

2. ADD STEP

Step

Owner: John Smith
Plan: 16 PD ESS Individual Giving / IID 00 / ESS Individual Donation

Step Type: Phone to Renew Donation Step Date: 02/19/2015 Warn Days: 21
Step Description: Phone to Renew Donation Due Date: 02/15/2016 Priority: Medium
Worker: Julia Dolman Completed Date: 00/00/0000

Associate ID: Associate Name:

Attachment: [Add](#)

Notes:

Created: 2/19/2015 14:57:36 by emulcar at WINSPEAR-7 Modified: 2/19/2015 14:57:36 by emulcar

[Prev](#) [Next](#) [Save](#) [Cancel](#)

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3. REMINDERS

Reminders

Show As of: 02/15/2016 New Managed Users Tasks Include Completed Reminders All Reminders Step Reminders Consultant Reminders Priority High Priority Medium Priority Low

Priority	Consultant ID	Consultant Name	Starting Date	Complete By	Campaign	Assigned To	Completed Date	Date
Medium	312249	John Smith	02/15/2016	02/15/2016	16 PD ESS Individual Giving	Phone to Renew Donation	emulcar	02/19/2015

Notes: Not Complete

Total Tasks: 1

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4. ADD CSI

Customer Service Issue

Constituent ID: 332545 Owner: John Smith
Issue #: 9441
Issue Date: 02/19/2015 Urgent:
Contact Method: Outbound Phone Category: Information Request
Activity Type: Donation Renewal Origin: (none)
Season: ((none)) Performance: Package: ((none))

Notes:
01/30/2016 - Phoned and left message requesting donation renewal
02/02/2016 - Followed up with an email requesting donation
02/15/2016 - John phoned and renewed monthly donation

Created: 2/19/2015 15:09:26 by emulcar at WINSPEAR-7 Modified: 2/19/2015 15:09:26 by emulcar

Reminders

Issue Actions:

User	Date	Action Date	Action	System Date	Resolved
emulcar	2/19/2015 15:09:31	2/19/2015	Follow-up Completed		<input checked="" type="checkbox"/>

Add Action Save Close

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MASS ADDING THE PLANS

1. GoTo > Campaigns
2. Campaigns > Plans Maintenance

Plans

Mode: Add Update
List: ESS Monthly Donors

Detail
Campaign: 16 PD ESS Individual Giving Ask: \$0.00 Start Dt: 02/19/2015
Designation: BHD 00 Goal: \$0.00 By: 00/00/0000
Fund: ESS Individual Donation Recorded: \$0.00 Cont. Total:
Type: Annual - High Likelihood Plan Source: PD Annual Gft. Renewal
Status: Monthly Sustaining Pledge Priority: Probability: % | ±

Custom Data

Notes

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EDIT DONATION AMOUNTS

The screenshot shows the 'Plans' window in the Teshura software. The window title is 'Teshura ** TEST SERVER**'. The main area displays a table of donation plans. The columns include: 'Amount', 'Contribution', 'Designation: IND 00', 'Fund: ESS Individual Donation', 'Start Date', 'Complete By', 'Status', 'Type', 'Original Source', and 'Priority'. The table contains multiple rows of data, with a large red rectangular area obscuring the first few columns. The status bar at the bottom shows '3/5/2015' and the number '7'.

ADD STEPS

The screenshot shows the 'Steps' window in the Teshura software. The window title is 'Teshura ** TEST SERVER**'. The main area displays a form for adding or editing steps. The form includes fields for: 'List: ESS Monthly Donors', 'Campaign: 16 PD ESS Individual Giving', 'Designation: IND 00', 'Fund: ESS Individual Donation', 'Step Type: Renew Sustaining Pledge', 'Step Description: Renew Sustaining Pledge', 'Worker: Julia Dotman (329684)', 'Step Date: 02/19/2015', 'Due Date: 00/00/0000', 'Completed Date: 00/00/0000', 'Wave Days: 21', and 'Priority: Medium'. The status bar at the bottom shows '3/5/2015' and the number '8'.

EDIT DUE DATES

The screenshot shows a window titled "Tesitura ** TEST SERVER**" with a menu bar (File, GoTo, Campaigns, Tools, Window, Help) and a toolbar. Below the toolbar, there are tabs for "Plans" and "Workers". The main area displays a list of donors under the heading "List: ESO Monthly Donors". The list has columns for "Name", "Date", and "Amount". The "Name" column contains "Julia Dolman (329684)" repeated for each row. The "Date" column shows dates from 02/18/2015 to 03/18/2015. The "Amount" column shows values like 100.000000 and 21.000000. At the bottom, there is a status bar that says "8 selected of 142 (142 entries)".

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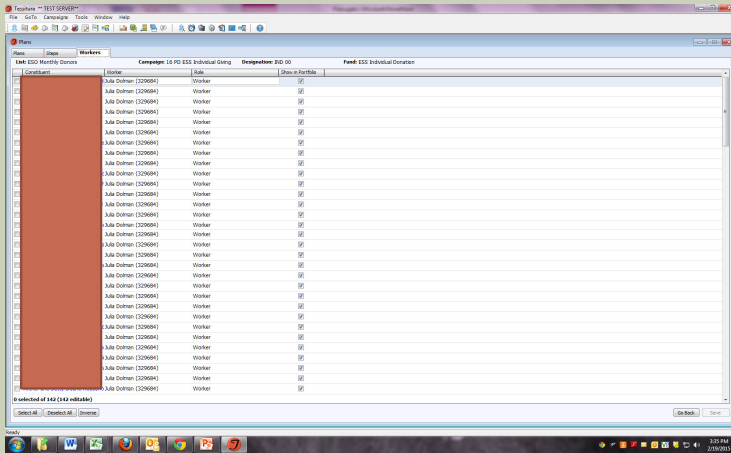
ADD WORKERS

The screenshot shows the same software interface as above, but with the "Workers" tab selected. The "List" dropdown still shows "ESO Monthly Donors". The "Detail" section contains several dropdown menus: "Campaign" is set to "16 PD ESS Individual Giving", "Designation" is "IND 00", and "Fund" is "ESS Individual Donation". The "Worker" dropdown is set to "Julia Dolman (329684)" and the "Role" dropdown is set to "Worker". There is a checked checkbox labeled "Show in Portfolio".

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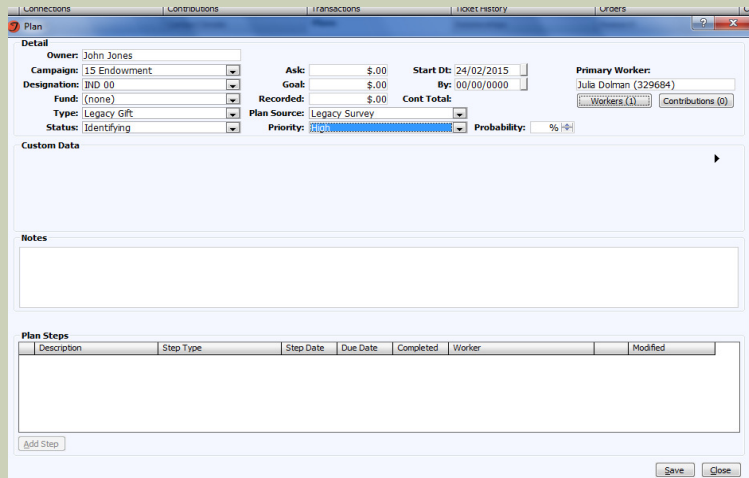
SAVE WORKERS



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LEGACY PLANS 1. ADD PLAN



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2. ADD STEP

The screenshot shows a 'Plan' window with a 'Step' dialog box open. The dialog box contains the following fields:

- Owner: John Jones
- Plan: 15 Endowment / IND 00
- Step Type: Follow-Up
- Step Description: Follow-Up
- Worker: Julia Dolman
- Associate ID: (empty)
- Associate Name: (empty)
- Step Date: 24/02/2015
- Due Date: 20/03/2015
- Warn Days: 7
- Priority: Medium
- Completed Date: 00/00/0000
- Attachment: Add
- Notes: (empty text area)

Buttons: Save, Cancel

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3. MASS ADDING PLANS

The screenshot shows a 'Plans' window with the following fields:

- Mode: Add (selected), Update
- List: Legacy List November
- Campaign: 15 Endowment
- Designation: IND 00
- Fund: (none)
- Type: Legacy Gift
- Status: Identifying
- Ask: \$ 0.00
- Goal: \$ 0.00
- Recorded: \$ 0.00
- Plan Source: Legacy Survey
- Priority: High
- Start Dt: 24/02/2015
- By: 00/00/0000
- Cont Total: (empty)
- Probability: % (empty)

Buttons: Add, Update

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6. SURVEY RETURNED (LEGACY EXPECTANT)

Description	Step Type	Step Date	Due Date	Completed	Worker	Modified
Status Changed	Status Change	24/02/2015			Identifying to Stewarding	24/02/2015 by jdolmar
Follow-Up	Follow-Up	24/02/2015	20/03/2015	24/02/2015	Jula Dolman	24/02/2015 by jdolmar

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7. ADD MORE STEPS!

Description	Step Type	Step Date	Due Date	Completed	Worker	Modified
Status Changed	Status Change	24/02/2015			Identifying to Stewarding	24/02/2015 by jdolmar
Follow-Up	Follow-Up	24/02/2015	20/03/2015	24/02/2015	Jula Dolman	24/02/2015 by jdolmar
Thank You Call	Thank You Call	24/02/2015	E3/03/2015	24/02/2015	Elaine Warwick	24/02/2015 by jdolmar

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7. ADD MORE STEPS (CONTINUED...)

Plan

Detail

Owner: John Jones

Campaign: 15 Endowment Ask: \$0.00 Start Dt: 24/02/2015

Designation: RND 00 Goal: \$0.00 By: 00/00/0000 Primary Worker: Julia Dolman

Fund: (none) Recorded: \$0.00 Cont Total: Workers (1) Contributions (0)

Type: Legacy Gift Plan Source: Legacy Survey

Status: Stewarding Priority: High Probability: %

Custom Data

Notes

John has left a gift in his will to the ESO.
John plays violin - started learning when he was 10 years old.

Created: 24/02/2015 10:52:07 by jdolman at WINSPEAR - Modified: 24/02/2015 10:56:17

Plan Steps						
Description	Step Type	Step Date	Due Date	Completed	Worker	Modified
Mail Brochure	Mail Brochure	24/02/2015	13/03/2015		Julia Dolman	24/02/2015 by jdolman
Thank You Call	Thank You Call	24/02/2015	03/03/2015		Elaine Wanick	24/02/2015 by jdolman
Status Changed	Status Change	24/02/2015	20/03/2015	Identifying to Stewarding	Julia Dolman	24/02/2015 by jdolman
Follow-Up	Follow-Up	24/02/2015	20/03/2015	24/02/2015	Julia Dolman	24/02/2015 by jdolman

Add Step

Save Close