

# AT-A-GLANCE: APPEALS

## WHAT IS AN APPEAL?

Advance has the capability to track dollars raised as a result of a particular direct mail piece. This type of tracking is done with Appeal Codes.

## HOW TO LOAD APPEAL CODES

- 1) Go to Advancement Services website and complete the Appeal Code Request Form. Complete this step prior to sending out your mail piece.
- 2) Generate your mailing list either through a lookup or a devreq. Save the clipboard list to be used in the Appeal Loader.
- 3) Go to canned reports and run the Appeal Loader report, referencing the saved clipboard list and the correct appeal code.
- 4) Prepare the solicitation piece and ensure the appeal code is printed on either the pledge card or return envelope that the donor will return to the university. Mail your solicitation piece.
- 5) When the donation is received the Gifts Processing staff will apply the donation to the appeal much like applying a payment to a pledge.

## APPEAL LOOKUPS

Users can search for appeal statistics and details by going to Lookups, changing the template to Gift-Appeal Header, entering the Appeal Code and clicking Search. Users will then see the Gift Appeal Header. To view appeal statistics, users can click Statistics on the left hand navigation tree. Users can also search for any transactions that have been associated with an appeal by going to Lookups, Gift-Transaction and typing in the Appeal Code.

## REPORTING ON APPEALS

There are two canned reports with appeal information available to users: Appeal by School and Appeal Comparison Report.

## APPEAL LOADER CANNED REPORT

Report Detail
Actions

Please enter parameters, if necessary, for running this report in the form below. When you have entered all criteria for the report, press Run Report.  
You may need to disable your browser's pop-up blocker to view the report.

Report Header
Help

**Description** Load Appeals given a clipboard and appeal code

**Type** Reports

**Comment** Run Report

**Clipboard Name:**

**Appeal Code:**

Lookups
Actions

1. Choose a template (optional)
2. Select results format\*
3. Select output type\*
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

Gift Appeal Header Lookup
Help

**Appeal** =  NUR-Doctorate Alumni EOY

**Status** =

**Description** =

Statistics
X

NUR-Doctorate...

Gift Appeal Header
Actions

**Detail**

Statistics

Gift Appeal List

Gift Appeal Header
Actions

**NUR-Doctorate Alumni EOY (12N10)**  **Active**

School of Nursing Direct Mail - Mgt. Centers

Gift Appeal Statistics
Actions
Help

Raised, Accrual Method				
	Amount	Count	Average	
Pledges	0.00	0	0.00	
Payments	n/a	n/a	n/a	
Gifts	2,450.00	18	136.11	
Matches	50.00	1	50.00	
<b>Total</b>	<b>2,500.00</b>	<b>19</b>	<b>131.58</b>	
Received, Cash Method				
	Amount	Count	Average	
Pledges	n/a	n/a	n/a	
Payments	175.00	3	58.33	
Gifts	2,450.00	18	136.11	
Matches	50.00	1	50.00	
<b>Total</b>	<b>2,675.00</b>	<b>22</b>	<b>121.59</b>	
Expenses				
Postage	0.00			
Phone	0.00			