

Managing Contacts, Donations & Membership with PastPerfect 5.0 Class Agenda

Day 3

- Classroom opens 30 min before class time, trainers available for Q&A
- Homework review 10 min before class start, additional questions
- Donation Funds
 - Default Donation Fund Letter – the template for all new funds
 - Create Donation Fund – Living History Garden Fund
 - Set up Thank You Letter for Fund using Microsoft Word
- Mail Merge Letters- Sending out a solicitation letter
 - Default Mail Merge Letter- the template for all new letters
 - Create & compose Living History Garden Solicit Letter
- Creating Bulk Email – Sending emails from PastPerfect
 - Email Setup settings
 - Creating emails: Plain Text vs. HTML
 - Limits on the number of emails you can send: Don't be marked as SPAM!
 - Options for larger bulk emails
- Small Break
- Contact Lists
 - Fixed Lists – Know what each is for
 - User Defined Lists- How to create them
 - Creating new folder – Fundraising Mailings
 - Create new lists
 - Living History Garden Letter, Email Contact Preferred
 - Manually adding Contacts to list (Email Contact Preferred) (ID#9, #16, Smiths)
 - Adding Contacts to a list through Queries (City="Perfectown")
 - Merging/Subtracting Lists
 - Add Director's Circle and Visitor's Picnic to Garden List
 - Subtract Email Contact Preferred from Garden List
 - Viewing Contacts on a List
 - Add new fields to the View List by going to Setup | Query Fields
 - Sorting by Zip Code
 - Send out Garden Letter from Contact List
 - Send out Email from Contact List
 - Bulk emails (Send One Email to Everyone vs. Send Emails to Everyone)
- Enter Donations
 - Donation from Contacts Record: Perfectown Pizza & Pasta donates \$150.00
 - Donation from Pledges & Receipts: Smith Family donates \$50.00
- Q&A, Review and Homework
 - Feedback survey sends out this afternoon
- Class ends; Q&A for those who have additional questions, others may log off webinar