Mailing Lists > highlight the desired Mailing List > Work With DMO



{

- **Description.** (70654 – 2014.01) This field at the top of the Data Mining screens can be used to a description of the Data Mining Operation. It will also be shown in the Data Mining Operation List and on the Data Mining Operation Report.

}

Left Panel

When you finish creating a DMO, it should have a logical list of steps on the left side of the Data Mining Operation Designer screen. It will be a list of steps / instructions for the computer to follow when you run that DMO. The DMO might be run just once, or re-run many times in the future.

Once selections are made / changed in the right panel, it is imperative that you select the Add Condition or Insert Section button at the bottom right of the screen to save the changes in the left panel – Data Mining Steps. Pardon the grammar, but *'If it ain't on the left, it ain't gonna happen!'*

To insert new selections between existing ones, click on the space between the steps to enable the Insert Section or Add Condition button.

To update or delete an existing step, click on the step in the left panel. The right panel will appear with an Update and a Delete button.

Right Panel

The right panel will contain options / fields associated with the step selected in the panel on the left.

Insert Section

There is an Insert Section option at the top of the screen and an Insert Section button in the Left Panel. All possible actions related to the Data Mining Steps can be accessed directly from this Insert Section option.

Data Mining Operation Designer Actions

{

- **Authority.** This option allows the User to grant Authority for other Users to have access to the Data Mining Operation.

}

- **Save.** If the DMO has been previously saved but you've made changes, click here to save the changes to the existing DMO.
- **Save As.** This option allows you to save a new DMO or it allows an existing DMO to be saved with a new name (copied).
- **Submit.** If the DMO has not yet been saved, this option will allow you to save it and submit it to run. If it has already been already been saved it will simply submit it to run.

{

⇨ **Print.** Produces a DMO Report showing the DMO parameters selected. See page 136 for more information.

{

> **Helpful Tip**
> *If you wish to run a DMO, it must be named. Likewise, if you wish to save the results of your DMO, you must also name the Warehouse or Mailing List. It is very helpful if the name of the DMO and the name of the Warehouse or Mailing List are the same (or at least very similar).*

Job Scheduler

Once you submit the DMO to run you will see a Job Scheduler. If you want the DMO to run only once and right away, click Submit. However, if you want the DMO to run at a later time or if you want to schedule it to run on a regular basis without any action on your part, choose the desired run schedule and submit.

1.2. Select Accounts

Insert Section > Select Accounts

This step allows you to specify which Accounts are to be selected. Once a primary selection method has been inserted into the DMO, additional selection Conditions (criteria) can be added to fine-tune your Account selection. These Conditions will be presented in Tabs that will appear on the right side of the screen.

Once you have made your primary selection, click the Insert Section button in the lower right corner of the screen. This moves your selection to the left (Data Mining Steps). Only the selections on the left will be saved and actually used when the DMO is submitted.

Note that a DMO can contain multiple Select statements. If your DMO includes multiple Select statements (and if the DMO does not include a Clear Selected Accounts section), then the result will include all of the Accounts. This means that some Accounts may appear twice in your results.

By Account Type

- **Individual Accounts.** All people in Andar are Individuals. They may be Donors, Volunteers, Account Managers, Prospects, etc. If you wish to select groups of people where the group is not based on a Relationships, then select Individuals. Once selected, a series of Tabs will appear in the panel on the left and additional Selection Conditions can be specified.

- **Organization Accounts.** Organizations in Andar are any Accounts that are not people. This will include Companies, Agencies, United Ways, Programs, etc. If you wish to select groups of Organizations where the group is not based on a Relationship, then select Organizations. Once selected, a series of Tabs will appear in the panel on the left and additional Selection Conditions can be specified.

By Relationship

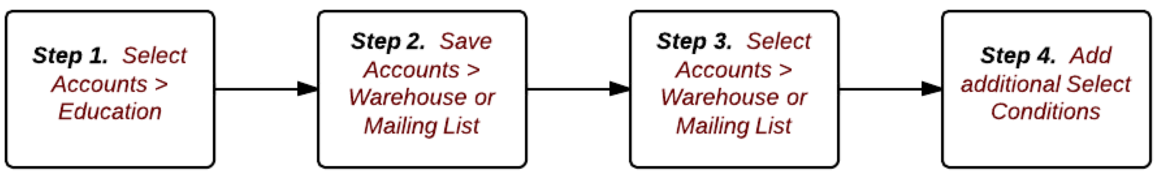
- **Contacts.** This selection is based on a Contact Relationship. It will select the Individual but provide an opportunity to Select / Extract information from both the Individual and the Organization Account. If you want to select all CEOs, then select Contacts. Once selected, the panel on the right will display additional fields regarding the Contact selection.

- **Employees.** This selection is based on an Employee Relationship. It will select the Individual but provide an opportunity to Select / Extract information from both the Individual and the Organization Account. If you want to select all Employees of Trish's Nut House who made a Pledge this Year, then select Employees. Once selected, the panel on the right will display additional fields regarding the Employee Relationship selection.

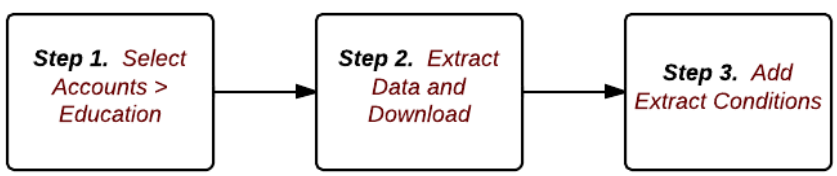
- **Affiliations.** This selection is based on Affiliation Relationships. It will select the Individual but provide an opportunity to Select / Extract information from both the Individual and the Organization Account. If you want to select all Partner Agency Board Members, then select Affiliations. Once selected, the panel on the right will display additional fields regarding the Affiliation selection.

➪ **Managed Accounts.** This selection is based on Manager Relationships. It will select the Managed Account but will provide an opportunity to Select / Extract information from both the Individual (Manager) and the Organization (Managed Account). If you want a list of all Accounts Managed by George Jetson, then select Managed Accounts. Once selected, you will need to Save the Accounts to a Warehouse or Mailing List, in order to add additional criteria to your selection.

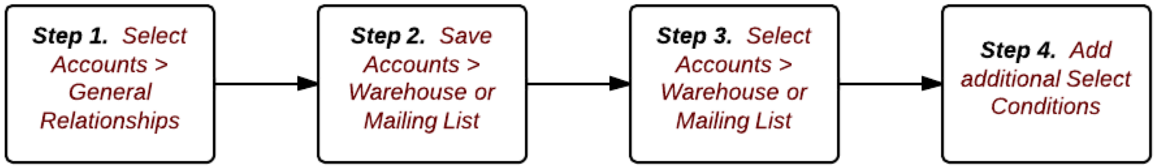
➪ **Education.** This selection is based on Education Relationships. It will select the Individual but provide an opportunity to Select / Extract information from both the Individual and the Organization Account. If you want all alumni from Georgia State University, then select Education. Once selected, the panel on the right will display additional fields regarding the Education selection.



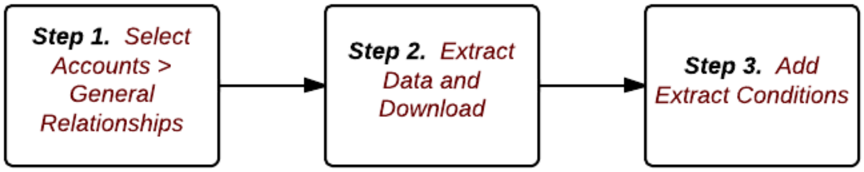
Or



➪ **General Relationships.** This selection is based on General Relationships. If you want to select the Accounts with a Parent / Subsidiary Relationship or a Combined Giver Relationship, then select General Relationships. Once selected, you will need to Save the Accounts to a Warehouse or Mailing List, in order to add additional Conditions / criteria to your selection.



Or



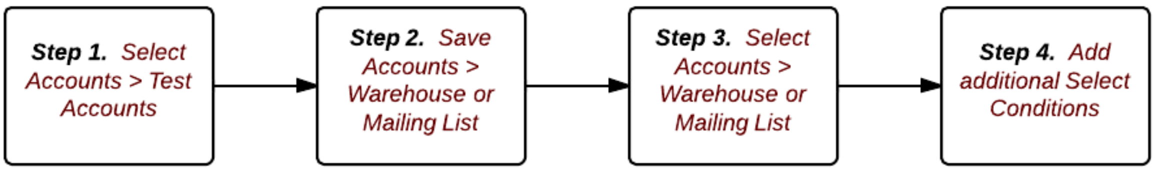
By An Existing Group

- **Account Warehouse.** This selection provides the ability to use a pre-existing Warehouse so you don't have to recreate the wheel. The selection is not based on a Relationship but an Account Warehouse can contain both Individual and Organization Accounts so you will have the opportunity to Select / Extract from both Individual and Organization Accounts. Once selected, the panel on the right will display additional conditions / criteria to be considered.

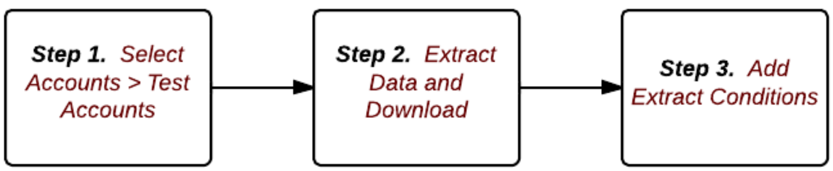
- **Mailing List.** This selection provides the ability to use a pre-existing Mailing List so you don't have to recreate the wheel. The selection is not based on a Relationship but a Mailing List can contain both Individual and Organization Accounts so you will have the opportunity to Select / Extract from both Individual and Organization Accounts. Once selected, the panel on the right will display additional conditions / criteria to be considered.

Other

➪ **Test Accounts.** This option selects a sample set of Accounts from those in a specified Account Warehouse. Select either a Number of Accounts to be included, or, specify a Percentage and Andar will select the appropriate Number of Accounts based on the Total Number of Accounts in the Warehouse. Once selected, you will need to Save the Accounts to a Warehouse or Mailing List, in order to add additional Conditions / criteria to your selection.



Or

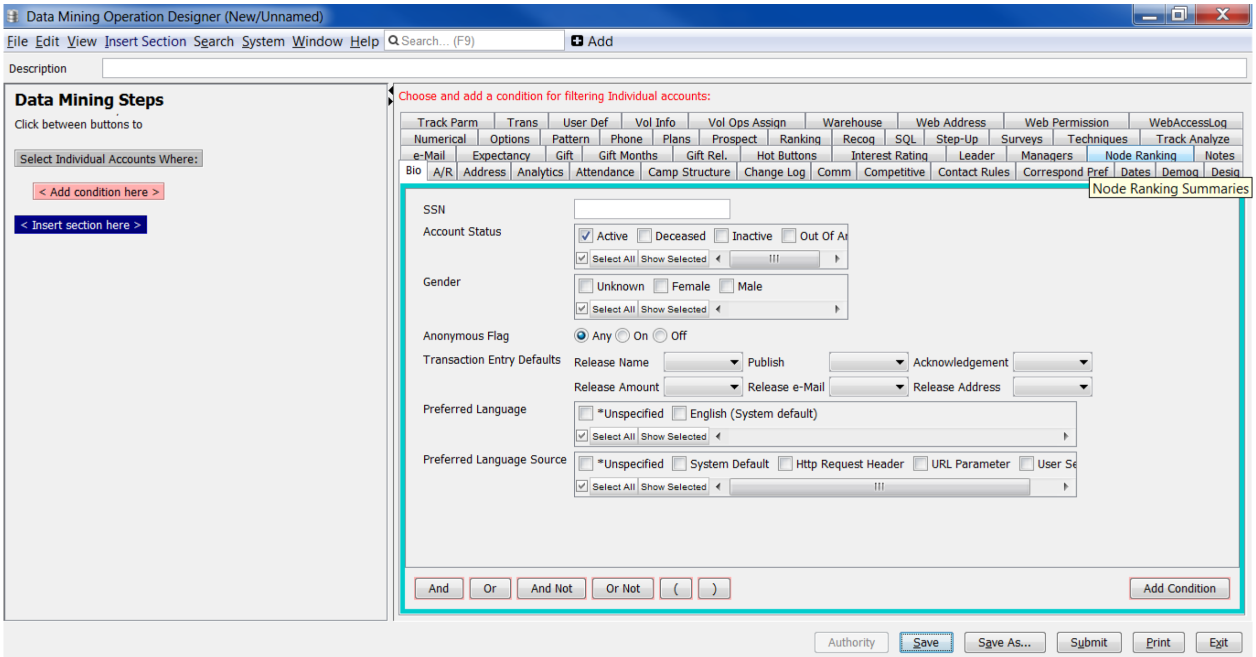


{

➪ **Transactions.** *(64893 – 2012.03)* This option allows the selection of Accounts based on Account pairs (Individual Account and Organization Account) on Transactions (Employee Transactions).

}

1.3. Select Conditions



Once you've specified the primary Account Selection method you can further refine your selection by adding Select Conditions (criteria). On the left side of the DMO Designer screen, indented within the Select Accounts section, you will see 'Add Condition Here' and on the right you will see a series of Tabs. These Tabs often resemble the names of Tabs or Sub-Tabs that are found within an Account Profile. Each of these Tabs allows you to refine your Account selection.

For example, if you want to find Lapsed Donors, you first choose to ***Select > Individuals***. Then you need to further refine this Selection so that the final result only includes Accounts with no Gift in the Current Campaign year but with a Gift in any one of the previous five Campaign Years. You could use the Pattern Tab to accomplish this.

There is no limit to the number of Conditions that can be added inside a Select Account section. If you want to use more than one Select Condition you will need to use an Operator (And, Or, And Not, etc.) to separate the Selection Conditions.

Important! Note that by default Andar will only select Accounts with an Account Status of Active. If you want to select Accounts that are Inactive, Deceased or Out of Area, you must make a selection from the Bio Tab.

Following is a list of Selection Condition Tabs that are available to help refine your Account selection. See the Data Mining Supplement or Andar Help for more detailed information on each Tab.

Select Condition Tabs

See the Data Mining Training Supplement or Andar Help for more information on the specific Select Condition Tabs.

- *Address*
- *Affiliation Type*
- *Analytics*
- *A/R (Accounts Receivable)*
- *Attendance*
- *Bio (Ind)*
- *Bio (Org)*
- *Campaign Structure*

{
- *Campaign Dates*
- *CB Allocation*

}
- *CB Budget*

{
- *CB Companies*

}
- *CB Demographics*
- *CB Funding*
- *CB Structure*
- *Change Log*
- *Communications*
- *Competitive*
- *Contact Rules*

{
- *Correspondence Preferences*

}
- *Contact Type*
- *Dates*
- *Donor Choice Structure*
- *Demographics*

{
- *Descriptions*

}
- *Designations*
- *e-Mail*
- *Employee Type*
- *Expectancy*
- *Gift*
- *Gift Months*
- *Gift Relationships*
- *Gift Rollup*
- *Hot Buttons*
- *Interest Rating*
- *Leader*
- *Managers*

{
- *Match Gift Rule*
- *Node Ranking*

}
- *Notes*
- *Numerical*
- *Options*
- *Pattern*

{
- *Phone*

}
- *Plans*
- *Prospect*
- *Ranking*
- *Ranking Rollup*

- *Recognition*
- *SQL*
- *Step-Up*
- *Survey / Forms*
- *Taxonomy*
- *Techniques*
- *Tracking Parameter Analysis*
- *Tracking Parameters*
- *Tracking Parameters Rollup*
- *Transactions*
- *User Defined*
- *Volunteer Info*
- *Volunteer Opportunities Assigned*
- *Warehouse*
- *Web Permission*

Operators

Complex Queries require that you add multiple Selection Conditions. The use of multiple Conditions necessitates the use of an Operator(s) to indicate the Relationship between the multiple Conditions.

- **And.** This Operator is used to indicate that the records selected must meet both Conditions – the Condition immediately before and the Condition immediately after. If the DMO selects Individuals who are both Leadership Donors and people who live in Kalamazoo, then And must be used.

- **Or.** This Operator is used to indicate that the records selected can meet either Condition. In the above example, if Or is used, all Leadership Donors plus all people who live in Kalamazoo would be selected. They will either be Leadership Donors or live in Kalamazoo.

- **And Not.** This Operator is used to exclude a group of Accounts. For example, you might select all Individuals who are Leadership Donors And Not those who have an Opt Out Contact Rule.

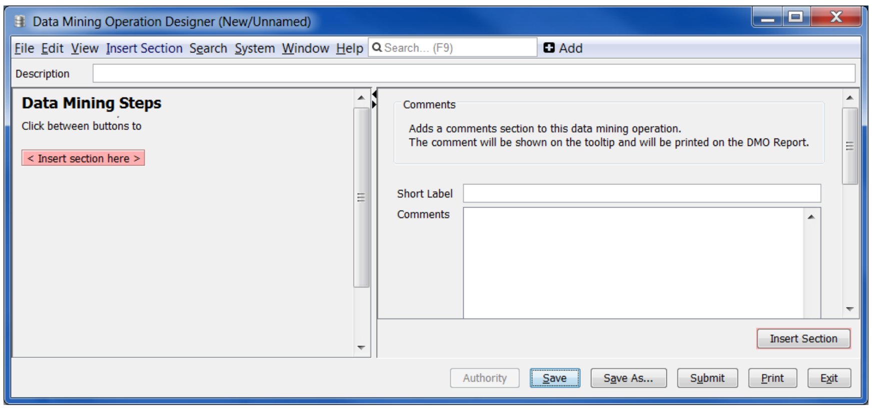
- **Or Not.** This Operator is rarely used. An Account would be selected if the first Condition is true, or if the second Condition is false.

- **Parentheses ( ).** If multiple Operators are used and if they are not all the same you must use Parentheses to indicate which Conditions belong together. The Conditions inside the Parentheses will be processed as a group before other Conditions are added to the mix.

You may wish to be both Inclusive as well as Exclusive when selecting Accounts. For example, if you want to select all Individuals who live in three key cities, and within those cities to select only the Leadership Donors, it will require different Operators and, in this case Parentheses. The statement would look like: Select Individuals who live in (Kalamazoo or Portage or Mattawan) And who are Leadership Donors.

1.4. Comments

Insert Section > Comments



This option inserts a Section that doesn't 'do' anything. The Short Label and Comments entered will be displayed in the Data Mining Steps. This is typically used to explain or remember something that is being done inside the DMO.

If the Statement and Comment are too long to display in the allotted space, the entire text becomes a Tool Tip if you point your cursor at the Comment in the Data Mining Steps in the Left Panel.

1.5. Account Warehouses

An Account Warehouse is a group of specified Accounts. Account Warehouses may be used for multiple purposes, such as generating reports for the selected Accounts, Mass Assigning Demographics, etc. to each of the Accounts and various other Andar functions.

An Account Warehouse contains Account Numbers only. Each record within an Account Warehouse can include an Individual Account, an Organization Account or a pair of Accounts (Individual and Organization). When you display or update the contents of an Account Warehouse other data about the Accounts will be displayed (such as the Account Name). This information will be current as of the date the Warehouse is used.

Account Warehouses can be created by a Data Mining Operation or manually. Once an Account Warehouse has been created, Accounts can be added into the Warehouse manually, from a DMO or through an import process.

Best Practice
The recommended practice is to use a DMO to create and populate an Account Warehouse. This allows you to re-run the whole DMO at a future date to re-select and store accounts (based on the data that is current at the time it is re-run).

Account Warehouse List Details

Andar Main Menu > Data Mining > Account Warehouses

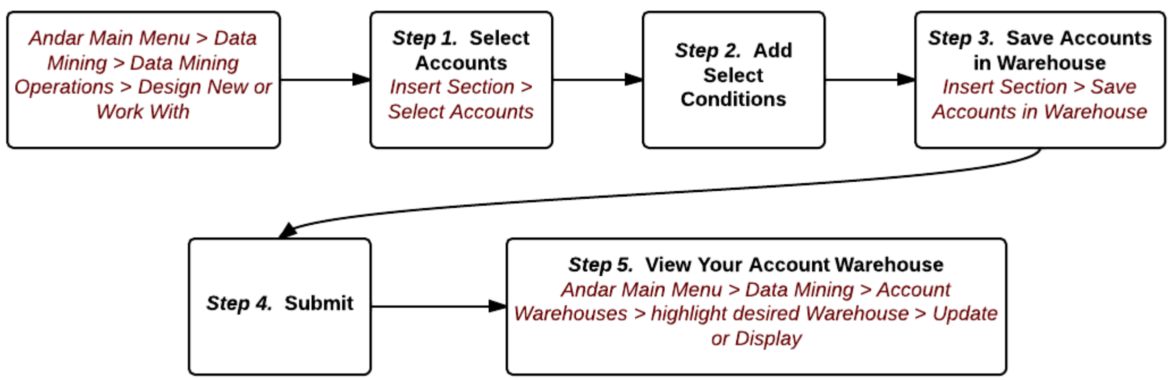
- ***Warehouse Name***
- ***Warehouse Description***
- ***Number of Individuals***
- ***Number of Organizations***
- ***Number of Both.*** Number of records with both an Individual and an Organization Account.
- ***Number of Records***
- ***Create Date / Time***
- ***Create User***
- ***Change Date / Time***
- ***In Use Date / Time***
- ***In Use By***
- ***Last DMO***

1.5.1. Create an Account Warehouse in a DMO

Insert Section > Save Accounts > In Warehouse

In a DMO, once you have selected your Accounts, you an insert this section to save those Accounts into an Account Warehouse. You can create a new one or select an existing one. This Account Warehouse can be used for other things, both inside and outside the DMO.

Important! If you select an existing Account Warehouse in this DMO step, you will completely replace the list of Accounts that were already in the Warehouse. It does not add the new Accounts to the list, it replaces them.



Step 1. Select Accounts

Insert Section > Select Accounts

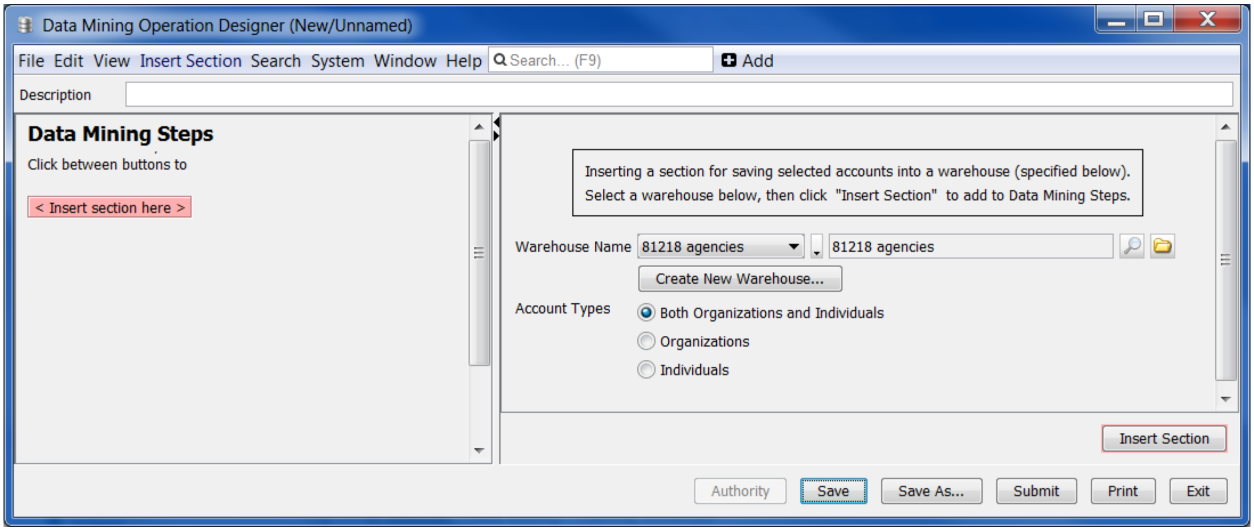
Step 2. Add Select Conditions

Add Condition Here

Select Conditions from the right panel.

Step 3. Save Accounts in Warehouse

Andar Main Menu > Data Mining > Data Mining Operations > Design New > Insert Section > Select desired Accounts > Add Conditions > Insert Section > Save Accounts in a Warehouse



- **Warehouse Name.** If you want to select a pre-existing Warehouse, select it here. Remember this process will replace all Accounts that currently exist in that Warehouse.
  - **Create New Warehouse.** To create a new Warehouse click the Create New Warehouse button.
    - **Warehouse Name**
    - **Warehouse Description**
- **Account Types**
  - **Both Organizations and Individuals.** If your selection includes Organizations and Individuals or selects Accounts based on a Relationship linking Organizations to Individuals, both types of Accounts will be included in the Account Warehouse.
  - **Organizations**

- o **Individuals**

Step 4. Submit

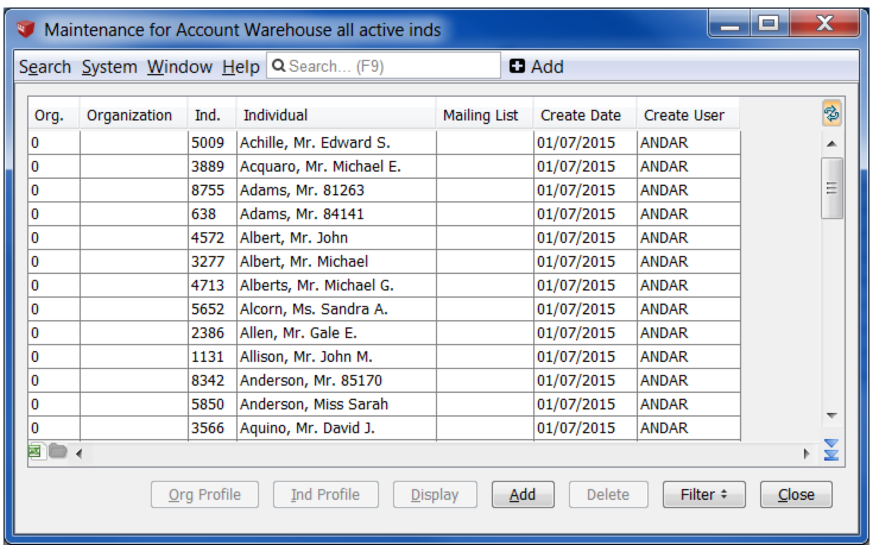
Step 5. View Your Account Warehouse

Andar Main Menu > Data Mining > Account Warehouses

{

Andar Main Menu > Data Mining > Data Mining Operations > highlight desired Warehouse > Warehouses

}



1.5.2. Create an Account Warehouse from the Andar Main Menu

Andar Main Menu > Data Mining > Account Warehouses

{

Andar Main Menu > Data Mining > Data Mining Operations > Warehouses

}

Although it is ***not recommended***, it is possible to create an Account Warehouse and manually add Accounts to it.

Once an Account Warehouse has been created (whether manually or through a Data Mining Operation) it can be managed from this location. Here you may manually add Accounts into an existing Warehouse and / or delete Accounts from the Warehouse.

> ***Important!*** If an Account Warehouse is created by any method other than through a Data Mining Operation, you will not be able to have it automatically update.

- **Warehouse Name**
- **Warehouse Description**

1.5.3. Managing Account Warehouses

View Accounts in a Warehouse

From The Andar Main Menu

Andar Main Menu > Data Mining > Account Warehouses > highlight desired Warehouse > Display or Update

{

Andar Main Menu > Data Mining > Data Mining Operations > highlight desired Warehouse > Warehouses > highlight desired Warehouse > Update or Display

}

From the Account Profile

Individual / Organization Account Profile > Communications Tab > Mail List Sub Tab

Manually Add Accounts to an Account Warehouse

Andar Main Menu > Data Mining > Account Warehouses > highlight desired Warehouse > Update > Add > select Individual / Organization Account > Add

{

Andar Main Menu > Data Mining > Data Mining Operations > highlight desired Warehouse > Warehouses > highlight desired Warehouse > Update > Add > select Individual / Organization Account > Add

}

Delete Accounts from an Account Warehouse

Andar Main Menu > Data Mining > Account Warehouses > highlight desired Warehouse > Update > highlight desired record > Delete

{

Andar Main Menu > Data Mining > Data Mining Operations > highlight desired Warehouse > Warehouses > highlight desired Warehouse > Update > Add > select Individual / Organization Account > Delete

}

Find the DMO for an Account Warehouse

Andar Main Menu > Data Mining > Account Warehouses > Last DMO column

If an Account Warehouse was created by a Data Mining Operation (DMO) you can easily find that DMO by looking at the Last DMO column on the list of Account Warehouses.

{

Work With the DMO that Created the Account Warehouse

Andar Main Menu > Data Mining > Account Warehouses > highlight desired Warehouse (with DMO in Last DMO column) > Work With DMO

Requires a MIG license. This feature allows you to find a DMO from an Account Warehouse and open that DMO from the list of Warehouses. Without MIG you can find the name of the DMO but you will have to go to the *Andar Main Menu > Data Mining > Data Mining Operations* and find the DMO to Work With.

Execute the DMO that Created the Account Warehouse

Andar Main Menu > Data Mining > Account Warehouses > highlight desired Warehouse (with DMO in Last DMO column) > Execute DMO

Requires a MIG license. This feature allows you to find a DMO from an Account Warehouse and Submit that DMO from the list of Warehouses. Without MIG you can find the name of the DMO but you will have to go to the ***Andar Main Menu > Data Mining > Data Mining Operations*** and find the DMO to Submit.

}

1.5.1. Import Accounts into an Account Warehouse

Andar Main Menu > Data Mining > Account Warehouses > highlight desired Warehouse > Import > Browse to find CSV file > Import

Requires an existing CSV file.

Requires Individuals and / or Organizations to already have an Account Profile in Andar and you must have the Account Number.

Remove all columns from your file that are not the Organization Account Number or the Individual Account Number. Your file will have a separate column for each of these Account Number types.

The first column header must begin with #F# followed by the column name (see below).

Columns must be EXACTLY as follows:

- DWOrgAccount
- DWIndAccount

{

[*Clear Warehouse before Importing*] (76861 – 2014.01)

When this option is checked on an Import, all the Accounts that are currently in the Warehouses will be deleted from that Warehouse and the Accounts in the selected CSV file will replace them. When unchecked, the Accounts in the selected CSV file will be added to the Accounts that are currently in the Warehouse.

}

1.5.5. Personal Preferences

System > Preferences > Personal Preferences > Recent Items

When viewing the list of Account Warehouses (***Andar Main Menu > Data Mining > Account Warehouses***) there is a section at the top of the list that displays a number of Account Warehouses most recently used. This number can be controlled by setting your Personal Preference.

> ***Important!*** This is set for each User and does not affect other Users. The same setting is used to display the Recent Mailing Lists and Recent Data Mining Operations.

2. Pecking Orders

It is critical that you develop written Standards surrounding how you will input data (Names, Addresses, etc.) and that you distribute those Standards to all Andar Users. Pecking Orders should also be documented and their descriptions should be distributed to all Users so that everyone can know which Pecking Orders to use for their reports, Extracts and Mailing Lists.

Pecking Orders are used in Mailing Lists to help ensure that the mail can be sent to the intended Recipient regardless of what types of Addresses, e-Mails and other contact information is captured for the Recipients.

Each Pecking Order tells Andar which data types to choose for a set of selected Accounts. For example, you might have an e-Mail Pecking Order called Personal e-Mail Priority Pecking Order. It might be set up to say 'If the Account has a Personal e-Mail, use it. But if the Account does not have a Personal e-Mail, then look to see if the Account has a Work e-Mail, and if it does, use it.

You can have as many Pecking Orders as you want. It is important that you have enough Pecking orders to accommodate the needs of all your staff.

Andar Provided Pecking Orders

Andar Main Menu > System Administration > Pecking Order Maintenance

Set up the Default Pecking Orders listed below to meet your most common communication requirements. The following list is all the Pecking Orders that are shipped with your new Andar.

- **Name Pecking Order**
  - ***Default Name Type Pecking Order (Table 10501).***
  - ***System Default Name Pecking Order (Table 10503)***

- **Address Pecking Orders**
  - ***AR Statement Address Pecking Order (Table 11004)***
  - ***Home Address First Priority Pecking Order (Table 11002)***
  - ***IM Customer Order Ship To Address Pecking Order (Table 900999)***
  - ***Payroll Statement Address Pecking Order (Table 11003)***
  - ***System Default Home Address Pecking Order (Table 11005)***
  - ***System Default Workplace Address Pecking Order (Table 11006)***
  - ***Workplace Address First Pecking Order (Table 11001)***

- **Salutation Pecking Orders**
  - ***Combined Giver Salutation Pecking Order (Table 11503)***
  - ***Formal Salutation Type Pecking Order (Table 11501)***
  - ***Informal Salutation Pecking Order (Table 11502)***
  - ***President's Salutation Pecking Order (Table 11504)***
  - ***System Default Salutation Pecking Order (Table 11505)***

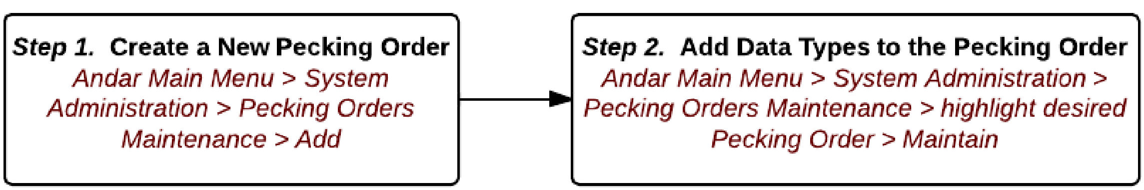
- **E-Mail Pecking Orders**
  - *Personal e-Mail Priority Pecking Order (Table 12502)*
  - *System Default General e-Mail Pecking Order (Table 12504)*
  - *System Default Home e-Mail Pecking Order (Table 12505)*
  - *System Default Workplace e-Mail Pecking Order (Table 12506)*
  - *Workplace e-Mail Priority Pecking Order (Table 12501)*

- **Phone Number Pecking Orders**
  - *Home Phone Number Priority Pecking Order (Table 13502)*
  - *System Default Home Phone Number Pecking Order (Table 13505)*
  - *System Default Workplace Phone Number Pecking Order (Table 13506)*
  - *Workplace Phone Number Priority Pecking Order (Table 13501)*

- **Fax Pecking Order**
  - *Home Fax Number Priority Pecking Order (Table 13602)*
  - *Work / Business Fax Number Priority Pecking Order (Table 13601)*

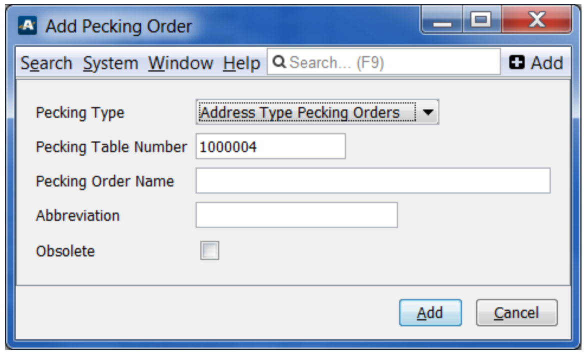
- **Contact Pecking Order**
  - *ECC CEO Contact Priority Pecking Order (Table 13001)*
  - *System Default General Contacts e-Mail Pecking Order (Table 13005)*

2.1. Create a New Pecking Order



Step 1. Create a New Pecking Order

Andar Main Menu > System Administration > Pecking Orders Maintenance > Add



- **Pecking Type.** Select the type of Pecking Order you want to create.
  - *Address Type Pecking Orders*
  - *Contact Type Pecking Orders*
  - *e-Mail Type Pecking Orders*
  - *Fax Number Type Pecking Orders*
  - *Manager Type Pecking Orders*
  - *Name Type Pecking Orders*
  - *Phone Type Pecking Orders*
  - *Salutation Type Pecking Orders*

- **Pecking Table Number.** This will be the Table Number for your new Pecking Order. It must be a number between 1,000,000 and 1,999,999.

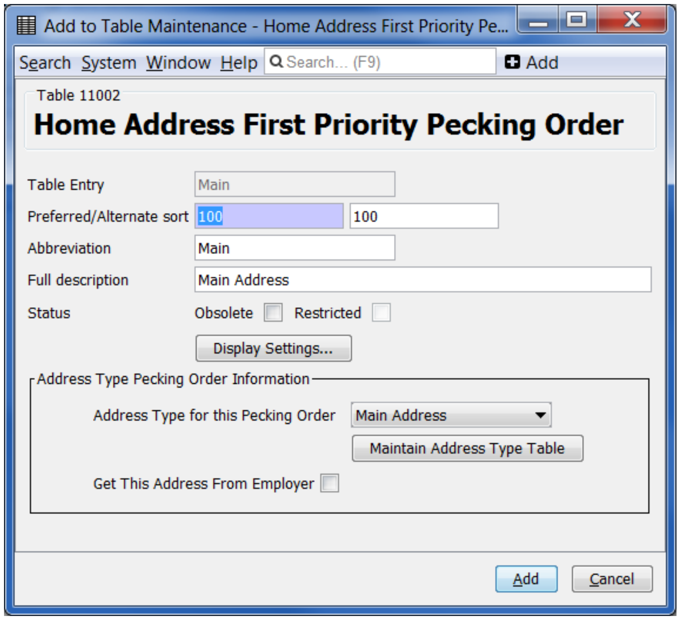
- **Pecking Order Name.** This will be the name of your new Pecking Order. It should be something that clearly defines what is in the Pecking Order.

- **Abbreviation.** Andar requires every Table to have an Abbreviation. It can be the same as the Pecking Order Name.

- **Obsolete.** N/A

Step 2. Add Data Types to the Pecking Order

Andar Main Menu > System Administration > Pecking Orders Maintenance > highlight desired Pecking Order > Maintain



Add Data Types to be included in the new Pecking Order and enter a Preferred Sort Number for each.

- **Table Entry**
- **Preferred Sort.** Andar will use the lowest number first. It is recommended that you use numbers in increments of 100 so you can easily go back and insert another entry between two existing ones. For example, if you have one entry that has a Preferred Sort of 100 and another that is 200 and you want to put third entry between them you could add it with a Preferred Sort of 150.
- **Alternate Sort.** This number provides a secondary way to sort the Pecking Order.
- **Abbreviation**
- **Full Description.** This is the Name of your Pecking Order.
- **Status**
    - **Obsolete.** When checked, the Data Item will not be included in the Pecking Order.

  - **Restricted.** When checked, the Data Item has functionality built into Andar.

- **Display Settings.** This option allows you to make the Data Item stand out by making the print bold, change the background color, etc.

- **Address Type Pecking Order Information.** Address Pecking Orders only.

  - **Address Type for This Pecking Order.** Choose the desired Address Type to be included in the Pecking Order.

    - ✶ **Maintain Address Type Table.** This option allows you to add or update Address Types (Table 7).

  - **Get This Address From Employer.** When Adding / Editing Address Types for Address Pecking Orders this option takes an Individual Account and looks for its Employee Relationship and uses the selected Address Type on the Organization Account of the Employer.

- **Contact Type Pecking Order Information.** Contact Pecking Orders only.

  - **Contact Type for This Pecking Order.** Choose the desired Contact Type to be included in the Pecking Order.

    - ✶ **Maintain Contact Type Table.** This option allows you to add or update Contact Types (Table 17).

- **E-Mail Type Pecking Order Information.** E-Mail Pecking Orders only.

  - **E-Mail Type For This Pecking Order.** Choose the desired e-Mail Type to be included in the Pecking Order.

    - ✶ **Maintain e-Mail Type Table.** This option allows you to add or update e-Mail Types (Table 68).

- **Fax Number Pecking Order Information.** Fax Pecking Orders only.

  - **Fax Number Type for This Pecking Order.** Choose the desired Fax Number Type to be included in the Pecking Order.

- ✶ **Maintain Fax Number Type Table.** This option allows you to add or update Fax Number Types (Table 10).

- **Manager Type Pecking Order Information.** Manager Pecking Orders only.
  - o **Manager Type for This Pecking Order.** Choose the desired Manager Type to be included in the Pecking Order.
    - ✶ **Maintain Manager Type Table.** This option allows you to add or update Manager Types (Table 31).

- **Name Type Pecking Order Information.** Name Pecking Orders only.
    - ✶ **Name Type for This Pecking Order.** Choose the desired Name Type to be included in the Pecking Order.
  - o **Maintain Name Type Table.** This option allows you to add or update Name Types (Table 5).

- **Phone Number Type Pecking Order Information.** Phone Number Pecking Orders only.
  - o **Phone Number Type for This Pecking Order.** Choose the desired Phone Number Type to be included in the Pecking Order.
    - ✶ **Maintain Phone Number Type Table.** This option allows you to add or update Phone Number Types (Table 10).
  - o **Get This Phone Number From Employer.** When Adding / Editing Phone Types for Phone Pecking Orders this option takes an Individual Account and looks for its Employee Relationship and uses the selected Phone Type on the Organization Account of the Employer.

- **Salutation Type Pecking Order Information.** Salutation Pecking Orders only.
  - o **Salutation Type for This Pecking Order.** Choose the desired Salutation Type to be included in the Pecking Order.

- ✶ **Maintain Salutation Type Table.** This option allows you to add or update Salutation Types (Table 18).

2.2. Edit Existing Pecking Orders

When Andar provides data based on a Pecking Order it gives you the data from the lowest Preferred Sort Number first. For example, if the Preferred Sort for Main Address is 100 and Mailing Address is 200 Andar will look first for the Main Address. If it is found that's what you'll get. If there is no Main Address it will look for the Mailing Address. If it is found that's what you'll get. If there is no Mailing Address it would look for the next highest Preferred Sort Number in the Pecking Order.

Change the Order of Items in a Pecking Order

Andar Main Menu > System Administration > Pecking Order Maintenance > Maintain

- **Preferred Sort.** Andar will use the lowest number first. It is recommended that you use numbers in increments of 100 so you can easily go back and insert another entry between two existing ones. For example, if you have one entry that has a Preferred Sort of 100 and another that is 200 and you want to put third entry between them you could add it with a Preferred Sort of 150.

Add New Items to a Pecking Order

Andar Main Menu > System Administration > Pecking Order Maintenance > highlight desired Pecking order > Maintain > Add

See *Step 2*. Add Data Types to the Pecking Order above for more information.

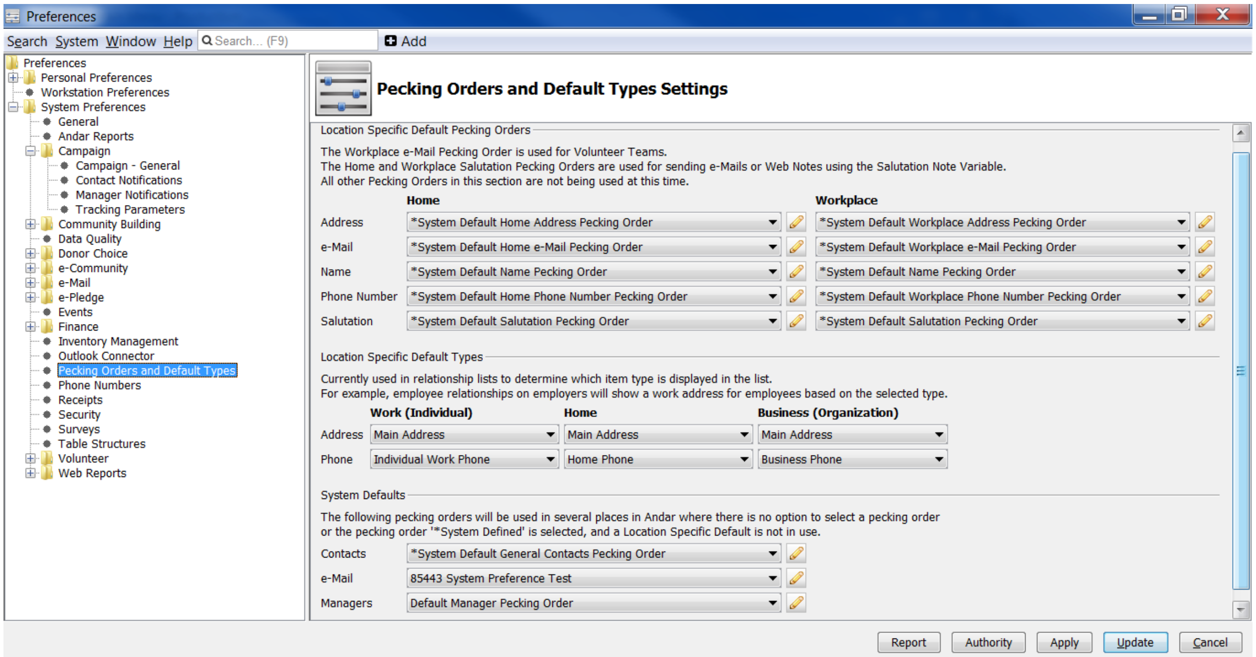
{

2.3. System Default Pecking Orders

Andar provides the ability for you to determine your system-wide defaults for Pecking Orders.

System Preferences *(71022 – 2013.01)*

System > Preferences > System Preferences > Pecking Orders and Default Types



[Location Specific Default Pecking Orders Section]()

- **Workplace > e-Mail.** This Pecking Order is used for Volunteer Teams.
- **Home / Workplace > Salutation.** This Pecking Order is used for Web Notes or e-Mails when the Salutation Note Variable is used.

All other Pecking Orders in this section are not being used at this time.

System Defaults Section

- **Contacts.** This Contact Pecking Order will be used throughout Andar when you see a Contact but there is no option to select the Contact Type or Contact Pecking Order.
- **E-Mail.** This e-Mail Pecking Order will be used throughout Andar when you see an e-Mail but there is no option to select the e-Mail Type or e-Mail Pecking Order.

- **Managers.** ***Requires a MIG license.*** This Manager Pecking Order is used to determine the Manager Type that will be displayed on Hot Button pop-ups.

}

3. Custom Spreadsheets (Extract Data)

Insert Section > Extract Data and Download

It's not always possible to get the information you want out of Andar by running a canned report. So, one of the primary reasons for creating a DMO is to create a spreadsheet that lists the Accounts that you want and contains the pieces of data about those Accounts that you want.

- ➪ **Extract Data and Download.** This option allows you to specify the data elements that are to be extracted from the selected Accounts, and to indicate where you want the extracted data to go.

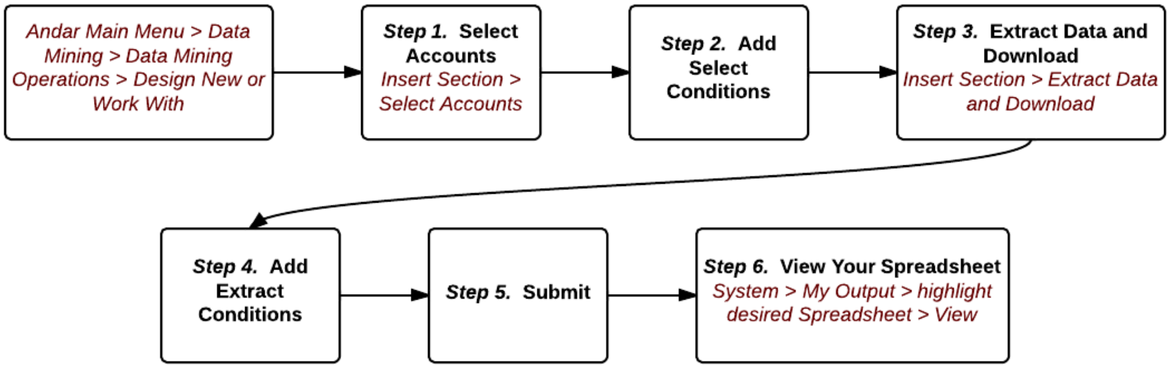
- ➪ **Extract Data.** Extract and Download can be split into two steps, Extract Data and Download Extract to My Output. This option allows you to name your Extract file, which is useful for SQL or Access queries on the data Extracted.

- ➪ **Download Extract to My Output.** Extract and Download can be split into two steps, Extract Data and Download Extract to My Output. This option is nearly obsolete because you can now perform this step automatically in Extract Data and Download or perform this step by combining it with Extract Data. It is only necessary if you are not using Extract Data and Download or if you selected not to submit the Download within Extract Data.

3.1. Create a Custom Spreadsheet

Insert Section > Extract Data and Download

In a DMO, the Select Accounts section is used to select the Accounts (who). For the spreadsheet, the Extract Data and Download section will be used to indicate that you want a spreadsheet. And finally, the Extract Conditions define the information to be included in the spreadsheet (what).



Step 1. Select Accounts

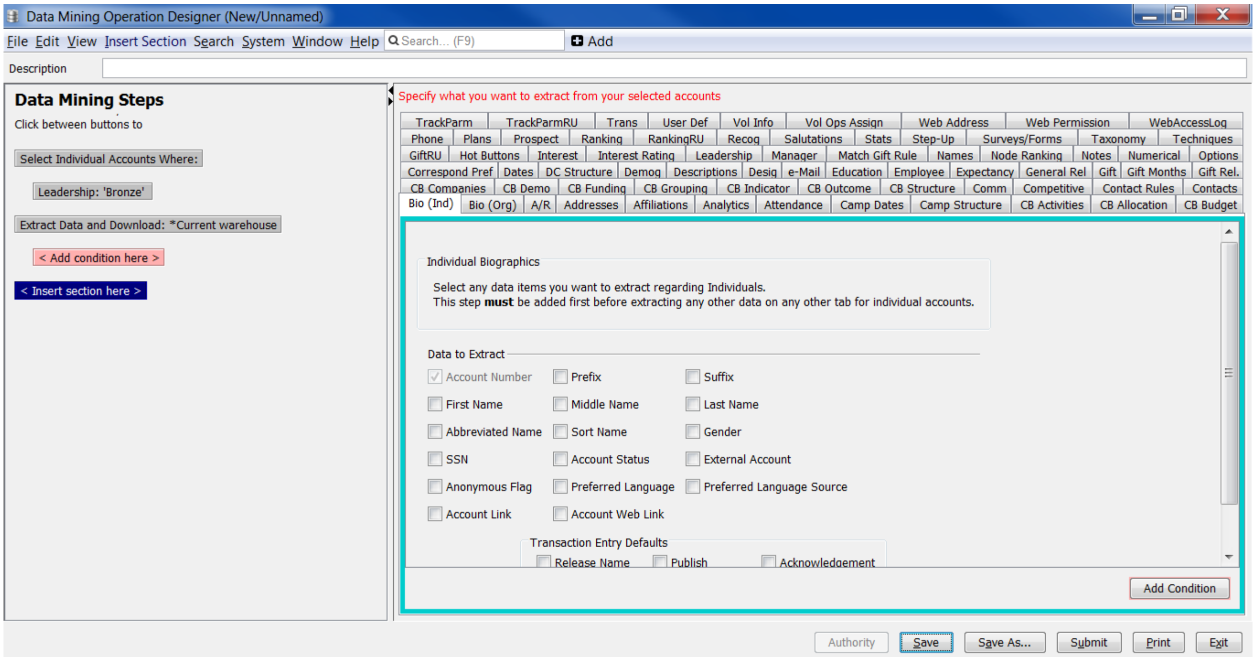
Insert Section > Select Accounts

Step 2. Add Select Conditions

Select Conditions from the right panel.

Step 3. Extract Data and Download

Step 4. Add Extract Conditions



After inserting this section you must specify what you want to see in columns of the spreadsheet. This is done by adding Extract Conditions in the DMO. On the left you will see an Add Condition Here and on the right you will see a series of Tabs. Each Tab will contain checkboxes which define the data to be included on your spreadsheet.

Important! You must select at least one of the Bio Tabs (Individual or Organization) to your Data Mining Steps. If you selected Individual Accounts, you must also select the Individual Bio Tab. If you selected Organization Accounts, you must also select the Organization Bio Tab. If you selected one of the Relationship options you must select both the Individual Bio Tab and the Organization Bio Tab. If you selected Account Warehouse or Mailing List you must make the Bio Tab selection based on the Accounts in the Warehouse or Mailing List.

{

Extract Condition Tabs

Extract Condition Tabs typically contain two types of options. First there will be options to filter the data that is included in the spreadsheet. For example, you want all Leadership Donors and you want to see their Main Address. When you choose the Addresses Tab you will select the Main Address and you will get only that Address Type, not any other Address Types. The second option is usually called Data to Extract. This defines the columns that will be included in the spreadsheet. See the Data Mining Training Supplement or Andar Help for more information on the specific Extract Condition Tabs.

- *A/R*
- *Addresses*
- *Affiliations*
- *Analytics*
- *Attendance*
- *Bio (Individual)*
- *Bio (Organization)*
- *Campaign Dates*
- *Campaign Structure*
- *CB Activities*
- *CB Allocation*
- *CB Budget*
- *CB Companies*
- *CB Demographics*
- *CB Funding*
- *CB Grouping*
- *CB Indicator*
- *CB Outcome*
- *CB Structure*
- *Communications*
- *Competitive*
- *Contact Rules*
- *Contacts*
- *Correspondence Preferences*
- *Dates*
- *Demographics*
- *Descriptions*
- *Designations*
- *Donor Choice Structure*
- *Education*
- *E-Mail*
- *Employee*
- *Expectancy*
- *General Relationships*
- *Gift*
- *Gift Months*
- *Gift Relationships*
- *Gift Rollup*
- *Hot Buttons*
- *Interest*
- *Interest Rating*
- *Leadership*
- *Mailing*
- *Manager*
- *Match Gift Rule*
- *Names*
- *Node Ranking*
- *Notes*
- *Numerical*
- *Options*
- *Phone*
- *Plans*
- *Prospect*
- *Ranking*
- *Ranking Rollup*
- *Recognition*

- *Salutations*
- *Step-Up*
- *Surveys / Forms*
- *Taxonomy*
- *Techniques*
- *Tracking Parameters*
- *Tracking Parameters Rollup*
- *Transactions*
- *User Defined*
- *Volunteer Info*
- *Volunteer Ops Assigned*
- *Web Permission*

}

Step 5. Submit

Step 6. View Your Spreadsheet

System > My Output > highlight desired Spreadsheet > View

4. Mailing Lists

Like an Account Warehouse, a Mailing List is also a collection of Accounts (Individuals, Organizations or sets of Individuals and Organizations). In addition, a Mailing List includes a set of instructions. These instructions tell Andar how to find the desired types of Names, Salutations, Addresses, Phone Numbers, e-Mail Addresses and Contacts for the Accounts in the Mailing List. This information will be current with the Mailing List is Downloaded.

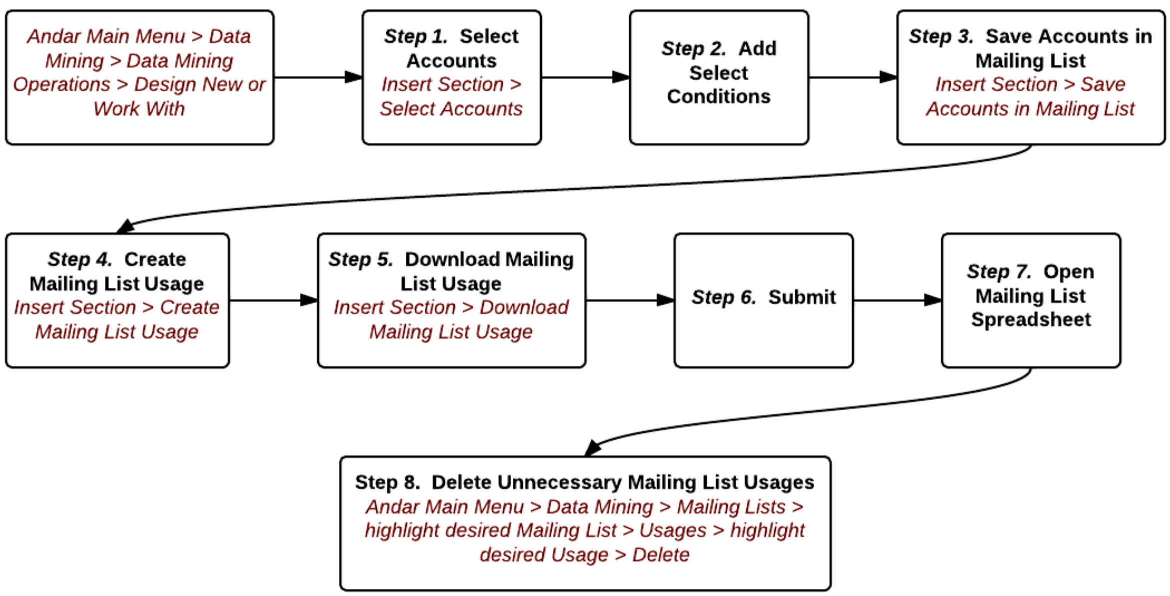
Mailing Lists can be created once and may then be used over and over. You tell Andar to use the Mailing List again by creating a new Mailing List Usage. The Usage follows the instructions from the Mailing List and produces the list with Names, Addresses, etc.

For example, you can create a Mailing List that includes Harry Spencer. On June 1, Harry lives live in Blue Ridge. You create a Mailing List Usage on June 1 and it will show his Address in Blue Ridge. A week later he moves to Blairsville. You create another Mailing List Usage on June 30 and it will show his Address in Blairsville.

There are several ways to produce and manage Mailing Lists. The method you choose is a matter of your preference and a matter of whether or not you need just contact information or other data to be merged into your letter / e-mail.

> **Helpful Tip**
>
> *When you have multiple Accounts that are linked using a Combined Giver Relationship choose one of those Accounts as the 'primary' account. It might be the person who gives the most money, it might be the man, or it might be the person who has been giving to you the longest. The decision is up to you, but it is important that there be a 'primary' Account.*
>
> *You will need to add a Formal Combined Salutation and / or an Informal Combined Salutation to that 'primary' Account. It should not be added to the 'secondary' Account.*

4.1. Mailing List Option 1



Step 1. Select Accounts

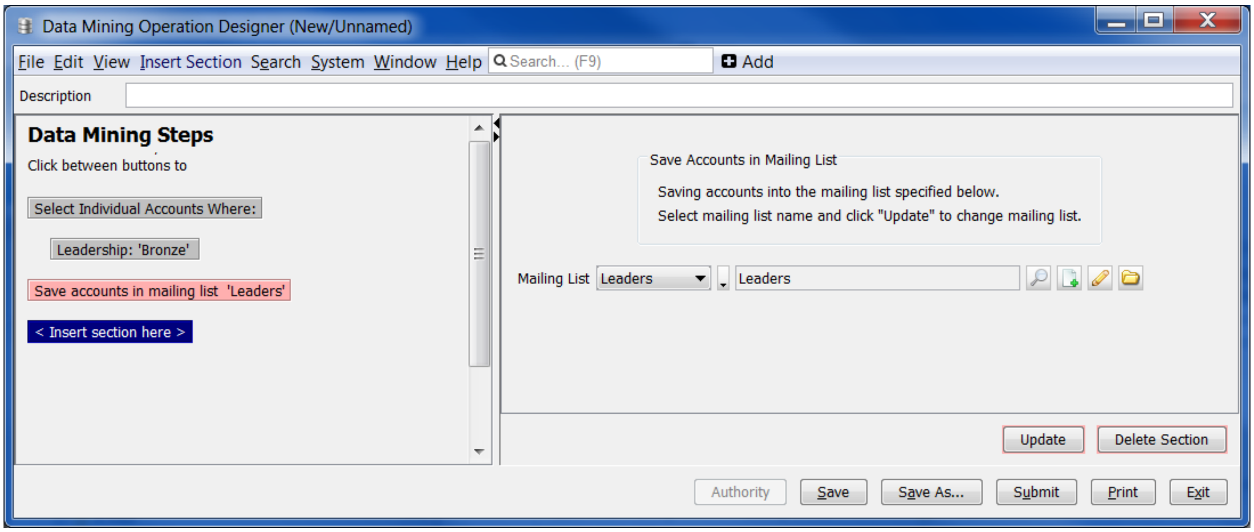
Insert Section > Select Accounts

Step 2. Add Select Conditions

Select Conditions from the right panel.

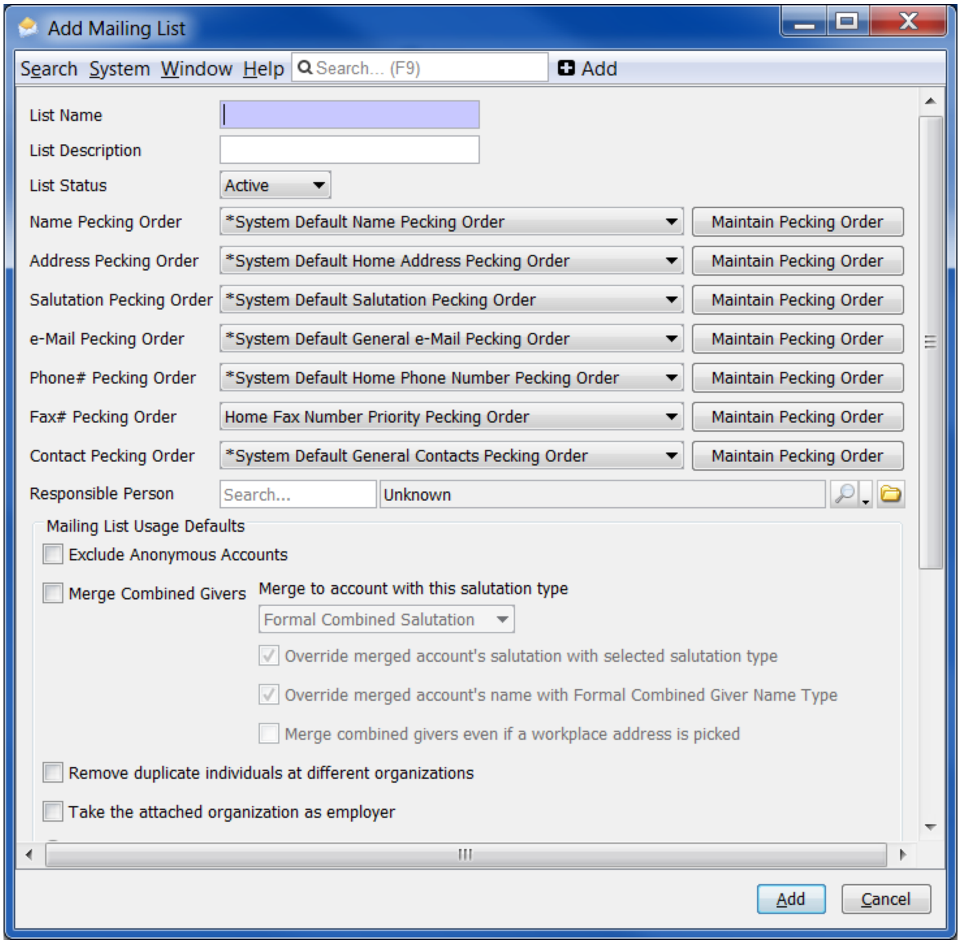
Step 3. Save Accounts in Mailing List

Insert Section > Save Accounts > In Mailing List



- **Mailing List Name.** If you want to create a new Mailing List, click the Add icon. If you want to replace the contents of a pre-existing Mailing List, select that Mailing list here.

- **Add.** Because you need to think about Pecking Orders for a Mailing List you need to take extra steps.



- **List Name.** Be consistent in naming your DMO items. This will help you in the future to know which DMO created which Mailing List.

- **List Description**

- **List Status**

- **Pecking Orders.** Select the Name Pecking Order that will give you the best results for your current need.

  If you don't already know how a Pecking Order behaves *select the desired Pecking Order > click Maintain Pecking Order > click on the Pref column header*. Andar will use the lowest Preference first. If there are multiple Types with the same Preference Number, they will be used alphabetically.

  If none of the existing Pecking Orders meet your needs, contact your System Administrator to create a new one.

- *Name Pecking Order*
- *Address Pecking Order*
- *Salutation Pecking Order*
- *e-Mail Pecking Order*
- *Phone Pecking Order*
- *Fax Pecking Order*
- *Contact Pecking Order*

- **Responsible Person**

- **Mailing List Usage Defaults Section.** As previously described, a Mailing List Usage is a list of Accounts and instructions about how to retrieve their Names, Addresses, e-Mails, etc. for those Accounts. A Mailing List Usage is that same list of Accounts but with the actual data (Name, Address, e-Mail, etc.).

> ***Important!*** This section on the Mailing List screen does not actually create a Mailing List Usage. It allows you to provide default values to use any time a Mailing List Usage is created for this Mailing List. Later, when you actually create a Mailing List Usage, you may use the defaults or you may choose different options.

- **Exclude Anonymous Accounts.** When checked, any Account that has been marked as Anonymous (***Individual / Organization Account Profile > Contact Information Tab > Privacy Defaults Sub Tab > Anonymous Checkbox***) will be removed from this Usage.

- **Merge Combined Givers.** When checked, you will get one record for all Accounts that share a Combined Giver Relationship. For example, if Roy and Rhonda each have an Individual Account, and if both have been selected, and if they share a Combined Giver Relationship, and if only one of the Accounts has a Combined Salutation, the Mailing List Usage will include only one of the Accounts (instead of both of them). This allows you to send a single piece of mail to the household.

  - **Merge To Account With This Salutation Type.** When you have one or more Accounts that are linked by a Combined Giver Relationship, you should add a Combined Salutation to one (and only one) of those Accounts. This is typically a Formal Combined Salutation or an Informal Combined Salutation (or both).

* **Override Merged Account's Salutation with the Selected Salutation Type.** When you choose this option and select a specific Salutation Type here, the selected Type will be used instead of the Salutation from the Pecking Order.

* **Override Merged Account's Name with Formal Combined Giver Name.** When you choose this option and select a specific Name Type here, the selected Type will be used instead of the Name from the Pecking Order.

* **Merge Combined Givers Even If A Workplace Address Is Picked.** If the Address Pecking Order that was specified in the Mailing List results in a Workplace (@ Employer or Individual Work) Address being used for the Merged Combined Givers, do you still want to Merge the Accounts? For example, the letter would be addressed to Mr. And Mrs. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA. When unchecked, the letter would be addressed to the primary Account in the Combined Giver Relationship. For example, Mr. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA.

✶ **Remove Duplicate Individuals At Different Organizations.** If an Individual is related to multiple Organizations (Employee, Contact, Manager, Affiliation, etc.) and, based on your selections the Individual is pulled more than once (for example, they could be a CEO of ABC Company and a CEO Call Volunteer for XYZ Company) Andar recognizes each combination of Individual Account Number and Organization Account Number as unique, therefore you would get the Individual twice, once for each Organization. This option tells Andar to ignore the related Organization Account Number and give you the Individual only once based on their Individual Account Number. The record with the highest Organization Account Number is the one that will be kept.

- **Take The Attached Organization As Employer.** ***Not Recommended.*** This option tells Andar to use the Address of any related Organization (even if it is not the Individual's Employer) and send the Individual's mail to that Address. For example, if you select Agency Board Member Affiliations and you check this option, Andar would assume (for this Mailing List Usage only) that the Agency is their Employer and look at that Agency's Address as the @ Employer Address. So their 'letter' would go to the Agency instead of their actual Employer.

- **Contact Rules.** These options are above and beyond the selection criteria you may have in your Data Mining Operation. It is for the Mailing List Usage download only. For example, the Mailing List might include Opt Out Accounts, but for this Usage download you do not want them.

  - **Include All Accounts.** When selected, the Mailing List Usage will include all Accounts in the Mailing List regardless of whether they have any Contact Rules or not.

  - **Only Include Opt In Accounts (Organization Policy / System Preference).** When selected, the Mailing List Usage will include only Accounts that have an Opt In Contact Rule set. If there is no Contact Rule on the Account that Account would not be included.

  - **Exclude Opt Out Accounts.** When selected, the Mailing List Usage will not include any Account that has an Opt Out Contact Rule set. If there is no Contact Rule on the Account it will be included.

  - **Categories.** ***Requires a MIG license.*** If you choose to have this Mailing List Usage consider Contact Rules by selecting one of the options above, you will also need to tell Andar which Category(ies) to look at.

{

> ***Important!*** If you select All Categories it will only look at Contact Rules with a Category selection of All. If the Contact Rule has a specific Category (like Newsletter, Solicitation, etc.) it will not be considered in the selection of All.

}

- ✶ **Generate Care Of Accounts.** ***Requires a MIG license.*** When checked, if an Account that is in the Mailing List has a Care Of Relationship, the Care Of Account information will be used instead of the selected Account's information.

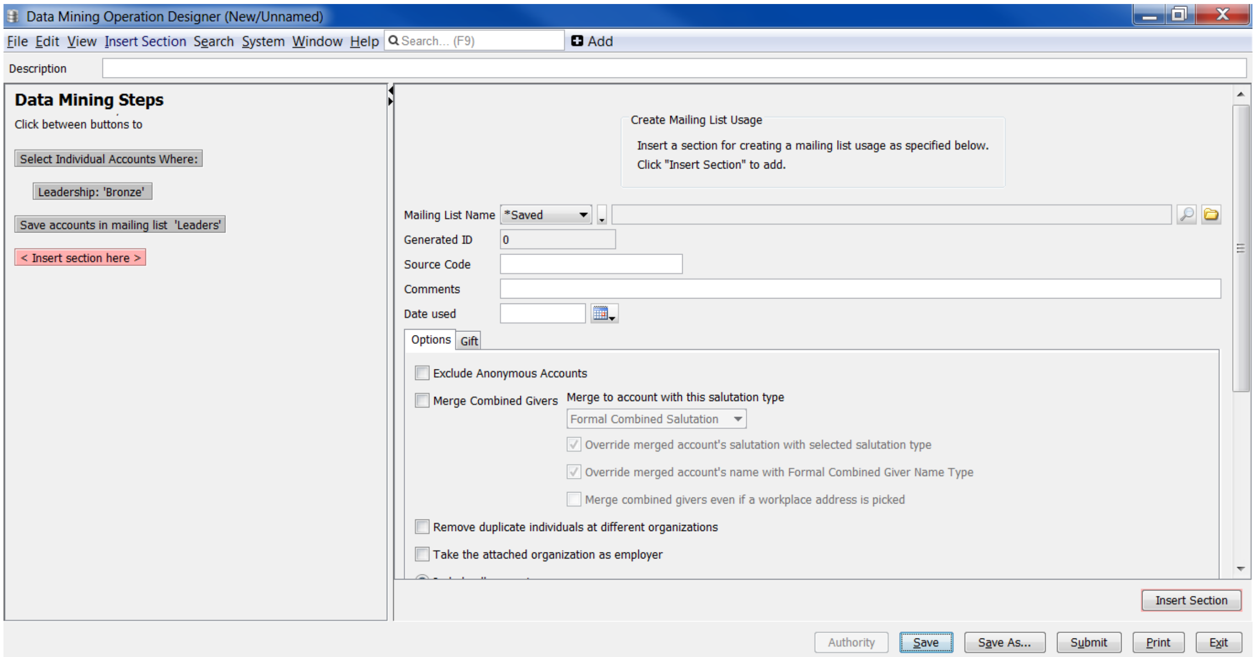
- ✶ **Exclude Blank Accounts.** When checked, after a Mailing List Usage is generated, if the selected Mail Types (below) are all blank then the Account will not be included in the Mailing List Usage.

- ✶ **Mail Types.** Select each Mail Type to allow that information to be included in the Mailing List Usage (and therefore available for downloading).

  If the Save Accounts in Mailing List step is followed by the Extract Data and Download step or Extract Data step, this determines which fields will be populated on the Mailing Tab, based on your selected Pecking Orders. For example, if you are doing Postal mail, select Postal. If you will be using your data file for both Postal mail as well as e-Mail, select both. If you do not select a Type, the fields will not be populated even if you select them from the Mailing Tab in the Extract step.
  - *By Postal (Addresses)*
  - *By e-Mail*
  - *By Phone*
  - *By Fax*

Step 4. Create Mailing List Usage

Insert Section > Create Mailing List Usage



A Mailing List is a list of Accounts, along with instructions about how to retrieve the selected Accounts' contact information (via Pecking Orders). A Mailing List does not include the actual Names, Addresses, e-Mails, etc.

To see the actual Names, Addresses, e-Mails, etc., you need a Mailing List Usage. A Mailing List Usage contains the list of Account Numbers that were in the Mailing List but it also includes their contact information (Names, Addresses, e-Mails, Phone Numbers).

- **Mailing List Name**

- **Generated ID.** This is an identifier created by Andar.

- **Source Code.** By default each Mailing List Usage will have a Source Code. You can customize the Source Code as needed.

  A Source Code allows you to track Constituents who got a specific piece of mail, how many responses you got and how much money was generated from that mailing. Response to a Mailing is tracked through Pledge Processing. You will need to print the Source Code on every piece of the Mailing including the return envelope. You will need to notify Pledge Processing to look for the Source Code on incoming mail. The Source Code is then entered on the Pledge Transaction.

- **Comments**

{

- **Date Used.** This field will provide the last Date the Mailing List Usage was Downloaded or used in an Andar e-Mail.

}

- **Options Tab**

    - **Exclude Anonymous Accounts.** When checked, any Account that has been marked as Anonymous (*Individual / Organization Account Profile > Contact Information Tab > Privacy Defaults Sub Tab > Anonymous Checkbox*) will be removed from this Usage.

    - **Merge Combined Givers.** When checked, you will get one record for all Accounts that share a Combined Giver Relationship. For example, if Roy and Rhonda each have an Individual Account, and if both have been selected, and if they share a Combined Giver Relationship, and if only one of the Accounts has a Combined Salutation, the Mailing List Usage will include only one of the Accounts (instead of both of them). This allows you to send a single piece of mail to the household.

        - **Merge To Account With This Salutation Type.** When you have one or more Accounts that are linked by a Combined Giver Relationship, you should add a Combined Salutation to one (and only one) of those Accounts. This is typically a Formal Combined Salutation or an Informal Combined Salutation (or both).

        - **Override Merged Account's Salutation with the Selected Salutation Type.** When you choose this option and select a specific Salutation Type here, the selected Type will be used instead of the Salutation from the Pecking Order.

        - **Override Merged Account's Name with Formal Combined Giver Name Type.** When you choose this option and select a specific Name Type here, the selected Type will be used instead of the Name from the Pecking Order.

- ✶ **Merge Combined Givers Even If A Workplace Address Is Picked.** If the Address Pecking Order that was specified in the Mailing List results in a Workplace (@ Employer or Individual Work) Address being used for the Merged Combined Givers, do you still want to Merge the Accounts? For example, the letter would be addressed to Mr. And Mrs. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA. When unchecked, the letter would be addressed to the primary Account in the Combined Giver Relationship. For example, Mr. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA.

- o **Remove Duplicate Individuals At Different Organizations.** If an Individual is related to multiple Organizations (Employee, Contact, Manager, Affiliation, etc.) and, based on your selections the Individual is pulled more than once (for example, they could be a CEO of ABC Company and a CEO Call Volunteer for XYZ Company) Andar recognizes each combination of Individual Account Number and Organization Account Number as unique, therefore you would get the Individual twice, once for each Organization. This option tells Andar to ignore the related Organization Account Number and give you the Individual only once based on their Individual Account Number. The record with the highest Organization Account Number is the one that will be kept.

- o **Take The Attached Organization As Employer.** ***Not Recommended.*** This option tells Andar to use the Address of any related Organization (even if it is not the Individual's Employer) and send the Individual's mail to that Address. For example, if you select Agency Board Member Affiliations and you check this option, Andar would assume (for this Mailing List Usage only) that the Agency is their Employer and look at that Agency's Address as the @ Employer Address. So their 'letter' would go to the Agency instead of their actual Employer.

- o **Contact Rules.** These options are above and beyond the selection criteria you may have in your Data Mining Operation. It is for the Mailing List Usage download only. For example, the Mailing List might include Opt Out Accounts, but for this Usage download you do not want them.

  - ✶ **Include All Accounts.** When selected, the Mailing List Usage will include all Accounts in the Mailing List regardless of whether they have any Contact Rules or not.

- **Only Include Opt In Accounts (Organization Policy / System Preference).** When selected, the Mailing List Usage will include only Accounts that have an Opt In Contact Rule set. If there is no Contact Rule on the Account that Account would not be included.

- **Exclude Opt Out Accounts.** When selected, the Mailing List Usage will not include any Account that has an Opt Out Contact Rule set. If there is no Contact Rule on the Account it will be included.

- **Categories.** ***Requires a MIG license.*** If you choose to have this Mailing List Usage consider Contact Rules by selecting one of the options above, you will also need to tell Andar which Category(ies) to look at.

{

Important! If you select All Categories it will only look at Contact Rules with a Category selection of All. If the Contact Rule has a specific Category (like Newsletter, Solicitation, etc.) it will not be considered in the selection of All.

}

- **Generate Care Of Accounts.** ***Requires a MIG license.*** When checked, if an Account that is in the Mailing List has a Care Of Relationship, the Care Of Account information will be used instead of the selected Account's information.

- **Exclude Blank Accounts.** When checked, after a Mailing List Usage is generated, if the selected Mail Types (below) are all blank then the Account will not be included in the Mailing List Usage.

- **Mail Type.** Select each Mail Type to allow that information to be included in the Mailing List Usage (and therefore available for downloading).

  If the Save Accounts in Mailing List step is followed by the Extract Data and Download step or Extract Data step, this determines which fields will be populated on the Mailing Tab, based on your selected Pecking Orders. For example, if you are doing Postal mail, select Postal. If you will be using your data file for both Postal mail as well as e-Mail, select both. If you do not select a Type, the fields will not be populated even if you select them from the Mailing Tab in the Extract step.

  - ***By Postal (Addresses)***
  - ***By e-Mail***

- *By Phone*
- *By Fax*

- **Gift Tab**

  - **Number of Names.** Only available when viewing a Mailing List Usage from *Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage*, not when viewing / adding it from inside a DMO. It will be populated when Mailing List Usage is added. This shows the Number of Names that were included in the Usage.

  - **Costs.** This is only available when viewing a Mailing List Usage from *Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage*, not when viewing / adding it from inside a DMO.

    It allows you to track the Cost of a specific Mailing. You can use this to compare the Cost against the Total Pledges received from the Mailing.

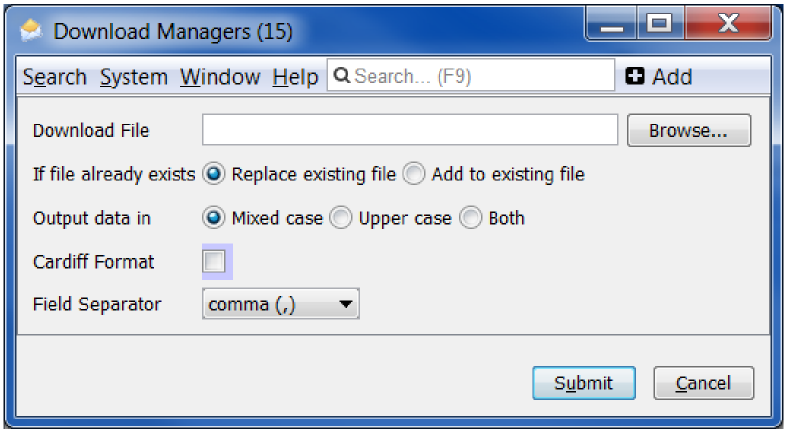
  - **Number of Responses.** This is only available when viewing a Mailing List Usage from *Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage*, not when viewing / adding it from inside a DMO.

    Response to a Mailing is tracked through Pledge Processing. You will need to print the Source Code on every piece of the Mailing including the return envelope. You will need to notify Pledge Processing to look for the Source Code on incoming mail. The Source Code is entered on Pledge Transaction. As Pledges are entered Andar will calculate the Number of Responses received with the specified Source Code.

  - **Total Pledge.** This is only available when viewing a Mailing List Usage from *Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage*, not when viewing / adding it from inside a DMO.

    As Pledges are entered Andar will calculate the Total Pledge Amount received with the specified Source Code.

Step 5. Download Mailing List Usage



Downloading a Mailing List Usage allows you to produce a spreadsheet containing Account contact information. This only downloads the Usage data (Name, Address, e-Mail, Phone Number). It does not download other types of information (such as Gifts, Dates, Ranking, etc.). If your goal is to produce a spreadsheet that includes more than just the data needed for a mailing label, you should use Mailing List Option 2 (see page 52 for more information) which uses the Extract Data feature.

- **Mailing List.** *Saved will use the Mailing List just created in this DMO or you can select the name of the Mailing List.

- **Mailing List Usage.** *Last Usage will use the Mailing List Usage just created in this DMO or you can select the name of the Mailing List Usage.

- **File Name.** This will be the name of the file once it's saved. It is recommended that you use the Browse button to find the location to which the file is to be saved. The path should be short. For example: c:/Jim/Mail not C/Jim/Andar/ Board/2005/Special/Mail. The folder to which the file should be saved must be in the look in field at the top of the browse window.

Important! The file Name MUST be followed by .csv.

- **If File Already Exists**

    - **Replace Existing File**

  - **Add To Existing File.** If you've already got a file with the same name this option will add these downloaded records to the end of that file.

- **Output Data In**
  - **Mixed Case.** Regardless of how the data appears in Andar this will download it in upper and lower case.
  - **Upper Case.** Regardless of how the data appears in Andar this will download it in upper case.
  - **Both.** If some selected data is stored in Andar in Mixed Case and some in Upper Case this option will download it as it is.

- **Cardiff Format.** Provides a scan line that can be used when scanning incoming Pledge Forms.

- **Field Separator.** ***Important!*** You must choose Comma as the Field Separator.

Step 6. Submit

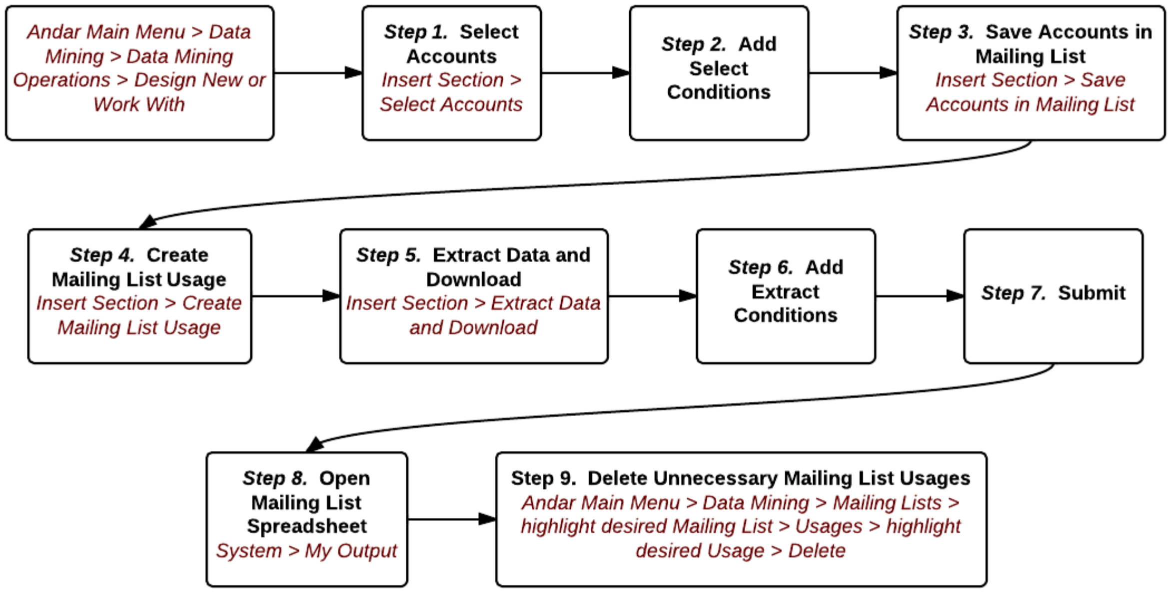
Step 7. Open Mailing List Spreadsheet

Your spreadsheet can be found in the location you identified to save it.

Step 8. Delete Unnecessary Mailing List Usages

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usages > highlight desired Usage > Delete

4.2. Mailing List Option 2



Step 1. Select Accounts

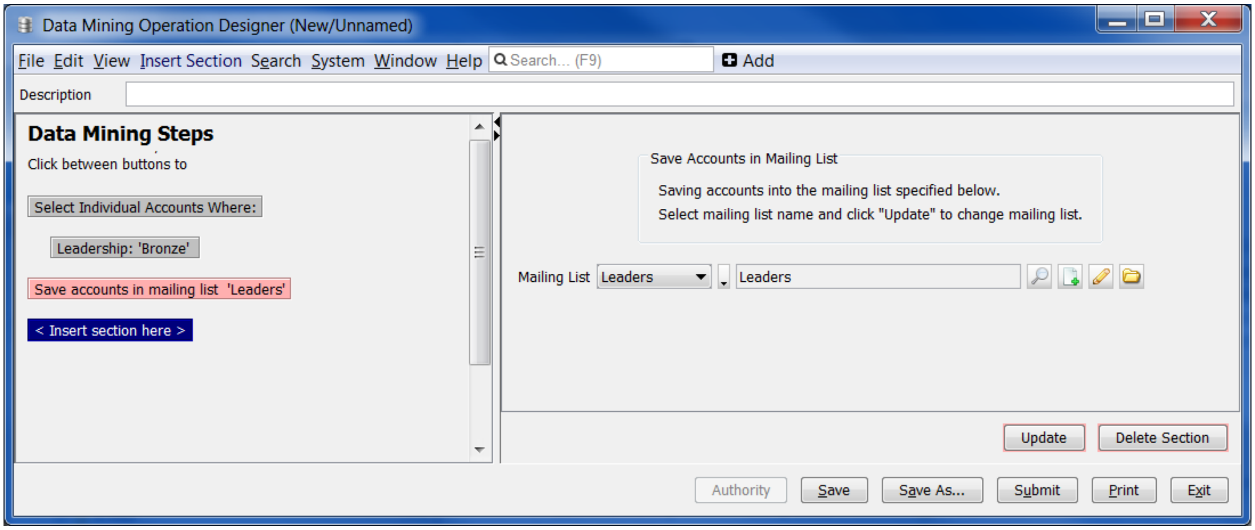
Insert Section > Select Accounts

Step 2. Add Select Conditions

Select Conditions from the right panel.

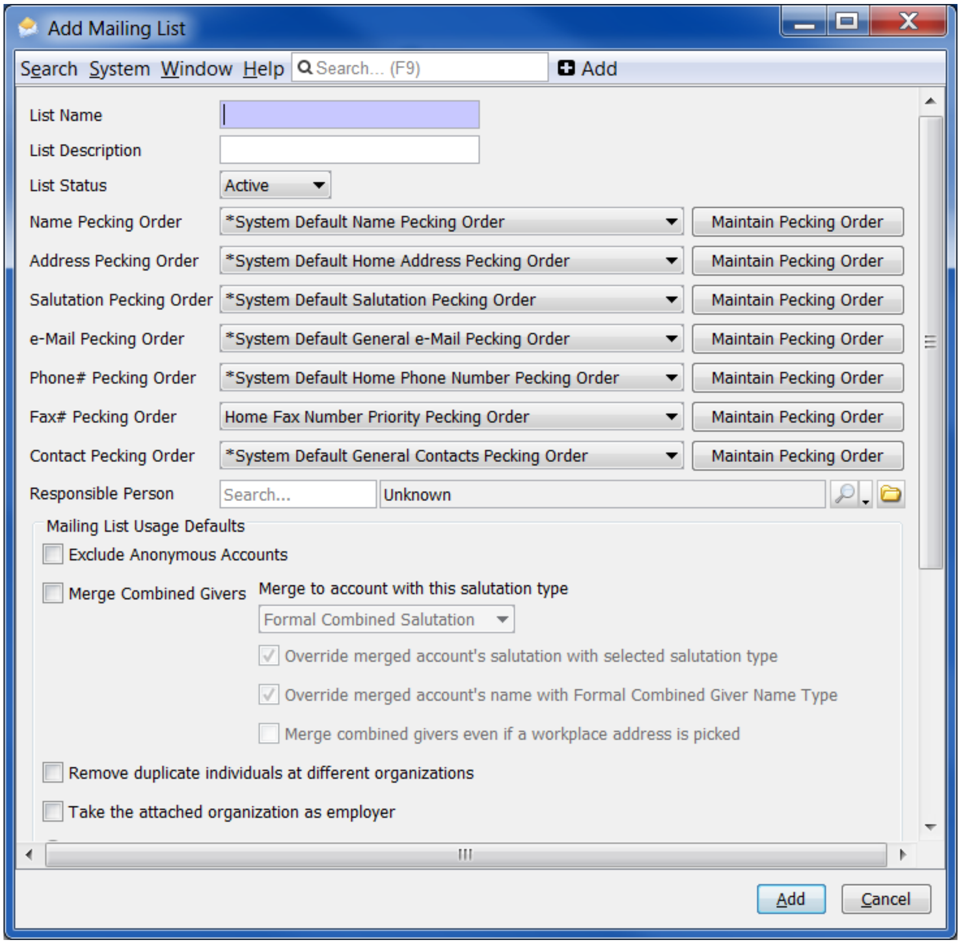
Step 3. Save Accounts in Mailing List

Insert Section > Save Accounts > In Mailing List



- **Mailing List Name.** If you want to create a new Mailing List, click the Add icon. If you want to replace the contents of a pre-existing Mailing List, select that Mailing list here.

- **Add.** Because you need to think about Pecking Orders for a Mailing List you need to take extra steps.



- **List Name.** Be consistent in naming your DMO items. This will help you in the future to know which DMO created which Mailing List.

- **List Description**

- **List Status**

- **Pecking Orders.** Select the Name Pecking Order that will give you the best results for your current need.

  If you don't already know how a Pecking Order behaves *select the desired Pecking Order > click Maintain Pecking Order > click on the Pref column header*. Andar will use the lowest Preference first. If there are multiple Types with the same Preference Number, they will be used alphabetically.

  If none of the existing Pecking Orders meet your needs, contact your System Administrator to create a new one.

- ➤ *Name Pecking Order*
- ➤ *Address Pecking Order*
- ➤ *Salutation Pecking Order*
- ➤ *e-Mail Pecking Order*
- ➤ *Phone Pecking Order*
- ➤ *Fax Pecking Order*
- ➤ *Contact Pecking Order*

- o **Responsible Person**

- o **Mailing List Usage Defaults Section.** As previously described, a Mailing List Usage is a list of Accounts and instructions about how to retrieve their Names, Addresses, e-Mails, etc. for those Accounts. A Mailing List Usage is that same list of Accounts but with the actual data (Name, Address, e-Mail, etc.).

> ***Important!*** This section on the Mailing List screen does not actually create a Mailing List Usage. It allows you to provide default values to use any time a Mailing List Usage is created for this Mailing List. Later, when you actually create a Mailing List Usage, you may use the defaults or you may choose different options.

- ✶ **Exclude Anonymous Accounts.** When checked, any Account that has been marked as Anonymous (***Individual / Organization Account Profile > Contact Information Tab > Privacy Defaults Sub Tab > Anonymous Checkbox***) will be removed from this Usage.

- ✶ **Merge Combined Givers.** When checked, you will get one record for all Accounts that share a Combined Giver Relationship. For example, if Roy and Rhonda each have an Individual Account, and if both have been selected, and if they share a Combined Giver Relationship, and if only one of the Accounts has a Combined Salutation, the Mailing List Usage will include only one of the Accounts (instead of both of them). This allows you to send a single piece of mail to the household.

  - ∗ **Merge to Account with this Salutation Type.** When you have one or more Accounts that are linked by a Combined Giver Relationship, you should add a Combined Salutation to one (and only one) of those Accounts. This is typically a Formal Combined Salutation or an Informal Combined Salutation (or both).

* **Override Merged Account's Salutation with the Selected Salutation Type.** When you choose this option and select a specific Salutation Type here, the selected Type will be used instead of the Salutation from the Pecking Order.

* **Override Merged Account's Name with Formal Combined Giver Name.** When you choose this option and select a specific Name Type here, the selected Type will be used instead of the Name from the Pecking Order.

* **Merge Combined Givers even if a Workplace Address is Picked.** If the Address Pecking Order that was specified in the Mailing List results in a Workplace (@ Employer or Individual Work) Address being used for the Merged Combined Givers, do you still want to Merge the Accounts? For example, the letter would be addressed to Mr. And Mrs. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA. When unchecked, the letter would be addressed to the primary Account in the Combined Giver Relationship. For example, Mr. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA.

✶ **Remove Duplicate Individuals at Different Organizations.** If an Individual is related to multiple Organizations (Employee, Contact, Manager, Affiliation, etc.) and, based on your selections the Individual is pulled more than once (for example, they could be a CEO of ABC Company and a CEO Call Volunteer for XYZ Company) Andar recognizes each combination of Individual Account Number and Organization Account Number as unique, therefore you would get the Individual twice, once for each Organization. This option tells Andar to ignore the related Organization Account Number and give you the Individual only once based on their Individual Account Number. The record with the highest Organization Account Number is the one that will be kept.

- **Take the Attached Organization as Employer.** *Not Recommended.* This option tells Andar to use the Address of any related Organization (even if it is not the Individual's Employer) and send the Individual's mail to that Address. For example, if you select Agency Board Member Affiliations and you check this option, Andar would assume (for this Mailing List Usage only) that the Agency is their Employer and look at that Agency's Address as the @ Employer Address. So their 'letter' would go to the Agency instead of their actual Employer.

- **Contact Rules.** These options are above and beyond the selection criteria you may have in your Data Mining Operation. It is for the Mailing List Usage download only. For example, the Mailing List might include Opt Out Accounts, but for this Usage download you do not want them.

  - **Include All Accounts.** When selected, the Mailing List Usage will include all Accounts in the Mailing List regardless of whether they have any Contact Rules or not.

  - **Only Include Opt In Accounts (Organization Policy / System Preference).** When selected, the Mailing List Usage will include only Accounts that have an Opt In Contact Rule set. If there is no Contact Rule on the Account that Account would not be included.

  - **Exclude Opt Out Accounts.** When selected, the Mailing List Usage will not include any Account that has an Opt Out Contact Rule set. If there is no Contact Rule on the Account it will be included.

  - **Categories.** ***Requires a MIG license.*** If you choose to have this Mailing List Usage consider Contact Rules by selecting one of the options above, you will also need to tell Andar which Category(ies) to look at.

{

> ***Important!*** Note that by default Andar will only select Accounts with an Account Status of Active. If you want to select Accounts that are Inactive, Deceased or Out of Area, you must make a selection from the Bio Tab.

}

- ✶ **Generate Care Of Accounts.** ***Requires a MIG license.*** When checked, if an Account that is in the Mailing List has a Care Of Relationship, the Care Of Account information will be used instead of the selected Account's information.

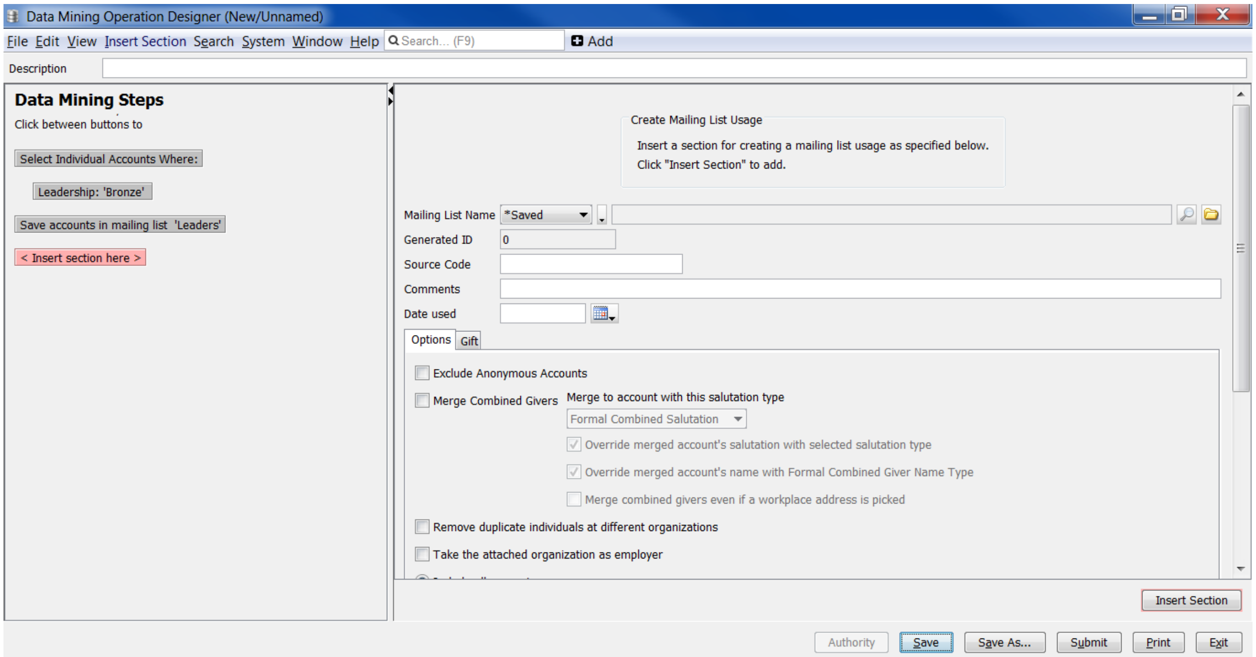
- ✶ **Exclude Blank Accounts.** When checked, after a Mailing List Usage is generated, if the selected Mail Types (below) are all blank then the Account will not be included in the Mailing List Usage.

- ✶ **Mail Types.** Select each Mail Type to allow that information to be included in the Mailing List Usage (and therefore available for downloading).

  If the Save Accounts in Mailing List step is followed by the Extract Data and Download step or Extract Data step, this determines which fields will be populated on the Mailing Tab, based on your selected Pecking Orders. For example, if you are doing Postal mail, select Postal. If you will be using your data file for both Postal mail as well as e-Mail, select both. If you do not select a Type, the fields will not be populated even if you select them from the Mailing Tab in the Extract step.
  - *By Postal (Addresses)*
  - *By e-Mail*
  - *By Phone*
  - *By Fax*

Step 4. Create Mailing List Usage

Insert Section > Create Mailing List Usage



When an Individual / Organization is contained in a Mailing List Usage, Andar will populate their ***Individual / Organization Account Profile > Communications Tab > Mail List Sub Tab*** so you will be able to look at an Account and see when mail was sent to them and what it was.

- **Mailing List Name**

- **Generated ID.** This is an identifier created by Andar.

- **Source Code.** Allows you to track Donors who got a specific piece of mail, how many responses you got and how much money was generated from that mailing.

  Response to a Mailing is tracked through Pledge Processing. You will need to print the Source Code on every piece of the Mailing including the return envelope. You will need to notify Pledge Processing to look for the Source Code on incoming mail. The Source Code is then entered on the Pledge Transaction.

- **Comments**

- **Options Tab**

- **Exclude Anonymous Accounts.** When checked, any Account that has been marked as Anonymous (***Individual / Organization Account Profile > Contact Information Tab > Privacy Defaults Sub Tab > Anonymous Checkbox***) will be removed from this Usage.

- **Merge Combined Givers.** When checked, you will get one record for all Accounts that share a Combined Giver Relationship. For example, if Roy and Rhonda each have an Individual Account, and if both have been selected, and if they share a Combined Giver Relationship, and if only one of the Accounts has a Combined Salutation, the Mailing List Usage will include only one of the Accounts (instead of both of them). This allows you to send a single piece of mail to the household.

  - **Merge to Account with this Salutation Type.** When you have one or more Accounts that are linked by a Combined Giver Relationship, you should add a Combined Salutation to one (and only one) of those Accounts. This is typically a Formal Combined Salutation or an Informal Combined Salutation (or both).

  - **Override Merged Account's Salutation with the Selected Salutation Type.** When you choose this option and select a specific Salutation Type here, the selected Type will be used instead of the Salutation from the Pecking Order.

  - **Override Merged Account's Name with Formal Combined Giver Name.** When you choose this option and select a specific Name Type here, the selected Type will be used instead of the Name from the Pecking Order.

  - **Merge Combined Givers even if a Workplace Address is Picked.** If the Address Pecking Order that was specified in the Mailing List results in a Workplace (@ Employer or Individual Work) Address being used for the Merged Combined Givers, do you still want to Merge the Accounts? For example, the letter would be addressed to Mr. And Mrs. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA. When unchecked, the letter would be addressed to the primary Account in the Combined Giver Relationship. For example, Mr. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA.

- **Remove Duplicate Individuals at Different Organizations.** If an Individual is related to multiple Organizations (Employee, Contact, Manager, Affiliation, etc.) and, based on your selections the Individual is pulled more than once (for example, they could be a CEO of ABC Company and a CEO Call Volunteer for XYZ Company) Andar recognizes each combination of Individual Account Number and Organization Account Number as unique, therefore you would get the Individual twice, once for each Organization. This option tells Andar to ignore the related Organization Account Number and give you the Individual only once based on their Individual Account Number. The record with the highest Organization Account Number is the one that will be kept.

- **Take the Attached Organization as Employer.** ***Not Recommended.*** This option tells Andar to use the Address of any related Organization (even if it is not the Individual's Employer) and send the Individual's mail to that Address. For example, if you select Agency Board Member Affiliations and you check this option, Andar would assume (for this Mailing List Usage only) that the Agency is their Employer and look at that Agency's Address as the @ Employer Address. So their 'letter' would go to the Agency instead of their actual Employer.

- **Contact Rules.** These options are above and beyond the selection criteria you may have in your Data Mining Operation. It is for the Mailing List Usage download only. For example, the Mailing List might include Opt Out Accounts, but for this Usage download you do not want them.

  - **Include All Accounts.** When selected, the Mailing List Usage will include all Accounts in the Mailing List regardless of whether they have any Contact Rules or not.
  - **Only Include Opt In Accounts (Organization Policy / System Preference).** When selected, the Mailing List Usage will include only Accounts that have an Opt In Contact Rule set. If there is no Contact Rule on the Account that Account would not be included.

  - **Exclude Opt Out Accounts.** When selected, the Mailing List Usage will not include any Account that has an Opt Out Contact Rule set. If there is no Contact Rule on the Account it will be included.

✶ **Categories.** ***Requires a MIG license.*** If you choose to have this Mailing List Usage consider Contact Rules by selecting one of the options above, you will also need to tell Andar which Category(ies) to look at.

{

> ***Important!*** If you select All Categories it will only look at Contact Rules with a Category selection of All. If the Contact Rule has a specific Category (like Newsletter, Solicitation, etc.) it will not be considered in the selection of All.

}

- **Generate Care Of Accounts.** ***Requires a MIG license.*** When checked, if an Account that is in the Mailing List has a Care Of Relationship, the Care Of Account information will be used instead of the selected Account's information.

- **Exclude Blank Accounts.** When checked, after a Mailing List Usage is generated, if the selected Mail Types (below) are all blank then the Account will not be included in the Mailing List Usage.

- **Mail Types.** Select each Mail Type to allow that information to be included in the Mailing List Usage (and therefore available for downloading).

  If the Save Accounts in Mailing List step is followed by the Extract Data and Download step or Extract Data step, this determines which fields will be populated on the Mailing Tab, based on your selected Pecking Orders. For example, if you are doing Postal mail, select Postal. If you will be using your data file for both Postal mail as well as e-Mail, select both. If you do not select a Type, the fields will not be populated even if you select them from the Mailing Tab in the Extract step.

  - ***By Postal (Addresses)***
  - ***By e-Mail***
  - ***By Phone***
  - ***By Fax***

- **Gift Tab**

- **Number of Names.** Only available when viewing a Mailing List Usage from ***Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage***, not when viewing / adding it from inside a DMO.

  This will be populated when Mailing List Usage is Added. This shows the Number of Names that were included in the Usage.

- **Costs.** Only available when viewing a Mailing List Usage from ***Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage***, not when viewing / adding it from inside a DMO.

  It allows you to track the Cost of a specific Mailing. You can use this to compare the Cost against the Total Pledges received from the Mailing.

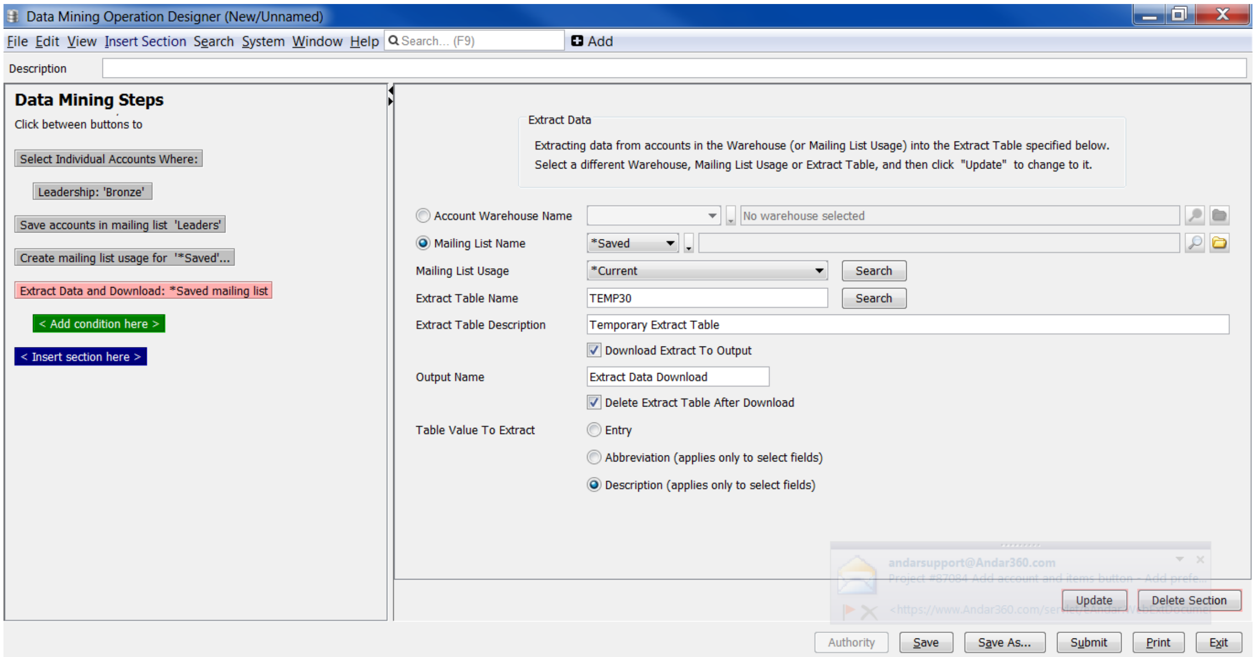
- **Number of Responses.** Only available when viewing a Mailing List Usage from ***Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage***, not when viewing / adding it from inside a DMO.

  Response to a Mailing is tracked through Pledge Processing. You will need to print the Source Code on every piece of the Mailing including the return envelope. You will need to notify Pledge Processing to look for the Source Code on incoming mail. The Source Code is then entered on Pledge Transaction. As Pledges are entered Andar will calculate the Number of Responses received with the specified Source Code.

- **Total Pledge.** Only available when viewing a Mailing List Usage from ***Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage***, not when viewing / adding it from inside a DMO.

  As Pledges are entered Andar will calculate the Total Pledge Amount received with the specified Source Code.

Step 5. Extract Data and Download



{

- **Account Warehouse Name.** Do not select.

}

- **Mailing List Name.** *Current will use the Mailing List just created in this DMO or you can select the name of the Mailing List.

- **Mailing List Usage.** *Current will use the Mailing List Usage just created in this DMO or you can select the name of the Mailing List.

- **Extract Table Name / Description.** You must give your Extract Table a name. It can have no spaces or punctuation.

- **Download Extract To Output.** This option will create your spreadsheet without having to include the Download Extract to My Output step.

- **Output Name.** This will be the name of the spreadsheet as it appears in *System > My Output* when the job is completed.

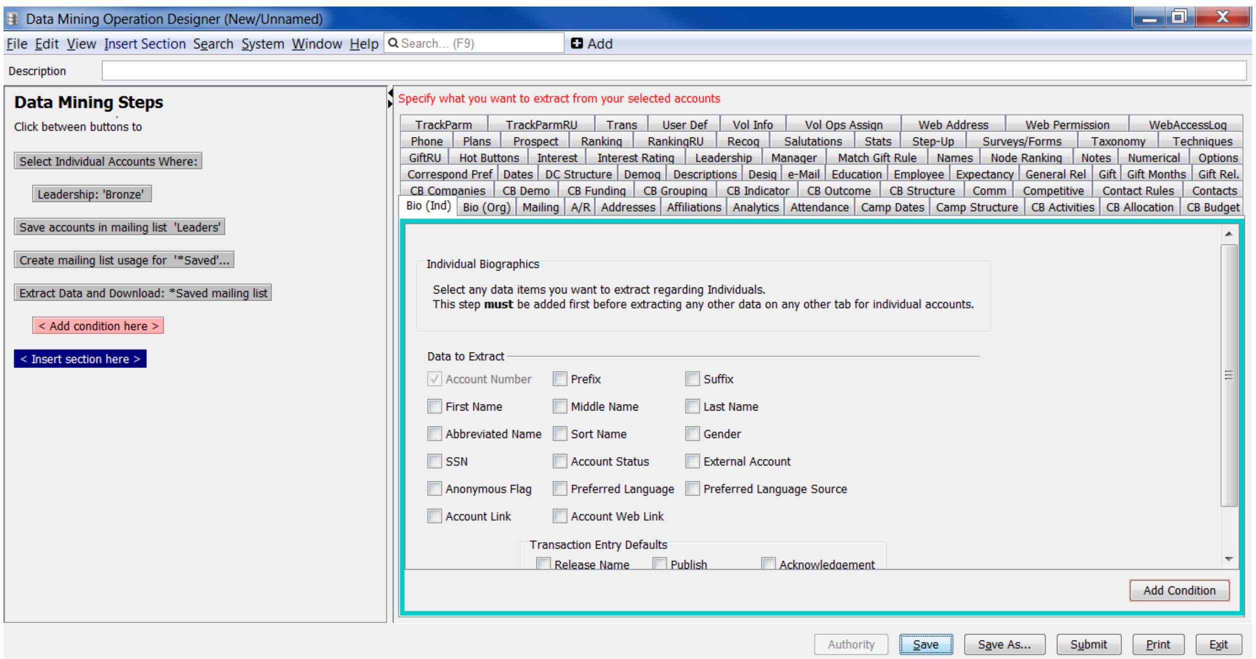
- **Delete Extract Table After Download.** If you have no plans to do any additional SQL queries using the Extract Table, choose this option. It will help keep your database clean.

{

- **Table Value to Extract.** This determines the information from the Table that will be pulled as the column header in your spreadsheet.
  - *Entry*
  - *Abbreviation*
  - *Description*

}

Step 6. Add Extract Conditions



You will now need to add your Conditions, which will become columns in your spreadsheet.

Select Conditions from the right panel. You must select something from the Bio Tab and, for a Mailing List, you will want to select your Mailing information from the Mailing Tab. See the Data Mining Reference Training Workbook for more information.

Remember to bring this selection from right to left so it appears under data mining steps. If it ain't there, it ain't gonna happen!

Step 7. Submit

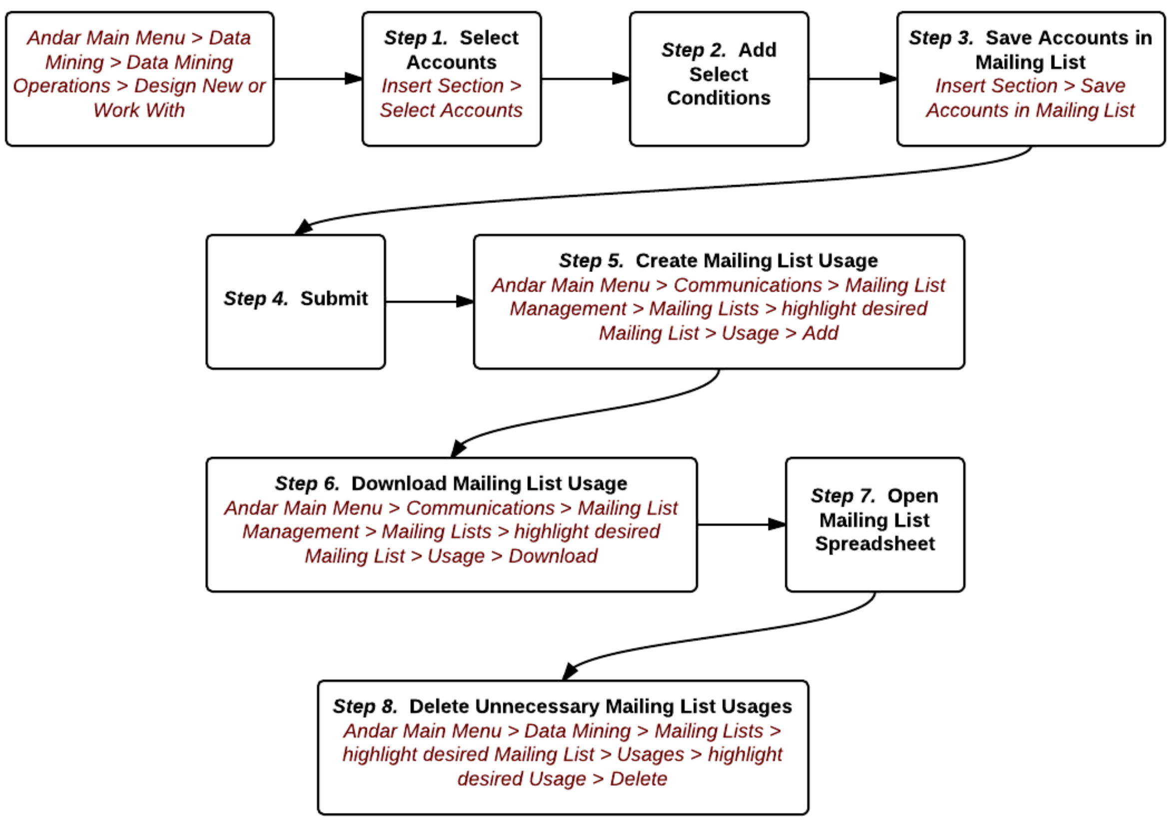
Step 8. Open Mailing List Spreadsheet

System > My Output

Step 9. Delete Unnecessary Mailing List Usages

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usages > highlight desired Usage > Delete

4.3. Mailing List Option 3



Step 1. Select Accounts

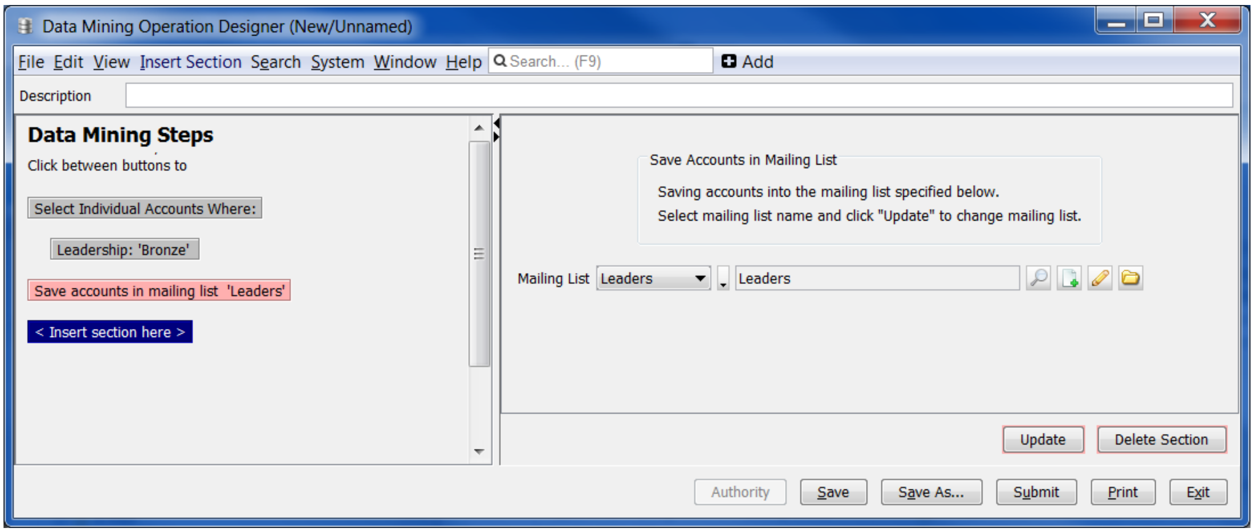
Insert Section > Select Accounts

Step 2. Add Select Conditions

Select Conditions from the right panel.

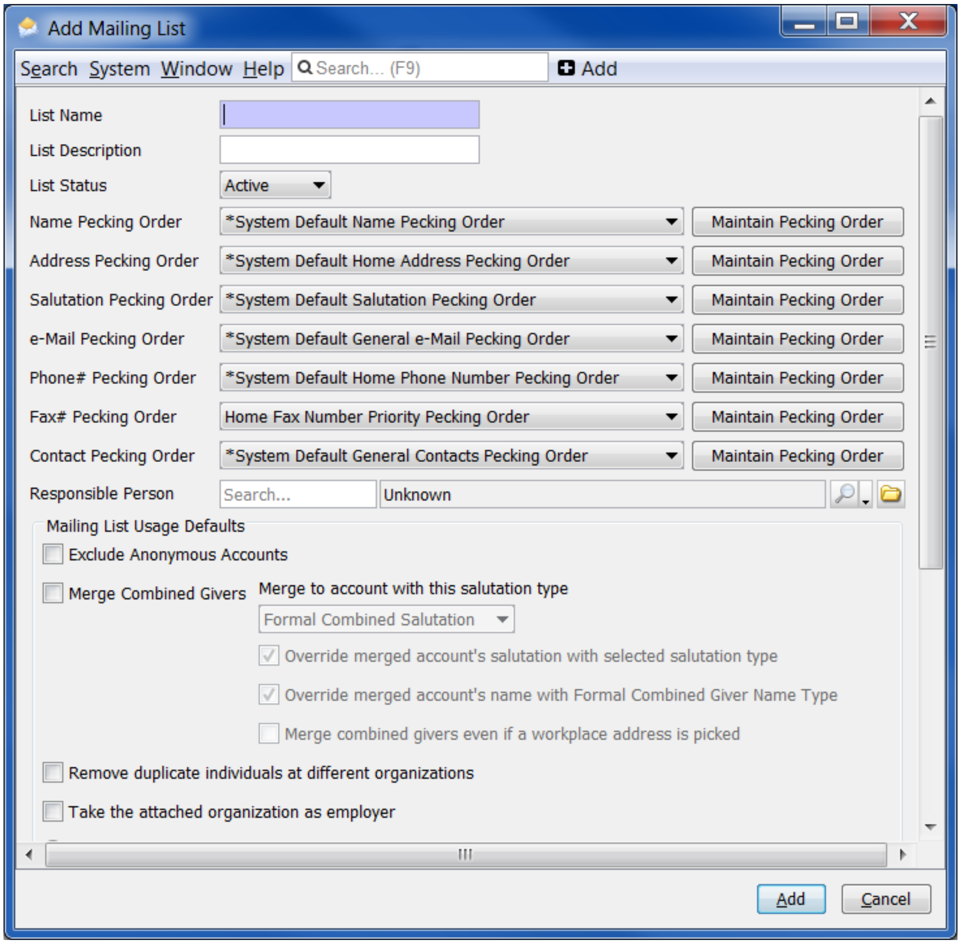
Step 3. Save Accounts in Mailing List

Insert Section > Save Accounts > In Mailing List



- **Mailing List Name.** If you want to create a new Mailing List, click the Add icon. If you want to replace the contents of a pre-existing Mailing List, select that Mailing list here.

- **Add.** Because you need to think about Pecking Orders for a Mailing List you need to take extra steps.



- **List Name.** Be consistent in naming your DMO items. This will help you in the future to know which DMO created which Mailing List.

- **List Description**

- **List Status**

- **Pecking Orders.** Select the Name Pecking Order that will give you the best results for your current need.

  If you don't already know how a Pecking Order behaves *select the desired Pecking Order > click Maintain Pecking Order > click on the Pref column header*. Andar will use the lowest Preference first. If there are multiple Types with the same Preference Number, they will be used alphabetically.

  If none of the existing Pecking Orders meet your needs, contact your System Administrator to create a new one.

- *Name Pecking Order*
- *Address Pecking Order*
- *Salutation Pecking Order*
- *e-Mail Pecking Order*
- *Phone Pecking Order*
- *Fax Pecking Order*
- *Contact Pecking Order*

- **Responsible Person**

- **Mailing List Usage Defaults Section.** As previously described, a Mailing List Usage is a list of Accounts and instructions about how to retrieve their Names, Addresses, e-Mails, etc. for those Accounts. A Mailing List Usage is that same list of Accounts but with the actual data (Name, Address, e-Mail, etc.).

> ***Important!*** This section on the Mailing List screen does not actually create a Mailing List Usage. It allows you to provide default values to use any time a Mailing List Usage is created for this Mailing List. Later, when you actually create a Mailing List Usage, you may use the defaults or you may choose different options.

- **Exclude Anonymous Accounts.** When checked, any Account that has been marked as Anonymous (***Individual / Organization Account Profile > Contact Information Tab > Privacy Defaults Sub Tab > Anonymous Checkbox***) will be removed from this Usage.

- **Merge Combined Givers.** When checked, you will get one record for all Accounts that share a Combined Giver Relationship. For example, if Roy and Rhonda each have an Individual Account, and if both have been selected, and if they share a Combined Giver Relationship, and if only one of the Accounts has a Combined Salutation, the Mailing List Usage will include only one of the Accounts (instead of both of them). This allows you to send a single piece of mail to the household.

  - **Merge to Account with this Salutation Type.** When you have one or more Accounts that are linked by a Combined Giver Relationship, you should add a Combined Salutation to one (and only one) of those Accounts. This is typically a Formal Combined Salutation or an Informal Combined Salutation (or both).

- **Override Merged Account's Salutation with the Selected Salutation Type.** When you choose this option and select a specific Salutation Type here, the selected Type will be used instead of the Salutation from the Pecking Order.

- **Override Merged Account's Name with Formal Combined Giver Name.** When you choose this option and select a specific Name Type here, the selected Type will be used instead of the Name from the Pecking Order.
- **Merge Combined Givers even if a Workplace Address is Picked.** If the Address Pecking Order that was specified in the Mailing List results in a Workplace (@ Employer or Individual Work) Address being used for the Merged Combined Givers, do you still want to Merge the Accounts? For example, the letter would be addressed to Mr. And Mrs. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA. When unchecked, the letter would be addressed to the primary Account in the Combined Giver Relationship. For example, Mr. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA.

✶ **Remove Duplicate Individuals at Different Organizations.** If an Individual is related to multiple Organizations (Employee, Contact, Manager, Affiliation, etc.) and, based on your selections the Individual is pulled more than once (for example, they could be a CEO of ABC Company and a CEO Call Volunteer for XYZ Company) Andar recognizes each combination of Individual Account Number and Organization Account Number as unique, therefore you would get the Individual twice, once for each Organization. This option tells Andar to ignore the related Organization Account Number and give you the Individual only once based on their Individual Account Number. The record with the highest Organization Account Number is the one that will be kept.

- ✶ **Take the Attached Organization as Employer.** ***Not Recommended.*** This option tells Andar to use the Address of any related Organization (even if it is not the Individual's Employer) and send the Individual's mail to that Address. For example, if you select Agency Board Member Affiliations and you check this option, Andar would assume (for this Mailing List Usage only) that the Agency is their Employer and look at that Agency's Address as the @ Employer Address. So their 'letter' would go to the Agency instead of their actual Employer.

- ✶ **Contact Rules.** These options are above and beyond the selection criteria you may have in your Data Mining Operation. It is for the Mailing List Usage download only. For example, the Mailing List might include Opt Out Accounts, but for this Usage download you do not want them.

  - **Include All Accounts.** When selected, the Mailing List Usage will include all Accounts in the Mailing List regardless of whether they have any Contact Rules or not.

  - **Only Include Opt In Accounts (Organization Policy / System Preference).** When selected, the Mailing List Usage will include only Accounts that have an Opt In Contact Rule set. If there is no Contact Rule on the Account that Account would not be included.

  - **Exclude Opt Out Accounts.** When selected, the Mailing List Usage will not include any Account that has an Opt Out Contact Rule set. If there is no Contact Rule on the Account it will be included.

  - **Categories.** ***Requires a MIG license.*** If you choose to have this Mailing List Usage consider Contact Rules by selecting one of the options above, you will also need to tell Andar which Category(ies) to look at.

{

Important! If you select All Categories it will only look at Contact Rules with a Category selection of All. If the Contact Rule has a specific Category (like Newsletter, Solicitation, etc.) it will not be considered in the selection of All.

}

- **Generate Care Of Accounts.** ***Requires a MIG license.*** When checked, if an Account that is in the Mailing List has a Care Of Relationship, the Care Of Account information will be used instead of the selected Account's information.

- **Exclude Blank Accounts.** When checked, after a Mailing List Usage is generated, if the selected Mail Types (below) are all blank then the Account will not be included in the Mailing List Usage.

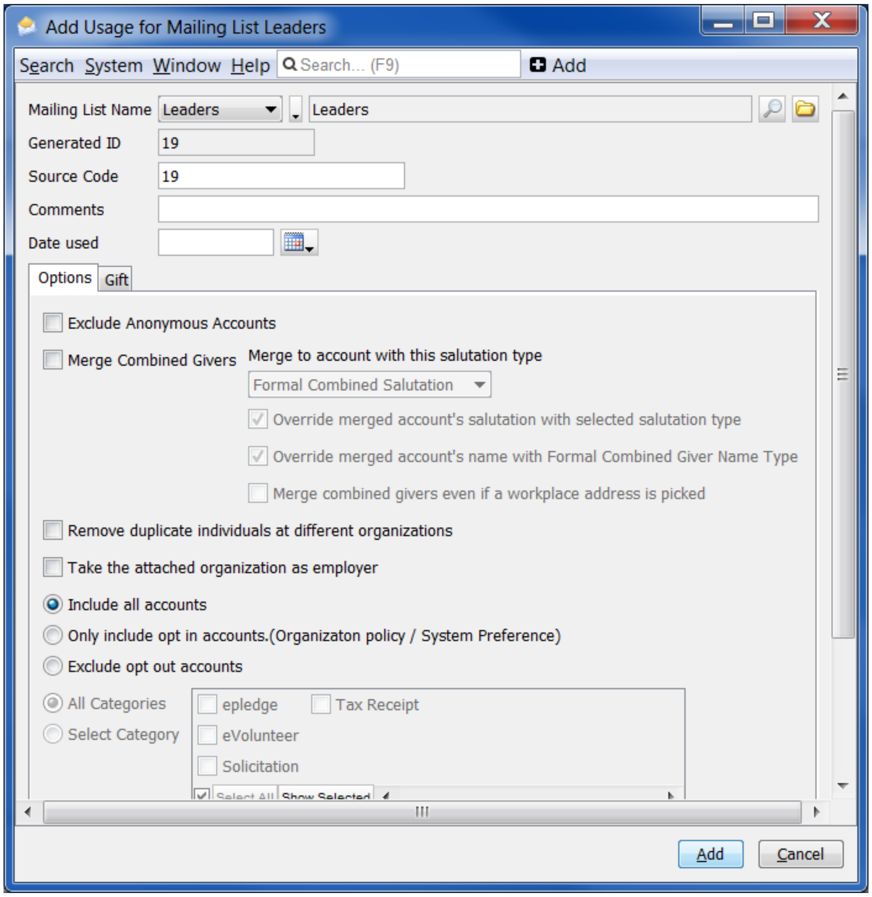
- **Mail Types.** Select each Mail Type to allow that information to be included in the Mailing List Usage (and therefore available for downloading).

  If the Save Accounts in Mailing List step is followed by the Extract Data and Download step or Extract Data step, this determines which fields will be populated on the Mailing Tab, based on your selected Pecking Orders. For example, if you are doing Postal mail, select Postal. If you will be using your data file for both Postal mail as well as e-Mail, select both. If you do not select a Type, the fields will not be populated even if you select them from the Mailing Tab in the Extract step.
  - ***By Postal (Addresses)***
  - ***By e-Mail***
  - ***By Phone***
  - ***By Fax***

Step 4. Submit

Step 5. Create Mailing List Usage from the Main Menu

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage > Add



When an Individual / Organization is contained in a Mailing List Usage, Andar will populate their ***Individual / Organization Account Profile > Communications Tab > Mail List Sub Tab*** so you will be able to look at an Account and see when mail was sent to them and what it was.

- **Mailing List Name**
- **List Description**
- **Generated ID.** This is an identifier created by Andar.
- **Source Code.** Allows you to track Donors who got a specific piece of mail, how many responses you got and how much money was generated from that mailing.

Response to a Mailing is tracked through Pledge Processing. You will need to print the Source Code on every piece of the Mailing including the return envelope. You will need to notify Pledge Processing to look for the Source Code on incoming mail. The Source Code is then entered on the Pledge Transaction.

- **Comments**

- **Options Tab**

  - ✶ **Exclude Anonymous Accounts.** When checked, any Account that has been marked as Anonymous (***Individual / Organization Account Profile > Contact Information Tab > Privacy Defaults Sub Tab > Anonymous Checkbox***) will be removed from this Usage.

  - ✶ **Merge Combined Givers.** When checked, you will get one record for all Accounts that share a Combined Giver Relationship. For example, if Roy and Rhonda each have an Individual Account, and if both have been selected, and if they share a Combined Giver Relationship, and if only one of the Accounts has a Combined Salutation, the Mailing List Usage will include only one of the Accounts (instead of both of them). This allows you to send a single piece of mail to the household.

    - **Merge to Account with this Salutation Type.** When you have one or more Accounts that are linked by a Combined Giver Relationship, you should add a Combined Salutation to one (and only one) of those Accounts. This is typically a Formal Combined Salutation or an Informal Combined Salutation (or both).

    - **Override Merged Account's Salutation with the Selected Salutation Type.** When you choose this option and select a specific Salutation Type here, the selected Type will be used instead of the Salutation from the Pecking Order.

    - **Override Merged Account's Name with Formal Combined Giver Name.** When you choose this option and select a specific Name Type here, the selected Type will be used instead of the Name from the Pecking Order.

- **Merge Combined Givers even if a Workplace Address is Picked.** If the Address Pecking Order that was specified in the Mailing List results in a Workplace (@ Employer or Individual Work) Address being used for the Merged Combined Givers, do you still want to Merge the Accounts? For example, the letter would be addressed to Mr. And Mrs. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA. When unchecked, the letter would be addressed to the primary Account in the Combined Giver Relationship. For example, Mr. Roy Dobbins, The Coca-Cola Company, 100 Coca-Cola Boulevard, Atlanta, GA.

✶ **Remove Duplicate Individuals at Different Organizations.** If an Individual is related to multiple Organizations (Employee, Contact, Manager, Affiliation, etc.) and, based on your selections the Individual is pulled more than once (for example, they could be a CEO of ABC Company and a CEO Call Volunteer for XYZ Company) Andar recognizes each combination of Individual Account Number and Organization Account Number as unique, therefore you would get the Individual twice, once for each Organization. This option tells Andar to ignore the related Organization Account Number and give you the Individual only once based on their Individual Account Number. The record with the highest Organization Account Number is the one that will be kept.

✶ **Take the Attached Organization as Employer.** ***Not Recommended.*** This option tells Andar to use the Address of any related Organization (even if it is not the Individual's Employer) and send the Individual's mail to that Address. For example, if you select Agency Board Member Affiliations and you check this option, Andar would assume (for this Mailing List Usage only) that the Agency is their Employer and look at that Agency's Address as the @ Employer Address. So their 'letter' would go to the Agency instead of their actual Employer.

✶ **Contact Rules.** These options are above and beyond the selection criteria you may have in your Data Mining Operation. It is for the Mailing List Usage download only. For example, the Mailing List might include Opt Out Accounts, but for this Usage download you do not want them.

* **Include All Accounts.** When selected, the Mailing List Usage will include all Accounts in the Mailing List regardless of whether they have any Contact Rules or not.

* **Only Include Opt In Accounts (Organization Policy / System Preference).** When selected, the Mailing List Usage will include only Accounts that have an Opt In Contact Rule set. If there is no Contact Rule on the Account that Account would not be included.

* **Exclude Opt Out Accounts.** When selected, the Mailing List Usage will not include any Account that has an Opt Out Contact Rule set. If there is no Contact Rule on the Account it will be included.

* **Categories.** ***Requires a MIG license.*** If you choose to have this Mailing List Usage consider Contact Rules by selecting one of the options above, you will also need to tell Andar which Category(ies) to look at.

{

> ***Important!*** If you select All Categories it will only look at Contact Rules with a Category selection of All. If the Contact Rule has a specific Category (like Newsletter, Solicitation, etc.) it will not be considered in the selection of All.

}

✶ **Generate Care Of Accounts.** ***Requires a MIG license.*** When checked, if an Account that is in the Mailing List has a Care Of Relationship, the Care Of Account information will be used instead of the selected Account's information.

✶ **Exclude Blank Accounts.** When checked, after a Mailing List Usage is generated, if the selected Mail Types (below) are all blank then the Account will not be included in the Mailing List Usage.

✶ **Mail Types.** Select each Mail Type to allow that information to be included in the Mailing List Usage (and therefore available for downloading).

If the Save Accounts in Mailing List step is followed by the Extract Data and Download step or Extract Data step, this determines which fields will be populated on the Mailing Tab, based on your selected Pecking Orders. For example, if you are doing Postal mail, select Postal. If you will be using your data file for both Postal mail as well as e-Mail, select both. If you do not select a Type, the fields will not be populated even if you select them from the Mailing Tab in the Extract step.

- ***By Postal (Addresses)***
- ***By e-Mail***
- ***By Phone***
- ***By Fax***

- **Gift Tab**
  - **Status**
  - **Date Used**
  - **Number of Names.** Only available when viewing a Mailing List Usage from ***Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage***, not when viewing / adding it from inside a DMO.

    Will be populated when Mailing List Usage is added. This shows the Number of Names that were included in the Usage.
  - **Costs.** Only available when viewing a Mailing List Usage from ***Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage***, not when viewing / adding it from inside a DMO.

    Allows you to track the Cost of a specific Mailing. You can use this to compare the Cost against the Total Pledges received from the Mailing.
  - **Number of Responses.** Only available when viewing a Mailing List Usage from ***Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage***, not when viewing / adding it from inside a DMO.

Response to a Mailing is tracked through Pledge Processing.

Print the Source Code on every piece of the Mailing including the return envelope.

Notify Pledge Processing to look for the Source Code on incoming mail.

The Source Code is entered on Pledge Transaction. As Pledges are entered Andar will calculate the Number of Responses received with the specified Source Code.

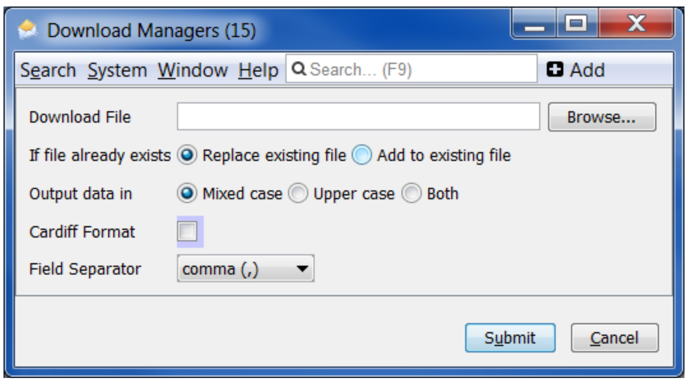
- **Total Pledge.** Only available when viewing a Mailing List Usage from *Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage*, not when viewing / adding it from inside a DMO.

  Response to a Mailing is tracked through Pledge Processing.

  As Pledges are entered Andar will calculate the Total Pledge Amount received with the specified Source Code.

Step 6. Download Usage

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage > Download



- **Ready Status.** When the Status of the Usage is Ready the Download button will be available.

- **Download.** This creates a spreadsheet, which will then become your data source for a Mail Merge.

- **Download File.** This will be the name of the file once it's saved. It is recommended that you use the Browse button to find the location to which the file is to be saved. The path should be short. For example: c:/Jim/Mail not C/Jim/Andar/ Board/2005/Special/Mail. The folder to which the file should be saved must be in the look in field at the top of the browse window.

Important! The file Name MUST be followed by .csv.

  - **If File Already Exists**

  - **Replace Existing File**

  - **Add To Existing File.** If you've already got a file with the same name this option will add these downloaded records to the end of that file.

- **Output Data In**

  - **Mixed Case.** Regardless of how the data appears in Andar this will download it in upper and lower case.

  - **Upper Case.** Regardless of how the data appears in Andar this will download it in upper case.

  - **Both.** If some selected data is stored in Andar in Mixed Case and some in Upper Case this option will download it as it is.

- **Cardiff Format.** Provides a scan line that can be used when scanning incoming Pledge Forms.

- **Field Separator.** You MUST choose Comma as the Field Separator.

Step 7. Open Mail List Spreadsheet

Your spreadsheet can be found in the location you identified to save it.

Step 8. Delete Unnecessary Mailing List Usages

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usages > highlight desired Usage > Delete

4.4. Managing Mailing Lists

4.4.1. Personal Preferences

When viewing the list of Mailing Lists (***Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists***) there is a section at the top of the list that displays a number of Mailing Lists most recently used.

This number can be controlled by setting your Personal Preference. (Andar ***Main Menu > User Customization > Personal Preferences > Maximum Number of Recent Items***)

This is set for each User and does not affect other Users.

The default setting is 20.

The same setting is used to display the Recent Account Warehouses and Data Mining Operations.

View a Mailing List

From the Andar Main Menu

Andar Main Menu > Data Mining > Mailing Lists> Mailing Lists > highlight desired Mailing List > Maintain List

{

Andar Main Menu > Data Mining > Data Mining Operations > Mailing Lists > highlight desired Mailing List > Maintain List

}

From an Account Profile

Individual / Organization Account Profile > Contact Information Tab > Mail List Sub Tab

Manually Add Accounts to a Mailing List

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Maintain List > Add > select Individual / Organization Account > Add

{

Andar Main Menu > Data Mining > Data Mining Operations > Mailing Lists > highlight desired Mailing List > Maintain List > highlight desired record > Add

}

Delete Accounts from a Mailing List

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Update > highlight desired record > Delete

{

Andar Main Menu > Data Mining > Data Mining Operations > Mailing Lists > highlight desired Mailing List > Maintain List > highlight desired record > Update > Delete

}

Maintain Mailing List Information

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Maintain List > highlight desired record > Update

{

Andar Main Menu > Data Mining > Data Mining Operations > Mailing Lists > highlight desired Mailing List > Maintain List > highlight desired record > Update

}

- **Sample Mail Label.** Shows the Name, Address and Salutation that was selected for this Account based on the selected Pecking Order.

When the @ Employer option is selected Andar will look for the Individual's Employee Relationship and use the selected @ Employer Address Type on the ***Employer's Organization Account Profile > Contact Information Tab >Addresses Sub Tab***. It will also bring in any existing Job Title, Mail Drop and Department recorded on the ***Individual's Account Profile > Relationships Tab > Employment Sub Tab > General Sub Tab***.

- **E-Mail Address.** Shows the e-Mail Address that was selected for this Account based on the selected Pecking Order.

- **Phone Number.** Shows the Phone Number that was selected for this Account based on the selected Pecking Order.

- **Fax Number.** Shows the Fax Number that was selected for this Account based on the selected Pecking Order.

- **Override Name Type.** If you want to change the Name that was selected, choose the desired Name Type here. It will change the Name Type that will be used for this Mailing List only. If the Mailing List is re-submitted this change will be lost.

- **Override Address Type.** If you want to change the Address that was selected, choose the desired Address Type here. It will change the Address Type that will be used for this Mailing List only. If the Mailing List is re-submitted this change will be lost.

- **Override Salutation Type.** If you want to change the Salutation that was selected, choose the desired Salutation Type here. It will change the Salutation Type that will be used for this Mailing List only. If the Mailing List is re-submitted this change will be lost.

- **Override e-Mail Type.** If you want to change the e-Mail Address that was selected, choose the desired e-Mail Address Type here. It will change the e-Mail Address Type that will be used for this Mailing List only. If the Mailing List is re-submitted this change will be lost.

- **Override Phone Number Type.** If you want to change the Phone Number that was selected, choose the desired Phone Number Type here. It will change the Phone Number Type that will be used for this Mailing List only. If the Mailing List is re-submitted this change will be lost.

- **Override Fax Number Type.** If you want to change the Fax Number that was selected, choose the desired Fax Number Type here. It will change the Fax Number Type that will be used for this Mailing List only. If the Mailing List is re-submitted this change will be lost.

- **Override Contact Type.** If you want to change the Contact that was selected, choose the desired Contact Type here. It will change the Contact Type that will be used for this Mailing List only. If the Mailing List is re-submitted this change will be lost.

Find DMO for a Mailing List

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > Last DMO column

If a Mailing List was created by a Data Mining Operation (DMO) you can easily find that DMO by looking at the Last DMO column on the list of Mailing Lists.

{

Work With the DMO that Created the Mailing List

Andar Main Menu > Data Mining > Mailing Lists > highlight desired Mailing List (with DMO in Last DMO column) > Work With DMO

Requires a MIG license. This feature allows you to find a DMO from a Mailing List and open that DMO from the list of Mailing Lists. Without MIG you can find the name of the DMO but you will have to go to the *Andar Main Menu > Data Mining > Data Mining Operations* and find the DMO to Work With.

Execute the DMO that Created the Mailing List

Andar Main Menu > Data Mining > Mailing Lists > highlight desired Mailing List (with DMO in Last DMO column) > Execute DMO

Requires a MIG license. This feature allows you to find a DMO from a Mailing List and Submit that DMO from the list of Mailing Lists. Without MIG you can find the name of the DMO but you will have to go to the ***Andar Main Menu > Data Mining > Data Mining Operations*** and find the DMO to Submit.

}

4.4.2. Import Accounts into a Mailing List

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Mass Assign > Search to find Account Warehouse Name > Submit

Requires an existing Account Warehouse.

4.5. Mail List Usages

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage > Add

A Mailing List can be created then used over and over. To keep an accurate record of when the Mailing List is actually used (when a person got a piece of mail) you will create a Mail List Usage each time the Mailing List is used and Download the data which then becomes your data source to merge with your letter, labels, etc.

When the Mailing List is used (a Mail List Usage created) Andar will populate the ***Individual / Organization Account Profile > Communications Tab > Mail List Sub Tab*** so you will be able to look at an Account Profile and see all the times they received mail.

Download a Mail List Usage

Andar Main Menu > Data Mining > Mailing Lists > Mailing Lists > highlight desired Mailing List > Usage > highlight desired Mailing List Usage > Download

Once a Mailing List Usage has been created using either method above it must be downloaded. This will provide you with a CSV file, which then becomes the data source for your mail merge.

Important! The Date Used (date downloaded) will be the date that will determine what Contact Rules are to be used.

- **Ready Status.** When the Status of the Usage is Ready the Download button will be available.
- **Download.** This creates a spreadsheet, which will then become your data source for a Mail Merge.
- **Download File.** This will be the name of the file once it's saved. It is recommended that you use the Browse button to find the location to which the file is to be saved. The path should be short. For example: c:/Jim/Mail not C/Jim/Andar/ Board/2005/Special/Mail. The folder to which the file should be saved must be in the look in field at the top of the browse window.

Important! The file Name MUST be followed by .csv.

  - **If File Already Exists**
  - **Replace Existing File**
  - **Add To Existing File.** If you've already got a file with the same name this option will add these downloaded records to the end of that file.
- **Output Data In**
  - **Mixed Case.** Regardless of how the data appears in Andar this will download it in upper and lower case.

  - o **Upper Case.** Regardless of how the data appears in Andar this will download it in upper case.

  - o **Both.** If some selected data is stored in Andar in Mixed Case and some in Upper Case this option will download it as it is.

- **Cardiff Format.** Provides a scan line that can be used when scanning incoming Pledge Forms.

- **Field Separator.** Comma

4.5.1. Matching a Mailing List Usage to a CSV File

Andar Main Menu > Communications > Mailing List Management > Mailing Lists > Usage > Match

Andar Main Menu > Communications > Mailing List Management > Mailing List Usages > Match

This feature will allow Users to Import a CSV file containing a list of Accounts and Source Codes and Match them against the Mailing List Usages with those Source Codes. For example, you create a Mailing List Usage for a mailing and send it out to a mail house. The mail house runs the list through their address verification system. Some of the addresses are no longer valid so they remove those Accounts from the list and do not mail to them. They send back to you the final CSV file including just the Accounts that did get the mailing.

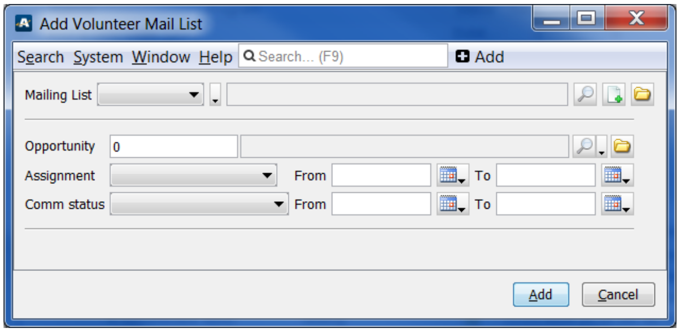
The column headers on the CSV file must be as follows. Any other columns will be ignored.

AccountNumber	SourceCode

You will be asked if you want to remove all unmatched Accounts. If you choose Yes, any Account that is in the Mailing List Usage and not in the CSV file will be removed from the Usage. All amounts will be recalculated based on the updated Usage.

> ***Important!*** This only works for Individual Accounts. Any Organization Accounts in the Usage or the CSV file will be ignored.

4.6. Create a Mailing List of Volunteers without Data Mining



From the Andar Main Menu

Andar Main Menu > Data Mining > Mailing Lists > Create Volunteer Mailing List

- **Create Mailing List.** Follow the previous steps for creating a Mailing List within a DMO.
  - o **Opportunity.** Select desired Opportunity.
  - o **Assignment**
    - ✶ **Assignment Status**
  - o **From / To.** Date range for the Assignment.
- **Communication Status.** Refers to automatic e-Mails that can be generated to Opportunity Contacts and / or Volunteers.
  - o **From / To.** Date range for the Communication Status Create Date.
- **Create Mailing List Usage.** *Andar Main Menu > Data Mining > Mailing List Management > Mailing Lists > highlight desired Mailing List > Usage > Add*
- **Download Mailing List.** *Andar Main Menu > Data Mining > Mailing List Management > Mailing Lists > highlight desired Mailing List > Usage > highlight desired Mailing List Usage (Status must be Ready) > Download*

- **View Spreadsheet.** You will find the spreadsheet in the location in which you chose to save it when you did the Download.

From an Opportunity

Andar Main Menu > Volunteer Management > Opportunities > highlight desired Opportunity > Update / Display > Assign Sub Tab > Create Mail List Button

From an Organization Account Profile

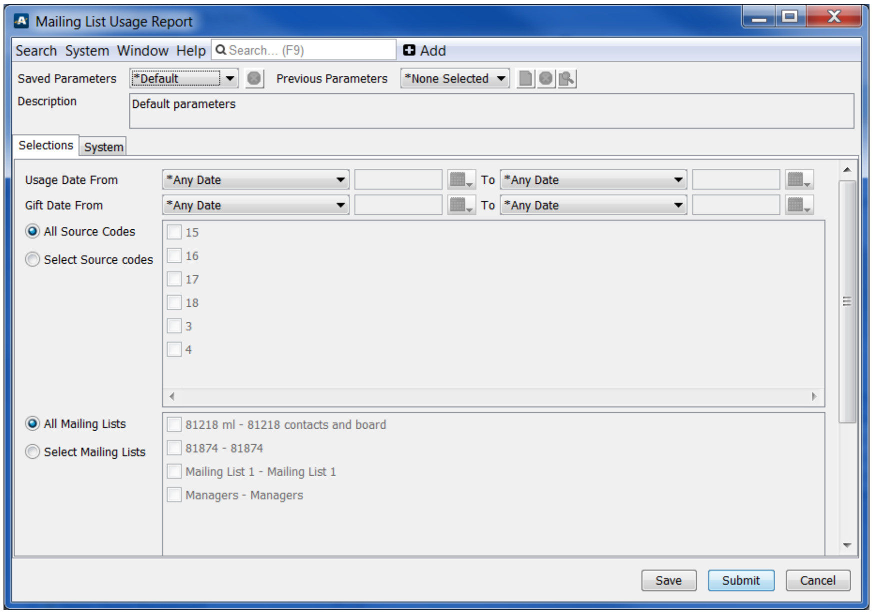
Organization Account Profile > Opportunities Tab > Assign Sub Tab

4.7. Mailing List Usage Report

Andar Main Menu > Communications > Mailing List Management > Reports > Mailing List Usage Report

Requires a MIG license. The Mailing List Usage Report provides information maintained on the Usage, such as the Number of Responses, Total Pledge, etc.

Report Submission



- **Selections Tab**

  - **Usage Date From / To.** The report will include only Mailing List Usages with a Usage Date that is within this date range.

  - **Gift Date From / To.** The report will include only Mailing List Usages that have Pledges where the Accounting Date is within this date range.

  - **Source Codes.** The report will include Mailing List Usage information only for the selected Source Code(s).

  - **Mailing Lists.** The report will include Mailing List Usage information only for the selected Mailing List(s).

{

  - **Details by Thank You Letter Code.** When checked, the totals will be broken down by Thank You Letter Code. When unchecked, all Thank You Letter Code numbers will be combined.

}

Report Output

- *Average Gift*
- *Cost / Amount per Pledge*

- ***Cost / Mailed.*** Total Cost divided by the Number of Names
- ***Cost / Number of Pledges***
- ***Date Used***
- ***Net / Mailed.*** Pledge per Mailed minus Cost per Mailed
- ***Net Revenue***
- ***Number of Names***
- ***Number of No Responses***
- ***Number of Responses***
- ***Percent of Responses.*** Responses vs. No Responses
- ***Pledge / Mailed.*** Total Pledge divided by the Number of Names
- ***Source Code***
- ***Total Cost***
- ***Total Pledge***
- ***Usage Create Date***

Mailing List Usage Report

Usage date range: Any Date
Gift date range: Any Date
Source code: 1000, 1001
Mailing list: ALL
Details by thank you letter code: No

Usage	Date Used	Source	#Names	#Resp	#NoResp	%Resp	Total Cost	Total Pledge	Net Revenue	Avg. Gift	Cost/#Pledge	Cost/$Pledge	Pledge/Mailed	Cost/Mailed	Net/Mailed
08/26/2001		1000	8	1	7	13.0%	$0.00	$24,000.00	$24,000.00	$24,000.00	$0.00	$0.00	$3,000.00	$0.00	$3,000.00
08/26/2001		1001	5	1	4	20.0%	$0.00	$12,000.00	$12,000.00	$12,000.00	$0.00	$0.00	$2,400.00	$0.00	$2,400.00
Grand Total:			**13**	**2**	**11**	**15.0%**	**$0.00**	**$36,000.00**	**$36,000.00**	**$18,000.00**	**$0.00**	**$0.00**	**$2,769.23**	**$0.00**	**$2,769.23**

5. Mass Assign Data Items

From a Data Mining Operation

Insert Section > Mass Assign

This option allows you to assign specific data to all of the selected Accounts, without having to open each Account one at a time.

This option allows you to perform a Mass Assignment to all the Accounts selected in this DMO. You can Save Accounts in Warehouse and perform the Mass Assign in the same job. See other Training Guides or Andar Help for more information on the data items being mass assigned.

- ***Communications.*** *Individual / Organization Account Profile > Communications Tab > Communications Log Sub Tab*
- ***Demographics.*** *Individual / Organization Account Profile > General Tab > Demographics Sub Tab*
- ***Prospect.*** *Individual / Organization Account Profile > CRM Tab > Prospects Sub Tab*
- ***Process Options.*** *Individual / Organization Account Profile > General Tab > Process Options Sub Tab*
- ***Global Eligibility.*** *Organization Account Profile > Donor Choice Tab > Global Eligibility Sub Tab*
- ***Task Statuses.*** *Individual / Organization Account Profile > Plans Tab > Plan Tasks Sub Tab*
- ***Techniques.*** *Individual / Organization Account Profile > Campaign Tab > Techniques Sub Tab*
- ***Recognition.*** *Individual / Organization Account Profile > General Tab > Recognition Sub Tab*

{

From the Andar Main Menu

There are also some Mass Assign options available from the Andar Main Menu. These Mass Assign jobs can be done using an Account Warehouse.

- *Campaign Status.* *Andar Main Menu > System Administration > Rollover > Campaign Rollover > Mass Assign Final Campaign Status*
- *Demographics.* *Andar Main Menu > General > Mass Assign Demographics*
- *Employee Goals and Projections.* *Andar Main Menu > System Administration > Rollover > Campaign Rollover > Mass Assign Employee Goals and Projections*
- *Employee Relationships.* *Andar Main Menu > General > Employee Management > Mass Expire Employee Relationships*
- *GeoCode Addresses.* *Andar Main Menu > General > Mass GeoCode Addresses*
- *Global Eligibility.* *Andar Main Menu > Donor Choice Management > DC Administration > Mass Assign Global Eligibility*
- *Goals and Projections.* *Andar Main Menu > System Administration > Rollover > Campaign Rollover > Mass Assign Goals and Projections*
- *Master Account.* *Andar Main Menu > Finance > Envelopes and Transactions > Mass Update Accounts To Master*

}

- *Process Options.* *Andar Main Menu > General > Mass Assign Processing Options*
- *Prospects.* *Andar Main Menu > Prospect Management > Mass Assign Prospects*
- *Recognition.* *Andar Main Menu > Recognition > Mass Assign Recognition*
- *Task Statuses.* *Andar Main Menu > Plan Management > Mass Assign Plan Task Statuses*
- *Techniques.* *Andar Main Menu > Campaign Management > Techniques > Mass Assign Techniques*
- *Thank You Letter Codes.* *Andar Main Menu > Communications > Thank You Letters > Thank You Letter Codes Mass Update*

- ***Volunteer Availability.*** *Andar Main Menu > Volunteer Management > Mass Assign Volunteer Availability*

6. Running Andar Reports

Insert Section > Reports

This option will allow you to produce any Andar canned report using the Accounts selected in this DMO. It will display a list of all Andar canned Reports. Select the report you want to run and the Right Panel will display the report submission options for that report. It will look exactly like the report submission screens on the Andar Main Menu.

You will also be able to choose to run Saved or previously run reports. *(78187 – 2014.02)*

7. Sending e-Mails

There are several ways to use Andar to send e-Mails. An e-Mail can be sent within the Data Mining Operation or it can be sent independently using a Mailing List.

7.1. E-Mailing Output from a Data Mining Operation

Insert Section > e-Mail Output

This option allows you to an e-Mail to one or more recipients that contains attachments of all Output generated by previous Step(s) within this DMO. For example, you Select all CEO's and run a Multi-Year Report for those CEOs. Then you ***Insert Section > e-Mail Output*** and identify who the e-Mail (and report) should go to.

{

- **Send e-Mail To.** *(80082 – 2014.02)* This selection determines who the e-Mail will go to.

}

  - o **Account**

{

    - ✶ **Send to User Executing This Data Mining Operation.** When checked, the e-mail will be sent to the logged in User.

}

    - ✶ **To Account.** For use when sending the e-Mail to only one Individual or one Organization.

    - ✶ **To Web User ID.** For use when sending the e-Mail to only one person and selecting by their User ID.

{

    - ✶ **To Recipient Address**
      Displays the Individual's e-Mail Address based on the Pecking Order set in System Preferences *System > Preferences > System Preferences > Pecking Orders > System Defaults Section > e-Mail*.

}

  - o **Mailing List**

    - ✶ **Mailing List.** Select the Mailing List that contains the Accounts to receive the e-Mail.

      - ∗ **Mail Usage ID.** You must have an existing Mail List Usage for the selected Mail List. It will default to the most recently recreated one but you can select any Usage.

      - ∗ **Starting From.** When sending a large number of e-Mails you can select the number to send at once so you don't overload your e-Mail Server. For example, Start From 1 or Start 301.

      - ∗ **Number to Send.** When sending a large number of e-Mails you can select the number to send at once so you don't overload your e-Mail Server. For example, Number to Send is 50 and Starting From is 1 would send the first 50. Number to Send is 50 and Starting From 51 would send the second 50.

{

- **Respondents.** *(78372 – 2014.02)* The recipient list will include only those Employees who have responded to the ask. This means they have made a Pledge or submitted a No Gift Transaction.

- **Non-Respondents.** The recipient list will include only those Employees who have not responded to the ask. This means they have not made a Pledge or have not submitted a No Gift Transaction.

- **Campaign Year.** The recipient list will look at the Accounts in the Mailing List and if they have Responded / Not Responded (based on the selection above) in the selected Campaign Year they will be included in the e-Mail.

}

- **Employees**

  - **Organization Account.** If you wish to send the e-Mail to Employees of a particular Organization, place the Organization Account Number here. When you tab out of this field, you'll see additional options on the screen for selecting certain Employees.

    - **Include Subsidiaries.** For use when sending to all Employees of one particular Organization and all its Subsidiaries.

  - **Reports to Coordinator.** Send e-Mail only to Employees assigned to the selected Coordinator.

  - **Campaign Year.** The recipient list will look at the Accounts in the Mailing List and if they have Responded / Not Responded (based on the selection above) in the selected Campaign Year they will be included in the e-Mail.

  - **Transactions Created From / To.** This option allows you to define a date range. The recipient list will include only those Employees who have a Transaction during that date range.

  - **Pledge Amounts From / To.** This option allows you to define an amount range. The recipient list will include only those Employees who have a Pledge within that range.

- **Employee Information Section.** If the Organization is using Sort Fields the recipient list can be refined based on the selected Sort Fields.

- **General Section**

  - **Respondents.** The recipient list will include only those Employees who have responded to the ask. This means they have made a Pledge or submitted a No Gift Transaction.

  - **Non-Respondents.** The recipient list will include only those Employees who have not responded to the ask. This means they have not made a Pledge or have not submitted a No Gift Transaction.

o **Warehouse**

- **Warehouse.** Select the Account Warehouse that contains the Accounts you want to receive the e-Mail.

{

  - **Individuals Only.** The e-Mail will go only to Individuals. If there are Organizations in the Warehouse, they will not receive the e-Mails.

  - **Organizations Only.** The e-Mail will go only to Organizations. If there are Individuals in the Warehouse, they will not receive the e-Mails.

  - **Both Individuals and Organizations.** The e-Mail will go to both Individuals and Organizations that are in the Warehouse.

- **Respondents.** *(78372 – 2014.02)* The recipient list will include only those Employees who have responded to the ask. This means they have made a Pledge or submitted a No Gift Transaction.

- **Non-Respondents.** The recipient list will include only those Employees who have not responded to the ask. This means they have not made a Pledge or have not submitted a No Gift Transaction.

  - ✶ **Campaign Year.** The recipient list will look at the Accounts in the Mailing List and if they have Responded / Not Responded (based on the selection above) in the selected Campaign Year they will be included in the e-Mail.

- **E-Mail Pecking Order.** Select the e-Mail Pecking Order to be used for this e-Mail. This will override the e-Mail Pecking order selected in the Mailing List. If you want to use the same one as the Mailing List, you will need to select it here.

}

- **Sender's e-Mail Address**

- **Subject**

- **Style Name.** ***Requires a MIG license.*** See Andar Help for more information.

- **Message Tab**

  - o **Text.** The e-Mail can be typed directly into the e-Mail content section below and can use the HTML Editor options at the top of that screen as well as Note Variables.

    - ✶ **E-Mail Template.** Select from drop down list to use an existing e-Mail Template. This list will include all Templates for Accounts whose Web Permission is associated to the selected Account.

      - * **None.** Used when you want to create your message without the use of a Template. This option requires remainder of fields to be entered.

    - ✶ **Language.** When your system is set up to allow multiple Languages, this allows the User to define the Language to be used for this Template.

    - ✶ **HTML Editor.** If not using a Template, the text can be typed in using the HTML Editor and Note Variables

    - ✶ **Plain Text Editor.** When this option is selected the body of the e-Mail can be typed as plain text. Simple HTML code can be used but must be manually typed.

- ✶ **E-Mail Note Variable.** When using a Template the text will be populated from that Template. These are items that can be selected from the Account Profile and inserted into the body of your e-Mail to personalize it.

  Position your cursor in the e-Mail Text field and click where you want to insert the Note Variable. Select a Note Variable from the drop down list. Click Insert.

- ✶ **Load HTML File.** Allows you to select an HTML file and have the e-Mail text replaced by the content of the file.

- ✶ **Quick Entry.** This feature can be used to insert a block of text or Note Variables into an e-Mail. To create a Quick Entry selection, create an e-Mail Template with the Usage of Quick Insert. The body of that e-Mail Template should be the block of information to be inserted.

- o **Newsletter.** See Andar Help for more information.

- o **Article.** See Andar Help for more information.

- **Attached Files Tab.** You can attach any file to the e-Mail.

  - o **File Path.** Browse your network and select the desired file to be attached to the e-Mail.

  - o **Drag and Drop.** Andar allows you to drag and drop a file from Explorer to the Andar attachment screen.

  - o **Copy and Paste.** Andar allows you to copy and paste a file from Explorer to the Andar attachment screen.

  - o **Attach File Reference Only**

  - o **Description.** For internal use only.

- **Advanced Tab**

  - **Track Click Through.** Records an Interest Rating on the e-Mail Recipient's Account Profile. It will be recorded in the ***Individual / Organization Account Profile > CRM Tab > Interest Rating Sub Tab***.

    If you have an Interest identified in an Article and that Article is included in the e-Mail the click through will be automatically recorded. Or you can insert code into the e-Mail which will track when the recipients click on that item. See Andar Help for more information.

Important! Track click through requires a mail list usage.

  - **Create Communications Log.** When using a Template this will be populated from that Template. When checked Andar creates a Communications record for each Individual and / or Organization that this e-Mail was sent to. The content of the e-Mail is not included in the Communication Log record.

    - **Subject Code.** When using a Template this will be populated from that Template. This becomes the Subject Code used for the above Communication records.

    - **Add Organizations from e-Mail Address.** When checked, Andar will look at the Domain Name of all the recipients of the e-Mail. If that Domain Name is found in the Website field on an Organization Account (***Individual / Organization Account Profile > Main Tab > Main Bio Sub Tab > Website***) that Organization will also be included in the Communication record created by this e-Mail.

{

  - **BCC to Sender.** When checked, the Sender will get a copy of the e-Mail.

}

  - **Importance.** Allows the User to define the Importance of the e-Mail message (High, Normal, and Low). This is similar to the same functionality provided in Outlook.

  - **Sensitivity.** Allows the User to define the Sensitivity of the e-Mail message (Personal, Private, and Company Confidential). This is similar to the same functionality provided in Outlook.

- **Reply To.** Allows the User to define a different e-Mail Address to receive any replies. For example, your president sends an e-Mail where he is the Sender but any replies should go to his assistant.

{

- **Password Reset Role.** This option only applies when the Password Reset Link is included in an e-Mail and the Web User has multiple User IDs. The following Pecking Order will be used to determine which User ID will be sent and which Password will be reset.

  - The User ID has a Login Default with a Permission that matches both the Organization set on the e-Mail Template and the selected Role.

  - The User ID has a Login Default with a Permission that matches the Organization set on the e-Mail Template.

  - The User ID has a Login Default with a Permission that matches the selected Role.

  - The User ID has no Login Default.

  - Any User ID.

}

- **E-Mail Job Log.** ***Recommended.*** The Job Log contains a list of e-Mails that were successfully sent and those that were not. This option automatically e-Mails the Job Log when the job is completed.

  - **E-Mail Job Log To.** Recipient for the Job Log.

Clear Output

Insert Section > Clear Output

When you've had an Output (Extract or Report) in the Data Mining Operation and you want to ignore that Output to do something else, such as send a different report to some different, insert this section and proceed with the next step.

7.2. Sending an e-Mail from the Andar Main Menu

Andar Main Menu > Communications > e-Mail > Send e-Mail

This e-Mail feature allows you to send e-Mails directly from Andar. When sending from here you have the added ability to automatically create a Communication record for all the Recipients, record their Interests, and more.

{

- **Send e-Mail To.** *(80082 – 2014.02)* This selection determines who the e-Mail will go to.

}

  - **Account**

{

    - ✶ **Send to User Executing This Data Mining Operation.** When checked, the e-mail will be sent to the logged in User.

}

    - ✶ **To Account.** For use when sending the e-Mail to only one Individual or one Organization.
    - ✶ **To Web User ID.** For use when sending the e-Mail to only one person and selecting by their User ID.

{

    - ✶ **To Recipient Address.** Displays the Individual's e-Mail Address based on the Pecking Order set in System Preferences *System > Preferences > System Preferences > Pecking Orders > System Defaults Section > e-Mail*.

}

  - **Mailing List**
    - ✶ **Mailing List.** Select the Mailing List that contains the Accounts to receive the e-Mail.
      - * **Mail Usage ID.** You must have an existing Mail List Usage for the selected Mail List. It will default to the most recently recreated one but you can select any Usage.

* **Starting From.** When sending a large number of e-Mails you can select the number to send at once so you don't overload your e-Mail Server. For example, Start From 1 or Start 301.

* **Number to Send.** When sending a large number of e-Mails you can select the number to send at once so you don't overload your e-Mail Server. For example, Number to Send is 50 and Starting From is 1 would send the first 50. Number to Send is 50 and Starting From 51 would send the second 50.

{

* **Respondents.** *(78372 – 2014.02)* The recipient list will include only those Employees who have responded to the ask. This means they have made a Pledge or submitted a No Gift Transaction.

* **Non-Respondents.** The recipient list will include only those Employees who have not responded to the ask. This means they have not made a Pledge or have not submitted a No Gift Transaction.

* **Campaign Year.** The recipient list will look at the Accounts in the Mailing List and if they have Responded / Not Responded (based on the selection above) in the selected Campaign Year they will be included in the e-Mail.

}

- **Employees**

  ✶ **Organization Account.** If you wish to send the e-Mail to Employees of a particular Organization, place the Organization Account Number here. When you tab out of this field, you'll see additional options on the screen for selecting certain Employees.

  * **Include Subsidiaries.** For use when sending to all Employees of one particular Organization and all its Subsidiaries.

  ✶ **Reports to Coordinator.** Send e-Mail only to Employees assigned to the selected Coordinator.

- **Campaign Year.** The recipient list will look at the Accounts in the Mailing List and if they have Responded / Not Responded (based on the selection above) in the selected Campaign Year they will be included in the e-Mail.

- **Transactions Created From / To.** This option allows you to define a date range. The recipient list will include only those Employees who have a Transaction during that date range.

- **Pledge Amounts From / To.** This option allows you to define an amount range. The recipient list will include only those Employees who have a Pledge within that range.

- **Employee Information Section.** If the Organization is using Sort Fields the recipient list can be refined based on the selected Sort Fields.

- **General Section**

  - **Respondents.** The recipient list will include only those Employees who have responded to the ask. This means they have made a Pledge or submitted a No Gift Transaction.

  - **Non-Respondents.** The recipient list will include only those Employees who have not responded to the ask. This means they have not made a Pledge or have not submitted a No Gift Transaction.

- **Warehouse**

  - **Warehouse.** Select the Account Warehouse that contains the Accounts you want to receive the e-Mail.

{

    - **Individuals Only.** The e-Mail will go only to Individuals. If there are Organizations in the Warehouse, they will not receive the e-Mails.

    - **Organizations Only.** The e-Mail will go only to Organizations. If there are Individuals in the Warehouse, they will not receive the e-Mails.

- **Both Individuals and Organizations.** The e-Mail will go to both Individuals and Organizations that are in the Warehouse.

- **Respondents.** *(78372 – 2014.02)* The recipient list will include only those Employees who have responded to the ask. This means they have made a Pledge or submitted a No Gift Transaction.

- **Non-Respondents.** The recipient list will include only those Employees who have not responded to the ask. This means they have not made a Pledge or have not submitted a No Gift Transaction.

- **Campaign Year.** The recipient list will look at the Accounts in the Mailing List and if they have Responded / Not Responded (based on the selection above) in the selected Campaign Year they will be included in the e-Mail.

- **E-Mail Pecking Order.** Select the e-Mail Pecking Order to be used for this e-Mail. This will override the e-Mail Pecking order selected in the Mailing List. If you want to use the same one as the Mailing List, you will need to select it here.

}

- **Sender's e-Mail Address**

- **Subject**

- **Style Name.** ***Requires a MIG license.*** See Andar Help for more information.

- **e-Mail Text Tab**

  - **Text.** The e-Mail can be typed directly into the e-Mail content section below and can use the HTML Editor options at the top of that screen as well as Note Variables.

    - **E-Mail Template.** Select from drop down list to use an existing e-Mail Template. This list will include all Templates for Accounts whose Web Permission is associated to the selected Account.

      - **None.** Used when you want to create your message without the use of a Template. This option requires remainder of fields to be entered.

- **Language.** When your system is set up to allow multiple Languages, this allows the User to define the Language to be used for this Template.

- **HTML Editor.** If not using a Template, the text can be typed in using the HTML Editor and Note Variables

- **Plain Text Editor.** When this option is selected the body of the e-Mail can be typed as plain text. Simple HTML code can be used but must be manually typed.

- **E-Mail Note Variable.** When using a Template the text will be populated from that Template. These are items that can be selected from the Account Profile and inserted into the body of your e-Mail to personalize it.

  Position your cursor in the e-Mail Text field and click where you want to insert the Note Variable. Select a Note Variable from the drop down list. Click Insert.

- **Load HTML File.** Allows you to select an HTML file and have the e-Mail text replaced by the content of the file.

- **Quick Entry.** This feature can be used to insert a block of text or Note Variables into an e-Mail. To create a Quick Entry selection, create an e-Mail Template with the Usage of Quick Insert. The body of that e-Mail Template should be the block of information to be inserted.

- **Newsletter.** See Andar Help for more information.

- **Article.** See Andar Help for more information.

- **Attached Files Tab.** You can attach any file to the e-Mail.

  - **File Path.** Browse your network and select the desired file to be attached to the e-Mail.

  - **Drag and Drop.** Andar allows you to drag and drop a file from Explorer to the Andar attachment screen.

- o **Copy and Paste.** Andar allows you to copy and paste a file from Explorer to the Andar attachment screen.
- o **Attach File Reference Only**
- o **Description.** For internal use only.

- **Advanced Tab**

  - o **Track Click Through.** Records an Interest Rating on the e-Mail Recipient's Account Profile. It will be recorded in the ***Individual / Organization Account Profile > CRM Tab > Interest Rating Sub Tab***.

    If you have an Interest identified in an Article and that Article is included in the e-Mail the click through will be automatically recorded. Or you can insert code into the e-Mail which will track when the recipients click on that item. See Andar Help for more information.

Important! Track click through requires a mail list usage.

  - o **Create Communications Log.** When using a Template this will be populated from that Template. When checked Andar creates a Communications record for each Individual and / or Organization that this e-Mail was sent to. The content of the e-Mail is not included in the Communication Log record.

    - ✶ **Subject Code.** When using a Template this will be populated from that Template. This becomes the Subject Code used for the above Communication records.

    - ✶ **Add Organizations From e-Mail Address.** When checked, Andar will look at the Domain Name of all the recipients of the e-Mail. If that Domain Name is found in the Website field on an Organization Account (***Individual / Organization Account Profile > Main Tab > Main Bio Sub Tab > Website***) that Organization will also be included in the Communication record created by this e-Mail.

{

  - o **BCC to Sender.** When checked, the Sender will get a copy of the e-Mail.

}

- o **Importance.** Allows the User to define the Importance of the e-Mail message (High, Normal, and Low). This is similar to the same functionality provided in Outlook.

- o **Sensitivity.** Allows the User to define the Sensitivity of the e-Mail message (Personal, Private, and Company Confidential). This is similar to the same functionality provided in Outlook.

- o **Reply To.** Allows the User to define a different e-Mail Address to receive any replies. For example, your president sends an e-Mail where he is the Sender but any replies should go to his assistant.

{

- o **Password Reset Role.** This option only applies when the Password Reset Link is included in an e-Mail and the Web User has multiple User IDs. The following Pecking Order will be used to determine which User ID will be sent and which Password will be reset.

  - ✶ The User ID has a Login Default with a Permission that matches both the Organization set on the e-Mail Template and the selected Role.

  - ✶ The User ID has a Login Default with a Permission that matches the Organization set on the e-Mail Template.

  - ✶ The User ID has a Login Default with a Permission that matches the selected Role.

  - ✶ The User ID has no Login Default.

  - ✶ Any User ID.

}

- o **E-Mail Job Log.** ***Recommended.*** The Job Log contains a list of e-Mails that were successfully sent and those that were not. This option automatically e-Mails the Job Log when the job is completed.

  - ✶ **E-Mail Job Log To.** Recipient for the Job Log.

7.3. E-Mail Templates

Andar Main Menu > Communications > e-Mail > e-Mail Templates

An e-Mail Template can be created once and then used repeatedly to send e-Mails with the same verbiage to multiple Web Users. Note Variables can be used within the Template to allow for personalization.

- **All Accounts.** The Template can be used for any e-Mail no matter who it is going to.

- **Account Number.** This is the Account that will have this Template available for use. The Pecking Order used will be *Individual Account > Organization Account > Event Account (**i-Attend only**) > Agency Account (**Community Building only**) > Program Account (**Community Building only**) > Designated Agency Account (**e-Pledge only**) > Parent Account > Campaign Account (**e-Pledge only**) > Master Account > Tailoring Account.*

- **Template Description.** This will be the name of the Template.

- **Usage Group.** This identifies Usages by category.

  - **Usage.** Defines how and when an e-Mail Template will be used. These will be primarily used when an action causes an e-mail to be automatically generated / sent.

Important! All e-mails that are automatically generated by Andar or Andar Web will use an e-Mail Template. The Template that will be used is based on the Usage selected for that Template. For e-mails that you will manually send the Usage must be General.

{

- **Opportunity Class.** This option is used for e-Mails that are automatically generated for Volunteer Assignments and can be customized based on the Opportunity Class. See the Volunteer Management Training Guide, e-Volunteer Training Guide or Andar Help for more information.

  - **Opportunity Sub-Class**

}

- **Use Sender Address Specified When Sending e-Mail.** When selected and this Template is used for sending an e-Mail, the User will be able to identify the Sender at the time the e-Mail is being sent. That piece of information will not be hard coded into the Template.

- **Sender's e-Mail Address**

- **Language.** When your system is set up to allow multiple Languages, this allows the User to define the Language to be used for this Template.

- **Subject**

- **Style Name.** ***Requires a MIG license*.** A Style Sheet can be selected and will be used for e-Mails generated by this Template.

- **e-Mail Text Tab**

    - **Text.** The e-Mail can be typed directly into the e-Mail content section below and can use the HTML Editor options at the top of that screen as well as Note Variables.

        - **E-Mail Template.** Select from drop down list to use an existing e-Mail Template. This list will include all Templates for Accounts whose Web Permission is associated to the selected Account.

            - **None.** Used when you want to create your message without the use of a Template. This option requires remainder of fields to be entered.

        - **Language.** When your system is set up to allow multiple Languages, this allows the User to define the Language to be used for this Template.

        - **HTML Editor.** If not using a Template, the text can be typed in using the HTML Editor and Note Variables

        - **Plain Text Editor.** When this option is selected the body of the e-Mail can be typed as plain text. Simple HTML code can be used but must be manually typed.

    - ✶ **E-Mail Note Variable.** When using a Template the text will be populated from that Template. These are items that can be selected from the Account Profile and inserted into the body of your e-Mail to personalize it.

      Position your cursor in the e-Mail Text field and click where you want to insert the Note Variable. Select a Note Variable from the drop down list. Click Insert.

    - ✶ **Load HTML File.** Allows you to select an HTML file and have the e-Mail text replaced by the content of the file.

    - ✶ **Quick Entry.** This feature can be used to insert a block of text or Note Variables into an e-Mail. To create a Quick Entry selection, create an e-Mail Template with the Usage of Quick Insert. The body of that e-Mail Template should be the block of information to be inserted.

  - o **Newsletter.** See Andar Help for more information.

  - o **Article.** See Andar Help for more information.

- **Attached Files Tab.** You can attach any file to the e-Mail.

  - o **File Path.** Browse your network and select the desired file to be attached to the e-Mail.

  - o **Drag and Drop.** Andar allows you to drag and drop a file from Explorer to the Andar attachment screen.

  - o **Copy and Paste.** Andar allows you to copy and paste a file from Explorer to the Andar attachment screen.

  - o **Attach File Reference Only**

  - o **Description.** For internal use only.

- **Advanced Tab**

  - **Track Click Through.** Records an Interest Rating on the e-Mail Recipient's Account Profile. It will be recorded in the *Individual / Organization Account Profile > CRM Tab > Interest Rating Sub Tab*.

    If you have an Interest identified in an Article and that Article is included in the e-Mail the click through will be automatically recorded. Or you can insert code into the e-Mail which will track when the recipients click on that item. See Andar Help for more information.

Important! Track click through requires a mail list usage.

  - **Create Communications Log.** When using a Template this will be populated from that Template. When checked Andar creates a Communications record for each Individual and / or Organization that this e-Mail was sent to. The content of the e-Mail is not included in the Communication Log record.

    - **Subject Code.** When using a Template this will be populated from that Template. This becomes the Subject Code used for the above Communication records.

    - **Add Organizations from e-Mail Address.** When checked, Andar will look at the Domain Name of all the recipients of the e-Mail. If that Domain Name is found in the Website field on an Organization Account (*Individual / Organization Account Profile > Main Tab > Main Bio Sub Tab > Website*) that Organization will also be included in the Communication record created by this e-Mail.

{

  - **BCC to Sender.** When checked, the Sender will get a copy of the e-Mail.

}

  - **Importance.** Allows the User to define the Importance of the e-Mail message (High, Normal, and Low). This is similar to the same functionality provided in Outlook.

  - **Sensitivity.** Allows the User to define the Sensitivity of the e-Mail message (Personal, Private, and Company Confidential). This is similar to the same functionality provided in Outlook.

- o **Reply To.** Allows the User to define a different e-Mail Address to receive any replies. For example, your president sends an e-Mail where he is the Sender but any replies should go to his assistant.

{

- o **Password Reset Role.** This option only applies when the Password Reset Link is included in an e-Mail and the Web User has multiple User IDs. The following Pecking Order will be used to determine which User ID will be sent and which Password will be reset.

  - ✶ The User ID has a Login Default with a Permission that matches both the Organization set on the e-Mail Template and the selected Role.
  - ✶ The User ID has a Login Default with a Permission that matches the Organization set on the e-Mail Template.
  - ✶ The User ID has a Login Default with a Permission that matches the selected Role.
  - ✶ The User ID has no Login Default.
  - ✶ Any User ID.

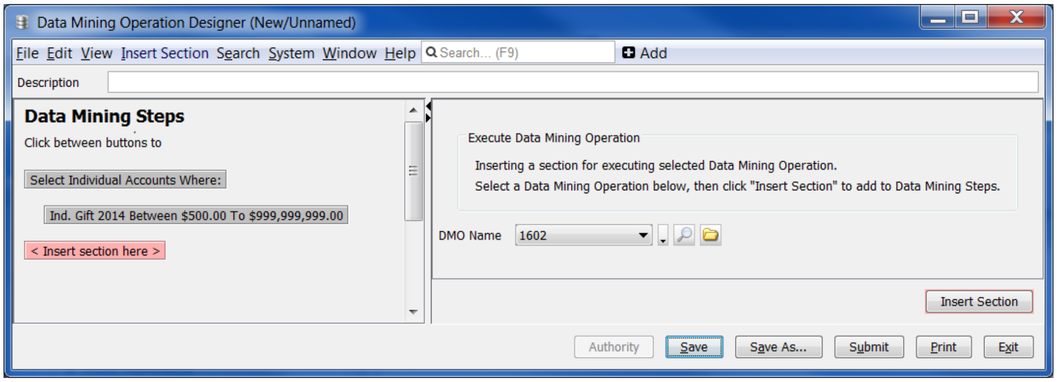
}

- o **E-Mail Job Log.** ***Recommended.*** The Job Log contains a list of e-Mails that were successfully sent and those that were not. This option automatically e-Mails the Job Log when the job is completed.

  - ✶ **E-Mail Job Log To.** Recipient for the Job Log.

8. Executing Another Job

Andar Main Menu > Data Mining > Data Mining Operations > Design New > Insert Section > Execute Another DMO



Provides the ability to Re-Submit another existing Data Mining Operation within the one you're working with. For example, you're currently doing an invitation to a big event and you want all your Volunteers. You have existing DMO's that create Warehouses or Mailing Lists for Board of Directors, Allocations Panels, etc. You want to make sure you get the latest list so you can instruct your current DMO to Re-Submit the DMO that created the Board list and pull those Accounts into the current DMO.

- **DMO Name.** Select the Name of the Data Mining Operation you want to be Re-Submitted.

8.1. Execute Another Data Mining Operation

Insert Section > Execute > Another Data Mining Operation

Enables another DMO to be re-submitted as a Step within a DMO. This step also enables an SQL Statement and / or a Command to be included as a Step in a DMO.

8.2. Execute a SQL Statement

Insert Section > Execute > SQL Statement

This option allows the User to add an independent SQL statement into a DMO. For example, you may want to execute a stored procedure or to do a custom insert into some other table.

See Andar Help for more information.

8.3. Execute a Command

Insert Section > Execute > Command

This option allows the User to add a DOS command or argument to a DMO.

See Andar Help for more information.

9. Complex Queries

In many cases you will need to select Accounts based on a number of common data. For example, you want all the members of your Board of Directors who are not Leadership Givers and are Rotary Club members and work for one of your top 100 companies. This would be a Complex Query.

9.1. Clear Selected Accounts

Insert Section > Clear Selected Accounts

This step removes all Accounts that have been selected so far by the DMO. It does not delete Account Numbers from Saved Account Warehouses or Mailing Lists.

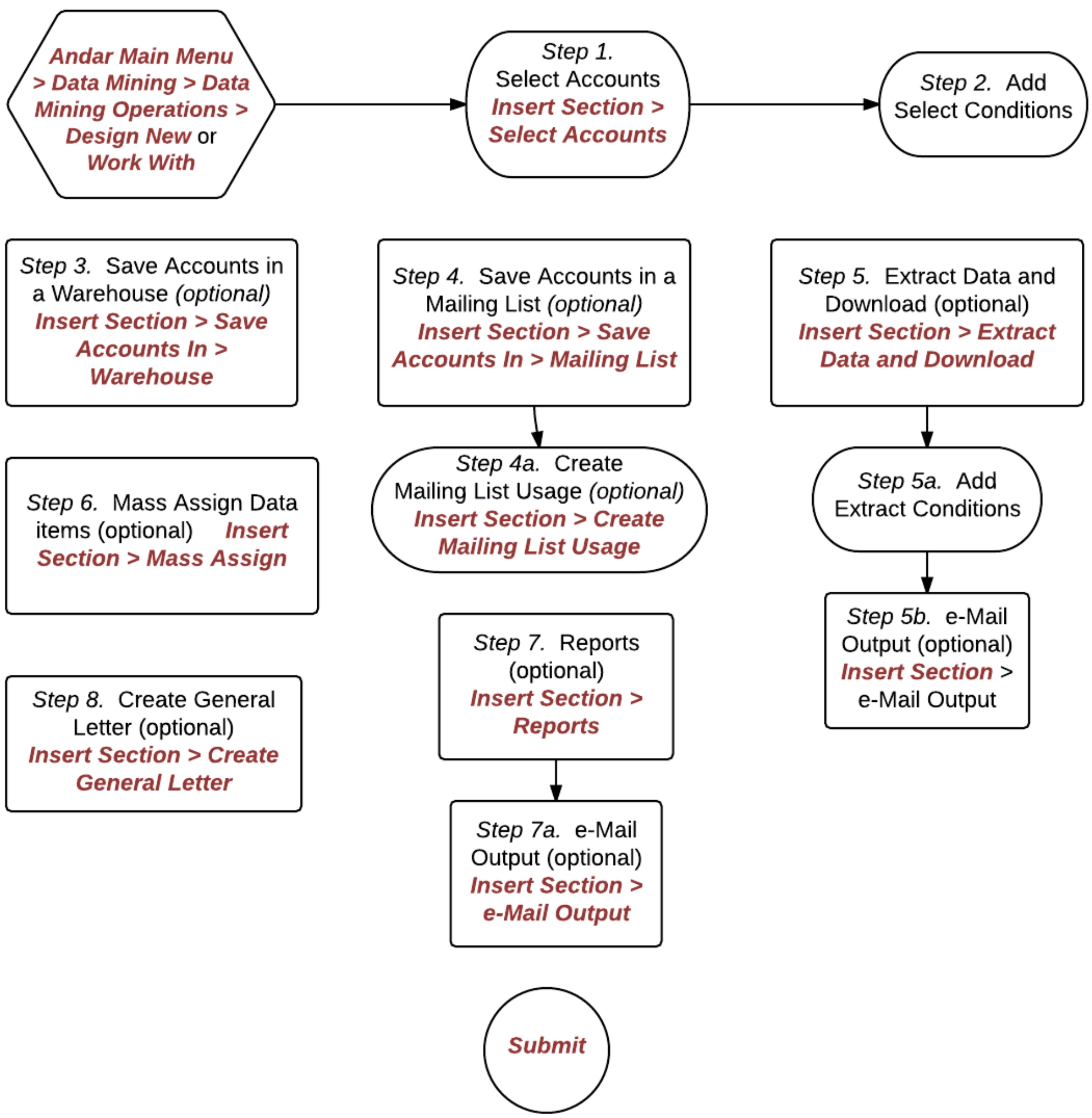
9.2. Transpose Extract Table

Insert Section > Transpose Extract Table

When General Relationship data is Extracted, Accounts in the same General Relationship will be in different rows in the Output file. Since Accounts are sequenced by the Account Number (not the Group Number), you will have to look through the entire file to find all the Accounts in the same General Relationship based on their Group Number. Adding the Transpose Extract Table step will enable Andar to Output all Accounts in the same General Relationship in a single row.

See the Data Mining Supplement Training Guide or Andar Help for more information.

9.3. Data Mining Operation with Multiple Options



9.4. Operators

Complex Queries require that you add multiple Conditions in your Selection. This requires the use of an Operator.

There is no limit to the number of Conditions that can be added in a DMO.

- **And.** All Conditions must be true. For example, you want all members of your Board of Directors who are Rotary Club members. You would put the And Operator between the two Conditions.

- **Or.** Any Condition can be true. For example, you want all members of your Board of Directors or your Finance Committee. They don't have to be on the Board and the Finance Committee, but they do need to be on one of them.

- **And Not.** Used when the first Condition must be true and the second Condition must be false. For example, you want all members of your Board of Directors who are not Leadership Givers.

- **Or Not.** Used when the first Condition must be true and the second ignores the first condition and must be false. This option is rarely needed.

- **( ) Brackets.** The DMO will perform the task inside the Brackets first. Much like Excel formulas or Algebraic formulas.
  Brackets are important! Example:
  - 3 + 1 * 6 / 5 – 4 = .2
  - 3 + (1 * 6) / 5 – 4 = .2
  - (3 + 1) * 6 / (5 – 4) = 24
  - (3 + (1 * 6)) / 5 – 4 = -2.2
  - (3 + (1*6)) / (5 – 4) = 9

9.5. Clear Selected Accounts

Clear Selected Accounts removes all Accounts selected in the previous step. This is the scenario when you have to select Accounts at a higher level first in order to get the desired Accounts at a lower level. The Clear Selected Accounts option will remove the Accounts that helped you get to the desired Accounts. If not removed, the Accounts at a higher level will also be included in your selection.

For example, you want to select Employee Accounts from the Subsidiaries of an Organization, but there is no existing Account Warehouse of the Subsidiaries. In order to select the Employee Accounts, you must first create an Account Warehouse for these Subsidiaries. Once the Warehouse is created, you must clear the selected Accounts (the Subsidiaries) before continuing to select Employee Accounts from the new Warehouse. Otherwise, both the Subsidiaries (Organizations) and the Employees (Individuals) will be included in your selection.

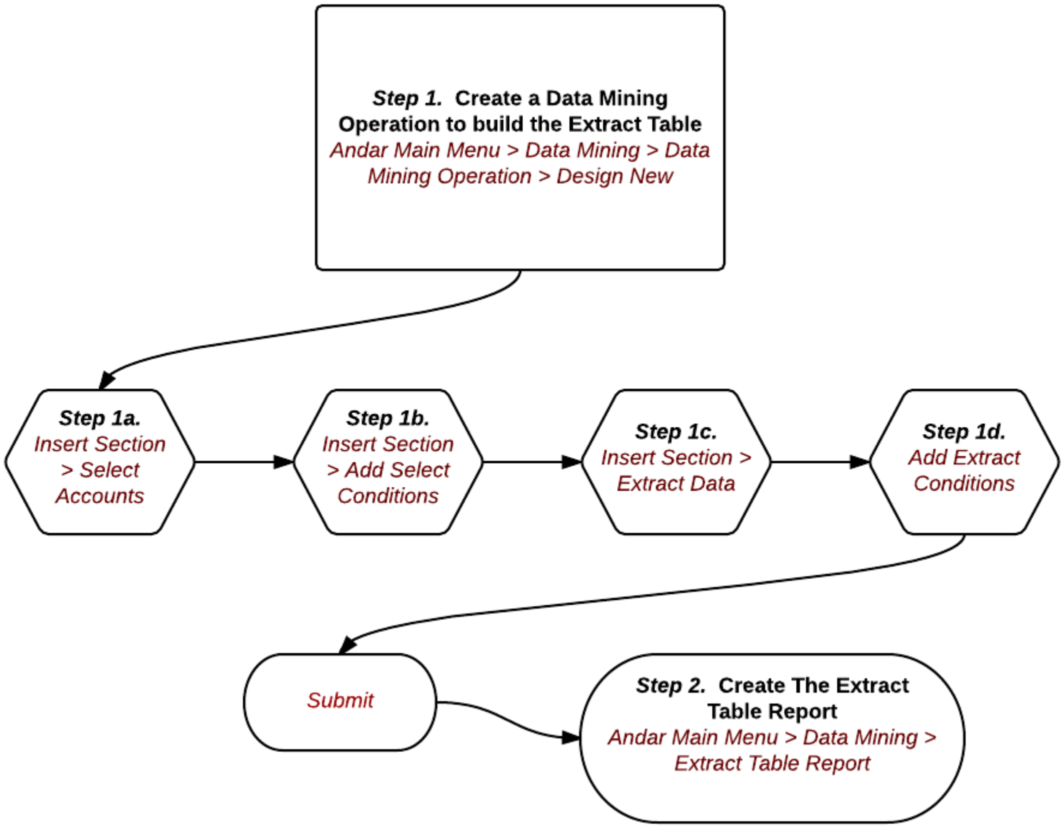
{

10. Extract Table Report *(65545 – 2014.01)*

Andar Main Menu > Data Mining > Extract Table Report

Requires a MIG license. Data Mining Operations can extract almost any data you want from the database. While anyone can download this data into a spreadsheet this feature will allow you to generate a custom report in PDF format. It allows you to choose which columns you want to appear in the report, how to sort the data and how you want the report to look.

Once an Extract Table Report is created, it will be like all other Andar reports so it can be saved to run again later or scheduled to run at any time.



Step 1. Create a Data Mining Operation to Build the Extract Table.

Andar Main Menu > Data Mining > Data Mining Operation > Design New

Step 1a. Insert Section > Select Accounts

Select the desired Accounts.

Step 1b. Insert Section > Add Select Conditions

Add the Select Conditions as needed.

Step 1c. Insert Section > Extract Data

- **Extract Table Name**
  The Table Name cannot contain spaces.

- **Extract Table Description**

- **Delete Extract Table After Download**

Important! Do not check this option.

- **Table Value to Extract**
  This option defines which Table information will be included in the Extract Table. If you choose Abbreviation or Description it will use that information most of the time. However, it is not possible in some cases and therefore, will default to the Table Entry when necessary.
  - *Entry*
  - *Abbreviation*
  - *Description*

Step 1d. Add Extract Conditions

You will need add Extract Conditions for each piece of information you want included on your report.

Step 1e. Submit

Step 2. Create the Extract Table Report

Andar Main Menu > Data Mining > Extract Table Report

- **Extract Table Tab**
  - **Extract Table.** Select the Extract Table defined in your Data Mining Operation.

- **Extract Executive Plus.** *(79035 – 2014.02)* Only Executive Plus Apps with Context Dashboard will be allowed. Executive Plus Apps that listen to other Dashboard or Bio Tab Apps will like fail to execute and cannot be used as a data source for an Extract Table Report.

  If the Executive Plus App cannot be executed by the Table Report an error will be displayed instead of the list of columns.

- **Report Title**

- **Report Footnote**

- **Summary Report Only.** *(80040 – 2014.03)* When checked, the report will provide only report totals, not Account details.

- **Sorting And Summaries Tab**

  - **Columns.** This section will contain a list of all the columns that will be included in the report. They will be the same as defined in the Extract Conditions in your Data Mining Operation.

  - **Sorted By.** This section determines how the report will be sorted. By default, Report Total is always a sorting field. When a Sorted By option is selected, the Sort Field Options will be active.

    The position options allow you to reorganize the sort options.
    - *Top*
    - *Up*
    - *Down*
    - *Bottom*

  - **Sort Field Options.** When the Sorted By field is selected, this section becomes enabled.

    - **New Page.** When checked, the selected Sorted By item will begin on a new page. For example, if you are sorting by Report Total, the Report Total will begin on a separate page.

- ✶ **New Line(s).** When checked, this option will allow you to specify the number of empty lines before the selected Sorted By item. For example, if you are sorting by Report Total and you enter 3 here, there will be 3 blank lines before the Report Total.

- o **Sort Field Summary Columns.** This shows all the available columns retrieved from the Extract Table. You can choose any field from that list and tell Andar to calculate the Total, Average, Median, Maximum, Minimum, and / or Count.

  When a Summary option is selected for a column, a checkmark will appear beside the item.

  - ✶ **List Selected First.** This option will reorganize the Sort Field Summary Columns section. It will move the highlighted item to the top of the list.

Important! This selection has nothing to do with the report output.

- ✶ **List Selected Only.** This option will reorganize the Sort Field Summary Columns section. It will remove any items except for the one highlighted.

Important! This has nothing to do with the report output.

- o **Summary Operations.** Select an item from the Sort Field Summary section and choose how you want it to be summarized. For example, if you have a Pledge Amount selected and you check Total and Average, the report will include a Total Pledge and an Average Pledge.
  - ✶ *Total*
  - ✶ *Average*
  - ✶ *Median*
  - ✶ *Maximum*
  - ✶ *Minimum*
  - ✶ *Count*

- **Columns Tab.** This screen allows you to choose which columns from the Extract will appear in the report and to customize the report layout. Your selections will affect the output in both PDF and CSV formats.

}
{

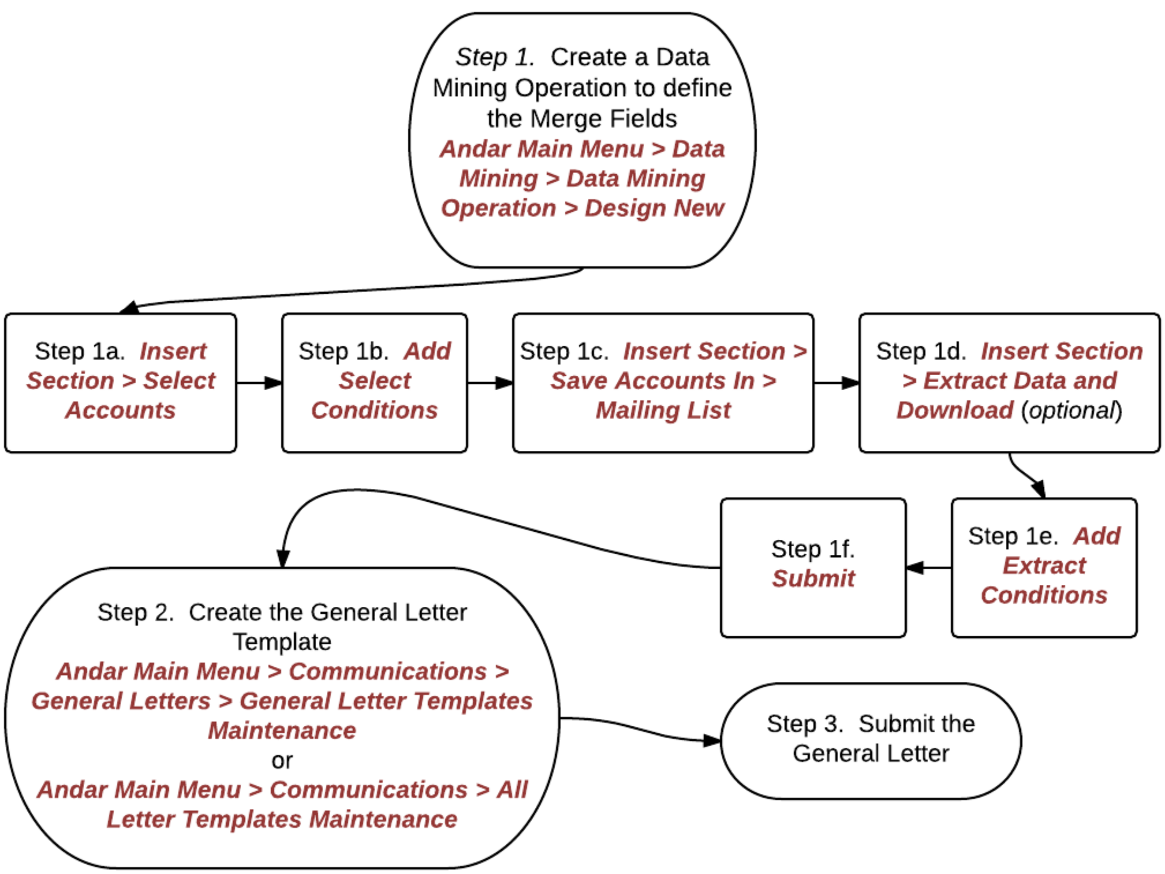
11. General Letters *(73489 – 2014.01)*

Andar gives you the ability to create a list of Recipients and a Letter Template then merge the two together to produce a finished PDF Letter ready to be printed.

}

This feature allows you to create a Letter directly in Andar using a Mailing List. The merge fields will come from the Mailing List Usage. This Letter can be produced as a PDF ready to print and mail or as an e-Mail.

If an e-Mail option was selected, it will send an e-Mail to the e-Mail Address on the given Mail List Usage.



Step 1. Create the Merge Fields

From a Data Mining Operation

Andar Main Menu > Data Mining > Data Mining Operations > Design New

- **Insert Section**
    - **Create General Letter**
        - ✶ **Generate From Mailing List.** A Letter will be produced for all Accounts in the selected Mailing List Usage. The only fields that will be available to include in the Letter are those that are included in the Mailing List Usage (Name, Address, e-Mail, Phone, Fax).
            - **Mailing List Name**
                - **Mailing List Usage**
        - ✶ **Generate From Current Extract Table.**

Important! When using this option, the Extract MUST be the last Section prior to the Create Letters step.

Important! When generating Letters from an Extract the Extract Data section must be using a Mailing List and the Conditions in the Extract must include Mailing List Tab, the Individual Bio Tab and / or the Individual Organization Tab.

- ✶ **General Template.** The task requires you to user a Letter Template. One can be added here or go to *Andar Main Menu > Communications > All Letter Templates Maintenance*.
- ✶ **Style Sheet.** You can select a specific Style Sheet to be used for the look of your Letter. See Andar Help for more information.

{

- **Sort Letters By.** *(82875 – 2015.01)*
  - *Account Name*
  - *Zip Code*

}

- **Create PDF Letter Only.** When selected, this option produces a PDF Letter that is ready to be printed and mailed.

  - **Put All Letters Into A Single PDF.** When checked, all the Letters will be created in a single PDF file. When unchecked, each Letter will be a separate PDF file.

  - **Create Mailing Labels.** When checked, Andar will also create Mailing Labels that can be printed on the selected Mailing Label paper.

- **Create PDF Letter and Attach to e-Mail.** When selected, this option will create the PDF Letters but instead of preparing them for mailing, they will be attached to an e-Mail. Each Recipient will receive his own e-Mail with his own Letter attached.

- **Embed Generated Letter In e-Mail Body.** When selected, this option will create the Letter as the body of an e-Mail. Each Recipient will receive his own e-Mail with his own information in the body.

- **E-Mail Template.** This will be the Template that will be used for the e-Mails in the two options above.

Important! When choosing to Embed Generated Letter In e-Mail Body, the e-Mail Template's content will not be used but the other features such as the Sender Address, Subject, etc. will be used.

Important! The e-Mail Templates for General Letters must have a Usage of General Letter.

If None is selected the System Default Template will be used.

- **Create Communication Logs.** A Communication record will be created for every Letter that is created / sent.

- **Primary Communicator Is**

  - **Account of User Executing This Data Mining Operation.** The User who is logged in to Andar will be listed as the Primary Communicator.

  - **Select Account.** A specific Account can be selected as the Primary Communicator.

- **Communication Type.** Defaults to Mass Communication but can be changed as needed.

- **Subject.** Defaults to General Letter but should be changed accordingly.

- **Subject Code.** Defaults to General Letter but should be changed accordingly.

- **Attach PDF Letter To Communication.** When selected and you are generating a PDF Letter and have each one as a separate file, the PDF will be attached to the Communication record. If the PDFs are all going to a single file, it will not be attached.

When the Create General Letter is added into a Data Mining Operation and it includes one of the e-Mail options and the DMO is submitted, the e-Mail will be sent at that time.

When the Create General Letter is added into a Data Mining Operation and it includes the PDF Letter option, the Letters will be in your Output.

From the Main Menu

Andar Main Menu > Communications > General Letters > Create General Letters

- **Selection Tab**

  - **Generate From Mailing List.** A Letter will be produced for all Accounts in the selected Mailing List Usage. The only fields that will be available to include in the Letter are those that are included in the Mailing List Usage (Name, Address, e-Mail, Phone, Fax).

    - ✶ **Mailing List Name**
        - ∗ **Mailing List Usage**
  - o **Generate From Current Extract Table**

> ***Important!*** When using this option, the Extract MUST be the last Section prior to the Create Letters step.

> ***Important!*** When generating Letters from an Extract the Extract Data section must be using a Mailing List and the Conditions in the Extract must include Mailing List Tab, the Individual Bio Tab and / or the Individual Organization Tab.

> ***Important!*** When using this option, you must first have a Data Mining Operation that had the Extract Data and Download selection. And on that Extract Table option the Delete Extract Table after Download must be unchecked.

    - ✶ **Extract Table.** Select the Extract Table to be used.
  - o **General Template.** The task requires you to user a Letter Template. One can be added here or go to *Andar Main Menu > Communications > All Letter Templates Maintenance*.
  - o **Style Sheet.** You can select a specific Style Sheet to be used for the look of your Letter. See Andar Help for more information.
  - o **Create PDF Letter Only.** When selected, this option produces a PDF Letter that is ready to be printed and mailed.
    - ✶ **Put All Letters Into A Single PDF.** When checked, all the Letters will be created in a single PDF file. When unchecked, each Letter will be a separate PDF file.
    - ✶ **Create Mailing Labels.** When checked, Andar will also create Mailing Labels that can be printed on the selected Mailing Label paper.

- **Create PDF Letter and Attach to e-Mail.** When selected, this option will create the PDF Letters but instead of preparing them for mailing, they will be attached to an e-Mail. Each Recipient will receive his own e-Mail with his own Letter attached.

- **Embed Generated Letter In e-Mail Body.** When selected, this option will create the Letter as the body of an e-Mail. Each Recipient will receive his own e-Mail with his own information in the body.

- **E-Mail Template.** This will be the Template that will be used for the e-Mails in the two options above.

> ***Important!*** When choosing to Embed Generated Letter In e-Mail Body, the e-Mail Template's content will not be used but the other features such as the Sender Address, Subject, etc. will be used.

> ***Important!*** The e-Mail Templates for General Letters must have a Usage of General Letter.

If None is selected the System Default Template will be used.

- **Create Communication Logs.** A Communication record will be created for every Letter that is created / sent.

  - **Primary Communicator Is**

    - **Account of User Executing This Data Mining Operation.** The User who is logged in to Andar will be listed as the Primary Communicator.

    - **Select Account.** A specific Account can be selected as the Primary Communicator.

  - **Communication Type.** Defaults to Mass Communication but can be changed as needed.

  - **Subject.** Defaults to General Letter but should be changed accordingly.

- ✶ **Subject Code.** Defaults to General Letter but should be changed accordingly.

- ✶ **Attach PDF Letter To Communication.** When selected and you are generating a PDF Letter and have each one as a separate file, the PDF will be attached to the Communication record. If the PDFs are all going to a single file, it will not be attached.

When the Create General Letter includes one of the e-Mail options and the job is submitted, the e-Mail will be sent at that time.

When the Create General Letter includes the PDF Letter option, the Letters will be in your Output.

Step 2. General Letter Templates

Andar Main Menu > Communications > General Letters > General Letter Templates Maintenance

Andar Main Menu > Communications > All Letter Templates Maintenance

- **Letter Code**
- **Short Description**
- **Letter Type**
- **Status**
    - **Open.** Under construction.
    - **Ready.** The Letter Template can be used in a Create General Letter job.
    - **Obsolete.** The Letter Template is not available for use.
- **Effective / Expiry Date**
- **Template Tab**

- o **PDF Letter Default Style**

- o **Insert Options**

- o **Note Variables.** Note Variables are the Merge Fields. If the Letter is being generated from a Mailing List Usage the Note Variables will be the fields from the Mailing List Usage (Name, Salutation, Address, Phone Number, e-Mail, Fax). If the Letter is being generated from an Extract Table, the Note Variables will be the fields from the Mailing List Usage and those that were extracted.

{

- o **Common Variables.** *(79859 – 2014.02)* This option allows you to insert some common pieces of information into the Letter.
  - *Copyright*
  - *Helix Website*
  - *Username*
  - *Current Date*
  - *Current Time*
  - *Base URL*
  - *Master Account Name*
  - *Master Account Website*
  - *Report Title*

}

- o **Letter Component**

- o **Body Of The Letter**

- **Description Tab.** Contains the Description from the General Letter Add screen.

- **Attached Files Tab.** If the Letter is to have an attachment it can be entered here. If the Letter is being sent via e-Mail, the attachment will be attached to the e-Mail. If a PDF Letter is being generated, the attachment will be a part of the PDF.

How to Create a Letter Component

Andar Main Menu > Communications > General Letters > General Letter Components Maintenance

Andar Main Menu > Communications > All Letter Components Maintenance

A Letter Component is a block of organized Data Variables to be inserted into the body of the Thank You Letter.

- **Component Name**

- **Description**

- **Letter Type.** General Letter

- **Stylesheet Class.** If using Style Sheets to customize the look of a specific Condition, enter the information here.

- **Component Type**

    - **Address Label.** An Address Label Component can be used to create a group of Embedded Variables (Note Variables) to create the Address Label information (Name, Employer, Job Title, Address Line 1, etc.). This Letter Component can then be used in multiple Thank You Letter Templates.

      It is important to understand that the difference between an Address Label Component and a Note Component is that the Address Label Component will automatically remove the C/O Line if no Care Of Account is involved. The Note Component will not. Also any blank Address Lines will be removed so that a blank line will not be inserted into the Output.

    - **Note.** This is a piece of HTML text with Embedded Variables (Note Variables). If there is a paragraph in the letter that is common to multiple Thank You Letter Codes, you can create it as a Letter Component and insert it into the Thank You Letter Template.

- **Table.** This section allows the User to customize what they want to Table to look like within the Letter. A Table Component contains data fields organized in an HTML Table where it would be better to show the information in a Table Format with column headings. For example, the list of Designations.

  - **Database Name.** Each selection provides a different list of Columns available.

    - **WrkThanksLetterHdr.** This option offers general information including Individual and Organization Account information, Total Pledge, Total Designation, and more.

    - **WrkThanksLetterDtl.** This option offers information specific to a Transaction.

    - **WrkThanksLetterDsgn.** This option offers information specific to a Designation.

    - **WrkThanksLetterSpecialInfo.** This option offers information specific to a Special Information Gift Relationship.

- **Conditions Tab.** Choose to display the Component on the Letter unconditionally or to display it only under a specific condition. For example, Display the Organization Account only when it Is Not Equal To 0.

}

12. Dashboards

Data Mining Operations

App = Data Mining Operation

You can place your most frequently used Data Mining Operations on a Dashboard. From the Dashboard you will be able to Submit or Open the DMO.

Account Warehouses

App = Account Warehouse

Requires a MIG license. You can place your most frequently used Account Warehouses on a Dashboard. From the Dashboard you will be able to manage all aspects of the Account Warehouse.

Mailing List Usage Details

App = Mailing List Usage Details

You can place a Mailing List Usage on a Dashboard. From the Dashboard you will be able to see all the details of the Usage.

{

Maintenance List

App = Maintenance Lists

You can place any maintenance list screen on a Dashboard. For example, your list of DMOs, your list of Mailing Lists, or your list of Account Warehouses.

Output

App = Output

You can place your Output on a Dashboard. This would be the same thing you get when you go to ***System > My Output***.

}

13. References

13.1. Data Mining Operation Report

System > My Output > highlight DMO Report - <name of DMO> View

Every time you submit a DMO, Andar generates a Data Mining Operation Report. This will show the steps in your DMO.

DMO Report - All Employees of 4820 and Subsidiaries

```
Data Mining Operation Name : All Employees of 4820 and Subsidiaries

Select General Relationships: Account Type = "Organization Accounts" And Relationship Type = "Affiliated Company /
          Parent:Subsidiary" And Campaign Year = "*Current Year" And Select an account And Account = "All About Aviation
          (4820)" And Select direction = "Select Subsidiary accounts"
Save accounts in warehouse 'Subsidiaries of 4820'
Clear selected accounts
Select Employees: Warehouse name = "Subsidiaries of 4820" And Effective Date = "*Current Date"
Save accounts in warehouse 'Employees Sub4820'
Save accounts in mailing list  'Employees 4820'
Create Mailing List Usage: List Name = "*Saved" And Source Code = "1234" And Costs = "$0.00" And Total Pledge = "$0.00"
          And Mail Type  (By Postal And By e-Mail)
Extract Data and Download to Output: Mailing List Name = "*Saved" And Mailing List Usage = "*Current" And Extract Table
          Name = "ALLEMPLOYEES4820" And Extract Table Description = "All Employees 4820" And Download Extract To Output
          And Output Name = "All Employees"
     Individual Biographics: Account Number, First Name, Middle Name, Last Name, Gender, Account Status, Anonymous Flag
     Gifts: Account Type = "Individual Accounts" And Campaign Account = "Local Campaign (2550)" And Campaign Year =
               "*Current Year" And Processing Account = "All Processing Accounts" And Fundraising Account = "All
               Fundraising Accounts" And Check-Off Account = "All Local Checkoff Accounts" And Event = "0" And Occurrence
               = -1 And Transaction Source = "Both"
     Mailing list usage info: Source Code, Salutation Type, Salutation, Contact Type, Name Type, Name part 1, Name part
               2, Employer Acct #, Employer Name 1, Employer Name 2, Employee Type, Employee ID, Job Title 1, Job Title
               2, Department, Mail Drop, Address Profile Type, Address Type, Address Line 1, Address Line 2, Address Line
               3, Address Line 4, City, State, Zip Code, Country Code, e-Mail Address Type, e-Mail Address, Phone# Type,
               Phone #, Fax# Type, Fax #
```

13.2. Standard Report Information

13.2.1. System Tab

- **Scheduling Options.** This section allows you to schedule the Report to be automatically run based on your selections. Once this is set you need not do anything more. When the time comes Andar will run the Report and place it in ***System > My Output*** for the User who scheduled it. The Report can be retrieved when desired.

- **Queue and Report Type Options**

  - **Job Queue**

    - **Local.** Runs on your local computer.

    - **Reports1.** Runs on the Server. Provides a Job Complete Dialog Box when the job is completed.

  - **Report Type.** Acrobat (PDF), Spreadsheet (CSV), Both Acrobat and Spreadsheet

    - **Print Header Page.** Prints a cover page showing all your selection Parameters.

{

  - **Description.** This Description will be displayed in the Job Log and Output screens to aid in finding your report.

}

  - **Suppress Job Completion Dialog Box.** When unchecked and the User submits a Report, Andar will display a message on the screen confirming the submission. When checked, that confirmation will not be displayed.

13.2.2. Save Report Parameters

- **Save.** Andar allows you to save a set of Report Parameters so that you can use them again at a later date or time. Once you've saved the Report Parameters it will be displayed in the list of Saved Reports at the top of the Report Submission screen. To Submit that same Report simply select it and click the Submit Button.
    - **Report Name.** This is the name of your Report.
    - **Description**
    - **Published On The Web.** ***Requires a web license.*** If the Report is accessible to any Web Users this option allows you to pre-define the Report that will be allowed on the Web (Web Reports Menu Item) and your Web Users will have access to submit it themselves.

13.2.3. Re-Submit Saved Reports

Go to the desired Report Submission screen.

- **Saved Reports.** Select the desired Report that was saved earlier. Andar will remember the Report Parameters and select them.
- **Submit.** When the Saved Report is selected and you click the Submit button, the Saved Report Parameters will be used.

13.2.4. Re-Submit Previously Run Reports

Go to the desired Report Submission screen.

- **Previously Run Reports.** Select the desired Report that was submitted earlier. Andar will remember the Report Parameters and select them.
    - **Show the Output for the Selected Previously Run Report.** This Option will open your Output list for the selected Report.

  - **Delete the Previously Run Report.** When Selected, The Parameters Of The selected Report will no longer be remembered.

  - **Display the Job Log for the Selected Previously Run Report.** This option will open the Job Log for the selected Report.

- **Submit.** When the Previously Run Report is selected and you click the Submit button, the Previously Run Report Parameters will be used.

13.2.5. View And / Or Print the Report

If the Job Queue selected was Reports1 you will receive a Job Complete Dialog Box when the job is completed. Click Output when this box appears.

To otherwise access the Report go to ***System > My Output > highlight the Report > View***. The Report will open in Acrobat or Excel. You can print the Report from there.

From My Output you can also

- Save the Report without having to view it using the Save As button.

- E-Mail it to someone using the e-Mail button. This opens Outlook with the Report as an attachment. All you have to do is enter the e-Mail Address of the Recipient and any accompanying text desired.

13.3. Enhanced Printed Reports

Requires a MIG license.

13.3.1. Style Sheets

Andar Main Menu > e-Community > Administration > Style Sheets Maintenance

This feature allows you to create Custom Style Sheets to be used for printing all Andar Reports. You must use HTML to create these Style Sheets. See Andar Help for more information. See Andar Help for more information.

13.3.2. System Preferences

System > Preferences > System Preferences > Andar Reports > MIG Section

- **Style Sheets**
  - **Base URL for Style Sheets.** This defines the base URL for relative paths in Style Sheets.

The following fields allow Users to add a Header or Footer Image to Andar Reports and choose colors for the Header or Footer text. The customization will apply to all PDF documents produced in Andar (including Print Window) with the exception of the Bio Tab Report, Dashboard Report, and the Long Form Account Profile Report. For these exceptions the Header / Footer Images and colors for the Header / Footer text can be controlled via a CSS Style Sheet.

- **URL for Report Header Image.** Specify a URL that points to a valid Image file. The URL can be any valid URL, including local files. It is recommended that the file be stored on a network drive. Network paths are valid in the URL. The URL in this case must begin with 'file:'. For example: file:/X:/Production/ PrinterBanner468x60.jpg. The file must be a GIF, JPEG, PNG or BMP file.
  - **Test.** If the URL is valid and if it points to a valid Image the Test button will display a sample image. When printing the PDF report, the Header Image will be displayed in the top right corner of the report.

- **Scale Header Image Height.** This allows Andar to scale the Header Image height when printing a PDF report. For example, if the image is 200x100 and you wish it to have a height of 50, enter 50 in this field. The Image will automatically be resized to 100x50.
    - **Test.** Displays the scaled size of the Image.
- **Header Text Color.** This will be the color of the Title of the PDF report. The default color is black.
- **URL for Report Footer Image.** Specify a URL that points to a valid Image file. The URL can be any valid URL, including local files. It is recommended that the file be stored on a network drive. Network paths are valid in the URL. The URL in this case must begin with 'file:'. For example: file:/X:/Production/ PrinterBanner468x60.jpg. The file must be a GIF, JPEG, PNG or BMP file.
    - **Test.** If the URL is valid and if it points to a valid Image the Test button will display a sample image. When printing the PDF report, the Header Image will be displayed at the bottom center of the report.
- **Scale Footer Image Height.** This allows Andar to scale the Footer Image height when printing a PDF report. For example, if the image is 200x100 and you wish it to have a height of 50, enter 50 in this field. The Image will automatically be resized to 100x50.
    - **Test.** Displays the scaled size of the Image.
- **Footer Text Color.** This will be the color of the Footer of the PDF report Page Number, User Name, and Date / Time). The default color is black.

13.4. Font Options

System > Preferences > System Preferences > Andar Reports

System > Preferences > Personal Preferences

- **Default Report Font.** The default Font used for Andar Reports is Times New Roman. You can change the Font (remember this is a system-wide setting). This can sometimes make Reports easier to read.

14. Practice Exercises

References:

Account Warehouses - page 17
Extracting Data - page 34
Mailing Lists - page 38

Campaign / Leadership

1. Select everyone who is a part of the Women's Initiative.

2. Select Individuals who are in the Residential (direct mail) Campaign Structure.

3. Select people who still have a Verbal Gift in the system.

4. Select all Step-Up Program participants.

5. Select Donors who gave $750-$999.

6. Select all Tocqueville Donors.

7. Select all Loaned Executives.

8. Select all Leadership Donors.

9. Select Donors who are Combined Leaders.

10. Select people to whom you've given a Leadership Override.

11. Select CEO Call Volunteers.

12. Select Leadership Prospects.

13. Select Donors who gave consistently over the last 4 Years but not this Year.

14. Select Donors who've given the same amount for the last four Years.

15. Select the top 50 Individual Donors.

16. Select Companies where you have already made a CEO Call.

17. Select Companies with a Corporate Gift of $50,000 or more.

18. Select Companies with an Employee Gift of less than $5,000.

19. Select Companies that raised money by use of a Special Event (bake sale, etc.).

20. Select Companies that gave a Corporate Gift for the last two Years and not this Year.

21. Select Companies who's Employee Gift has decreased steadily for the last five Years.

22. Select GCL Companies.

23. Select Organizations with an outstanding Verbal Pledge.

24. Select ECC's.

25. Select Retirees that are solicited by the Company they retired from.

26. Select Accounts Managed by __________, Loaned Executive.

27. Select Accounts managed by _____, CEO Call Volunteer.

28. Select __________ (company) and all its Subsidiaries.

29. Select Donors who have a Perpetual Pledge for last Year and no Pledge this Year.

30. Select Companies with an Employee Gift of less than $1,000 that has more than 500 Employees.

31. Select Companies with Subsidiaries where the entire group gave a Corporate Gift of less than $10,000.

32. Select Companies with Subsidiaries where the entire group gave an Employee Gift of more than $100,000.

33. Select Wal-Mart Employees who gave at least $100 in the Previous Year.

34. Select members of your Board of Directors that are not Leadership Donors.

35. Select Companies who give $5,000 or more except those in Campaign Structure __________.

36. Select CEO Call Volunteers who give less than $100.

37. Select Leadership Donors who's Pledge has decreased from the Previous Year.

38. Select Individuals in the Residential (Direct Mail) Campaign Structure and have not given this year.

39. Select Organizations that 'live' in Zip / Postal Code _____ and don't give either a Corporate or an Employee Gift.

40. Select Organizations that have 250 or more Employees but less than 50 Donors.

41. Select Employees of __________ (Company) and its Subsidiaries that are Leadership Donors.

42. Select Tocqueville Donors who are not on one of your Committees.

43. Select Accounts Managed by __________ (Loaned Executive) that have a Projection and no Pledge yet.

44. Select Leadership Donors at the $1000 to $5000 gift range (Bronze & Silver) who achieved the Leadership Level individually (not be combining their gift) in the Local Campaign only, for the Current Campaign Year.

45. Select Accounts Managed by __________ (CEO Call Volunteer) that have not yet had the CEO Call made.

46. Select Loaned Executives that are not Employees of your top 100 Companies.

47. Select Organizations which have an Average Employee Gift of at least $400 in the Current Campaign Year.

48. Select all Contacts for all Organizations in the __________ Campaign Structure Node where the Organization has given a Corporate Gift of $1,000 or more every year for the last 9 Years.

49. Select all Accounts currently Managed by __________, where he is a Structure Level Manager for the Current Year Main Campaign Structure.

50. Select Organizations that are currently associated with a Union.

51. Select Individuals who have Volunteered for your Organization but who are lapsed Donors.

52. Select all Females who gave a Gift of at least $500 in each of the last 3 Years.

53. Select Organizations that have more than 5 Donors and who have both Card Value and a Goal set for the Current Campaign Year.

54. Select Subsidiaries of __________ Company. Do not include the Parent Account.

55. Select Employees of __________ Company and its Subsidiaries that have increased their Total Giving in each of the last 3 Years by at least 5%.

56. Select Accounts Managed by __________ that are in the City of __________, with Current Year Card Value that is higher than the Previous Year Card Value or whose Current Year Goal is higher than the Previous Year Goal, and who's Current Total In is less than the Previous Year Total In.

Finance / Processing

57. Select everyone who Designated to the __________ Service Category.

58. Select Donors who gave as Employees and asked to be Billed for their Pledge.

59. Select everyone who Designated to American Cancer Society.

60. Select everyone who Designated at least 50% of his Gift.

61. Select Organizations that have an Outstanding Balance for 2 Campaigns ago.

62. Select Organizations who's Payroll Bills go to the City of __________.

Community Building

63. Select Members of your Allocations Committee.

64. Select Agency Board Members.

65. Select all Agencies and Programs assigned to the __________ Funding Team for the Current CB Year.

Events

66. Select all Individuals who attended the last Annual Meeting.

67. Select Organizations who participated in the __________ Event through a Corporate Even Participation Transaction.

Volunteer

68. Select all of your current Board Members.

69. Select all current Volunteers for your Organization.

General

70. Select all Active Males.

71. Select people who want to be contacted.

72. Select people who want to be Anonymous.

73. Select Donors who haven't paid their entire Pledge for last Year.

74. Select Donors who've made a Payment by Visa.

75. Select people who live in Zip / Postal Code _____.

76. Select Organizations who 'live' in Zip / Postal Code _____.

77. Select People who live in the City of __________.

78. Select everyone you need to call next week.

79. Select everyone you had a meeting with last month.

80. Select people who live in __________ County.

81. Select all females.

82. Select Accounts with a Profile Alert Note.

83. Select everyone who has an Interest in teenage pregnancy.

84. Select everyone with a Net Worth of over $1,000,000.

85. Select __________ Award Recipients.

86. Select Organizations that do not want to be contacted.

87. Select Companies with between 200 and 300 Employees.

88. Select CEO's.

89. Select CEO's and ECC's.

90. Select Employees of __________ (Company).

91. Select Students of __________ School.

92. Select Board Members with a Birthday in the month of March.

93. Select women who are a part of the African American initiative.

94. Select Individuals who have an Opt Out Contact Rule.

95. Select Organizations with a Communication Log with the Subject Code of __________.

96. Select Current year CEO's, Current and Previous Year ECC's, Current and Previous Year Leadership Givers, members of your Board of Directors, members of your Campaign Cabinet, members of your Allocations Panels, Executive Directors of your Partner Agencies and Current and Previous Year Loaned Executives, only exclude those that do not want to receive mail from you.

End of Training Guide