

Review and Edit Appeal

02/26/2024 4:13 pm EST

1. Click on one of the ask-range columns or donor types to access the "Review and Edit" page.
2. Check out the "Critical Ask Factor." This shows you what in your data was the deciding factor for creating the donor's ask amount. Click the blue button to review the ask calculations.

Critical Ask Factor

Giving / Lifetime Gifts = Average

Giving / Lifetime Gifts = Average

Giving / Lifetime Gifts = Average

Greatest Gift

Giving / Lifetime Gifts = Average

3. Donors who are "flagged for review" will be shown in red, with the reason for the flag indicated in the red box. These donors will automatically be designated to the "secondary list" unless you switch their export location to the "primary list."

Contact Name	Informal Name	Base Ask	Monthly Ask 1	\$5k or above	3x appeal gift last year	1k more than appeal gift last year	Export Location
Heidi and Mathew Mooney	Heidi and Mathew	\$1,100	\$110.00		✓	✓	Secondary List
Hewlett Packard Enterpris...		\$100	\$100.00				Primary List
Jaime Sawyer	Jaime	\$100	\$100.00				Primary List
Jeremy and Irene Barrett	Jeremy and Irene	\$100	\$100.00				Primary List
Jill and Bill Cooley	Jill and Bill	\$100	\$100.00				Exclude From Export Secondary List
Josephine and Chad Price	Josephine and Chad	\$100	\$100.00				Primary List

4. To change the base ask for any donor, click on the amount, and either select from the pre-filled amounts or enter a custom amount. You can change the base ask for multiple donors at once by clicking the checkboxes on the left.

\$100 - \$249 Search [] Rearrange Columns [] Undo [] Select/Deselect []

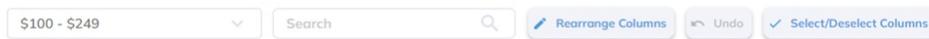
Contact ID	Contact Name	Informal Name	Base Ask	Monthly Ask 1	
<input type="checkbox"/>	12	Heidi and Mathew Mooney	Heidi and Mathew	\$100	\$100.00
<input type="checkbox"/>	1066	Hewlett Packard Enterpris...		\$100	\$100.00
<input type="checkbox"/>	378	Jaime Sawyer	Jaime	\$100	\$100.00
<input type="checkbox"/>	2864	Jeremy and Irene Barrett	Jeremy and Irene	\$100	\$100.00
<input type="checkbox"/>	1555	Jill and Bill Cooley	Jill and Bill	\$100	\$100.00
<input type="checkbox"/>	404	Josephine and Chad Price	Josephine and Chad	\$100	\$100.00
<input type="checkbox"/>	182	Julian and Brandy Crabtree	Julian and Brandy	\$100	\$100.00

Base Ask dropdown menu: \$100, \$10, \$15, \$20, \$25, \$30, \$50

<input checked="" type="checkbox"/>	Contact ID	Contact Name	Informal Name	Base Ask	Monthly Ask 1
<input checked="" type="checkbox"/>	12	Heidi and Mathew Mooney	Heidi and Mathew	\$100	\$100.00
<input checked="" type="checkbox"/>	1066	Hewlett Packard Enterpris...		\$100	\$100.00
<input checked="" type="checkbox"/>	378	Jaime Sawyer	Jaime	\$100	\$100.00
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<input checked="" type="checkbox"/>	182	Julian and Brandy Crabtree	Julian and Brandy	\$100	\$100.00

5. Other actions available on the “Review and Edit” page are:

- a. Rearrange columns
- b. Select/Deselect Columns
- c. Search for donors
- d. Switch between ask ranges and donor types



6. When you’ve made your final changes, click “Apply” at the bottom right of your screen. This will take you back to the “Appeal Summary.”
