

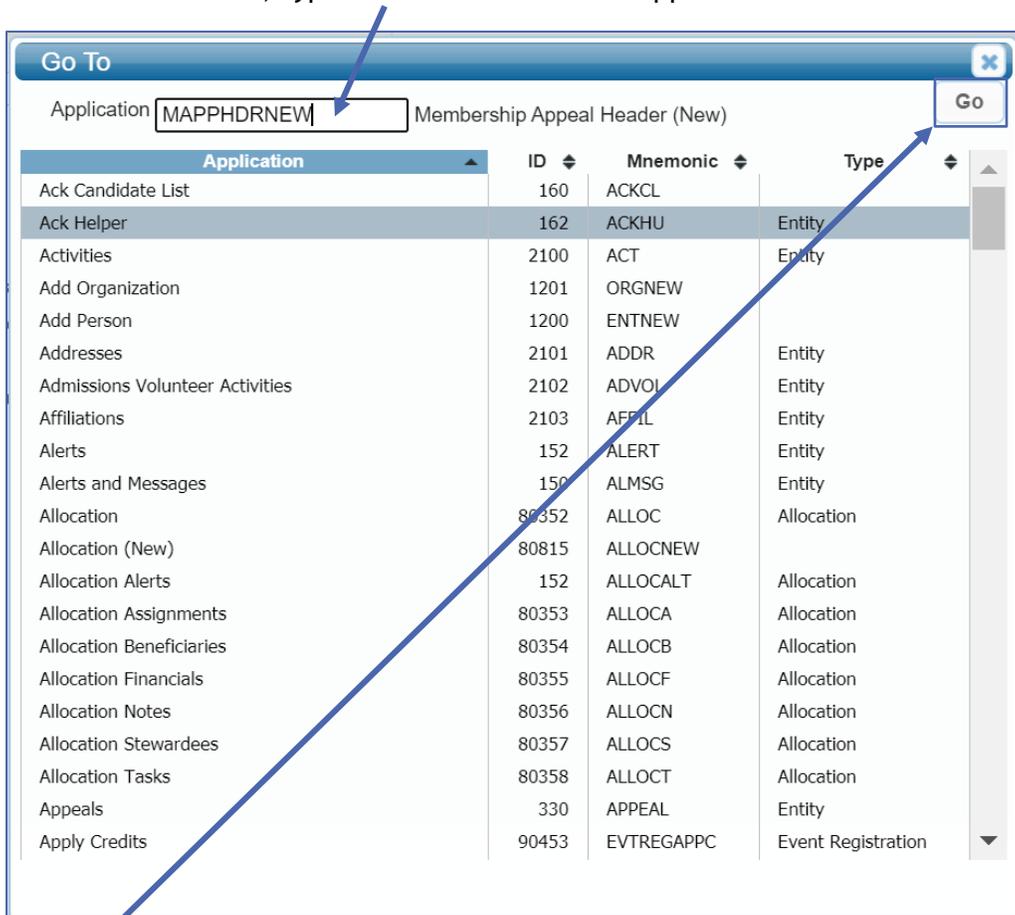
How To Create Membership Appeal Header (Alumni Association)

Ver. 1.1

5/28/2020

Create Membership Appeal Header

1. Log in to Advance.
2. Click **Go To**  from the **Main Menu**.
3. In the **Go To** window, type **MAPPHDRNEW** in the Application Box.



Application	ID	Mnemonic	Type
Ack Candidate List	160	ACKCL	
Ack Helper	162	ACKHU	Entity
Activities	2100	ACT	Entity
Add Organization	1201	ORGNEW	
Add Person	1200	ENTNEW	
Addresses	2101	ADDR	Entity
Admissions Volunteer Activities	2102	ADVOL	Entity
Affiliations	2103	AFFIL	Entity
Alerts	152	ALERT	Entity
Alerts and Messages	150	ALMSG	Entity
Allocation	80352	ALLOC	Allocation
Allocation (New)	80815	ALLOCNEW	
Allocation Alerts	152	ALLOCALT	Allocation
Allocation Assignments	80353	ALLOCA	Allocation
Allocation Beneficiaries	80354	ALLOCB	Allocation
Allocation Financials	80355	ALLOCF	Allocation
Allocation Notes	80356	ALLOCN	Allocation
Allocation Stewardees	80357	ALLOCS	Allocation
Allocation Tasks	80358	ALLOCT	Allocation
Appeals	330	APPEAL	Entity
Apply Credits	90453	EVTREGAPPC	Event Registration

4. Click **Go** button.

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5. Membership Appeal Header (New) screen will appear.

Membership Appeal Header (New) Actions

New Membership Appeal Header
Start
Stop

Membership Appeal Header Detail (80025) Save Actions Help

Appeal Code* Automatically Assign Code Active

Description*

Unit University Development Start

Group* Stop

Appeal Type* Postal Cost

Memb Type Phone Cost

Campaign Staffing Cost

Solicit Vendor/Supply Cost

Sent Total Cost

Proj Resp Proj Revenue

Year Month

Segment Exp Month

Exp Year

Mail Date

Memb Cmpn

Effort #

Package

Recency

Mbr Tenure

List Source

Charter Mbr

Geographic

Multi-Donor

Misc1

Misc2

Misc3

Contact ID

Discount

Event ID

Comment

Can be applied to Giving transactions

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6. Fill in the required fields (plus any additional fields that you would like to use:)

Membership Appeal Header Actions

2010 Chancellor's Welcome Message (10CW) Active

Appeal Type e-mail Solicitation Start 08/23/2010

Memb Type Annual Stop

Group

Membership Appeal Header Detail (80025) Save New Delete Actions Help

Appeal Code* 10CW Active

Description* 2010 Chancellor's Welcome Message

Unit ALU Alumni Association Start 08/23/2010

Group* A Annual Stop

Appeal Type* E e-mail Solicitation Postal Cost 0.00

Memb Type Phone Cost 0.00

Campaign Staffing Cost 0.00

Solicit 0 Vendor/Supply Cost 0.00

Sent 0 Total Cost 0.00

Proj Resp 0 Proj Revenue 0.00

Year Month

Segment Exp Month

Exp Year

Mail Date

Memb Cmpn

Effort #

Package

Recency

Mbr Tenure

List Source

Charter Mbr

Geographic

Multi-Donor

Misc1

Misc2

Misc3

Contact ID

Discount

Event ID

Comment

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7. Click **Save**.



The screenshot shows a web-based form titled "Membership Appeal Header" for a record with ID 80025. The form is divided into several sections. At the top, there is a header bar with the title and an "Actions" menu. Below this, the record details are displayed: "2010 Chancellor's Welcome Message (10CW)", "Appeal Type: e-mail Solicitation", "Memb Type: Annual", "Start: 08/23/2010", and "Active" (checked). A blue arrow points from the text "7. Click Save." to the "Save" button in the "Membership Appeal Header Detail (80025)" sub-header. The main form area contains various fields for data entry, including "Appeal Code*" (10CW), "Description*" (2010 Chancellor's Welcome Message), "Unit" (ALU - Alumni Association), "Group*" (A - Annual), "Appeal Type*" (E - e-mail Solicitation), and "Memb Type". There are also fields for costs (Postal, Phone, Staffing, Vendor/Supply, Total) and revenue (Proj Revenue), all currently set to 0.00. Other fields include "# Solicit", "# Sent", "Proj Resp", "Year", "Segment", "Exp Year", "Mail Date", "Memb Cmpn", "Effort #", "Package", "Recency", "Mbr Tenure", "List Source", "Charter Mbr", "Geographic", "Multi-Donor", "Misc1-3", "Contact ID", "Discount", "Event ID", and "Comment". A checkbox at the bottom is labeled "Can be applied to Giving transactions".

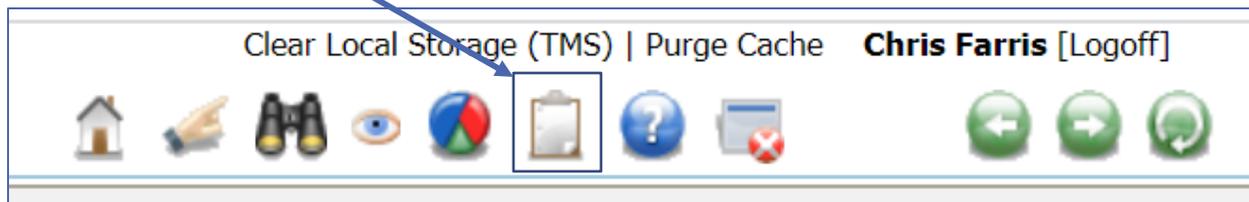
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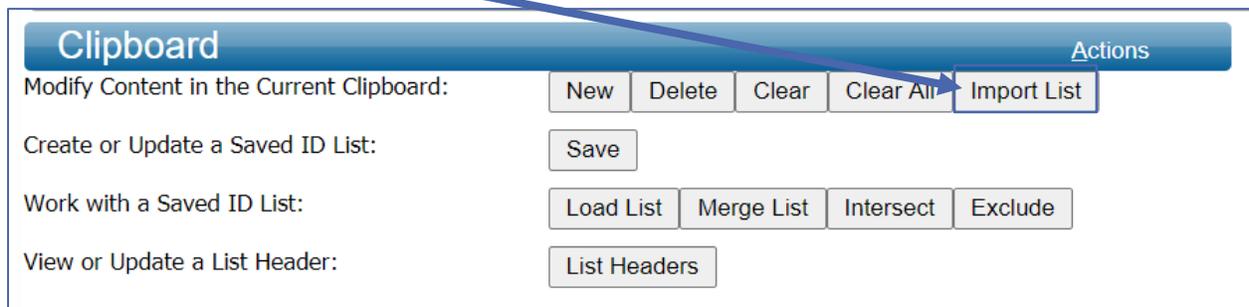
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Add Membership Appeal Recipients to Clipboard

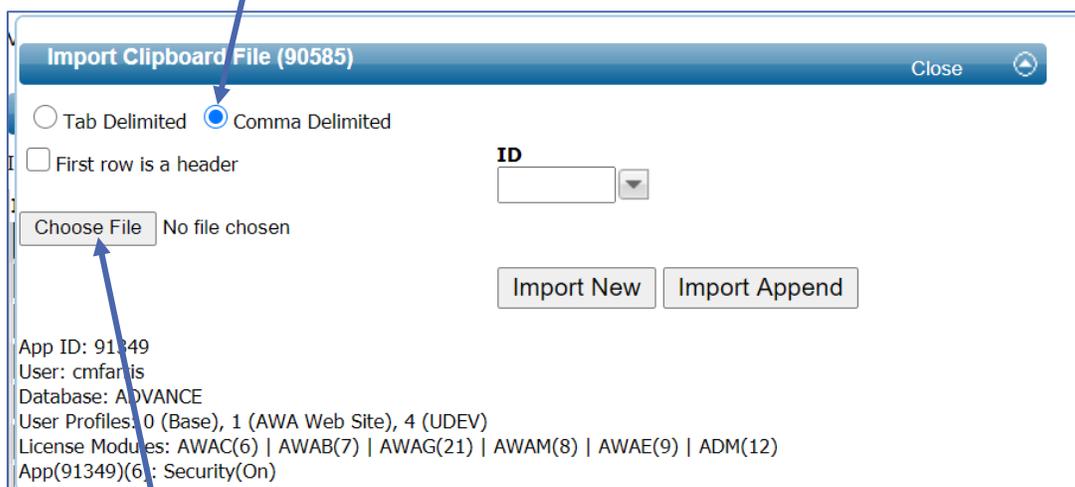
1. Open **Clipboard**.



2. Click **Import List**.



3. Change to **Comma Delimited**.



4. Click **Choose File**. (Navigate to the .csv file on your PC that contains the list of Members that received the Membership Appeal.)

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5. Click **Import New**. (This imports all of the Members into the Clipboard.)

Import Clipboard File (90585) Close

Tab Delimited Comma Delimited

First row is a header

Choose File EntityIDs_56.csv

ID

Import New Import Append

App ID: 91349
User: cmfarris
Database: ADVANCE
User Profiles: 0 (Base), 1 (AWA Web Site), 4 (UDEV)
License Modules: AWAC(6) | AWAB(7) | AWAG(21) | AWAM(8) | AWAE(9) | ADM(12)
App(91349)(6): Security(On)

6. Choose **Actions**.

Clipboard Actions

Modify Content in the Current Clipboard: New Delete Clear Clear All Import List

Create or Update a Saved ID List: Save

Work with a Saved ID List: Load List Merge List Intersect Exclude

View or Update a List Header: List Headers

Entity Clipboard (50462) (1/58) Actions Help

Items 1 to 15 of 58

ID	
2034	
6656	
6657	
6971	
8351	
8352	
12499	
16406	
16407	

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7. Choose **Reports**.

The screenshot shows a software interface with a 'Clipboard' header and an 'Entity Clipboard (50462) (1/58)' section. The 'Clipboard' section has buttons for 'New', 'Delete', 'Clear', 'Clear All', 'Import List', 'Save', 'Load List', 'Merge List', 'Intersect', 'Exclude', and 'List Headers'. The 'Entity Clipboard' section has a search bar, a list of IDs (2034, 6656, 6657, 6971, 8351, 8352, 12499, 16406, 16407, 20798), and a 'Reports' menu. The 'Reports' menu is open, showing options: 'Mass Invite', 'Export Form', 'Mass Add', 'Mass Modify', and 'Export to Excel'. A blue arrow points from the text 'Choose Reports.' to the 'Reports' menu item.

ID	Name
2034	The Honorable Kenneth H. Jones
6656	
6657	
6971	
8351	
8352	
12499	
16406	
16407	
20798	

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8. Choose **UA Session ID**.

Report List Actions

This is the list of reports that apply to your current context. When you run a report from this list, the report generated will be for the specific records you are viewing.

Report List (504/7) Actions Help 

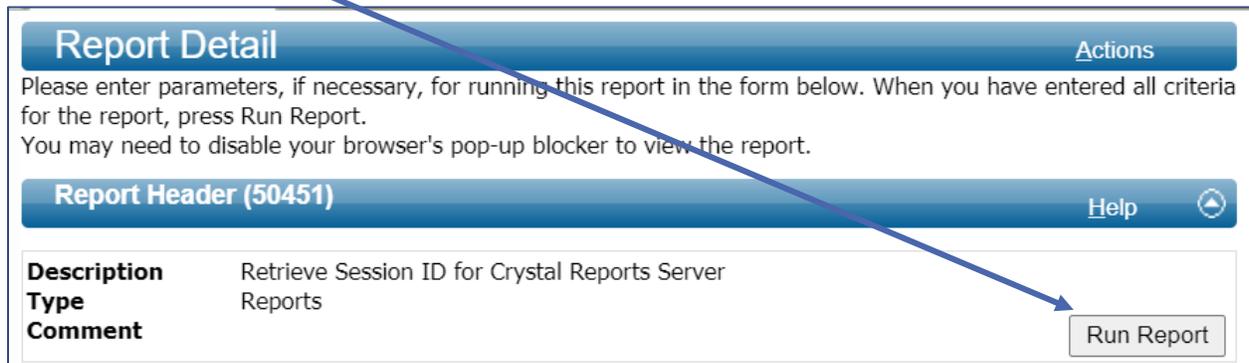
	Context	Name	Description
	Entity	Appeal Assignment	Assign appeals from id list
	Entity	Entity Profile Report	Profile reports about entities
	Entity	Google Entities	Map selected entities with Googl...
	Entity	Labels	Create mailing labels
	Entity	Merge	Create Merged Document
	Entity	NameTag and TentCard	Produces a printable NameTag a...
	Entity	UA Comm Mass Load	Utility to Mass Load Communicat...
	Entity	UA Entity Brief Bio v2	UA Entity Brief Bio v2
	Entity	UA One Line Per Entity	UA One Line Per Entity
	Entity	UA Session ID	Retrieve Session ID for Crystal R...

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9. Click **Run Report**.



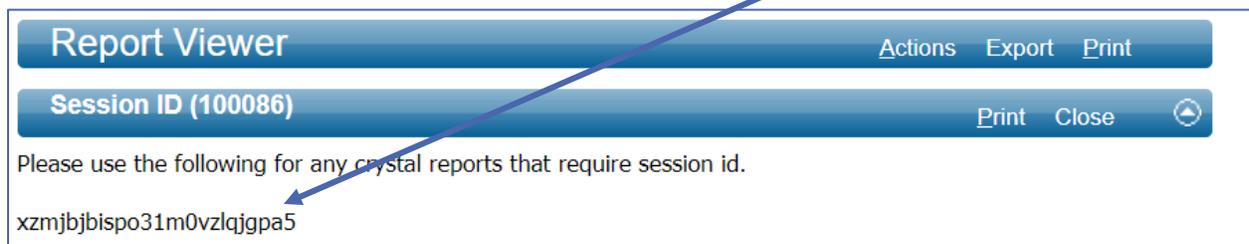
Report Detail Actions

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 (50451) Help 

Description	Retrieve Session ID for Crystal Reports Server
Type	Reports
Comment	

10. Highlight (with mouse) and Copy (Ctrl-C) the **UA Session ID**.



Report Viewer Actions Export Print

Session ID (100086) Print Close 

Please use the following for any crystal reports that require session id.

xzmjbjbispo31m0vzlqjgpa5



VERY IMPORTANT!!!

**DO NOT CLOSE ADVANCE.
ADVANCE MUST REMAIN OPEN
FOR THE NEXT STEP TO WORK
CORRECTLY.**

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Apply Membership Appeal Code to Entities

1. Log in to Crystal Reports
2. Navigate to **ALUM Alumni Association Folder**, then to **Membership Processing** folder.

The screenshot shows the SAP Crystal Reports interface. The 'My Documents' pane on the left displays a tree view of folders. The 'ALUM Alumni Association Folder' is expanded, showing sub-folders like 'AAA Reporting', 'Auditor Reports', 'Business Memberships', 'Campus Partners', 'Campus Partners Newsletter', 'Generic Stats', 'Life Membership', 'Membership Fulfillment', 'Membership Output', 'Membership Processing', 'Membership Stats', 'Outreach and Engagement', 'Quality Assurance Reports', and 'Student Programs'. The 'Membership Processing' folder is selected and highlighted. The main pane on the right displays a list of reports with columns for 'Title' and 'Type'. The 'AAA Membership Appeal Load' report is highlighted in blue. A blue box is drawn around this report title. Blue arrows point from the text in step 2 to the 'ALUM Alumni Association Folder' and 'Membership Processing' folders, and from step 3 to the 'AAA Membership Appeal Load' report.

Title	Type
AAA - Membership Batch Load Unmatched Report	Crystal Re
AAA - Auto Renewal Report	Crystal Re
AAA - Auto Schol Gift Loader	Crystal Re
AAA - Batch Proof Report	Crystal Re
AAA - Gift Batches	Crystal Re
AAA - Life Membership Acknowledgements	Crystal Re
AAA - Life Membership Acknowledgements 2020	Crystal Re
AAA - Memb Batch Entities	Crystal Re
AAA - Membership Acknowledgements 2020	Crystal Re
AAA - Membership Acknowledgements v4 updated June 2016	Crystal Re
AAA - Membership Batches	Crystal Re
AAA - Open Batch Bad Address	Crystal Re
AAA - Payroll Deduct Check Number Add	Crystal Re
AAA - Payroll Deduct Membership Check	Crystal Re
AAA - Schol Gift Report by Memb Batch Range	Crystal Re
AAA Membership Appeal Load	Crystal Re
Payroll Deduct Scholarship Gift Loader	Crystal Re

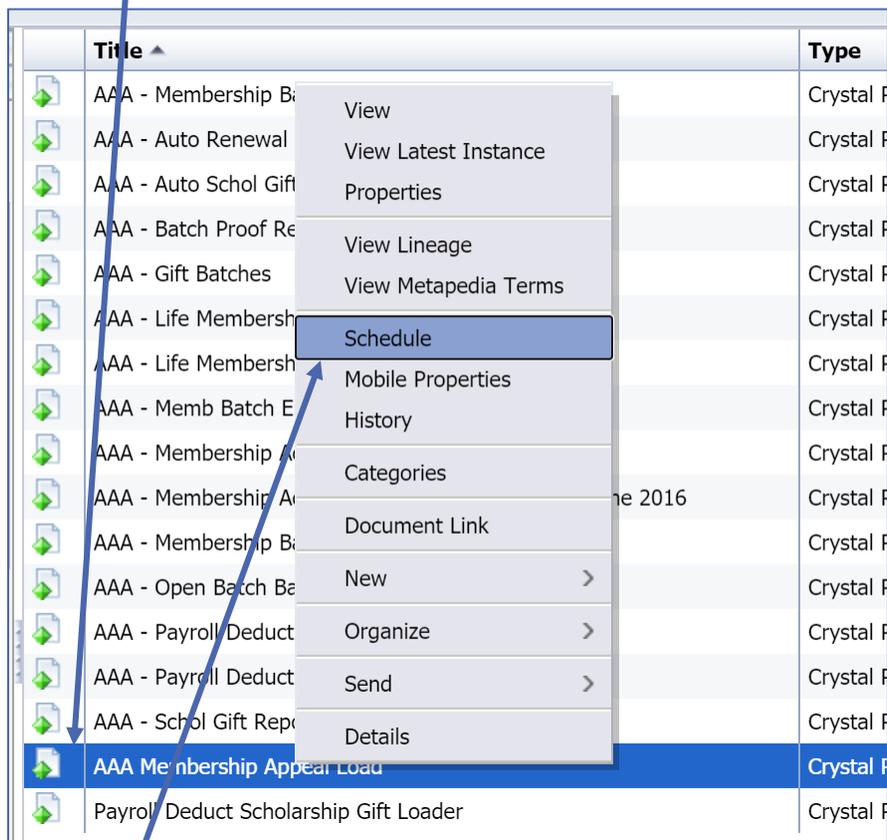
3. Find **AAA Membership Appeal Load** report.

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4. Right click on **AAA Membership Appeal Load**.



5. Select **Schedule**.

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6. Select **Prompts**.

The screenshot shows the SAP Administrator web interface. At the top, the SAP logo is on the left, and the user is logged in as 'Administrator'. Navigation links for 'Applications', 'Preferences', 'Help menu', and 'Log off' are visible. Below the navigation bar, there are tabs for 'Home' and 'Documents'. The main content area is titled 'Schedule – AAA Membership Appeal Load'. On the left, a tree view shows a dropdown menu for 'Schedule' with the following options: 'Instance Title', 'Recurrence', 'Database Logon', 'Prompts', 'Filters', 'Formats', 'Destinations', 'Print Settings', 'Events', 'Scheduling Server Group', and 'Languages'. The 'Prompts' option is highlighted with a blue box, and a blue arrow points from the text '6. Select Prompts.' to this option. On the right side of the main content area, there is a section titled 'Instance Title' with a text input field containing the value 'AAA Membership Appeal Load'.

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7. Select **Edit Values**.

The screenshot shows a software interface titled "Schedule - AAA Membership Appeal Load". On the left is a sidebar with a tree view containing the following items: Schedule (expanded), Instance Title, Recurrence, Database Logon, Prompts (highlighted in blue), Filters, Formats, Destinations, Print Settings, Events, Scheduling Server Group, and Languages. An arrow points from the text "7. Select Edit Values." to the "Edit Values..." button in the "Prompts" section of the main content area.

Prompts

Edit Values...

Parameter	Scheduling
* I_SESSION_ID	null
* I_APPEAL_CODE	null
* I_DATE_SENT	null
* I_OPERATOR_NAME	null

* Required

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8. Enter values from previous work:
 - a. Session ID
 - b. Appeal Code Created
 - c. Date of Appeal
 - d. Name of Person Doing this Work

Prompts

Enter prompt values.

I_SESSION_ID

Set to Null

I_APPEAL_CODE

Set to Null

I_DATE_SENT

Please enter DateTime in format "mm/dd/yyyy hh:mm:ss".

Set to Null

I_OPERATOR_NAME

Set to Null

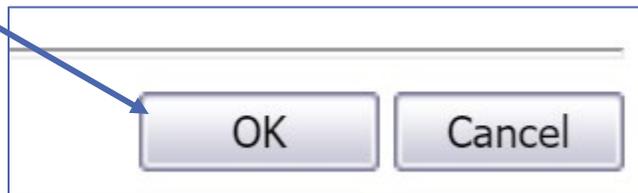
11. Remember to remove **Set to Null!!**

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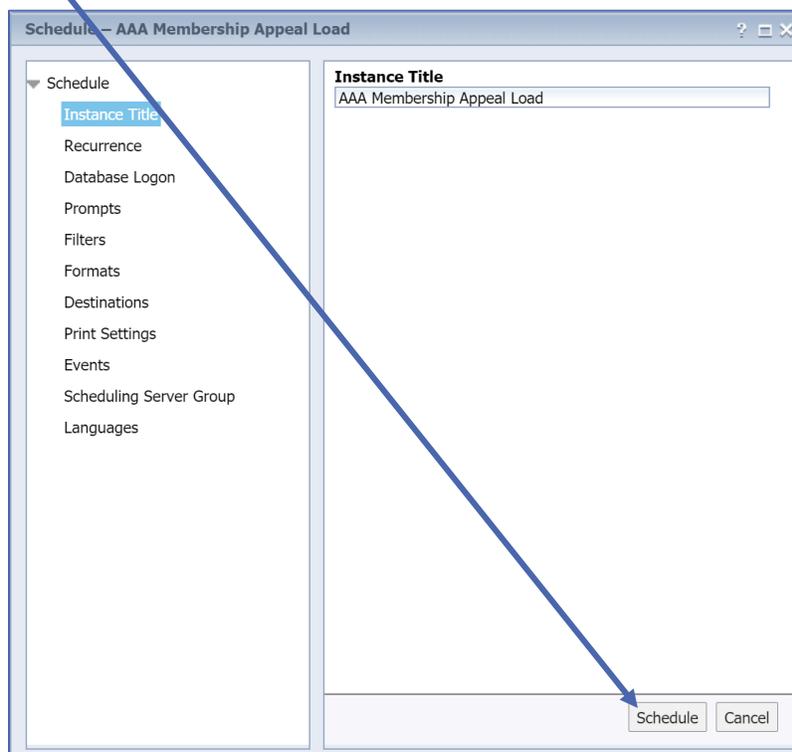
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12. Click **OK**.



13. Click **Schedule**.



14. Stop. Running this report has added the Membership Appeal code to all Entities in your Clipboard. You may now close Advance.