

# Reminders Explained

## OVERVIEW

Supporters provide an essential source of funding for the ongoing fulfillment of an organization's mission. The Reminder function is part of the Membership Database System (MbrDB) and is used to advise supporters about when their annual membership is due. To keep the database up to date this process should, at a minimum, be performed weekly.

Reminders revolve around an **Expired** list that is displayed using the **Reminders** menu. The expired list is comprised of active supporter records for which no payment, marked as "Dues" in the case of a member/volunteer or "Donation" in the case of a donor, has been entered into the membership database within the last 11 months. Supporters on this list may need to be sent a renewal reminder.

It should be noted that an **Active** member, volunteer, or donor has a record with a **Mbr Status** of "1-Member," "2-Vol," or "3-Donor," and a **Mbr-Inactive?** flag of "No." Records with a **Mbr-Status** of "0-Contact" are not viewed as active supporters and therefore do not receive reminders.

Here are some important time periods to remember:

1. 11 months period of time after a payment is made before an active supporter is on expired list;
2. 30 days period of time after a reminder is sent that a supporter is excluded from expired list;
3. 90 days period of time before an inactive supporter is deleted from the database.

## REMINDERS MENU

### Reminders ☰ Display Expired

The reminder process begins with listing all active members, volunteers, or donors for whom a payment is due (i.e., nothing paid in the last 11 months). These lists are produced by selecting **Reminders ☰ Display Expired** and then selecting an option from the drop-down list that is located at the top left of the **Reminders ☰ Display Expired** page. An expired list for 1-Member, 2-Volunteer, or 3-Donor supporters will display when that option is selected. The default is 1-Member.

A supporter's MCID is excluded from the expired list when one of the following occurs:

- the MCID has a **new** Funding record—"Dues" if a 1-Member or 2-Volunteer, or "Donation" if a 3-Donor;
- the MCID has been re-designated to a non-supporter status (**Mbr Status** = "0-Contact");
- the MCID has been designated as inactive (**Mbr Inactive?** flag = "Yes");
- the MCID was sent a reminder message (excluded for 30 days only).

The expired list has several columns. The **MCID** column contains links to the Member Information (**Mbr Info**) page for each MCID listed. The **Email?** and **Mail?** columns contain checkboxes, and at the bottom of each column is a corresponding submit button. The checkboxes are present when the Member Information **Email OK?** or **Mail OK?** flag is set to "Yes." For example, if a supporter has indicated that they do *not* wish to receive email from PWC or do not have an email address, then their **Email OK?** flag is set to "No" and therefore no checkbox will appear for that MCID in the **Email?** column. The same applies to the **Mail OK?** flag and checkbox in the **Mail?** column for supporters who have no mailing address or do not want to receive mail.

The **Inactive?** column contains a checkbox for all MCIDs listed. The checkbox provides the ability to set one or more supporters to **Inactive** using today's date. Usually this option is used when it has been determined that all proper notices have been sent to the supporter and that it is now appropriate to drop the supporter from the database entirely. By checking one or more checkboxes in the **Inactive?** column and then clicking the corresponding **MakeInactive** button at the bottom of that column, those MCIDs will be marked inactive (i.e., **Mbr Inactive?** flag set to "Yes" with a **Date Inactive** equal to today's date).

It should be noted that marking a supporter as inactive will not, in and of itself, delete that supporter's record. The ADMIN function **DB Janitor** uses a MCID's **Date Inactive** to calculate a 90-day time period after which a MCID record will be permanently deleted. Any dues or donations made during that 90-day time period will automatically set the supporter's **Mbr Inactive?** flag to "No" thus making the record active once again.

The **Rem Cnt.** column shows the number of reminders that have been sent to each MCID listed. Supporters who have been sent over 3 reminders should be carefully reviewed to determine if it is now

appropriate to drop them from the database entirely.

## Reminders ☰ Print Labels and Letters

The checkboxes in the **Email?** and **Mail?** columns are used to select supporters from an expired list in order to send them a specific reminder message via email, postcard, or letter. The specific reminder message to be sent is chosen from a list of message templates. Email messages are sent immediately. Mail messages are queued for later printing of letters and/or labels using **Reminders ☰ Print Labels and Letters** (ref.

**Recommended Reminders Workflow** below). Once a message is generated, a notation is entered into the supporter's **Correspondence** log that is viewable from the MCID's Member Information.

**NOTE:** Creation and modification of the message templates is an ADMIN function.

Once a reminder message has been sent to a supporter they will not appear on the expired list for 30 days. Hopefully this provides enough time for the supporter to respond to the reminder they received. After 30 days, and failing any new update to their Funding record, the supporter will again be listed on the expired list.

If a supporter has been marked as inactive through the reminder process, they will automatically become active again if any dues or donation payment is received prior to the deletion deadline of 90 days.

## Reminders ☰ In-Progress Reminders

This menu item provides the ability to manage all membership enrollment. Selecting **Reminders ☰ In-Progress Reminders** displays a list of all MCIDs who have received a reminder but have not submitted a funding payment (i.e., in-progress). Using information recorded in a supporter's **Correspondence** log, and regardless of when the last reminder was sent, MCIDs are listed showing the current reminder count, and the date and type of the last reminder sent.

An MCID will be removed from this list when one of the following occurs:

1. a funding payment is received and entered as a "Dues" payment;
2. the supporter record is marked as inactive;
3. the status of the supporter record is marked as "0-Contacts."

## Reminders ☰ Reminders Explained

This is it!

## Recommended Reminders Workflow

### HOUSEKEEPING

1. Select **Reminders** ☰ **Print Labels and Letters** and click the **CLICK TO LIST AND DELETE LABELS/LETTERS** button to list any previously queued MCIDs. Click the **Check/Uncheck All** box to check all listed MCIDs and then click the **Delete Checked** button.
2. Check that the drop-down list at top of page shows **1-Member** then select **Reminders** ☰ **Display Expired** to display the **Members with expired memberships** list.
3. Return to and review the list. Look for checkboxes in the **Email?** and **Mail?** columns and click on the MCID link for any supporter with **NO** checkboxes to review their Member Information. If the supporter has no email or mail address, or if information in Notes indicates that the supporter does not wish to be contacted, leave the **Email?** and **Mail?** flags set to "No." Otherwise, update the **Email?** and/or **Mail?** flags to "Yes" based on the presence of an email and/or mail address. Change **Mbr Inactive?** flag to "Yes" for those that have no email or mail address as we have no way to correspond with them.
4. Return to and review the list. Look for values of 3 or greater in the **Rem Cnt.** column to identify supporters that have not responded to repeated reminders. Click the MCID link for those supporters and **determine if their Mbr Status should be changed to "0-Contact"** or if their **Mbr Inactive?** flag should be set to "Yes." Organizational policy should determine at what point to stop sending reminders to a supporter by changing the supporter's record to inactive.
5. Return to and review the list. Click the checkboxes in the **Inactive?** column for any remaining MCIDs that are determined to be inactive. Click the **MakeInactive** button at the bottom of the **Inactive?** column to set the **Inactive?** flag to "Yes" for the checked MCIDs.

### SEND EMAIL REMINDERS

6. Return to and review the list. Click on the checkboxes in the **Email?** column for all MCIDs who are candidates (**Rem Cnt.** = blank) for receiving the -First Notification email reminder message. Click the **SendEmail** button at the bottom of the **Email?** column and select the appropriate email message template. You can now optionally edit the Subject line or message. Click the **Submit** button to display a list of recipients and the email message. Each supporter's "Correspondence" log is updated with the date and the subject line of the email message sent. Also, a copy of the email just sent and a list of all those it was sent to is available for review, for a limited time, by selecting **Reports** ☰ **Mail Log Viewer**.
7. Repeat previous step for -Second Notification (**Rem Cnt.** = 1) and -Final Notification (**Rem Cnt.** = 2) email reminder messages. Those MCIDs with **Rem Cnt.** of 3+ need to be individually reviewed.
8. Repeat previous steps for **2-Volunteer** and **3-Donor** records using the drop-down list at top of page.

### PRINT MAIL REMINDERS - POSTCARDS

9. Return to and review the list and select **1-Member** from drop-down list at top of page. Click on the checkboxes in the **Mail?** column for all MCIDs to be sent a postcard (**Rem Cnt.** = blank). Click the **SendMail** button at the bottom of the **Mail?** column. **Select Label Only and then click the Submit button.** Repeat this step for **2-Volunteer** and **3-Donor** records using the drop-down list at top of page.
10. Select **Reminders** ☰ **Print Labels and Letters**. If needed, enter the number of blank labels at the top of a partially-used first page of labels. Click the **Submit** button under **Print Labels** to print all the labels for the postcards. Click **Close**.

### PRINT MAIL REMINDERS - LETTERS

11. Return to and review the list of the remaining records and select **1-Member** from drop-down list at top of page. Click on the checkboxes in the **Mail?** column for all MCIDs that need to be sent the Renewal Reminder Letter (hopefully all those that remain). Click the **SendMail** button at the bottom of the **Mail?** column. Repeat this step for **2-Volunteer** and **3-Donor** records.
12. Select **Reminders** ☰ **Print Labels and Letters**. If needed, enter the number of blank labels at the top of a partially-used first page of labels. Click the **Submit** button under **Print Labels** to print all labels for the letters. Click **Close**.
13. Select the **Renewal Reminder Letter**. If the logo is to be printed, check the "Include letterhead image in output?" box. Click on the **Submit** button under **Print Form Letters**. The letters to be printed will display. **Print the letters.** Scroll to the end of the letters and click **Close**.

14. Repeat Step 1.