

TO BE FILLED OUT BY DATABASE ASSOCIATE:

Check box when done
 Appeal ID assigned in RE: _____
 Date finished: _____
 Staff Initials: _____

APPEAL SET-UP REQUEST FORM

Use when you need an appeal to be added in Raiser's Edge

When there is a solicitation appeal or an appeal that need to be tracked for package/newsletter sent to constituents in Raiser's Edge, it needs to be set up in Raiser's Edge by Database Associate. Please fill out the information below and submit it to Database Associate. You must submit appeal request form at least **4 weeks before** packages are sent out for an appeal. This gives Database Associate enough time to set-up an appeal, pull lists and have you proof it before packages are sent and gifts are linked to an appeal in Raiser's Edge.

DATE REQUESTED: _____

STAFF PERSON MAKING THE REQUEST: _____

DATE YOU NEED AN APPEAL SET-UP IN RAISER'S EDGE: _____

INFORMATION NEEDED FOR RAISER'S EDGE:

a. Appeal Type

Financial Appeal (*tip: if you need accounting reports for this appeal in future*)

Non-financial Appeal (*tip: you would like RE reports and tracking but no accounting reports*)

b. Department/Area that is overseeing the scheduled appeal: _____

c. Appeal Description: _____

d. Appeal Packages: _____

e. Appeal: Start date: _____ End date: _____

f. Overall goal for this appeal: \$ _____

g. Will there be gifts received for this appeal? : Yes No

i. If yes, please provide the default fund gifts will be designated for:

***please verify that a fund you list here is on TPLF's chart of accounts – if it is a new fund, set it up with Accounting first and then list it here*

h. How long gifts should be attributed to this appeal if gifts for this appeal are received in following years?

i. List pull required from Raiser' Edge? Yes No

i. If yes, please submit Data Request Form no later than **one week after** Appeal Request Form is submitted.

j. Expected date of Data Request Form to Database Associate: _____

k. Specific thank you letter to be sent with tax-receipt through Raiser's Edge? Yes No

i. If yes, please submit templates for thank you letter/s no later than **two weeks after** Appeal Request Form is submitted.

l. Expected date of letter template/s to Database Associate: _____

m. Special note re: data/gift/note tracking required in Raiser's Edge for this appeal: _____

n. GL account code this appeal links to (**this is imperative when setting up an appeal for which gifts will be received**): _____ (if not sure about GL account code, discuss with Database Associate or Accounting)

o. **Any other Notes/Special Instructions for this appeal:**

