

The Morton Arboretum-Development Office-Raiser's Edge Report Request

No. of Workdays Given to Complete -----> Calculated when Request & Due Dates are entered.	
--	--

Submitted by: _____	Project Name: _____
Date Requested: _____	Due Date: _____
Request For: <input type="checkbox"/> Report <input type="checkbox"/> Pivot Report <input type="checkbox"/> Code Setup (by Sue) & Performance Report Setup (by Sheila)	
For Lists Only Estimated # of Records → <input type="checkbox"/> Email/Mailing List <input type="checkbox"/> Call List <input type="checkbox"/> Query/ Report Setup <input type="checkbox"/> Record Count <input type="checkbox"/> Import <input type="checkbox"/> Other (list below)	

Summary (description of the request and, if applicable, the reason for less than 6 days to complete)

I
n
f
o

Exclude These Records

Do Not Solicit Do Not Exchange Name Do Not Phone Do Not Mail No Renewal Notice Arborvitae

[Note: Exclusions will not apply to lists intended to include Trustees.] Phones/Emails marked with "Do Not Contact"

w/ Port. Mgr-(Specify Below) w/out Port. Mgr-(Specify Below) Comp 6-Month Membership Other _____

Exclude PM's(name or type): _____

Include Other Codes: Deceased Inactive Constituents No Valid Address

Include these Constituency Codes: Corporation Trustee Individual Government Life Trustee

Foundation Employee Volunteer Organization Trustee Family Fund/Foundation

Include Additional Records All Arborvitae (apply exclusions) All Arborvitae (no exclusions) Trustees (no exclusions)

Additional Inclusions/Exclusions Info _____

Membership Criteria

Membership Expiration Date Range _____

Include the following current Membership Standings and Categories:

Active All Lower Level Memberships Specific Categories-Define in "Additional Information" Section Below

Lapsed Friend Partner Lower Levels < April 2009 Lower Levels < May 2011

Dropped Thornhill Program Presidents Council

Giving Criteria

Date Range _____

Gift Amount (\$\$) _____

Single Gift Amount Total Gift Amount

Include: Cash Other _____ Pledges **OR** Pledge Payment In-Kind Gifts Soft-credits (Donor & Rec-Includes Matching Gift)

Exclude gifts to: Capital Campaign Membership Adopt-a-Tree

Dinner Party Tickets & Raffle Member Events Memorial & Tribute

Dinner Party Table Library Friends Other _____

Globally Add (Used for Tracking) Attribute **OR** Appeal → Appeal/Attribute Name _____

Print Control Report

Additional Information _____

C
r
i
t
e
r
i
a

Output Fields:

ID Number Primary Addressee Membership Category Gift Amount & Date Portfolio Mgr-CEO Constituency Code

Name Primary Salutation Membership Expiration Last Gift and Date Portfolio Mgr-Primary Staff Email Address

Address Membership Salutation Membership Standing Appeal for Gifts Solicitor-Trustee Other-List Below

Additional Output Info _____

O
u
t
p
u
t