Map Appeal

06/05/2024 1:10 pm EDT

1. This page is designed to locate donation data related to:

    a. Annual appeal gifts from the last three years.

    b. Gifts to a major capital campaign within the last eight years.

    c. Recent gifts to a special event.

2. Selecting Campaigns, Appeals, and Funds:

    a. For each category (e.g., Annual appeal gifts made last year, 2 years ago, 3 years ago), click the respective dropdown menu.

    b. From the dropdown, select the specific campaign, appeal, and/or fund where these gifts were recorded in your RE NXT system.

    c. In order for campaigns, appeals, and funds to appear in the dropdowns, it's necessary for the donors in your audience to have a recorded gift in one of the mentioned categories.

3. Filter Gifts by Date (Optional):

    a. If your campaigns, appeals, or funds are ongoing (evergreen), you can specify a date range to focus on gifts made within a particular timeframe. This helps in accurate mapping to generate ask strings.

    b. Use the "From Date" and "To Date" fields next to each category to set these ranges.

    c. You can leave the "From Date" and "To Date" blank if you would like to bypass the date range filter.

4. Inclusion of Soft Credits:

    a. Decide whether to include soft credits in generating ask strings by toggling the "Include Soft Credits?" option at the bottom. Turn it to 'Yes' if you want soft credits considered in your ask strings.

5. Handling Missing Data:

    a. If you have no contributions in one of the specified areas, such as a recent capital campaign, leave that section's dropdown blank. AskGenius will skip this data category when generating the ask strings.

6. "Apples to Apples" Mapping:

    a. Ensure that the data you map from the past corresponds directly to the categories requested. For example, when asked for "Annual appeal gifts made last year," ensure that the gifts selected from the dropdown were part of the same type of appeal as expected for this year. This consistency is crucial for accurate and effective ask strings.

7. Complete the Mapping:

    a. After making all selections and setting the appropriate configurations, click on the "Select Number of Asks" button at the bottom right of the page. This will finalize the data mapping and take you to the next

step of generating ask strings based on the mapped data.