

## PastPerfect Training: Membership and Contacts

### **Contacts Setup:**

- Contact Groups
- Donation Funds and Pledges
- Mail Merge
- Membership Types
- Projects
- Email

### **Contacts:**

- Adding
- Default Data
- Browsing
- Contact Management
- Pledges
- Donations
- Membership
- Volunteers
- Gifts-in-kind
- Planned Giving
- Additional Information Screens
  - Biography
  - Mail and contact log
- Accessions
- Loans
- Update History
- Printing
- Add Entry to Mailing Log
- Couples with two records

### **Campaigns:**

- Campaign activities
- Set up Thank You and Reminder Letters
- Multi-media upgrade
- Printing

### **Lists and Labels:**

- Create new user-defined list
- View List
- Add manually to list via Contacts Screen
- Print, View or Email

**Pledges and Receipts:**

- Yearly or Monthly review
- Enter Pledge
- Enter Donation Receipt
- History for contact
- Print-Pledge/Donation
- Print Dues Receipts
- Print Lists for dues or donations

**Word-Rite**

## Setup

- Contacts
  - Mail-merge Letters
- Insert Field
- Insert Image with Frame
- Tools
- Default Mail Merge Letter