

## **SMS Solicitation and Contribution Coding Setup and Processing Ideas**

This document will give you ideas on how to manage solicitation and contribution information in SMS.

Here are possible lists you may want to generate from SMS:

1. Individuals who do not want to get any type of solicitation.
2. Individuals who have contributed at least once.
3. Individuals who have not yet refused solicitation and have not yet contributed.

### **Setup procedures**

These are suggested setup procedures to be able to generate the lists above .

Set up a coding system in the User Codes. Two codes would be best and easiest: one code for No Solicitation (Y or Blank), the other code for Contributed (Y or Blank). Here's how the values can be used to generate the three lists above:

1. No Solicitation=Y means they do not want solicitation.
2. Contributed=Y means they have contributed.
3. No Solicitation=Blank and Contributed=Blank means they have not told you NOT to solicit and they have not contributed.

Note: Blank is used instead of N so that you do not have to do any initial coding for the individual records. The individuals will be automatically coded correctly for the third list defined above.

### **Generating the lists**

You can use the **Select Records** utility to select the desired list of individuals. Once the records are selected, you can print labels, print reports, export the list to Excel and other applications, and perform mail merges in a word processing application.