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