

MM32021 Mailing

MM32021 A

Constituents whose average gift is >\$100 (excluding special events) within the last 3 years (11/1/2017), exclude constituents who gave to MM12021 and MM22021, and include board members, staff, and contractors.

Card Details

Giving levels are adjusted for the higher gift amounts. Monthly giving stays the same.

- Giving levels: \$125, \$250, \$500, \$750, \$1,000 or other
- Monthly giving levels: \$10, \$25, \$50, \$75, \$100 or other

PROCESS

Step One

Find the average gift amounts excluding special events of constituents who have given within the last 3 years.

- Use Average Donation query to filter out special event funds, date parameters, and individual donors. Create Query MM32021- Average Donations.
 - o Reports→Queries→Advanced Query Wizard→Average Donations→Update Filter criteria→Next→Next→Save→Save Query Criteria
 - Filter:
 - Add all funds, then remove 2018 BD, 2019 BD, 2019 Social, 2020 BD, 2020 Social, and 2021 Inside the Muse Studio
 - Donation received date greater than or equal to 4/1/2018
 - Donor constituent type equals individual
 - Payment type does not equal Gift In Kind
- Export query results and save as MM32021 A Mailing List_IN PROCESS_20210330
 - o Name tab Step One

Step Two

Assign constituents whose average gift is greater than or equal to \$100 to a temporary group.

- Copy all data from Step One and paste it into Step Two
- Convert Average Donation Amount by Constituent Number to numbers
- Sort from largest to smallest and delete all that are \$100 or below
- Copy the Constituent Number column into a new excel sheet
- Save as TEMP MM32021 A- greater than \$100.csv
- Create TEMP MM32021 A- greater than \$100

- Manage→Configuration→Groups→Add→OK
- Import into Salsa as TEMP MM22021 A- greater than \$100
 - Reports→Queries→Advanced Query Wizard→Import→ Open existing comma-delimited ("CSV") file→Choose File→Select TEMP MM32021 A- greater than \$100.csv→Next→Global Update→Assign to Group→Select TEMP MM32021 A- greater than \$100→OK

Step Three

Export TEMP MM32021 A- greater than \$100 into mailing list format.

- Create query MM32021 A Mailing List- greater than \$100
 - Reports→Queries→Advanced Query Wizard→ MM32021 A Mailing List- greater than \$100
- Export query results and copy & paste into a new tab on MM32021 A Mailing List_IN PROCESS_20210330
 - Name tab Step Three

Step Four

Exclude constituents who gave to MM12021.

- Create query MM32021 A Mailing List- MM22021 Gifts
- Reports→Queries→Advanced Query Wizard→ MM32021 A Mailing List- MM22021 Gifts
- Export query results and copy & paste into a new tab on MM32021 A Mailing List_IN PROCESS_20210330
 - Name tab Step Four
 - Highlight all rows

Step Five

Remove constituents who gave to MM22021.

- Create a new tab and name it Step Five
- Copy & paste all data from Step Three and Four into Step Five tab
- Highlight Constituent Number Duplicates
 - Sort by Constituent Number
 - Remove all rows that match with a highlighted row LEAVE THE HIGHLIGHTED ROW
- Highlight Spouse Constituent Number Duplicates
 - Sort by Spouse Constituent Number
 - Remove all rows that match with a highlighted row LEAVE THE HIGHLIGHTED ROW
- Highlight Spouse Constituent Numbers and Constituent Number Duplicates
 - Sort by Constituent Number
 - Remove all rows that match with a highlighted row LEAVE THE HIGHLIGHTED ROW
 - Sort by Spouse Constituent Number

- Remove all rows that match with a highlighted row LEAVE THE HIGHLIGHTED ROW
- Sort by highlighted rows to find MM12021 Gifts
 - Delete all highlighted rows

Step Six

Assign constituents to a temporary group.

- Create a new tab and name it Step Six
- Copy all Constituent numbers and Spouse constituent numbers from Step Five into Step Six into one column
- Copy all data from Step Six and paste into a new excel sheet
- Save as TEMP MM32021 A_IMPORT_20210330.csv
- Create TEMP MM32021 A group
 - Manage→Configuration→Groups→Add→OK
- Import into Salsa as TEMP MM32021 A
 - Reports→Queries→Advanced Query Wizard→Import→ Open existing comma-delimited ("CSV") file→Choose File→Select TEMP MM32021 A_IMPORT_20210330.csv→Next→Global Update→Assign to Group→Select TEMP MM32021 A→OK

Step Seven

Add BoT, Staff, and Contractors.

- Run query Board Member, Staff, and Contractors
 - Reports→Queries→Advanced Query Wizard→ Board Member, Staff, and Contractors
- Add Board Member, Staff, and Contractors to TEMP MM32021 A group
 - Next→Global Update→Assign to Group→Include Spouses→Temp MM32021 A→OK→OK

MM22021 B

Constituents who have given but not within the last 3 years (4/1/2018) and constituents who have never given and were entered into Salsa within the last five years (4/1/2016). Constituents whose last name begins with A-L.

Card Details

Giving levels remain the same. We could emphasize monthly giving, but since these are constituents who have never given, they are not the target audience for monthly givers.

- Giving levels: \$25, \$50, \$75, \$100 or other
- Monthly giving levels: \$5, \$10, \$15, \$25 or other

PROCESS

Step One

- Create Query MM32021 B Mailing List- Last Gift prior to 4/1/2018
 - o Reports→Queries→Advanced Query Wizard→ MM32021 B Mailing List- Last gift prior to 4/1/2018
- Export query results and save as MM32021 B Mailing List_IN PROCESS_20210330
 - o Name tab Step One

Step Two

- Create Query MM32021 B Mailing List- Never given and entered after 4/1/2016
 - o Reports→Queries→Advanced Query Wizard→ MM32021 B Mailing List- Never given and entered after 4/1/2016
- Export query results and copy & paste onto new tab in MM32021 B Mailing List_IN PROCESS_20210330
 - o Name tab Step Two

Step Three

- Create a new tab and name it Step Three
- Copy all data from Step One and Step Two and paste into Step Three
- Sort by Last or Org Name
- Delete all constituents whose last name begins with M-Z

Step Four

- Create a new tab and name it Step Four
- Copy all Constituent numbers and Spouse constituent numbers from Step Three into one column
- Copy all data from Step Four and paste into a new excel sheet
- Save as TEMP MM32021 B_IMPORT_20210330.csv
- Create TEMP MM32021 B group
 - o Manage→Configuration→Groups→Add→OK
- Import into Salsa as TEMP MM32021 B
 - o Reports→Queries→Advanced Query Wizard→Import→ Open existing comma-delimited ("CSV") file→Choose File→Select TEMP MM32021 B_IMPORT_20210330.csv→Next→Global Update→Assign to Group→Include Spouses→Select TEMP MM32021 B→OK

MM22021 C

Constituents who have given an average of <=\$100 within the last 3 years (4/1/2018), exclude donors who gave to MM22021, and include constituents whose only gift was to a special event in the last 3 years.

Card Details

Monthly giving levels stay the same, but the line is moved to the top in larger/bold type. Giving levels have been adjusted to include a new "high". Selection wording on the coupon will also need updated.

- **Monthly giving levels: \$5, \$10, \$15, \$25 or other**
- Giving levels: \$25, \$50, \$75, \$100, \$150 or other

PROCESS

Step One

Find the average gift amounts excluding special events of constituents who have given within the last 3 years.

- Run MM32021- Average Donations query.
 - o Reports→Queries→Advanced Query Wizard→MM32021- Average Donations→Next→Next
- Export query results and save as MM32021 C Mailing List_IN PROCESS_20210330
 - o Name tab Step One

Step Two

Assign constituents whose average gift is less than \$100 to a temporary group.

- Copy all data from Step One and paste it into Step Two
- Convert Average Donation Amount by Constituent Number to numbers
- Sort from largest to smallest and delete all that are above \$100
- Copy the Constituent Number column into a new excel sheet
- Save as TEMP MM32021 C- less than \$100.csv
- Create TEMP MM32021 C- less than \$100
 - o Manage→Configuration→Groups→Add→OK
- Import into Salsa as TEMP MM22021 C- less than \$100
 - o Reports→Queries→Advanced Query Wizard→Import→ Open existing comma-delimited ("CSV") file→Choose File→Select TEMP MM32021 C- less than \$100.csv→Next→Global Update→Assign to Group→Select TEMP MM32021 C- less than \$100→OK

Step Three

Export TEMP MM32021 C- less than \$100 into mailing list format.

- Create query MM32021 C Mailing List- less than \$100
 - o Reports→Queries→Advanced Query Wizard→ MM32021 C Mailing List- less than \$100
- Export query results and copy & paste into a new tab on MM32021 C Mailing List_IN
PROCESS_20210330
 - o Name tab Step Three

Step Four

Exclude constituents who gave to MM22021.

- Create query MM32021 C Mailing List- MM22021 Gifts
- Reports→Queries→Advanced Query Wizard→ MM32021 C Mailing List- MM22021 Gifts
- Export query results and copy & paste into a new tab on MM32021 C Mailing List_IN
PROCESS_20210330
 - o Name tab Step Four
 - o Highlight all rows

Step Five

Remove constituents who gave to MM22021.

- Create a new tab and name it Step Five
- Copy & paste all data from Step Three and Four into Step Five tab
- Highlight Constituent Number Duplicates
 - o Sort by Constituent Number
 - o Remove all rows that match with a highlighted row LEAVE THE HIGHLIGHTED ROW
- Highlight Spouse Constituent Number Duplicates
 - o Sort by Spouse Constituent Number
 - o Remove all rows that match with a highlighted row LEAVE THE HIGHLIGHTED ROW
- Highlight Spouse Constituent Numbers and Constituent Number Duplicates
 - o Sort by Constituent Number
 - o Remove all rows that match with a highlighted row LEAVE THE HIGHLIGHTED ROW
 - o Sort by Spouse Constituent Number
 - o Remove all rows that match with a highlighted row LEAVE THE HIGHLIGHTED ROW
- Sort by highlighted rows to find MM22021 Gifts
 - o Delete all highlighted rows

Step Six

Add constituents who have only given to special events within the last 3 years.

- Create a TEMP MM32021 C- Events Only group
 - o Manage→Configuration→Add→OK
- Create Query MM32021 C- Events Only and assign constituents to TEMP MM32021 C- Events Only group

- Reports→Queries→Advanced Query Wizard→ MM32021 C- Events Only→Next→Next→Global Update→Assign to Group→ MM32021 C Mailing List- Events Only
- Create Query MM32021 C Mailing List- Remove from Events Only and remove constituents from TEMP MM32021 C- Events Only group
 - Reports→Queries→Advanced Query Wizard→ MM32021 C Mailing List- Remove from Events Only →Next→Next→Global Update→Remove from Group→ MM32021 C Mailing List- Events Only
- Create query MM32021 C Mailing List- Events Only
 - Reports→Queries→Advanced Query Wizard→ MM32021 C Mailing List- Events Only
- Export query results and copy & paste into a new tab on MM32021 C Mailing List_IN PROCESS_20210330
 - Name tab Step Six

Step Seven

Add constituents to TEMP MM32021 C group.

- Create a new tab and name it Step Seven
- Copy all Constituent numbers and Spouse constituent numbers from Steps Five and Six into one column
- Copy all data from Step Seven and paste into a new excel sheet
- Save as TEMP MM32021 C_IMPORT_20210330.csv
- Create TEMP MM32021 C group
 - Manage→Configuration→Groups→Add→OK
- Import into Salsa as TEMP MM32021 C
 - Reports→Queries→Advanced Query Wizard→Import→ Open existing comma-delimited ("CSV") file→Choose File→Select TEMP MM32021 C_IMPORT_20210330.csv→Next→Global Update→Assign to Group→Include Spouses→Select TEMP MM32021 C→OK

Producing Final MM32021 A, B & C Mailing Lists

PROCESS

Step One

- Create Query MM32021 Mailing List- TEMP Groups MM32021 A, MM32021 B and MM32021 C with group listed for sorting purposes
 - Reports→Queries→Advanced Query Wizard→ MM32021 Mailing List- TEMP Groups MM32021 A, MM32021 B and MM32021 C
- Export query results and save as MM32021 Mailing List- Groups MM32021 A, MM32021 B and MM32021 C_IN PROCESS_20210330
- Highlight duplicate Constituent Numbers

- Delete duplicates
 - Fix any issues in Salsa that may have caused the duplication
- Highlight duplicate Spouse Constituent Numbers
 - Delete duplicates
 - Fix any issues in Salsa that may have caused the duplication
- Highlight duplicate Constituent Numbers vs Spouse Constituent Numbers
 - Delete duplicates
 - Fix any issues in Salsa that may have caused the duplication
- Highlight duplicate emails
 - Delete duplicates
 - Fix any issues in Salsa that may have caused the duplication
- Highlight duplicate addresses
 - Delete duplicates
 - Fix any issues in Salsa that may have caused the duplication

Step Two

- Copy & paste all data from Step One tab into new tab Step Two
- Add a column for notes
- Send to development director for review
 - Ask that no changes are made, just notes.
- After file is returned, make all changes to sheet and Salsa
 - Per MCZ remove all children at same address as parents

Step Three

- After RC returns the list with her edits, copy all data from Step Two and paste into Step Three.
- Make any changes as directed by RC.

Step Four

- Copy & paste all data from Step Three tab into new tab Step Four- MM32021 A
- Sort by Group Name Lookup
- Cut & paste all TEMP MM22021 B into new tab Step Four-MM32021 B
- Cut & paste all TEMP MM22021 C into new tab Step Four-MM32021 C

Step Five

- Create three new tabs and name them Step Five- MM32021 A, Step Five- MM32021 B, and Step Five- MM32021 C
- Copy all Constituent numbers and Spouse constituent numbers from Step Four- MM32021 A into one column on Step Five- MM32021 A.
- Copy all Constituent numbers and Spouse constituent numbers from Step Four- MM32021 B into one column on Step Five- MM32021 B.

- Copy all Constituent numbers and Spouse constituent numbers from Step Four- MM32021 C into one column on Step Five- MM32021 C.
- Copy all data from Step Five- MM32021 A and paste into a new excel sheet
- Save as Group MM32021 A_IMPORT_20210607.csv
- Create MM32021 A group
 - o Manage→Configuration→Groups→Add→OK
- Import into Salsa as MM32021 A
 - o Reports→Queries→Advanced Query Wizard→Import→ Open existing comma-delimited ("CSV") file→Choose File→Select MM32021 A_IMPORT_20210607.csv→Next→Global Update→Assign to Group→Select MM32021 A→OK
- Copy all data from Step Five- MM32021 B and paste into a new excel sheet
- Save as Group MM32021 B_IMPORT_20210607.csv
- Create MM32021 B group
 - o Manage→Configuration→Groups→Add→OK
- Import into Salsa as MM32021 B
 - o Reports→Queries→Advanced Query Wizard→Import→ Open existing comma-delimited ("CSV") file→Choose File→Select MM32021 B_IMPORT_20210607.csv→Next→Global Update→Assign to Group→Select MM32021 B→OK
- Copy all data from Step Five- MM32021 C and paste into a new excel sheet
- Save as Group MM32021 C_IMPORT_20210607.csv
- Create MM32021 C group
 - o Manage→Configuration→Groups→Add→OK
- Import into Salsa as MM32021 C
 - o Reports→Queries→Advanced Query Wizard→Import→ Open existing comma-delimited ("CSV") file→Choose File→Select MM32021 C_IMPORT_20210607.csv→Next→Global Update→Assign to Group→Select MM32021 C→OK

Step Six

- Remove individuals from all Temp groups and delete
 - o Reports→Queries→Advanced Query Wizard→ MM32021 Mailing List- TEMP Groups MM32021 A, MM32021 B and MM32021 C→Run→Next→Global Update→Remove from Group→TEMP MM32021 A→OK→Remove from Group→TEMP MM32021 B→OK→ Remove from Group→TEMP MM32021 C→OK→OK
 - o Manage→Configuration→Groups→Delete TEMP MM32021 A, TEMP MM32021 B, and TEMP MM32021 C

Step Seven

- Copy all data from Step Four- MM32021 A and paste into a new excel sheet with tab named MM32021 A
 - o Delete all columns EXCLUDING
 - Smart Addressee
 - Smart Informal Salutation
 - Address Prefix 1
 - Address Line 1
 - Address Line 2
 - City
 - State
 - Postal Code
 - Postal Code Suffix
- Copy all data from Step Four- MM32021 B and paste into a new excel sheet with tab named MM32021 B
 - o Delete all columns EXCLUDING
 - Smart Addressee
 - Smart Informal Salutation
 - Address Prefix 1
 - Address Line 1
 - Address Line 2
 - City
 - State
 - Postal Code
 - Postal Code Suffix
- Copy all data from Step Four- MM32021 C and paste into a new excel sheet with tab named MM32021 C
 - o Delete all columns EXCLUDING
 - Smart Addressee
 - Smart Informal Salutation
 - Address Prefix 1
 - Address Line 1
 - Address Line 2
 - City
 - State
 - Postal Code
 - Postal Code Suffix
- Save As MM32021_FINAL_20210607

