

Where to Look on a CONSTITUENT Record:



ON THE INTERACTIONS TAB

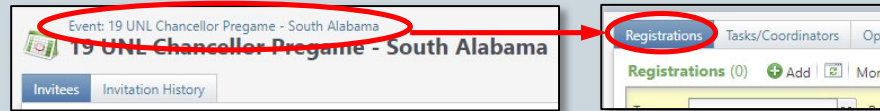
Documentations and Interactions tab Interactions sub-tab

- Interactions are **personal 1:1 direct** communications with unique messaging to a specific individual, organization or committee.
- When multiple constituents are part of the interaction, they can be added as **participants** to mirror one interaction across multiple constituent records.
- This tab includes general interactions and all steps (except planned).
- It also includes **Write a Letter** interactions.

Write a Letter is a task on the left sidebar of all constituent records. Use a letter template that prefills addressee information to create and print an individual letter to a constituent, then save the form to simultaneously create an interaction record.

ON THE COMMUNICATIONS TAB

- **Event invitations** are run as part of an event in Ali CRM. The breadcrumb *hyperlink* on the top of the Invitees record provides a link to the top to the event record. The Registrations tab then shows details, including other invitees and RSVPs.



- **Appeal mailings** are coordinated by the foundation's marketing and communications team. Anything that has a contribution card is an appeal mailing. The *hyperlink* on appeal mailings shows details about that direct marketing effort. Contact [Joel Gehringer](#) or [Kristi Pease](#) with questions.
- **BBIS messages** are email sent with the Ali CRM email engine and are automatically stored in Ali CRM. All foundation non-solicitation emails are sent with BBIS as well as all UNOAA, UNKAA and UNMCAA email. NAA emails are sent with iModules and entered as general correspondence.
- **Acknowledgements, receipts and reminders** are automated processes that are managed by the foundation's donor relations team. They are based on specific criteria for revenue transactions.
- **General correspondence** is a record of mass communications sent via physical mail or email, such as newsletters, announcements and introduction letters. Click the green chevron to see details. The *hyperlink* shows all of the information about that general correspondence.
 - **Recent status** shows how many constituents received that piece.
 - **History** shows previous mailings related to this communication piece.
 - **Merge letter** shows the actual mailing that was sent (if available).
 - **Download output** allows you to see the full list of constituents who received the mailing.

(see screenshot, page 2)

WE NEED YOUR HELP!

Please let us know if you are aware of any communications that aren't being recorded in Ali CRM so we can add them and help fill in the 360° view of our constituents, their engagement and passions.

- Any communications with alumni, donors and friends.
- Regularly scheduled or ad-hoc mailings.

Send ideas or questions to:

alicrm@nufoundation.org

See screenshots on the next pages for reference.

Anatomy of the Communications tab on a constituent record:

The screenshot shows the 'Communications' tab with a sub-tab 'Preferences' circled in red. Below the sub-tabs, there are filters for 'Communication' (set to 'All'), 'Date range' (set to 'Last 12 months'), 'Channel' (set to 'All'), and 'Sites' (set to 'All sites'). An 'Apply' button is visible. A table lists communications with columns: Date sent, Communication, Details, H..., Site, and Channel. The 'Channel' column is circled in red. A green chevron icon in the 'Date sent' column is also circled in red. A callout box on the right lists 'Channel' types: Mail and Email. Another callout box on the right says 'Look at the Preferences tab to see the constituent's preferred method of communication and any applicable solicit or opt-out codes.' Below the table, a communication record is expanded, showing details for 'Women Investing in Nebraska - Membership'.

Channel:

- Mail
- Email

Look at the **Preferences** tab to see the constituent's preferred method of communication and any applicable solicit or opt-out codes.

Click the **green chevron** to see more details about the communication record.

Filter by communication type, date range, channel or site. Click the **Apply** button to refresh the datalist.

Hyperlink takes you to the communication record for even more information. *(see screenshot, page 3)*

Communication types:

- Appeal mailing
- Event invitation
- General correspondence
- Acknowledgements
- Receipts
- Reminders
- BBIS messages *(see definitions, page 1)*

Anatomy of a correspondence process record:

Correspondence list
UNF Trustee Newsletter Winter 2018

Name: UNF Trustee Newsletter Winter 2018 ✔ Active
 Description: UNF Trustee Newsletter Winter 2018

Correspondence code: UNF Trustee Newsletter

Include selection: UNF Trustees Newsletter or Communications (Ad-hoc Query) Create output selection: No

Output format: Formatted mail correspondence output Output selection name:

Letter template: General Correspondence Letter.docx Overwrite existing selection: No

Label template: General Correspondence Labels.docx

Recent status **History**

Download output **View Merged Letter** View Merged Label

Status: ✔ Completed
 Status message: Completed

Started by: NUFOUNDATION\theng Server name: ELWOOD

Started: 12/11/2018 2:46:53 PM **Total records processed:** 607

Ended: 12/11/2018 2:47:33 PM
 Number of exceptions: 0

Duration: 40 seconds Records successfully processed: 607

This record is accessed from the hyperlink for general correspondence on the Communications tab of constituent records seen on the previous page.

The **selection** or list that was used for this most recent mailing.

The **History** tab shows previous mailings for this correspondence.

View the **letter** that was sent if available.

The **number of constituents** that received the mailing. Note that this could be the number of *households* that received the mailing.

Started is the date the correspondence process was run and may not necessarily represent the date the communication was sent.

	C	D	E	F	G	H	I	J	K
1	CONSTITUENTNAME	ADDRESSEE	SALUTATION	NICKNAME	CONTACTADDRESSEE	ADDRESSBLOCK	CITY	STATE	POSTCODE
2	Bryan E. Stone	Bryan and Le	Bryan and Les			11752 Whitmore St	Omaha	NE	68142-1639
3	Paul and Deborah Eura	Paul and Deb	Paul and Debo		Paul and Deborah Eura	9200 Montello Rd	Lincoln	NE	68520-1433
4	Byron J. St					555 Riverfront Plz	Omaha	NE	68102-4049
5	Linda G. H					6142 N Yucca Rd	Paradise	AZ	85253-4284
6	Douglas J.					PO Box 217	Elkhorn	NE	68022-0217
7	Mark A. Whitehead	Mark and Ch	Mark and Chri			2433 Woodscres	Lincoln	NE	68502-4054

View the mail list that was used by clicking **Download output**.