User Guide

Version 2.2a April 2008

THE PETRA USER GUIDE SET

- General User Guide
- Partner User Guide ← **This guide**
- Finance User Guide
- Personnel User Guide
- Conference Management User Guide
- Financial Development User Guide
- System Manager Guide

Operation Mobilisation
Information Technology Department
PO Box 27
Carlisle
Cumbria CA1 2HG
United Kingdom

Tel: +44-1228-615-100
Fax: +44-1228-515-607
Email: petra–support@ict–software.org

Document History

Partner User Guide				
Version	**Date**	**Sections changed**	**Notes on Major Changes (chapter/section numbers)**	**Author**
2	1 Apr 02	All	New version for PETRA 2.0, revised from previous version. Main changes are in additional extracts and Shepherds. Some other chapters have been re-arranged.	Ken Fitchew
2.1	1 Nov 04	1.3.1, 1.5, 2.6, 2.7, 2.8, 3.2, 3.4.6, 4, 11	Work with recent partners menu added. Add site moved to System Manager. New partner classes (bank and venue). Major change to Finance Details and bank accounts. Better explanation of partner export. Postcode regions added (table and extracts). Ch.11 removed.	Ken Fitchew
2.2	1 Nov 07	All	Partner Edit Screen completely changed. New extracts. Partner Interests and Reminders added. Foundations added. Credit card details added. Local Partner Data added. New style Reports for Local Partner Data. Chapter 6 on Form Letters and Mailmerge updated. Relationship Categories added.	Ken Fitchew
2.2a	1 April 08	2.3.4.2, 2.3.6, 2.5.3	Cancelling all subscriptions; Deactivate partner; Bank Details screen changed.	Ken Fitchew

Petra Partner User Guide

Chapters

Detailed Table of Contents

Chapter 1 Overview of the Partner System

1.1 Introduction

Almost all of the activities of international mission groups involve contacts with people. These include:

- People joining in summer or year campaigns (or longer)
- Supporters who receive prayer letters and provide donations
- Churches who support the mission or are interested in the work
- Other mission groups and charitable trusts with whom we co-operate
- Other organisations, both those with similar aims and commercial companies such as banks

All these work with the organisation, and can be called ‘partners’.

The purpose of the Partner Administration System of PETRA is to maintain the information necessary for the organisation to communicate well with its partners, and to manage these contacts effectively. Much of this information is also used by the other PETRA systems (e.g. Finance and Personnel).

The functions of the Partner System are to help an office:

- hold information about partners and to keep it up-to-date;
- use this data for activities such as printing labels for sending newsletters, producing standard letters to reply to inquiries, or contacting a particular group of partners (e.g. former members, to invite them to a special meeting.)

Because international groups work in many countries, the system must be very flexible. For example, different cultures have different ways of using family and given names, and different ways of writing addresses. The PETRA Partner System has therefore been designed so that many features can be changed to meet the needs of individual offices, while retaining common principles. This results in the system being a little more complex that it would need to be for use in just one situation. However, efforts have been taken to make the system as easy to use as possible, while providing sufficient flexibility.

The following sections of Chapter 1 give a general introduction to the Partner System. The remaining chapters of this User Guide explain how to use it.

1.2 Scope of the Partner System

The PETRA Partner System supports the activities of an administrative office which require access to Partner information. These include mailing publications, standard or customised letters to supporters, and the maintenance of other partner details for use by the other PETRA Systems (e.g. the Finance System for sending receipts and the Personnel System for recording personal details such as date of birth). The most important features are as follows.

Storing Partner Names, Addresses and Other Information PETRA can store names and addresses, phone numbers, E-mail addresses, etc. of supporters, churches, members, internal units and other organisations. Where needed, several addresses can be stored for one partner. It is also possible to record that partners are special types, such as Board members. PETRA can also record details of ‘private’ partners, such as individual prayer supporters; these may only be seen and used by the PETRA User who entered them.

Partners are grouped into different classes, namely: Family, Church, Organisation, Unit, Bank, Venue and Person. These are explained in section 1.3.1, ‘Partner Class’. The reason for having different classes is that different items of data are useful for each one. For example, ‘Date of Birth’ may need to be recorded for an OM member, but is not relevant for a church.

Relationships between Partners PETRA can record relationships between partners, such as the fact that a partner of class Church supports a particular member of the Organisation.

Subscriptions to Publications PETRA can keep lists of all publications handled by an office and record which partners subscribe to receive each publication. This data can also include dates when subscriptions need to be renewed, postage costs, free and trial subscriptions, etc. Partner records are automatically updated when publications are sent.

Contacts with Partners You can record details of contacts which your office has with partners.

Sorting Groups of Partners (Extracts) PETRA allows groups of partners to be selected from the complete list. This is essential for mass mailings of publications, but can also be used, for example, to contact all supporting churches within a certain area in order to advertise a meeting.

Mailings to Partners PETRA can print envelopes or mailing labels for a group of partners. There is a lot of flexibility over the format of the address, to meet the different needs of different countries.

Compiling and Printing Management Reports Various types of report can be generated using the information stored in PETRA, such as lists of partners subscribing to a publication.

Producing Customised Form Letters PETRA allows a ‘Mail merge’ in which partner data relating to subscriptions, recent gifts, etc. can be merged with a standard letter to produce a set of letters, each addressed to one partner, and containing data relevant to that partner. Petra also has an export mailmerge facility; key elements of partner data, eg address, can be exported in a text table, suitable for importing into an external word-processor to use in mailmerge operations.

1.3 Types of Partner

1.3.1 Partner Class

There are several different classes of partner. The reason is that different data needs to be stored for different types of partner. For example, you may want to record whether a person is married, but this is meaningless for an organisation. PETRA uses 7 different classes of partner. However, one of them, class Person, is never used by itself, but only in conjunction with class Family. The classes are as follows.

- **Family -** This is the general class for partners who are people, **both individuals and married couples**. For Family class partners, PETRA can record basic contact data such as address and phone number, and also information about subscriptions to publications.
- **(Person)** - This class is never used by itself, but as an additional class for partners who already exist as class Family. It creates additional, supplementary records, holding extra information that cannot be stored in a record of class Family, e.g. date of birth. It is used mainly for members. An individual member has a main entry as class Family, and a supplementary one as class Person. A couple working with the Organisation will have one entry as class Family, and separate records of class Person, both linked to the same Family record.
- **Church -** For churches with links to the Organisation, or who support members. In addition to address details, PETRA can store data such as denomination, or existence of prayer cells
- **Organisation -** For all organisations except churches. Foundations, which may fund projects, are a special type of Organisation.

- **Unit -** For data on those internal organisational units that the office deals with. These units include not just sending and receiving fields, etc, but also conferences, campaigns and key ministries.
- **Venue** - For sites where conferences are held. A venue is associated with accommodation details (buildings, number of rooms, beds, etc).
- **Bank** - Branches of banks at which other partners have bank accounts.

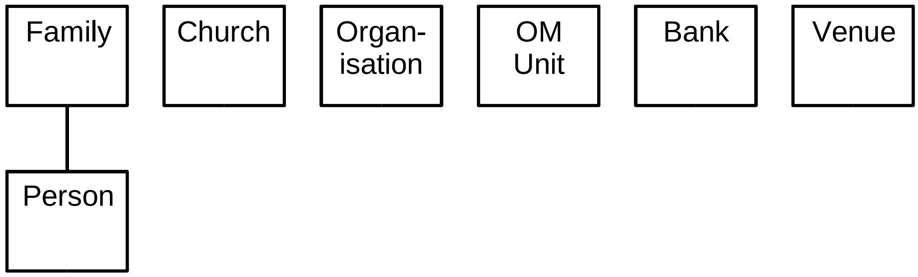


Figure 1-1 Classes of Partner for data records in Petra

1.3.2 Partner Status

In PETRA, every partner is given a Status. The status can be changed at any time. The options are:

Active - a partner who is active

Deceased - a person who used to be a partner but has died

Inactive - a partner who no longer wishes to receive mailings

Private - a partner who is only on a personal mailing list

For most operations, offices work with partners of status Active.

Status **Private** is used for personal contacts of individual users. Private partners are "owned" by the PETRA User who entered them, and are marked with that PETRA User Identification (ID). Other users who log in to PETRA with a different User ID cannot edit these partners.

1.4 Major Principles of Partner System

Partner Key Each partner is given a unique key number automatically when they are first entered in PETRA. The first part of the number indicates the site where they have been entered, and the rest is their unique identification number. This key will appear on many screens referring to that partner.

Partner Find Facility PETRA is designed to be used in offices which have many partners, and so a powerful facility is provided in the *Partner Find Screen* to help a User to find easily the record of a partner. If necessary the user can look at (browse) the details of all partners who have similar names or live in the same area before selecting the correct one. PETRA can also produce lists of groups of partners with something in common (these lists are called ‘Extracts’).

Addresses Addresses are made up of two parts: a *Location*, and *Location Details*. Partners may share a location (for example a team of people living at the same address), but have different Location Details (phone numbers).

Tables of Options Some partner data can take any form (for example, name and address). However, much of the data relates to fixed options. For example, an office will only support a small number of publications. In cases such as this, PETRA uses a simple code for each publication, and keeps a list of publications that may be used by that office. Lists like this are known as Tables, and cover not just publications, but other items such as partner details (e.g. ex-members, church denominations, languages spoken etc.) Some of these choices and codes are common throughout the Organisation, but in many cases local offices can add items to these lists to meet their local requirements.

Administrative Operations PETRA can use the data stored to help the local team in standard operations such as printing address labels for partners who receive publications, special letters to announce events, etc. A range of standard reports is also available to assist local teams in effectively managing their operations.

Maintenance or Housekeeping The partner system includes housekeeping operations such as searching for duplicate address entries and purging old extracts.

1.5 Menu Structure

To open the Partner Module, click on the Partner icon in the *Petra Welcome Screen*. The *Partner Screen* is displayed (see Figure 1-2). Almost all operations in the User Guide assume that you are starting from this screen. The Partner System is based round the main menus in the menu bar of this screen.

- **File Menu** allows partners to be imported from and exported to other PETRA systems. [Note - `Add Site` used to be under this menu, but this is now in the System Manager module.]

Figure 1-2 Main partner Screen, showing File Menu

- **Partner Menu** This offers various operations for handling partners or selected groups of partners (extracts) and keeping information up to date. Figure 1-3 shows the options. `Recent Partners` allows you to select quickly any of the last ten partners worked with.

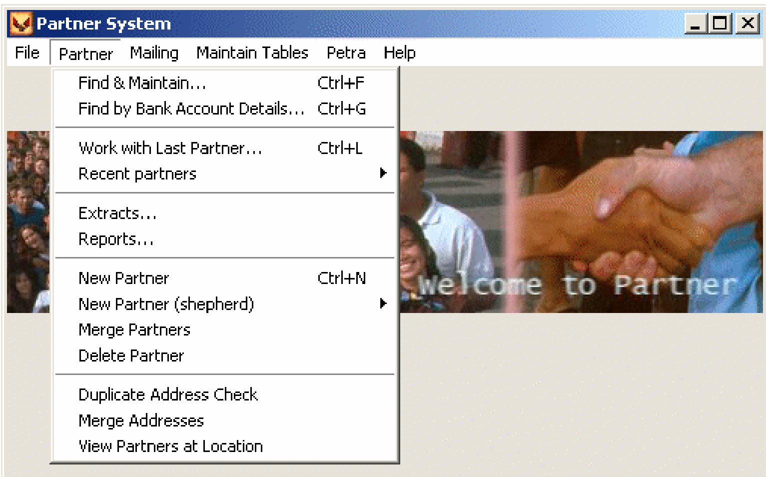


Figure 1-3 Partner Welcome Screen with Partner Menu

`Find and maintain Partner` is used extremely commonly and so may also be accessed by the button in the centre of the screen (Figure 1-2).

- **Mailing** is a menu that leads to the main operations for office management such as printing labels, form letters and reports.

Figure 1-4 Mailing menu in Partner Welcome Screen

- **Maintain Tables** is a two level menu which allows you to update the Tables which list choices. The Tables are grouped into four sets, and each group has a sub-menu;

  Most of these tables will not be changed often. However, several of them, particularly the Form Letter tables must be used as part of the preparation work before sending a form letter.

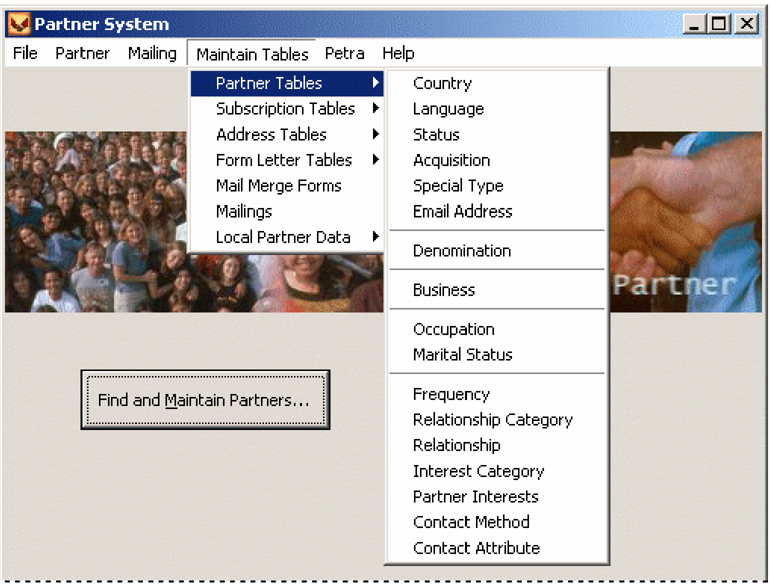


Figure 1-5 Maintain Tables menu

- **Petra Menu** allows access to the other sub-systems of PETRA (Finance, Personnel, etc.)

1.6 Layout of the Partner User Guide

The Guide is organised into 11 Chapters.

Chapter 1, Overview of the Partner System

Chapter 2, Entering and Editing a Partner explains how to enter the details of a partner and how to edit the information later; this includes how to enter a subscription to a publication.

Chapter 3, Maintaining Tables explains how to update the Tables of possible choices in the selection lists for entering data.

Chapter 4, Selecting a Group of Partners (Extracts) explains how to make Extracts (lists of groups of partners with something in common).

Chapter 5, Printing Labels and Envelopes explains how to print mailing labels and envelopes to a group of partners selected in an Extract.

Chapter 6, Form Letters and Mailmerge explains how to write and print standard letters, and also how to save data for use in an external word-processor.

Chapter 7, Partner Reports explains how to produce management reports using the Partner data held in PETRA.

Chapter 8, Subscriptions to Publications explains how to manage the job of sending publications to partners. It refers to other chapters where necessary.

Chapter 9, Address Management explains a few more specialised functions on managing addresses (checking for duplicate addresses and removing old addresses).

Chapter 10, Sending E-mail from PETRA explains how e-mail addresses stored in PETRA can be used easily to send email messages.

Chapter 11, Foundations explains how to enter Foundation details for this sub-set of Organisations.

1.7 Learning to Use the Partner System

A new user of PETRA may find the following plan useful to learn the basic principles:

1. First look through the PETRA GENERAL USER GUIDE, which gives general principles of operation of PETRA.
2. Moving to the PARTNER USER GUIDE (this part), begin with the first part of Chapter 2 (up to section 2.3.3.2). All users need to be familiar with the use of the *Partner Find Screen* and how to enter data through the *Partner Edit* Screen, since these are central to the use of PETRA. Don't work through all the later sections of Chapter 2 at this stage. You may wish first to try entering a simple partner using the Add Family Shepherd, but then try using the 'full' process in order to become familiar with the screens.
3. Go to Chapter 4. Extracts are essential for most of the operations of an office using PETRA. Work through the first few pages up to and including section 4.2.1 'Publication Extract'.
4. Now go to Chapter 7, 'Partner Reports'. This will provide an example of using Extracts and also provide some experience in printing.
5. Look at the use of Tables, by studying the first part of Chapter 3. Read from the beginning to section 3.1.5, 'The Find Facility'.
6. You will then have a good knowledge of the basic principles before moving on to other items such as entering additional information on partners (the rest of Chapter 2), printing labels (Chapter 5) and Form Letters (Chapter 6); Form Letters is perhaps the most complex common operation, and this should not be attempted until the user is familiar with the other parts mentioned above.

> **Partners are people, not data!** We are working with people, even if they are part of an organisation. We aim to show respect, care, appreciation and understanding of the partners' concerns in all our dealings with them, whether it is a confusing address change or a missing subscription. It is hoped that PETRA will be a useful tool in working with Partners, and enhancing relationships, but it cannot substitute for a caring attitude.

----- End of Chapter 1 -----

Chapter 2 Entering and Editing a Partner

Adding a partner and maintaining (editing) partner details are the most basic operations in the PETRA Partner System. The Partner system allows you to record much general information about a partner. The Personnel system is used to enter specific personnel information, such as applications to join a campaign, and the Finance system is used for gifts, invoices etc, but Personnel and Finance also use the basic information entered in the Partner system.

Partner system data can be entered (and edited) from the *Partner Edit Screen*. However, this is a little complex, and so PETRA has Shepherds which lead you through the initial steps for adding new partners of class Family, Person and Church. It is not necessary to use Shepherds, but they help to ensure that basic information is entered correctly; they do not ask for all possible information, and so after the initial data has been entered using a Shepherd, the *Partner Edit Screen* can be used to add additional items. The *Partner Edit Screen* must also be used to change data that has already been entered.

Before you can open the *Partner Edit Screen* for a particular partner, you must first find them in the PETRA database. This is done through the *Partner Find Screen*, and this is introduced in the next section. This chapter then covers other topics as shown below:

2.1 Finding an Existing Partner

In many operations in PETRA, it is necessary to find and display the current details recorded for a partner. This is done by using the *Partner Find Screen*. You can go directly to a partner if you know enough details, or browse a list of partners and then select the one you want. The main way to do this is using the *Partner Find Screen*, which is described next. However, it is also possible to find a partner from details of their Bank Account (see section 2.5.4, Finding the Holder of a Bank Account, page 57).

2.1.1 The Partner Find Screen

On the PETRA welcome screen, click the large [Partner] button to see the *Partner System (Welcome) Screen*. Click the [Find and Maintain Partner] button in the centre of the screen (the function is also available from the Partner menu on the menu bar.) The *Partner Find Screen* appears (see Figure 2-1). This is the starting point for searching the data in PETRA to find a Partner.

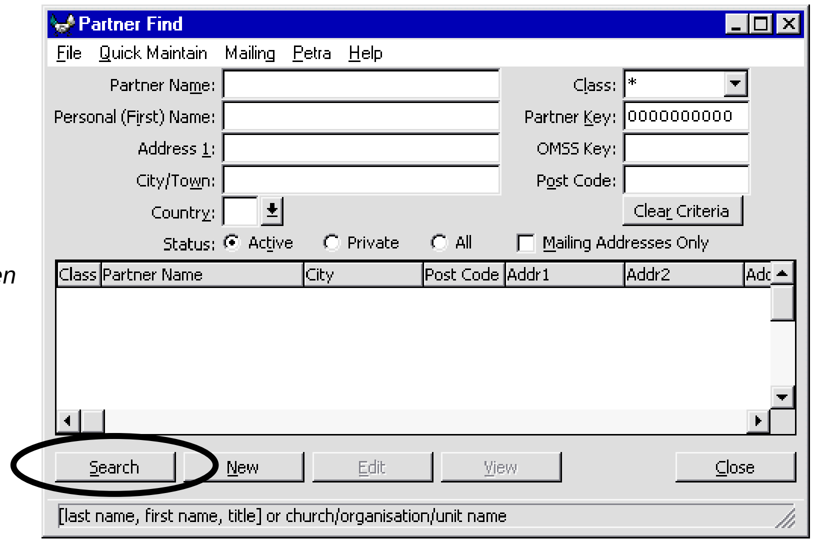


Figure 2-1 Partner Find Screen

1. To view all active partners on the system, just click the Search button. The screen will now display all active partners in a list in alphabetical order (Figure 2-2).

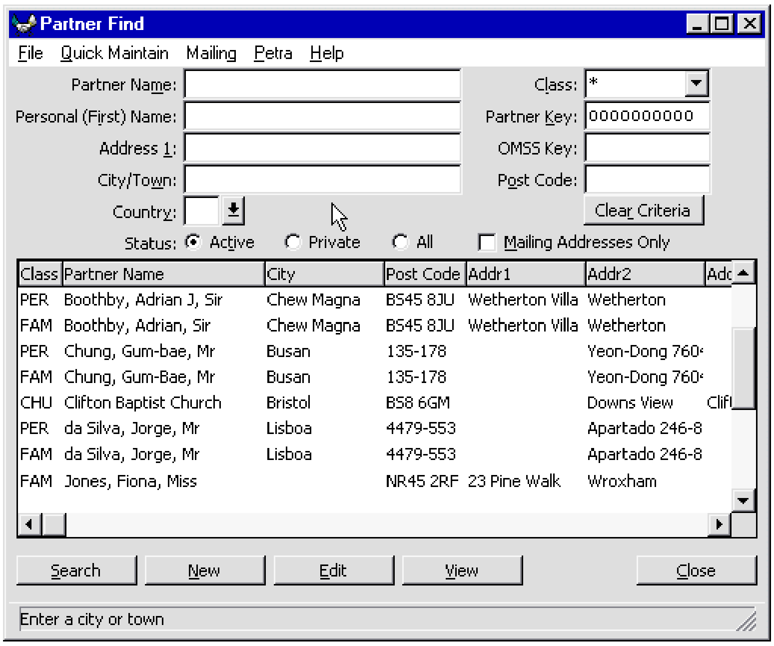


Figure 2-2 Partner Find Screen, showing results of search

2. Use the vertical scroll bar to move up and down the list. Alternatively, click on one partner to select them, and then use the cursor keys to move up and down the list. As shown in Figure 2-2, some partners (e.g. Chung) may appear more than once. This is because the Find screen may show a number of records for the partner, for example a Family record and a Person record. Also, if a partner has several addresses, each address appears as a different entry. This can be prevented by narrowing the search as described in the section 2.1.2.
3. Use the horizontal scroll bar to see additional information, such as the address **location key**. However, for a quick view of a partner's information, highlight the partner and click View (or double click on the partner.) This will bring up a *Partner View Screen* (Figure 2-3).

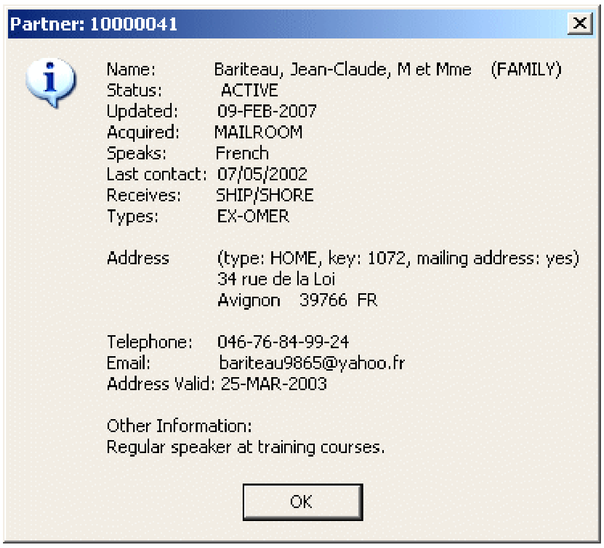


Figure 2-3 Partner View Screen

Click OK to return to the *Partner Find Screen*.

4. When you have found the partner, you can edit partner details. Highlight them and click the Edit button. The *Partner Edit Screen* appears, and you can continue as explained in section 2.3.2, page 22, and later sections. If you wish to exit, click Close .

2.1.2 Narrowing the Search for Partners

Browsing the complete list of partners is very slow, and so the *Partner Find Screen* may be used to select a smaller number of partners, or even to select the one partner that you require directly. The *Partner Find Screen* allows you to specify some of the following items before starting the search.

Class The drop-down box at the top right of the screen can be used to search for partners of just one class. It also includes the option OM-FAM; this limits the search to partners of class Family who have also been marked as special type OMer (see special type in section 2.3.5, page 32).

Name Often entering just the family name, and the first letter of the personal name will find the partner easily.

Address information If you know part of the address, this information can be entered into the blank fields to limit the search.

Partner Key If you know the partner key, you can enter this. Click at the left-hand side of the box and type in the number. (Note: 0s at the end of a key are treated as ‘wild’ or ‘any character’. So, if you enter 0027012340, PETRA will display all records from 0027012340 to 0027012349. Entering 0027000000 will display all records from 0027000000 to 0027999999.)

OMSS Key If you know the OMSS key, you can enter this.

Status Normally all Active partners are considered (see page 11 for explanation of Status). If you wish to find partners with a different status, find the Status options on the screen, and click ALL (See Chapter 1 for definition of Status). It is also possible just to look at partners of status Private; this will show only the partners of status Private which have been entered by you (entered using your User ID).

Mailing Addresses Only Mailing addresses are those which are both current (valid date range) and have also been marked as the partner’s **Mailing Address** (the address to send post to). Check the box if you wish only to see current mailing addresses. If this box is unchecked, you will see all addresses for this partner. This selection is ‘sticky’ - which means that PETRA will remember your choice for next time. (See following Warning.)

> **Warning** Normally the Family class record is used for mailing. Person records hold the valid address, but do not normally have the Mailing Address box checked (otherwise people might be sent two copies.) When using records of class Person, you will probably find that there are no addresses marked Mailing Address, so you will need to clear the **Mailing Address Only** checkbox.

To do a limited search, enter the known details in the upper part of the screen; then click Search .

Example: To search for a partner with family name MacDonald. Click in the Name box, and type MacDonald. Then click `Search`*. The screen will show all partners with the name MacDonald.*

It is not necessary to type the full name. Entering 'Ma' lists all partners with names beginning with 'Ma'.

Several search criteria may be used simultaneously. For example, to find all partners which are **churches** in the **Bristol** region of **Great Britain**, select Country GB, select Class CHURCH, enter Post Code BS, and click Search.

Very often you only need to enter the Name (the Family name) and the personal name to find a partner. It is possible to use * as a 'wildcard' character. For example, entering '*son' will find all names ending with the letters 'son'. However, using wildcards in finding partners can be very slow if many partners have been entered in PETRA.

For a new search, click Clear Criteria, enter the new search criteria and click Search.

When you have found the partner that you are looking for, click to highlight them, then click the Edit button to go to the *Partner Edit Screen*. This takes you on to section 2.3.2, page 22.

> **Note - Accept Button:** The *Partner Find Screen* is used in many PETRA operations. Sometimes you need to select a partner as part of another operation, for example to set up a relationship. In these cases the screen has an extra Accept button in the bottom row. After highlighting a partner, click Accept to confirm that this is the partner you want.

2.1.3 Copying an Address, Partner Key or Location Key

The Partner Find Screen has a number of other uses. Some are described elsewhere in this User Guide, but the several of them have more general application.

To Copy a Partner's Address to the Clipboard

A partner's address can be copied to the clipboard so that it can then be pasted into a word-processor.

1. Find and highlight the partner in the *Partner Find Screen*, not the *Partner Edit Screen*. Then from the `File` menu, select `Copy Address`, or use short-cut keys <Ctrl> + C. A dialogue box appears, asking you to select the required format (normally select SmlLabel) and press the <Enter> key. The address is copied to the Windows clipboard.

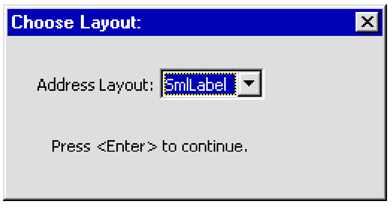


Figure 2-4 Choose layout to copy to clipboard

2. Switch to the new application, eg Word-processor, and paste the address.

To Copy a Partner's Key to the Clipboard

Find and highlight the partner. From the `File` menu, select `Copy Partner Key`. The partner key is now on the clipboard, and can be easily pasted into another window when required.

To Find a Location Key

In the *Partner Find Screen* highlight the partner and address for which you wish to find the location key. They key is actually on the same line, but you have to scroll to the extreme right to see it.

2.2 Adding a Partner using a Shepherd

Full details of adding or editing a partner is given in the following sections (starting with section 2.3, page 21), which explain how all data can be entered from the *Partner Edit Screen*. This section provides a brief description of the Shepherds, which can guide you through the key processes of entering a new partner. It is necessary to refer to the full method for a more detailed explanation of the different items.

Shepherds do not allow you to enter more complicated partner information (such as multiple addresses or additional data), and they cannot be used to edit existing partners. For these you need to use the *Partner Edit Screen*. It may be useful to use the Shepherd to add basic details for a new partner first, and then go to the *Partner Edit Screen* to add additional information.

Figure 2-5 shows a typical Shepherd Screen. You are asked to fill in a few items of data, and then click Next >. This takes you on to the next screen. At any point you can click < Back, to step back and check what you have already entered.

Warning - Multiple Sites If you have multiple sites, set up on your system, the Person Shepherd asks you select the site (as shown in this description). The Family and Church Shepherds miss out this stage and use the site set as the default. So, if you need to select a site other than the default when entering a new partner of class Family or Church, you have to use the full method.

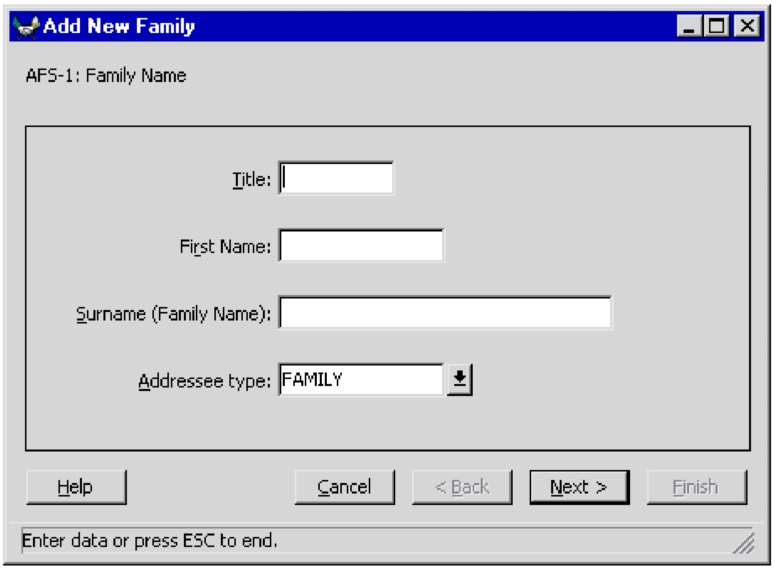
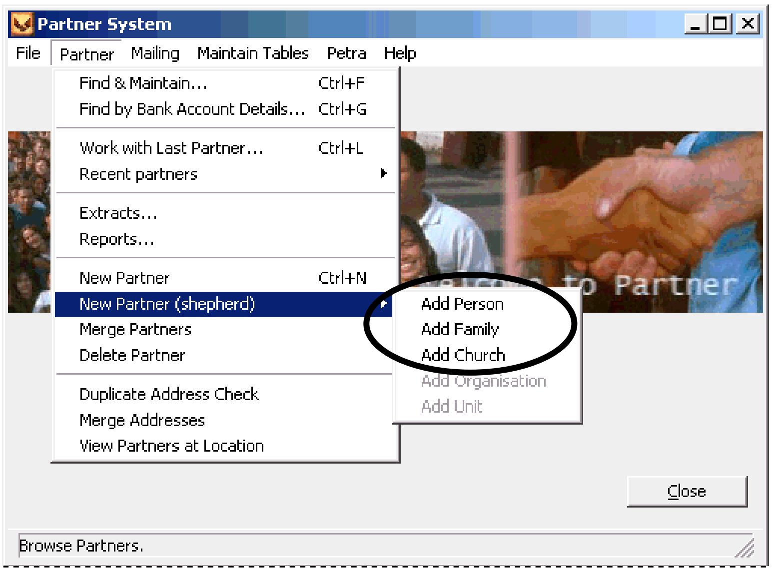


Figure 2-5 Add Family Shepherd (Screen 1)

Currently there are Shepherds to add partners of class Family, Person and Church. Much of the information is similar. The class Person is slightly more complicated, since it requires an additional stage (creating or finding a Family record to be linked to the person record).

To add a new partner using a shepherd, from the menu bar of the *Partner Welcome Screen* select `Partner`, then `New Partner (Shepherd)`, and finally the Shepherd that you want.

Figure 2-6 Partner menu on Partner Screen, showing Partner menu and New Partner with Shepherd options



The Shepherd screens differ a little for the different partner classes. The following summary shows the stages of the Add Person Shepherd, which is the longest of the three. Most of the screens of the other Shepherds are included in the Person Shepherd. More complete details of the various items are included in the "full" procedure described later in this chapter.

Fill in the data and click Next > . This takes you to another screen that asks for address information. Continue until all screens have been completed, and then click Finish. If you make a mistake, or wish to check something before you finish, click < Back .

Screen	Data to enter	Notes
1 (APS-1)	Select Site	Normally just click `Next`. A small number of offices manage more than one site, and this screen allows them to select the correct one.
2 (APS-2)	Title (eg Mr) and name	First Name means personal name (in some languages it is not first!) Family name means the name that children would share.
3 (APS-3)	Personal information	Previous Family Name is used for partners who may have changed their name on being married, and may have PETRA entries under their previous name.
4 (APS-4)	Select family to which the Person record should be linked	There are three choices. Click the first button to select from the list of likely candidates that PETRA lists below. Click the second button to go to a *Partner Find Screen* and select another existing Family. Click the third button to create a new Family record.
5 (APS-5)	Select Family (or Find)	This screen only appears if you chose the second option in the previous screen. Either enter the partner key of the family record that you are choosing, or click ... to bring up a Find Screen to search for the Family record required.
6 (APS-6)	Main Address details	Enter the main address. The exact form of this screen depends on which choice you made in selecting a family. The Find Address button allows you to select an address which already exists in PETRA. If you use this to find an existing address, and make a mistake, then you can undo this by selecting New Address . If you find an existing address, but need to correct it, you can use the can the Edit button, but remember that this may be used by other partners, so do not do this unless you are sure. If in doubt use the New button.
7 (APS-7)	Location Information	Select the location type from the drop-down box, and enter phone number, e-mail address, etc. The small boxes after the main phone number boxes allow you enter phone extension numbers.

Screen	Data to enter	Notes
8 (APS-8)	Partner Special Type	You can mark a partner as being of a special type. Click on the type(s) of interest. (See section 2.3.5, page 32.) Churches should be marked as special type **Church**.
9 (APS-9)	Summary	This screen displays a summary of the information that you have entered. If anything is wrong, you can step back to change it. Alternatively you can click Finish and then make amendments using the *Partner Edit Screen*.

Additional screens used in Add Family and Add Church Shepherds

Screen	Data to enter	Notes
(ACS-1)	Church name and denomination	As well as the name, select the appropriate denomination of the church.
(ACS-2)	Address and Location information	This combines the information requested in two different screens in the Add Person Shepherd.
(AFS-3) and (ACS-3)	Subscriptions	Publications which the partner wishes to receive. Click to select or deselect. The extra fields at the bottom can be used to add more detail, but these will apply to all the subscriptions (2.3.4.1, page 29). If you need different detail for different subscriptions, this needs to be edited later.

2.3 Adding or Editing a Partner – Basic Information

Section 2.2 introduced a simple way of adding basic data for new partners of class Family, Person or Church using Shepherds. However, for partners of other classes it is necessary to use the *Partner Edit Screen.* This method is also required to add more detailed information (for all classes of partner), or to edit partner information after it has been entered. Partners

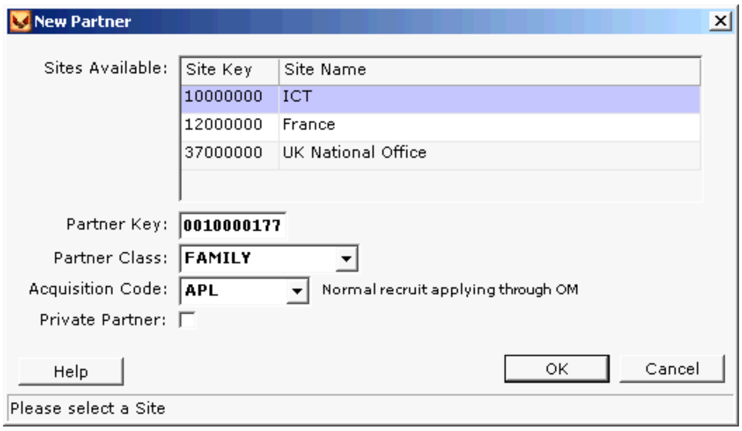
This section explains the longer but fuller way of entering details of a new partner, and editing an existing partner, using the *Partner Edit Screen*. If you are entering a new partner, you first need to follow section 2.3.1, but if you are editing an existing partner, go straight to section 2.3.2, page 22. You will then need to decide which of the following sections are relevant, depending on what information you wish to enter.

2.3.1 New Partner - Class and Site

> **Note** Before entering a new partner record of class Person, make sure that an appropriate record of class Family exists.

1. From the menu bar of the *Partner Welcome Screen*, select `Partner`, then `New Partner`. This opens the *New Partner Screen*. (Alternatively, click the New button at the bottom of the *Partner Find Screen*.)

Figure 2-7 New Partner Screen



2. Enter or change the various fields as follows.

   Site Select the Site to which you wish to add the partner. Most offices will only use one site. If you need to add another site, then see the SYSTEM MANAGER GUIDE.

   Partner Class Use the drop-down box to select the partner class for the new partner (section 1.3.1, page 10, explains the different partner classes). It is important to choose the class correctly because PETRA stores different types of data for the different classes of partner. It is not possible to change the class of a partner later without re-entering all the data again.

   Family If you select partner class Person, a Family button appears to the right of the Partner Class selection box. Click this to find and select the Family that the person belongs to. A *Partner Find Screen* appears. Use it to find the Family partner as explained in section 2.1, page 15. Highlight the Family partner and click Accept.

   Acquisition Code Select the code best describing why the partner is being entered.

   Partner Key is the unique identifying number for the new partner. This number is inserted automatically by PETRA, so do not attempt to edit this field.

   Private Check the box if this is a private partner (see section 1.3.2, page 11.)

3. Click OK. The *Partner Edit Screen* appears. You can now go on to section 2.3.2.

2.3.2 The Partner Edit Screen

Basic partner details are entered in the *Partner Edit Screen*. For new partners, open this screen as described in section 2.3.1. For an existing partner, highlight them on the *Partner Find Screen*, and click the Edit button (see section 2.1, page 15). The appearance of the *Partner Edit Screen* varies slightly depending on the class of the partner. Figure 2-8 shows the *Partner Edit Screen* for class Family, with some data entered.

New Partner Edit Screen - Video tutorial In PETRA 2.2, the *Partner Edit Screen* has been completely changed. To introduce the new features, a tutorial video has been produced. To view this in your Web Browser, open the *Partner Edit Screen*, and select `Help` > `Video tutorial` and follow the instructions. You may need to download the video (20MB) unless it is already installed on your computer.

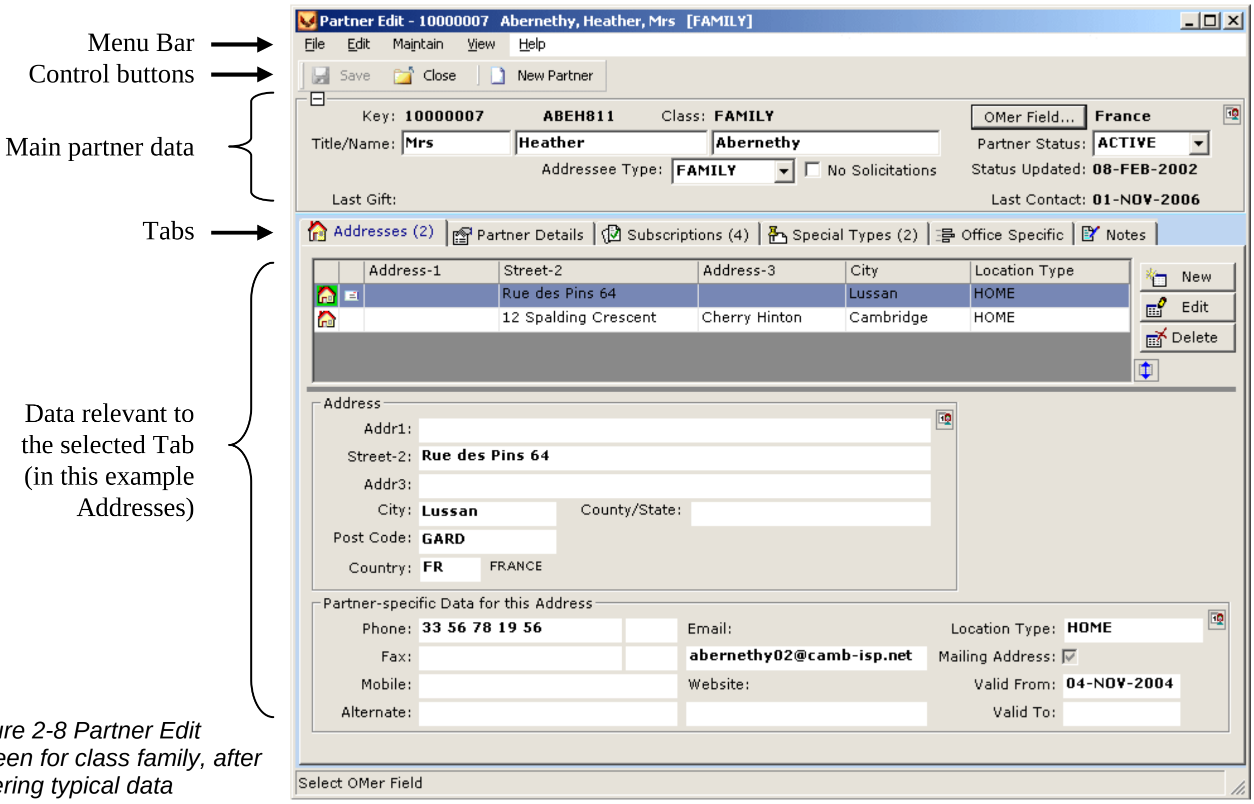


Figure 2-8 Partner Edit Screen for class family, after entering typical data

The *Partner Edit Screen* has the following main components, which are indicated in Figure 2-8.

Menu Bar The `File` menu provides options such as exporting a partner, the `Edit` menu allows certain Undo and Find facilities; the `Maintain` menu is similar to the Tabs (described below) for accessing many different items of partner data.

Control buttons At the top, underneath the menu bar, there are a number of **control buttons**. When the screen opens, the [Partner Data] button is shown selected, because this screen is used to edit partner data. The other buttons allow you to [Save] changes, [Close] the window, or enter a [New Partner]. In the future, there will be additional buttons to allow you to switch to Personnel Data or Finance Data.

Basic partner data Only the most essential data (name, status, etc.) is shown here. However, this panel also shows the date that this partner last made a gift, and the date that a Contact with the partner was last recorded. (Dates for confidential gifts are only visible to users with the appropriate Finance Security rights.)

Tabs for Partner Data The different tabs allow you to enter data for different items (Addresses, subscriptions, etc.) When a tab is selected, the remainder of the window below the tab contains fields which show data relevant to the subject of the tab.

The tabs cover the most important items. However, there are more facilities (some of which may be added as additional tabs in later releases of PETRA), and the full list of facilities, including those on the tabs, is available from the menu bar `Maintain` menu.

The basic partner data will now be described, as if entering a new partner. The later sections deal with the subjects of the different Tabs, and the further topics available from the `Maintain` menu. When all relevant data has been entered, using the required Tabs or items from the `Maintain` menu, click [Save], then [Close] to exit the *Partner Edit Screen*.

To enter/edit basic partner data

1. Enter data as follows. Click in the first empty field, **Title/Name**, and then use the <Tab> key to move to the next field.

   Title/Name The format of the name is different for different partner classes. A family has three boxes, a person has four and others one box.

Mr	John		Smith	Family
Mr	John	N	Smith	Person
Springtime Publications				Organisation, Church, Unit, Bank, Venue

   The length of the entries is not limited to the size of the box; if you type a longer name the box 'scrolls' to let you type more letters. However, it is not possible to include very long names in address labels, so it may be best to shorten the name of an organisation if it is very long.

> **Note – Name Change** If the name of the partner changes (for example, a partner gets married, or an organisation or church changes its name, the previous name can be recorded under the Partner Detail tab. It is important to retain information about this for financial audits, etc.

   Gender For Partners of class Person, there is an additional box below **Title/Name**. Select `Male`, `Female` or `Unknown` from the drop-down menu.

   Addressee Type This controls how the person will be addressed in a letter. For example in a formal English letter, a single man will be addressed as 'Dear Sir', but a single woman 'Dear Madam'. The standard options are:

Addressee Type Code	Description
`1-FEMALE`	Single female
`1-MALE`	Single male
`CHURCH`	Churches
`COUPLE`	Couple (no children)
`DEFAULT`	Default (if not known)
`FAMILY`	Family
`ORGANISA`	Organisation

   No solicitations If a partner has said that they do not wish to receive mass mailings asking for donations, check this box. Such partners can be excluded from lists (see explanation in section 4.2.1, starting page 99).

   OMer Field This button allows you to record the Receiving Field in which an OMer is working, and is used by the Finance department for gift entry. If a field has been selected already, this is shown to the right of the button ("France" is shown in Figure 2-8.) See the note at the end of this section for more information on how this works for Person and Family records.

   Status Select the partner status, and press the <Tab> or < ↹ > key. Normally for new partners the status will be ACTIVE. (Section 1.3.2, page 11, describes the alternatives.) [Note: If you change the status of a Family class Partner, PETRA will ask if you wish to make the same change to all members of that Family.]

2. When all data has been entered, you can move on to use of the different Tabs, to enter additional information. It is possible to save at this point, using the Save button at the upper left of the screen. However, if you do this before entering an address, you will see a warning message asking if you want to share this "empty" address. Click No, because you will later want to enter address details.

3. Section 2.3.3 and the following sections explain the different Tabs and other items on the `Maintain` menu. Select the item you wish to work on, and refer to the appropriate section of this user guide, starting with section 2.3.3, page 25, for addresses.

Note – Additional information on OMer Field

The information shown for OMer Field is obtained in two ways, depending on whether or not commitments have been entered for Persons in the Personnel module.

New Partners With a new partner, it is possible to enter an OMer Field simply by selecting the Field from a list, as described here.

1. Click [OMer Field] . A list of OM Fields appears:

Figure 2-9 Select OMer Field

2. Select the correct OM Unit, and click [OK]. The OM Field will then appear on the *Partner Edit Screen*. To clear an entry, click [Clear].

Existing Partners If a commitment record has been entered in the Personnel module, then when you click [OMer Field], you will see the commitment record screen, showing the current commitment. Commitments refer to records of class Person. However, for convenience the OMer field is also shown on the Family class record. In the rare case where, say, a husband and wife are assigned to different Fields, then, on the Family record, the Field of the family member with ID 0 takes precedence over Family ID 1.(For more information on Family IDs, see section 2.4.2, page 40.)

2.3.3 Entering or Editing Addresses

How addresses work in Petra

Because different partners can sometimes share the same address, PETRA saves addresses as follows:

- Addresses, known as **locations**, are saved separately from partner data, so an address can be linked to several partners.
- A partner can be linked to several different locations (for example home address and work address.) One address is marked as the **mailing address**, to which mail should be sent. (In some situations PETRA has to decide on the best address. See note on **Multiple Addresses** at the end of this section for details.)
- The link of a partner to an address can include dates to show when it was valid (date from and date to). When a partner moves, the old address is not changed, but the ‘Date to’ is entered, to show it is no longer valid. A new address is then entered for the partner.
- For each partner, a different phone number, email address, etc can be associated with each of the different addresses. So, if several partners share the same address, they can have different phone numbers and email addresses recorded. These are known as **location details**, and correspond to a particular partner for a particular address.

2.3.3.1 To enter an address on the Partner Edit Screen

1. With the *Partner Edit Screen* open (Figure 2-8, page 23), click the Addresses tab. The parts of the screen are explained in Figure 2-10. The Address Tab screen is divided into three panels. The top one is a list of addresses entered for this partner. For a new partner this list will just contain one blank line. It is possible to highlight any of the addresses in the list, and the details of the highlighted address appear in the second panel of the screen. The bottom panel shows the **location details** for this partner for this address.

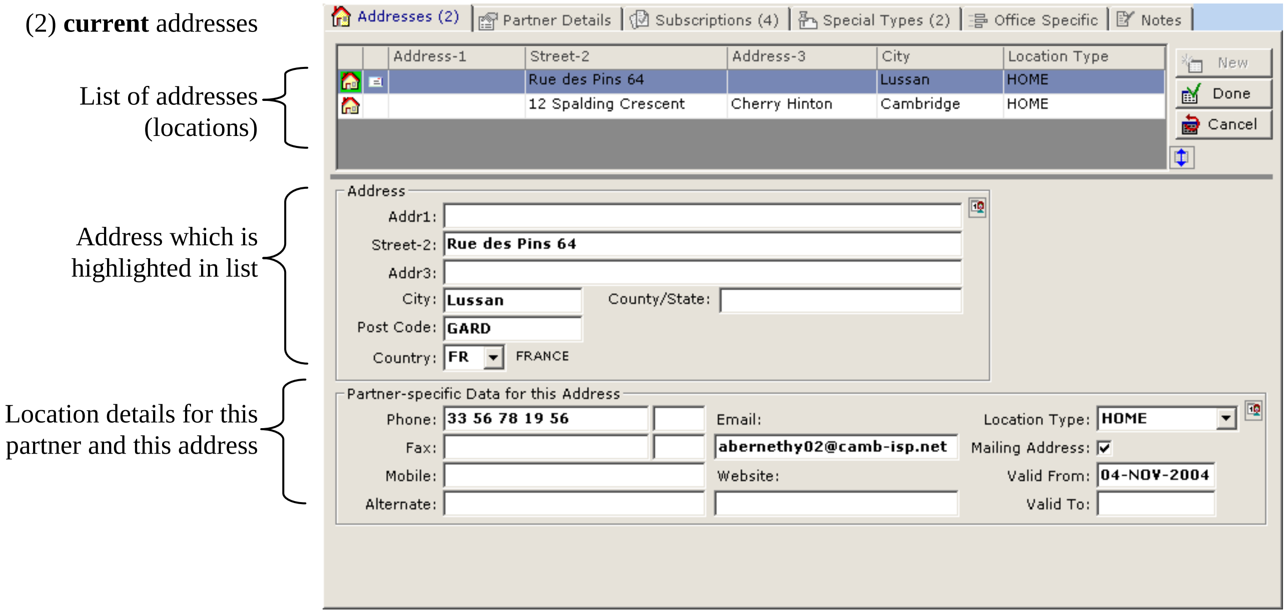


Figure 2-10 Partner Edit Screen - Address Tab

Icons in list of addresses In the first column a red house indicates a current address, a grey house indicates a past (expired) address, and a blue house a future address. A green background indicates the best address for mailing. In the second column, an envelope shows that this has been flagged as a mailing address (normally just one.)

> **Warning - Changing an existing address** If an existing partner is moving to a new address, do NOT just edit the existing address. Instead enter a new address and change the **Date to** entry for the old address. It is important to keep a record of previous addresses, for Finance Dept, etc.

2. To edit an existing address or location details for an existing partner, select the address that you wish to edit and click the Edit button on the right. (In Figure 2-10, the Edit button is actually shown as the Done button – the name changes after you select it.) For new partners, there will be only one blank address line, which is already selected, so click the Edit button. To enter a new address for an existing partner, click the New button. In each case the second and third panels of the screen are then enabled.

3. Enter the details in the Address panel as follows:

   Address Line 1 (Note: This is NOT the street!) This should only be used for the name of a building, or perhaps the name of a company in the case that the partner is an individual but uses a company address. Otherwise leave blank. The street must be put in Address Line 2 since otherwise the duplicate address check will not work effectively.

   Address Lines 2 and 3, City, Postcode and County/State/Province Enter these in a way appropriate for your country.

4. Enter the location details relating to this partner in this address, in the third panel.

   Location Type Select using the menu button. This shows whether the address is a home address, business address, college address etc. PASTOR, SECRETARY and TREASURER are used for a partner of class Church, to indicate that this is the address of the pastor or secretary. [Note: If an address type TREASURER has been entered for a church, this address will be selected when some Donor extracts are run. while addresses type PASTOR or SECRETARY will be used for Partner Type, Publication and Subscription Expiry extracts.]

Mailing Address Check the box if mail is to be sent to this address. Normally this box should only be checked for one address.

> **Warning** Normally the Family class record is used for mailing. Person records should not normally have the Mailing Address box checked (otherwise people might be sent two copies.)

Phone Number and Fax Number Include the full national number (including the area code); for international numbers, follow the office policy on whether to include the international code in this box. International codes are given separately in country tables. The second box is for office extension numbers at business addresses.

Alternate and **Mobile** These fields allow you to record an alternative phone number and a mobile number.

Date From Enter the date from which the address should be active for this partner. (See the GENERAL USER GUIDE for date formats). Normally you will enter today's date. (This option is used for address changes - a partner may tell you that he or she will move after a certain date.)

Date To Usually this should be left blank. However, if you know that this address will cease to be correct after a particular date, enter that date.

E-mail address and **WEB URL** Enter the partner's e-mail and web site addresses if known.

4. Click the Done button on the right, to exit the address edit panels, and then the Save button at the upper left of the screen. When entering a completely new partner, the data is saved, and you can either click Close, or move on to add subscriptions, special types, etc (see sections 2.3.4, page 29, and following). However, you may see dialogue boxes either referring to a similar existing address or other partners sharing this address. This is explained in section 2.3.3.2, page 27. If in doubt, do **not** share addresses or edit the addresses of other partners.

2.3.3.2 Addresses (Locations) Shared by Partners

An address, known as a **location**, can be shared by several different partners (for example, a team address). The most common example is where the address location recorded on a partner record of class Family also applies to the individual Person records for members of that family. The **location** only refers to the basic physical location (address lines, town, postcode, county, country). It does not include the **location details** (phone/fax/email/valid dates for the location, etc) which belong to each partner individually.

When a new partner is entered, or an address is edited, or a new address is added, PETRA performs three checks.

1. First it looks to see if that address, or a very similar one, has already been entered for another partner. [The degree of similarity is set in the System Manager as the Address Match.] If a similar address is found, PETRA asks you whether you wish to use the existing location (Figure 2-11). Check carefully that the address is correct. If you know that several partners share this address, then click Yes. If you are not sure, then click No, to make a new record of an address location.

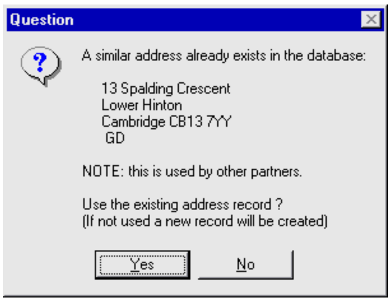


Figure 2-11 Dialogue box concerning use of existing location

2. Second, it looks to see if the partner for whom you are adding a new address is part of a family. If so, PETRA asks you if you want to make this change apply to all members of that family. Normally this will be the case. (If you are just adding a "Date to" entry to the record, because the family is moving, this date will be applied to all family members without warning.)
3. Third, if you are editing (correcting) an address, it checks whether this location is also used by other partners. If so, a screen appears showing which other partners share the address that you are changing (Figure 2-12).

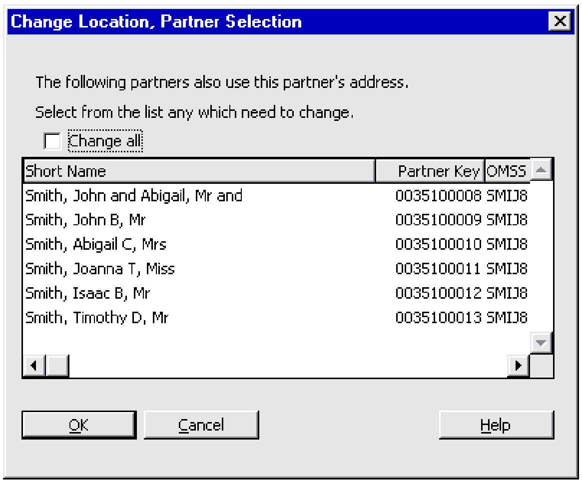


Figure 2-12 Change Location Selection for shared addresses

Select the ones that that you wish to change (use the <Ctrl> key to select more than one.) Click OK. **Be careful!** Do not change the address for all partners unless you are sure that the change applies to all the people who live at the location.

Copying an Existing Address

If an address has already been entered for a partner, and you wish to use it again for another partner, it is possible to copy the address - it is not necessary to retype it. This avoids mistakes and also avoids PETRA storing the same address twice.

1. Open the *Partner Edit Screen* to show the partner to whom you wish to add the address. Select the `Address` Tab.
2. If there is an existing address displayed, which has been valid up to now, and you wish to mark this as inactive, select it, click Edit, enter today's date (or the appropriate date) in the **Date To** field, and click Done.
3. Click New, to show that you wish to create a new address. You should NOT use the Edit option to completely change an address (see note on Edit button at end of this section.)
4. On the menu bar, select `Edit`, then `Find New Address`. The *Location Find Screen* appears (Figure 2-13). The screen will be blank initially. Enter one or two significant parts of the address and click Search. All addresses which include this data are now shown. In the example we have searched for all addresses in the town of Krainem.

> **Note – Wildcards (*)** If you enter just part of a field, then you must use * to show that there are more characters before or after the address. For example, to find “12 Spalding Street” you could search for “ *spald* ”.

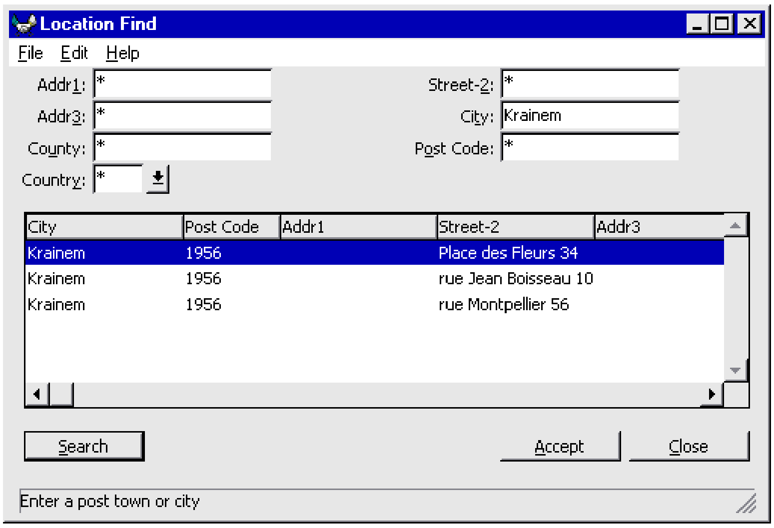


Figure 2-13 Location Find Screen

5. Select the address that you want to copy and then click [Accept]. The address will be copied to the partner as a new address.
6. Add any required location details and click [Done].
7. If the partner now has more than one address, then check that only one is marked as the mailing address, by looking at the envelopes in column 2. If necessary edit an address to remove the Mailing Address flag.

> **[Edit] button** This button should not generally be used because it overwrites the currently selected record. However, it has the advantage that it copies not just the location, but also the location details. To copy both an address and location details, first create a new blank address, and save it, making sure that you do not share it with other people with a similar address. You can then use the [Edit] button to copy both the location and location details to overwrite the new blank entry.

> **Multiple Addresses** Sometimes PETRA needs to decide which is the best address to use. First it looks for a current mailing address, then for a future mailing address, and then for a past mailing address. If there is no mailing address, it looks for any current address, then a future address and then a past address. In each case, if there is more than one address of a type, it looks for the one that has a **Date from** closest to today’s date (or **Date to** in the case of past addresses).

2.3.4 Entering and Cancelling Subscriptions

This section explains how to enter a partner on a publication subscription list, or delete a partner from the list. Using subscription lists is covered in Chapter 8, ‘Subscriptions to Publications’ on page 167.

2.3.4.1 Entering a Subscription

To enter a publication subscription for a partner (or to edit an existing subscription), go to the *Partner Edit Screen* for the partner (Figure 2-8, page 23). In the case of people, subscriptions should normally be entered on records of class Family, rather than class Person.

1. Select the `Subscriptions` Tab. The upper panel of the subscriptions screen shows a list of all publications that are available. If this partner already has any subscriptions, these publications are

shown at the top of the list, and are marked by an entry in the Subscription Status column. One item on the list is highlighted, initially the first line. The lower part of the screen shows details of the highlighted subscription, but, with the current version of PETRA, it cannot be edited. Instead, changes are made as follows.

1 **current** subscription

List of publications available

Publication highlighted in list

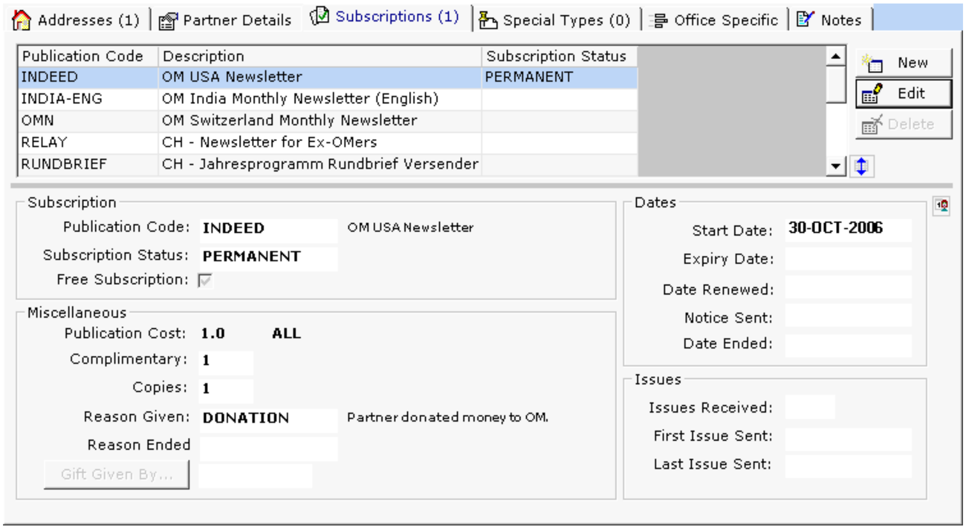


Figure 2-14 Subscription Tab on Partner Edit Screen

2. Select the publication and then click the Edit button. Details of this publication are now enabled in the lower part of the screen
3. Enter the appropriate data in the screen.

Subscription Status Enter the status of the subscription from the following options.

Status Code	Status Description
PERMANENT(P)	This is the normal status used for a new or continuing subscription.
CANCELLED(C)	The subscription has been cancelled. No more issues should be sent. The reason is entered in the box.
The following status codes are only used by offices which charge for sending the publication	
PROVISIONAL (V)	The partner is receiving free copies for a period, but the subscription is not a regular permanent one.
GIFT (G)	The fee for this partner has been paid by another partner as a gift.
EXPIRED (E)	The subscription has expired. This status will be set automatically by the system when expired subscriptions are checked (see Chapter 8).

Free Subscription Sometimes a subscription is not normally free, but it should be free for a particular partner (for example because they have made a donation). In this case check this box. If subscriptions to this publication are always free, there is no need to use this box.

Publication Cost This is shown for information only, and is publication cost entered in the Publication Cost Table (see section 3.3.2, page 82). The postage cost is not included.

Complimentary Enter the number of complimentary (free of charge) issues. This is usually used for a subscription of type PROVISIONAL, to indicate how many free issues should be sent before the subscription is reviewed. If a subscription is always free, there is no need to enter this.

Number of copies Enter the number of copies of each issue to be sent (the normal default is 1). This is used for partners who receive a bulk mailing of several copies to distribute locally (within a church).

Issues Received (This number is updated automatically when labels are printed for publications to be mailed.)

Reason Given Select the reason for starting the subscription from the button list. Typical reasons included in the options are: `Donation` (if a partner has made a donation), `Free` (for free publications), and `Paid` (for publications that require a subscription to be paid.)

Gift Given by If the subscription is a gift (Status Code `Gift`, above) then first click the [Save] button. Then click [Gift Given by] and use the *Partner Find Screen* to find the partner who has made the gift; click [Accept] to select the partner. (You must save the subscription before you can associate the giving partner.)

Start date The start date will normally be today's date, but a later date can be entered if required.

Expiry date Enter this if it is a paid subscription, or if you want to review all subscriptions after a given time.

Renewal date Enter this for publications that requires subscription to be renewed.

Ignore the other fields in the screen, since either they refer to **subscription renewal** (see Chapter 8, page 167), or they are updated automatically by PETRA when labels are printed.

4. If there are no more subscriptions to enter for this partner click [Close]. To enter another subscription for this partner, click [Save] then [New]. Select the next Publication Code, and repeat the above process. There is no limit to the number of subscriptions. Click [Save] , and then [Close].

2.3.4.2 Cancelling a Subscription

To cancel a subscription to a publication, go to the *Partner Edit Screen* for the partner.

1. Click the Subscriptions Tab, select the publication subscription that you wish to cancel, and click the [Edit] button. [To cancel all subscriptions, click [Action ▾] (below the [Delete] button) and then Cancel All Subscriptions.]
2. Enter the appropriate data in the screen.

Subscription Status Select `Cancelled`.

Date Ended Enter the date that the subscription was cancelled.

Reason Ended Select the reason why a subscription has stopped.

Code	Reason Ended Description
`BAD-ADD`	The mailing was returned due to a bad address
`COMPLETE`	The subscription has ended
`DECEASED`	The partner has died
`DISCONTINUED`	Publication is no longer produced.
`OFFICE`	The office decided to end the subscription.
`OTHER`	Unknown
`REQUEST`	Partner asked for subscription to be ended.

3. Click [Save]. On the Subscriptions Tab for the partner, the subscription now shows Cancelled.

> **Warning! Cancel or Delete?** Subscriptions should be **cancelled** as described above, so that the records are saved. Existing subscriptions should never be deleted (although deletion can be useful if you enter a subscription in error and need to remove it immediately.)

2.3.5 Special Type of Partner

PETRA can record that partners are of Special Types. This makes it easy to select a group of partners, for example Board members to mail an agenda. There is a list of standard special types, but local offices often add others for local use (see section 3.2.13, page 78, for the method of viewing existing special types and adding new ones). It is possible for a partner to be of more than one Special Type. In the case of people, check the local office practice for whether a Special Type should be added to a Family record, or a Person record. To add or remove a special type:

1. Go to the *Partner Edit Screen* for the partner, and select the `Special Types` tab. The screen shows a list of all the special types available on the system.

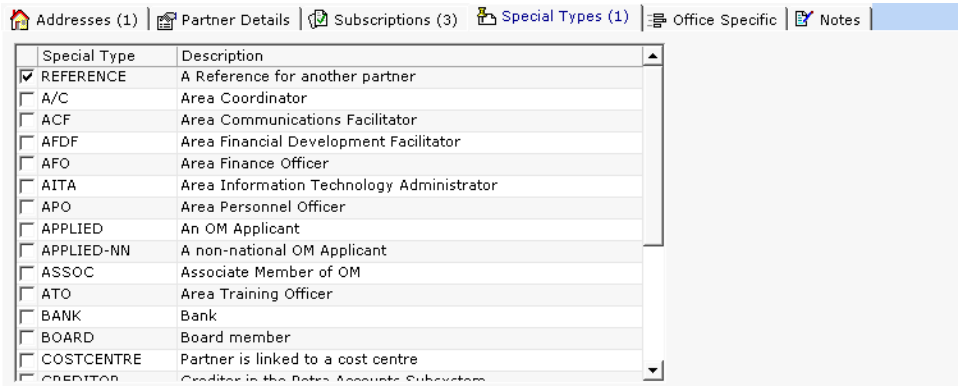


Figure 2-15 Special Types Tab on the Partner Edit Screen

2. Scroll to find the special type that you wish to add (or remove), and check (or uncheck) the appropriate box. A dialogue box asks you to confirm that you wish to add (remove) this special type. If it is correct, click [Yes]. Special Types that have been set for a partner appear at the top of the list.
3. If required, you can add more special types. When finished, click [Save] , and then [Close].

> **Note - Person Records** When you create a new Person record, existing Special Types on the Family record are automatically copied to the Person record. You need to check these and delete any that do not apply to the Person record.

2.3.6 Retiring, Deleting and Deactivating a Partner

If a partner is no longer active, they may be **retired**. Previous data is stored, but the partner will not be included in any future mailings (which are normally only to partners of Status Active). Normally partners should be retired, not deleted. This is because if the partner has made a donation, then the Finance system needs to keep the details. However, in some cases, for example if a partner specifically requests this, of if they were entered in error, it is possible to **delete** a partner. In addition to changing a partner's status to INACTIVE, it will also be necessary to cancel subscriptions and mark addresses as being no longer valid. PETRA allows all these to be done in a single operation, known as **deactivating** a partner. The three operations are as follows:

To retire a partner

1. Find the partner and open the *Partner Edit Screen*, as described in 2.1, page 15.
2. Change the status box to `INACTIVE`.
3. Click [Save] , and then [Close].

To delete a partner (only on the authority of the office manager)

For the reasons given above, a partner should only be deleted on the authority of the partner system administrator. To delete a partner.

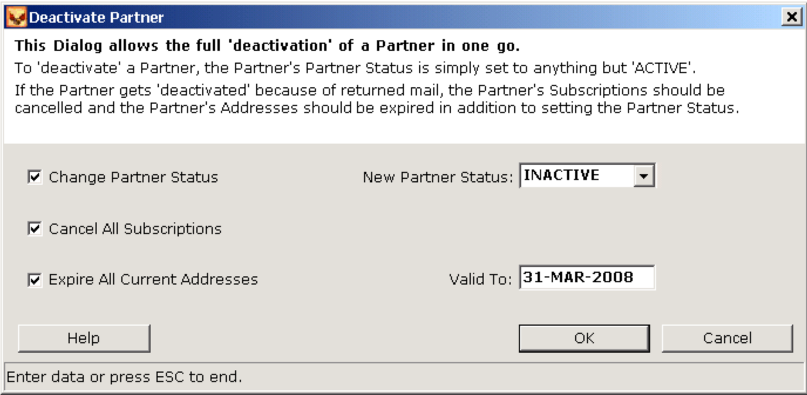
1. From the *Partner (Welcome) Screen*, go to the `Partner` menu, and select `Delete Partner` (see Figure 2-6, page 20 for a view of the menu.) A *Partner Find Screen* opens.
2. Find the required partner, and click the Accept button. A warning appears. If you are sure that you want to delete this partner, click OK.

To deactivate a partner

This allows several operations to be carried out in a single step.

1. Open the *Partner Edit Screen* for the partner you wish to deactivate.
2. From the menu bar, select `File` > `Deactivate Partner`. The following dialog box appears:

Figure 2-16 Deactivate Partner Screen



3. Use the check boxes to select the operations that you wish to perform.

   Change Partner Status Use the drop down box to select the new status.

   Cancel all Subscriptions Checking this box will result in all subscriptions to publications being cancelled.

   All Current Addresses Checking this box will result in all current addresses being given a Valid To date of yesterday.

4. Click OK .

2.4 Additional Partner Information (except Bank Accounts)

In addition to the main items of partner data mentioned earlier, PETRA can hold a number of other items of information in the partner system. This section describes how to enter these for an individual partner. If you need to add exactly the same information for a number of partners, see section 4.6, page 129, for a quicker way of doing this for a group of partners simultaneously, using an "extract".

The sub-sections below section explain how to enter additional information of different types. In all cases, the starting point is the *Partner Edit Screen*. Some items may be selected by Tabs or buttons for convenience, but all items are available from the `Edit` menu on the menu bar of the *Partner Edit Screen*.

The table below shows where to find information on different items of additional partner information. This relates to "general" information. The FINANCE, PERSONNEL and CONFERENCE MANAGEMENT USER GUIDES explain how to enter detailed information relevant to those functions.

Item	Description	Section/Page

Item	Description	Section/Page
Finance Details	Recording Bank Account and other financial details for a partner	2.5, Pg. 50
Relationships	Showing any relationship between partners (e.g. that a Church partner supports an individual partner.)	2.4.3, Pg. 42
Contacts	Recording contacts with a partner (phone calls, letters, meetings, etc.)	2.4.6, Pg. 46
Partner Detail (except classes Bank & Venue)	Other information, depending upon the class of partner.	2.4.1, Pg. 34
Partner Detail (class Bank)	This is included in the section explaining Bank class partners.	2.5.2, Pg. 51
Partner Detail (class Venue)	Information on accommodation available, etc. See the CONFERENCE MANAGEMENT USER GUIDE	
Family Members (Classes Person and Family	To manage all the Person records linked to the Family record	2.4.2, Pg. 40
Local Partner Data	Recording specific items of data as set up by the local office.	2.4.4, Pg. 45
Reminders	Allows the Petra user to set a reminder to contact this particular partner at a future date.	2.4.7. Pg. 48
Interests	Recording particular interests that a partner has.	2.4.5, Pg. 45

Tip The *Partner Find Screen* has a `Quick Maintain` menu on the menu bar. If you highlight a partner, you can go directly to the items on the `Maintain` menu without needing to open the *Partner Edit Screen*. Personnel Module users can also access Personnel screens from here. You can also point to the partner and right-click to see the same alternatives.

2.4.1 Partner Details for Different Classes of Partner

Note - Banks and Venues These are special classes of partner. Partner details for Banks are described in section 2.5.2, page 51. For Venues, see the Conference Management User Guide.

PETRA can record other items of information about partners. The operation is similar for each class of partner, but the PETRA screens are different, because different information items are collected for each class.

Warning: Be careful what you write. In some countries, such as the UK, individuals have a legal right to ask to see what information about them is held on computer. Make sure you know the situation in your country, and that everything recorded is both **true** and **polite**.

2.4.1.1 Partner Details (Family)

To add additional information for a partner of class Family, first find the partner and go to the *Partner Edit Screen*. Then continue as follows.

1. Select the Partner Details Tab, so that the screen appears as follows.

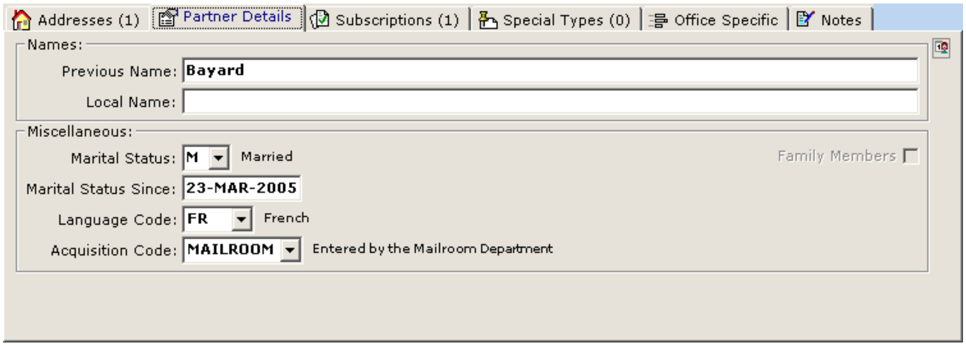


Figure 2-17 Partner Details Screen - Family

2. Enter the appropriate data in the screen.

   Previous Name You can record a previous name (eg the name before being married.)

   Local Name If required you can enter a local language name for use in your office (this is mainly used for classes Organisation and Unit.)

   Marital Status If required, you can select the marital status, and also enter the date from which this applied in the **Marital Status Since** box.

   Language Select the language for the partner using the button, or type in the code.

   Acquisition Code Select the Acquisition Code if required. This allows you to record why a new partner was first entered into PETRA.

   Family Members ? (Read only) This box is for information only. If it is checked, it shows that there is at least one person record associated with this family record. This is checked even in the case of a single person who has both a family and person record.

3. Click Save. If you have finished with this partner, click Close; otherwise select another item.

2.4.1.2 Partner Details (Person)

Note: Class 'Person' is mainly used for members of the Organisation. It is only used where it is necessary to record more personal detailed information than can be recorded in a Family class record.

> **Note:** One important item of information for members of the Organisation is an emergency contact with a telephone number. This is entered as a relationship (see section 2.4.3, page 42).

To add additional information for a partner of class Person, first find the partner and go to the *Partner Edit Screen*. Then continue as follows.

1. Select the Partner Details Tab, so that the screen appears as follows.

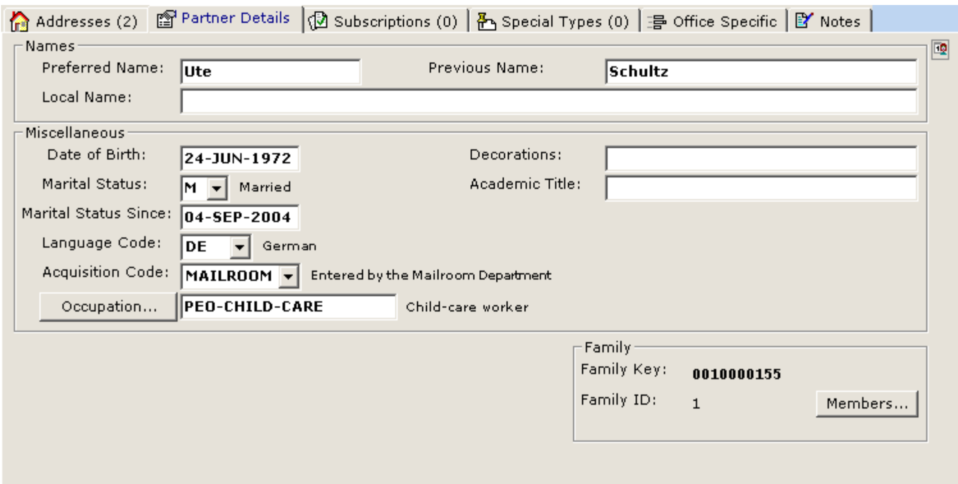


Figure 2-18 Partner Details Screen - Person

2. Enter the appropriate data in the screen; leave Occupation until last, since it is explained in the next step.

   Preferred Name Enter the name that the partner would like colleagues to use.

   Previous Name If the person has a previous family name (e.g. before marriage), enter it here.

   Local Short Name If required you can enter a local language name for use in your office (this is mainly used for classes Organisation and Unit, but is also possible here.)

   Date of Birth Enter date of birth in the form DDMMYYYY or MMDDYYYY, depending upon how your system is set up (see the Date Format in the GENERAL USER GUIDE).

   Marital Status Select the marital status of the person, using the drop down box.

   Language Select the language for the partner using the menu button to see the choices. If you know the correct code, you can just type it in.

   Acquisition Code Select the Acquisition Code if required. This allows you to record how this partner was introduced to the Organisation.

   Decorations Enter decorations, degrees, professional membership, etc. which you might wish to print after the name (for example, ‘Mr J. R. Smith, B.Sc., FIET’).

   Academic Title (for example, Prof., Dr.) This can be included in form letters etc (see section 6.4.6.1, page 155).

   Occupation See below on how to enter this.

   Family Key The read-only entry here shows the partner key of the family to which this person record is attached.

   Family Identification Number (ID) The Family ID is used to identify the different family members within a family. If there is only one person in the ‘family’, this should be ‘0’. If there is a husband, wife and children, the parents should be numbered 0 and 1, and the children 2, 3, etc. To get an overview of all Family Members, click the Members button, which takes you to the *Family Members Screen* (see section 2.4.2, page 40, for how to use this).

3. Enter the **Occupation**. There are a large number of possible codes, and PETRA helps you to find the best one. Click the Occupation button. This brings up the *Occupation Find Screen*.

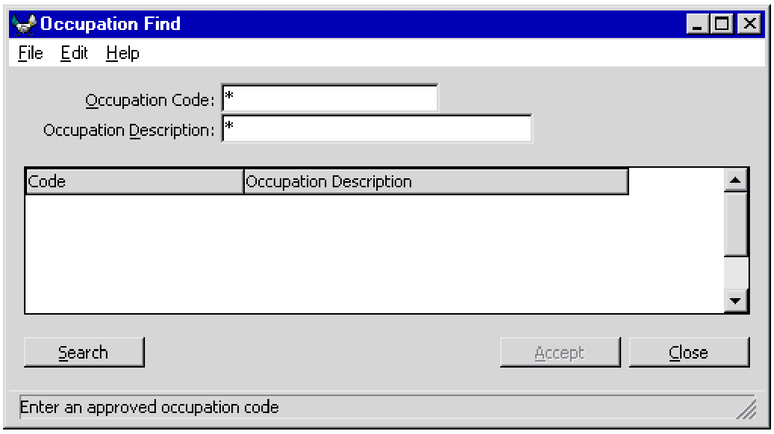


Figure 2-19 Occupation Find Screen

4. To browse all possible codes and descriptions, click the Search button. The codes are arranged in a number of groups; the following table gives examples for each group.

Group	Sample Code	Sample Description
Communications	`COM-DRAMA`	Drama/theatre
Communications	`COM-JOURNALIST`	Journalist
Ministry	`MIN-DRUG-ADDICT`	Drug addict worker
Music	`MUS-FLUTE`	Flute
Office work	`OFF-ADMINISTR`	Administrator
People	`PEO-CHILD-CARE`	Childcare worker
People	`PEO-DENTIST`	Dentist
Practical	`PRAC-ARCHITECT`	Architect
Practical	`PRAC-DECK-OFFICE`	Deck officer
. . .	. . .	. . .

5. The top two fields of the *Occupation Find Screen* allow you to search for part of a code or a word. Include an asterisk (*) at the beginning and end of each search (this indicates that there may be other letters before and after the group being sought.

   Example: To find a possible code for a school teacher. Enter `*teach*` *in the description, and click the* `Start Search` *button. The Occupation Find Screen shows the results of the search as follows.*

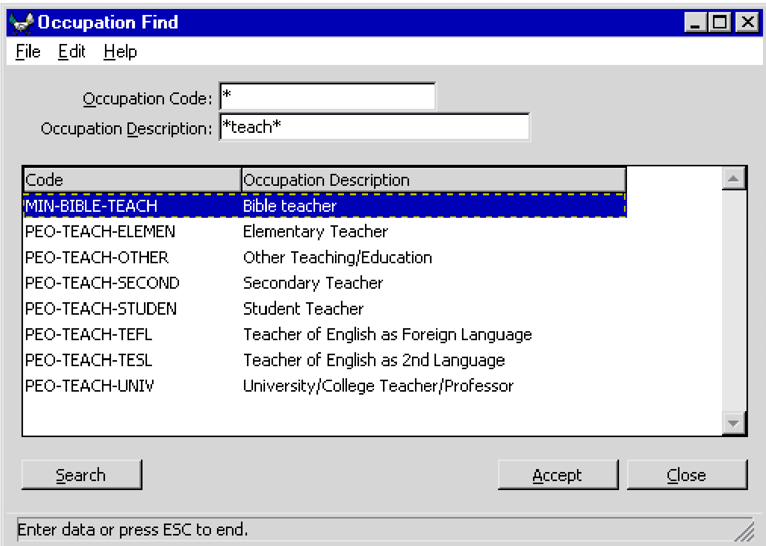


Figure 2-20 Occupation Find Screen, showing results of search

6. Perform another search if required. Select the correct occupation and click Accept. This takes you back to the Partner Details tab.
7. Click Save. If you have finished with this partner, click Close; otherwise select another item.

2.4.1.3 Partner Details (Church)

To add additional information for a partner of class Church, first find the partner and go to the *Partner Edit Screen*. Then continue as follows.

1. Select the Partner Details Tab, so that the screen appears as follows.

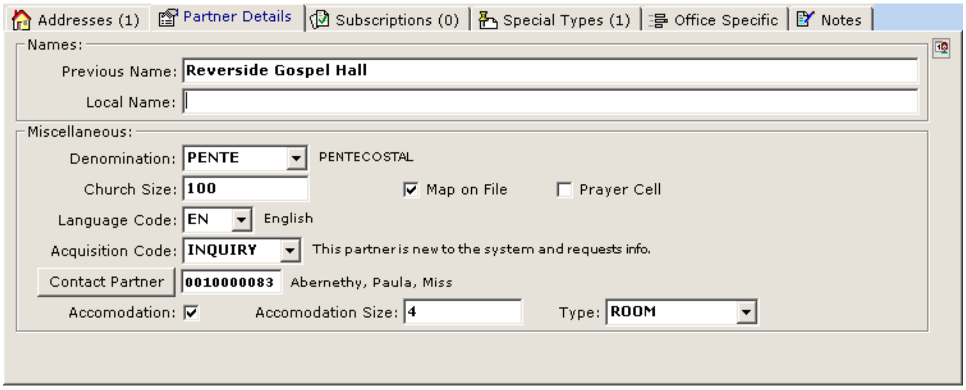


Figure 2-21 Partner Details Screen - Church

2. Enter the appropriate data in the screen.

   Previous Name If you wish to record a previous name for the church, enter it here.

   Local Name If required you can enter a local language name for use in your office.

   Denomination Select the denomination using the menu button.

   Church Size Enter the approximate church size (if known).

   Map on File If your office has a map showing the church, check the box.

   Prayer Cell If there is an OM prayer cell at the church, check the box.

   Language Select the main language used by the church using the menu button or by typing the code. If the church uses more than one language, record this on the **Notes Tab**.

   Contact Person You can click this button to find and accept a Contact Person for this church. This person's name can be included in any address layout for mailing to the church (see section 3.4.2, page 84 on setting up address layouts.)

   Acquisition Code Select the Acquisition Code if required. This allows you to record how this partner was introduced to the Organisation.

   Accommodation If the church can provide accommodation for visitors, check the box. This opens two other boxes. Enter the **Size** (the number of people who can be accommodated) and select the **Type** of accommodation.

3. Click Save. If you have finished with this partner, click Close; otherwise select another item.

2.4.1.4 Partner Details (Organisation)

To add additional information for a partner of class Organisation, first find the partner and go to the *Partner Edit Screen*. Then continue as follows.

1. Select the Partner Details Tab, so that the screen appears as follows.

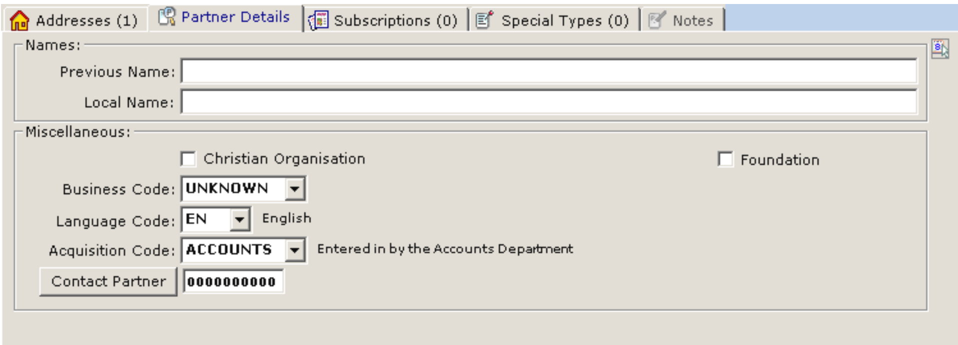


Figure 2-22 Partner Details Screen - Organisation

2. Enter the appropriate data in the screen.

Local Name If required you can enter a short name for use in your office. For example you may use the name of a foreign organisation in the language of the local office.

Previous Name If the organisation changes its name, the previous name should be entered here, since it may need to be referred to for audit purposes, etc.

Christian If the organisation is a 'Christian' one, check the box.

Business Code Select the most appropriate business code using the button menu.

Language Select the language used by the organisation using the menu button to see the choices. If you know the correct code, you can just type it in. If the organisation uses more than one language, show this in the **Notes**.

Acquisition Code Select the Acquisition Code if required. This allows you to record how this partner was introduced to the Organisation.

Contact Person You can click this button to find and accept a Contact Person for this organisation. This person's name can be included in any address layout for mailing to the organisation (see section 3.4.2, page 84 on setting up address layouts.)

Foundation If this organisation is a Foundation, which offers to grants, then check this box. This introduces an additional Foundations Tab, which allows you record specific details of applications for funding for projects, etc.

3. If your organisation is not a foundation, then you have finished with this tab. Click Save , and then Close. If you have checked the Foundations box, then go to the Foundations Tab. Entering data for this Tab is explained in Chapter 11, page 182.

2.4.1.5 Partner Details (Unit)

> **Note:** If you are entering data for a Conference or Campaign, or setting up a new organisation unit, consult the PERSONNEL USER GUIDE for additional information on choice of codes, etc.

To add additional information for a partner of class Unit, first find the partner and go to the *Partner Edit Screen*. Then continue as follows.

1. Select the Partner Details Tab, so that the screen appears as follows.

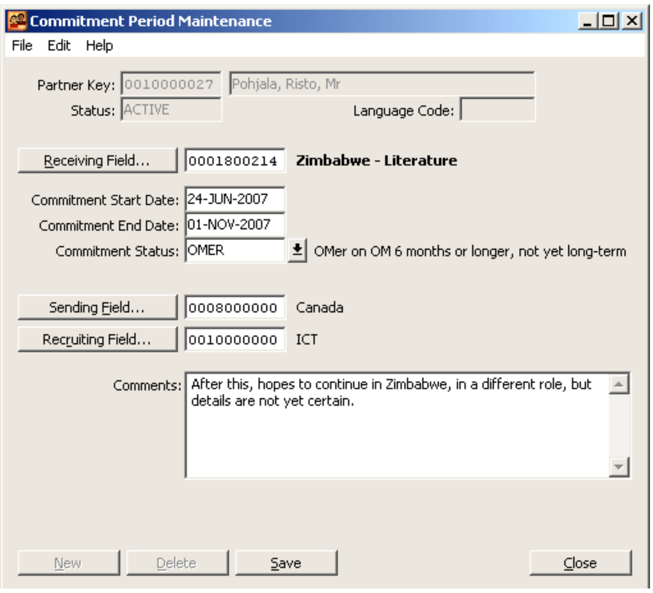


Figure 2-23 Partner Details Screen - Unit

2. Enter the appropriate data in the screen. Some data is automatically supplied by PETRA.

Previous Name If you wish to record a previous name for the unit, enter it here.

Local Short Name If required you can enter a local language name for use in your office.

OMSS Code An OMSS code can be entered if required.

Country Code Select the country in which the unit is based from the drop-down box.

Unit Type Select the Unit type (e.g. Field. Country, Campaign, Key Ministry,) from the menu button.

Language Select the language used by the unit.

Acquisition Code (This is not applicable for OM Units.)

Campaign Code If this unit is a campaign, enter the campaign code. For details on the form of a campaign code, see the PERSONNEL USER GUIDE, Event Maintenance.

Campaign Costs and **Currency** For units of type Campaign, enter the cost of participating and the currency.

3. Click Save , and then Close.

2.4.2 Family Members and Family ID Numbers

PETRA allows the Person records of several persons to be linked to the same Family record. This is used for single people working with the organisation (since they must have a Person class record as well as a Family record) but also for married couples (and children) working with the Organisation. PETRA's Family Members system works as follows.

- A single record of class Family identifies the family. Normally this will be for a couple (Mr and Mrs J Smith).
- Each member of the family must have their own record of class Person, to store additional personal details. These Person records are all linked to the same Family record.
- Within the family, each member has an Identification Number (ID). The first person record to be attached to a Family record will be assigned the ID Number 0. Numbers 0 and 1 should be used for parents, and 2, 3, 4 ... 9 for children. In the case of a single parent, Family ID 1 should not be used.

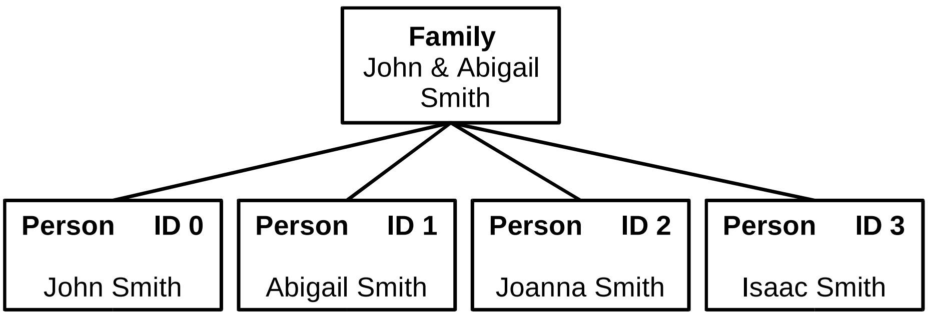


Figure 2-24 Example of Person records linked to a Family record

PETRA allows two specific operations related to this.

1. From the Family record it is possible to view all the family members and to amend the Family ID numbers to give a logical sequence.
2. It is possible to move a Person to a different Family (typically when they become adult and so need their own record of Class Family.) This can be done from either the existing or the new Family record, or the Person record of the person to be moved.

In both cases the options are accessed from the `Family Members` tab on the *Partner Edit Screen* of the record concerned.

2.4.2.1 To View and Amend Family ID Numbers

Since an overview of the complete family is required, this is done from the Family record.

1. Using the Partner Find option, go to the *Partner Edit Screen* for the Family class partner that you wish to review. Select the `Family Members` Tab.

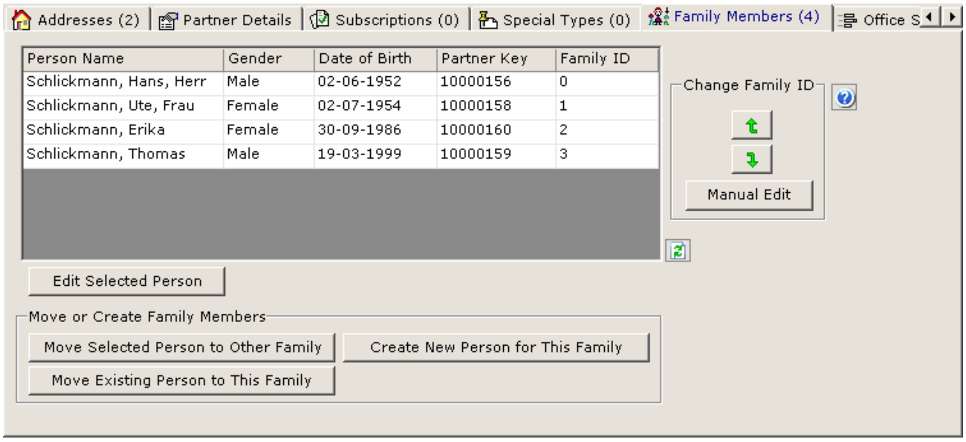


Figure 2-25 Family Members Tab on Partner Edit Screen of Family class partner

2. The panel on the screen shows all persons attached to this family, and gives the Family ID number of each one. There are two ways to change the Family IDs.
3. **Method 1** Select a person who you wish to move up or down the list. Click the up (or down) arrow on the right, and this will cause them to change places with the person above (or below) them in the list. It may be necessary to do this operation several times to obtain the final order that you want.
4. **Method 2** The alternative method is useful in cases where it is necessary to omit Family ID 1 (in the case of a; single parent.) Click the Manual Edit button. Now a box appears next to the selected person. This allows you to select an appropriate free ID number for this person. You can do this for each person in turn.

   To check the details or a person, highlight them and click the Edit button.

2.4.2.2 Changing Family

Occasionally it is necessary to move a Person record to be linked to a different family (typically when they become adult and so need their own record of Class Family). This can be done using the buttons on the lower part of the Family Members Tab. This can be done from the Person record, the existing Family record, or the new Family record – the one that the person is to be moved too.

If you are working from the existing Family record, and wish to move a family member to another family, the procedure is as follows:

1. Open the existing Family record, and select the Family Members tab.
2. Select the person to be moved and click the Move selected person to other family button. A *Partner Find Screen* appears.
3. Find the new Family record that you wish to link the person to, highlight the partner and click Accept.

It is also possible to move a person from another family to the family that you are working on by using the Move existing person to this family button.

The following example explains all that is involved, in the most logical manner.

Example: Erika Schlickmann, a child of Hans and Ute Schlickmann, has reached the age of 18, and wishes to join a team for a while before going to university. At present she has a record of class Person, linked to her parents' Family record.

1. Create a new Family-class record for Erika Schlickmann, as described in section 2.1.3 for a new partner. It is necessary to copy all basic information such as address, phone number, etc, but this can be done simply as described in **Copying an existing address**, on page 28. This is the one situation when it may be useful to use the Edit button, as described at the end of that section. Click Save.
2. Go to the Family record of her parents, Hans and Ute Schlickmann. Open the *Partner Edit Screen*.
3. Select the Family Members tab. The list of family members appears (as in Figure 2-25, page 41). Erika should be included in the list. Highlight Erika and click the Move selected person to other family button at the bottom of the screen.
4. A *Partner Find Screen* appears. This is the same as that shown in Figure 2-1, page 16, except that there is an Accept button. Find the new Family record for Erika Schlickmann (the one you have just created), and select it so that it is highlighted. Click Accept. A dialogue box asks you to confirm this change - click Yes. A second dialogue box asks you if you wish to see the updated list of Family members for the new Family. Click Yes. Erika's Person record is now transferred to her own Family record. It is no longer linked to her parents' Family record.
5. You will now see the Erika's new Family class record, with the Family Members tab selected. Her person record should be the only entry. Click Close at the top of the screen.
6. You will now again see the Family Members List for Hans and Ute Schlickmann, with the list update, so that Erika is no longer shown. Check the family ID numbers. If there are other children, you may wish to set new Family ID numbers for any younger children (to avoid a gap in the numbering) - see previous section on changing Family ID number.
7. Finally, check whether it is necessary to add any additional information to Erika's new Family record, e.g. Finance Details, Additional Details, etc., as described in the earlier part of section 2.3.5, page 32. Erika's records are no longer linked to her parents' record as a Family member, so you may wish to enter a Relationship (parent-daughter) as described in section 2.4.3.

2.4.2.3 Adding a New Child to a Family

1. Find the family record of the family to which you with to add a partner. Click the Family Members Tab.
2. Click the button Create New Person for this Family near the bottom of the screen.
3. If prompted, select the appropriate site, and click OK. (This may not be required if you only use one site.)
4. The basic address details should be entered automatically from the Family record. Check that they are correct, if necessary copy additional addresses, and click Save. The child's Person record is now linked to the Family, and he or she will appear in the *Person List Screen* (see Figure 2-25, page 41).
5. Add additional information for the child (e.g. gender, date of birth). From the menu bar of the *Partner Edit Screen*, select the Partner Details tab, and enter data as in section 2.4.1.2, page 35.
6. Enter a relationship (child-parent) as described in 2.4.3, page 42.

2.4.3 Relationships between Partners

This facility records a relationship between two partners. For example, it is possible to record that a church (partner A) supports an OMer (partner B).

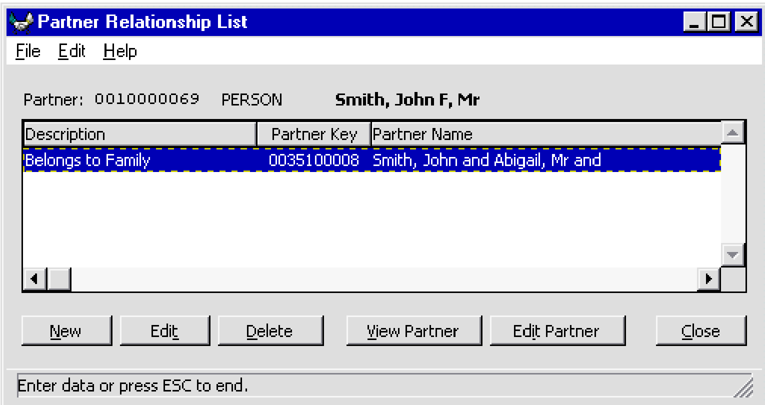
Note – Relationships and Family ID Partner Relationship is NOT the main way to link individual partners who are family members (i.e. husband, wife and children). This is done using Family ID (see section 2.4.2, page 40). Partner Relationship is used for other relationships between partners. It can be used to record family relationships as well, but is not the main way of doing this.

A list of typical standard relationships is given in Chapter 11. One important relationship for OMers is a person to contact in an **emergency**. This relationship must always be entered for an OMer, under their record of class person.

Example: To record that partner Clifton Baptist Church supports partner John Smith.

1. User the *Partner Find Screen* to find one of the partners (John Smith) and go to the *Partner Edit Screen*. From the `Maintain` menu at the top of the screen, select `Relationship`. The *Partner Relationship List Screen* appears.

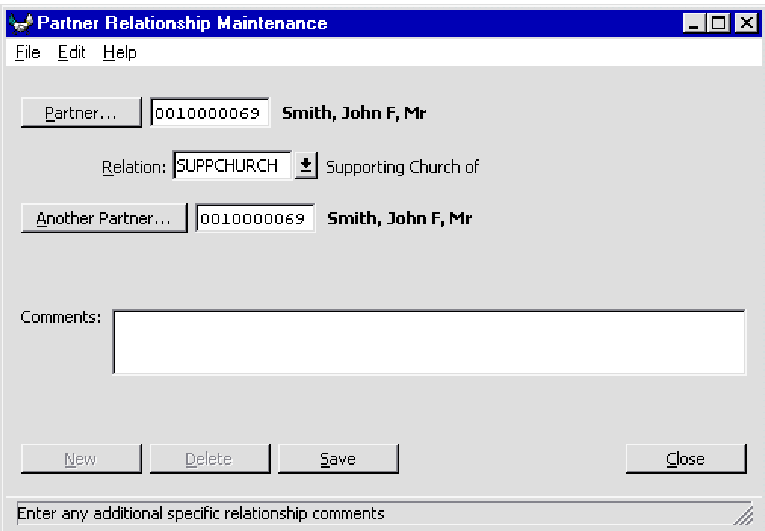
Figure 2-26 Partner Relationship List, showing existing relationship



2. Existing relationships are shown in the box. To define a new relationship, click New. If you wish to edit a relationship, select it and click Edit. To view or edit the other Partner shown in an existing relationship, click View Partner or Edit Partner.)
3. When you click New or Edit, the *Partner Relationship Maintenance Screen* appears. It shows the same partner details in both the first and third lines. The second line, **Relation Name**, is blank at this stage.

Emergency Contacts If you need to view somebody's emergency contacts, this is most easily done from the Personnel Module. However, it can be done from the Partner module, as described here. Find the Person record for the partner, and open the *Partner Relationship List* (Figure 2-26, above). Highlight the emergency contact relationship and click View Partner or Edit Partner.

Figure 2-27 Partner Relationship Maintenance Screen (after selection of relationship)



4. The relationship must now be entered. Relations are described by reading down the top three rows, as in these examples.

	Example 1	Example 2
Partner	**Clifton Baptist Church**	**Benoit, Pierre, Mr**
Relation Name	**is a supporting church of**	**is the Field Leader of**
Another Partner	**Smith, John, Mr**	**Lebanon Unit**

5. If you are setting up a new relationship, the new screen appears with the **Relation Name** blank, and the first partner's name in BOTH Partner boxes. We will set up the relationship in Example 1.
6. Select the **Relation Name** that you require from the list (in this case SUPPCHURCH). The words 'is the supporting church of' now appear on the screen (as shown in Figure 2-27).
7. We must now change one of the Partner entries, so that the relationship reads correctly. In this case we need to change the first partner line to partner 'Clifton Baptist Church'. (Which one should you change? See the box on '**Reciprocal Relations**' at the end of this section.) Click on the [Partner] button in the first line.
8. This will take you to a *Partner Find Screen*. Find the correct partner (in this case Clifton Baptist Church) using the Partner search options as described in section 2.1, page 15. Click on the correct partner and then click the [Accept] button.
9. The *Partner Relationship Maintenance Screen* reappears.

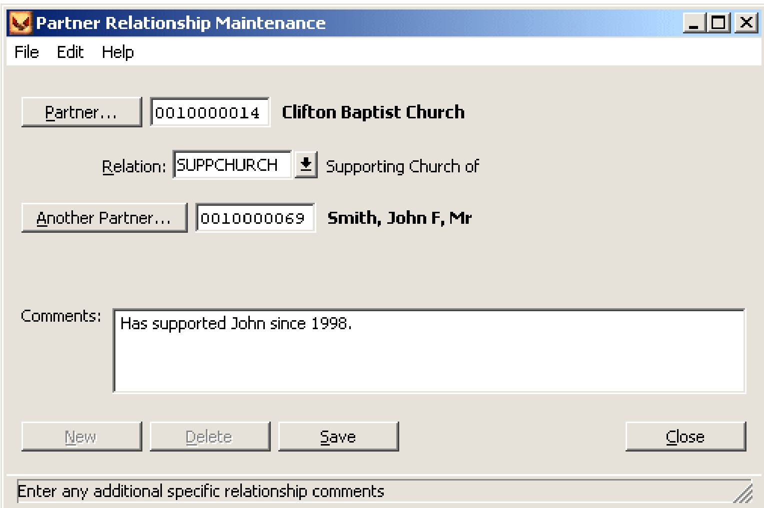


Figure 2-28 Partner Relationship Screen, after entering relationship and selecting correct partner

10. Enter comments if required, as in the example.
11. If the details are now correct, click [Save] , and then [Close].
12. The *Partner Relationship List* appears again, now including the new relationship. Click `Close` or `New` (if you wish to enter another relationship for John Smith). If you have made a mistake, select the relationship and click `Edit` to correct it.

Note - Supporting Church When a 'supporting church' relationship is set up between a church and a member of the Organisation, the church is automatically marked as Special Type CHURCH-OM.

Note - Reciprocal Relations A relationship always relates two partners. If a relationship is entered for one partner, PETRA automatically knows about it for the other. The description shown on the *Relation List Screen* for the second partner will be worded differently, because the other partner is the subject of the sentence; this is the reciprocal relation. For example,

Clifton Baptist Church	**is a supporting church of**	*John Smith*
John Smith	**is supported by**	*Clifton Baptist Church*

If the wording is difficult to understand, and you are not sure if you have entered the relationship in the right way, look at the *Relationship List Screen* of the other partner, to check that it is correct.

2.4.4 Local Partner Data

Local Partner Data is data which is only relevant to the local office; it will not be exported to another office. The appeaerance of the screen will depend on what lables have been set up by the local office. Section 3.6, page 92, explains how the Local Partner Data fields are set up.

To enter or edit Local partner Data for a partner:

1. From the *Partner Edit Screen*, select the `Local Partner Data` Tab.

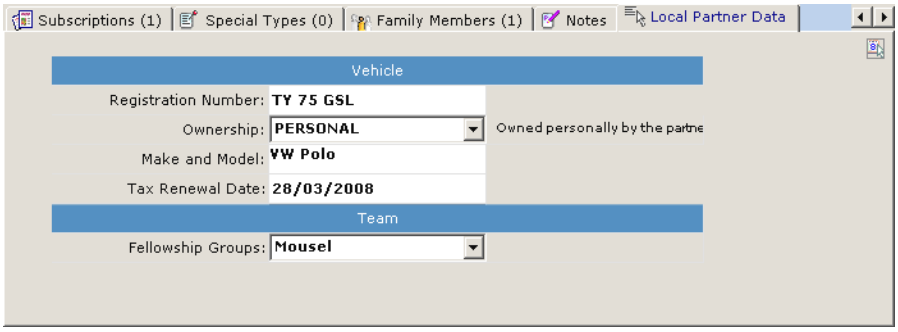


Figure 2-29 Local Partner Data Tab on Partner Edit Screen (example)

2. The fields shown will depend on what has been set up for this site. For the example shown, there are five possible fields. Field such as the Registration Number are text fields, while Ownership requires you to select from a list using the drop-down box. After entering the data, click Save on the *Partner Edit Screen*.

2.4.5 Interests

It is possible to record a partner's interests in particular areas of ministry. Interests are grouped into Interest Categories, which are set up in the Interest Tables (see sections 3.2.9, page 75.) It is also possible to records interests in particular countries or Fields. The level of interest can also be specified if required. To record an interest:

1. Find the partner concerning whom you wish to set an interest. From the menu bar of the *Partner Edit Screen*, select `Maintain`, then `Interests`. A *Partner Interest List Screen* appears. Click `New`. The *Partner Interest Maintenance Screen* appears.

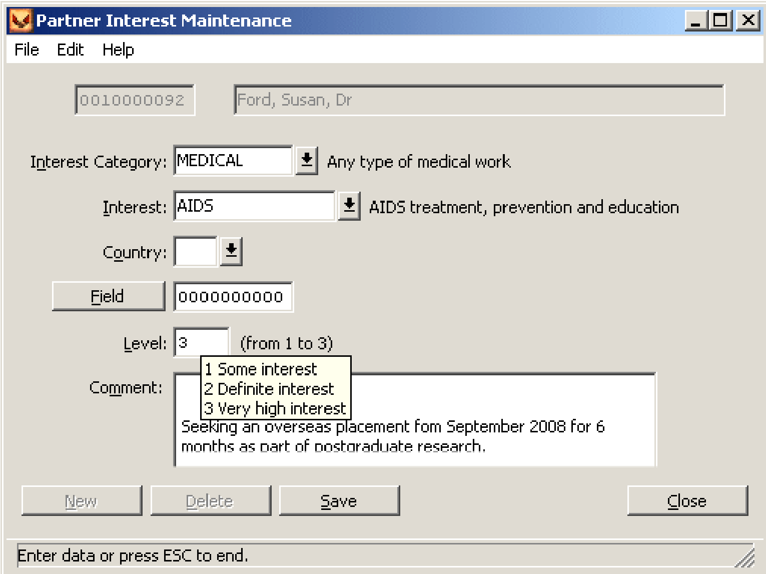


Figure 2-30 Partner Interest Maintenance Screen, showing Tool Tip decribing levels– visible when the cursor hovers over the Level box for 2 seconds.

3. Record the details of the partner's interest.

   Interest Category /Interest / Country / Field Select the interest from the drop down boxes, and/or enter a country of interest or use the Field button to select one of the organisation's Fields. If you wish to enter a new Interest or Interest Category, see section 3.2.9, page 75. However, check with your PETRA partner manager first, to ensure consistency.

   Level If an Interest has been set up to allow the level of interest to be recorded, enter it here. To see the range of levels, let the curson hover over the box for 2 seconds or so, and the too tip will appear as shown in the Figure.

   Comment If you use comments, make sure they can be understood by others.

4. When finished, click Save , and then Close. You can now enter another (new) interest for this partner or click Close again.

2.4.6 Contacts with Partners

The Contacts menu allows you to record contacts between the partner and the OM office, such as a letter received, a telephone call made or the fact that this partner was included in a special mailing.

In addition to the date and method of contact (letter, email, etc), you can record information in two main ways. First, a text screen allows you to record your own notes of the contact event. Second, it is possible to assign codes to the contact, to allow you to identify all partners contacted on a particular occasion. One type of code, **Mailings**, allows you to record contact through a mass mailing on a particular day. The second type of code, **Attributes** + **Attribute Details**, allows you to record contacts in a more systematic way. For example, an Attribute can be set up for the category 'Meetings' and a different Attribute Detail set up for each particular meeting. All partners attending a meeting can then have a contact recorded with this particular Attribute Detail.

For convenience, the date of the last contact appears on the *Partner Find Screen*, on the right hand side, just above the row of Tabs (see Figure 2-8, page 23).

To enter details of a contact:

1. Go to the *Partner Edit Screen* showing the partner details.
2. From the `Maintain` menu at the top, select `Contact`. The *Partner Contact List Screen* appears, showing details of any contacts entered before.

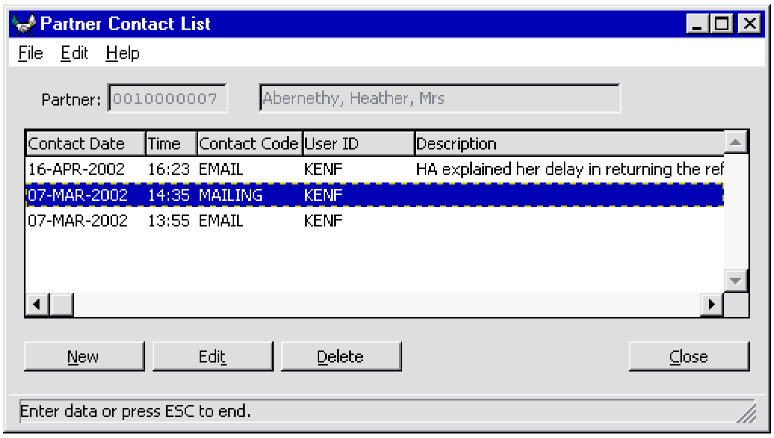


Figure 2-31 Partner Contact List, showing existing contact records

3. To enter a new contact click New. To edit an existing contact click Edit. The *Partner Contact Maintenance Screen* appears.

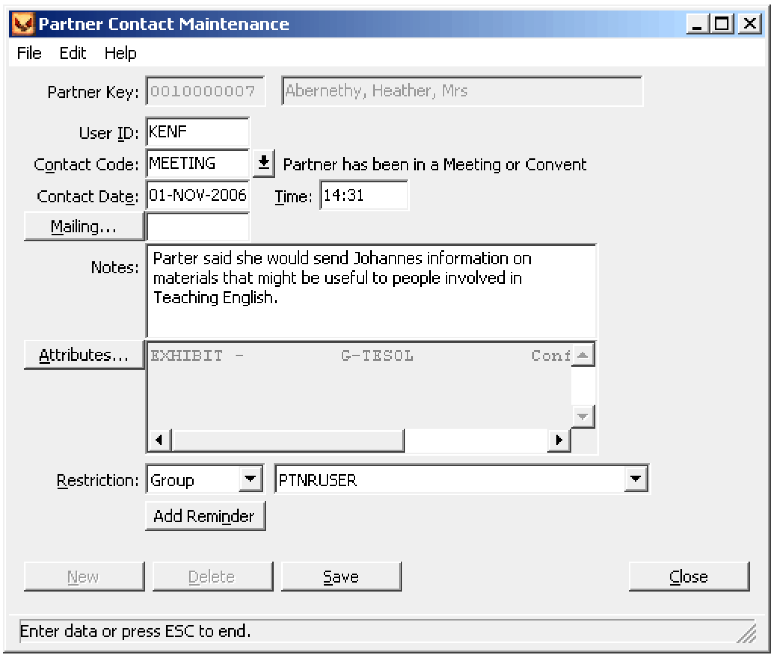


Figure 2-32 Partner Contact Maintenance Screen, after entering data

4. Enter details of the contact as follows.

Contact Code Use the drop-down button to select the means of contact (letter, email, etc.)

Notes A summary of the contact can be entered in this text box.

Restricted / Module ID If the contact detail information should not be available to all users, then click the **Restricted** box to show a tick. If you do this, the **Module ID** field appears. Using the drop down button, select the Module which should be able to read the contents. Other modules will just know that there is a contact, but the contents of the Notes field will not be visible (the word "restricted" will be displayed). In the example shown, the information might be sensitive, and so is restricted to those with access to the personnel module.

Mailing If required, a mailing code can be selected. Click on the Mailing button, and the Mailings List Screen appears. Highlight the required mailing and click Accept. Mailing Codes are explained further in section 3.5, Mailings Table, page 92, and are a useful facility when many partners are sent the same mailing or email.

Attributes If required, a 'contact attribute' can be applied. Click the Attribute button to see the *Attribute Selection Screen*. In the following, example (Figure 2-33), we have defined a

Contact Attribute ‘EXHIBIT’, to identify all partners to whom we have visited a stand at an exhibition. Under this we have two different Contact Attribute Details to show different exhibitions. These have all been set up as described in the Contacts Attributes Table, section 3.2.3, page 69. If there is a + beside an Attribute, this indicates that there are attribute details (sub-categories) for this attribute. Double-click an attribute to see the attribute details. To select an attribute detail (or attribute if there are no details), highlight it in the upper panel and click Add. It moves to the lower panel. When you click OK, it is selected for adding to the partner’s record. If you make a mistake, highlight it in the lower panel and click Remove. The Maintain Attributes button provides a short cut to the Maintain Attributes Table (see section 3.2.3, page 69). When you have added the correct Attribute (and Attribute Detail if required) click OK.

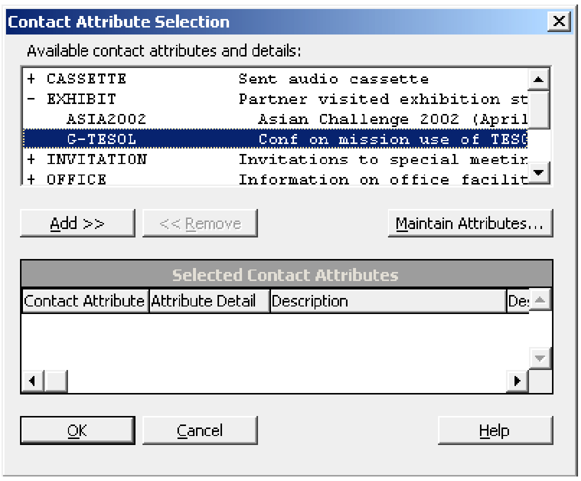


Figure 2-33 Contact Attribute Selection. For attribute EXHIBIT, there are two attribute details

Restriction If you need to restrict which users can see this comment, use the drop down boxes to select the group or module access rights to be applied. Other users will be able to see that there is a contact recorded, but no details of the Notes or Attributes.

Add reminder After saving the entry, this button can be used to set up a reminder for any follow up action (for reminders, see section 2.4.7, page 48).

5. Click Close.

Tip If you wish to add the same contact information to a whole group of partners, this can be done using the Update Partners Extract Facility - see section 4.6, page 129.

2.4.7 Reminders

Suppose a user needs to remember to contact a partner before a certain date. The user can enter details in PETRA, and an email will then be sent to the user before the event, reminding them of the action to take with regard to this partner. To set up a reminder:

1. Find the partner who you will need to contact. From the menu bar of the *Partner Edit Screen*, select `Maintain`, then `Reminders`. A *Reminder List Screen* appears. Click New. The *Partner Reminder Maintenance Screen* appears.

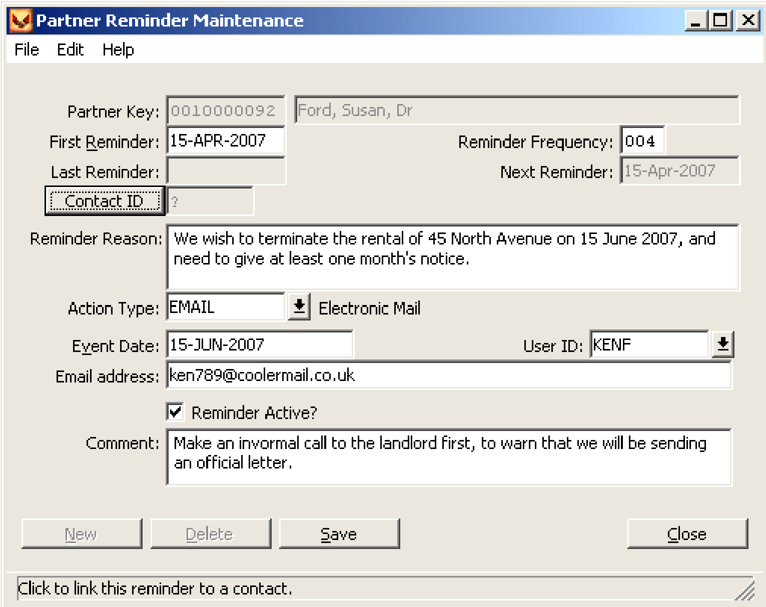


Figure 2-34 Partner Reminder Maintenance Screen

2. Enter data as follows (the order shown here is not quite the same as the order on the screen).

   Event Date The date of the actual event you want to be reminded of.

   Action Type From the drop-down list, select the type of action required before or on the event date.

   First Reminder / Reminder Frequency The date that the first reminder email should be sent, and the number of days between successive reminders.

   Last Reminder / Next Reminder If a first reminder has already been sent., then the first box shows the date that the previous email was sent. The second box shows the date on which PETRA will send the next reminder.

   Reminder Reason Description of why the reminder is being sent. Additional information can be added in **Comments**.

   Email Address This is the email to which the reminder will be sent.

   Contact ID If the reminder results from a previous recorded contact, then click this button to select the contact reference.

   User ID Normally this will be the user who is setting up the reminder.

3. Click Save , and then Close, then Close again. On the first reminder day, and subsequent days at the specified interval until cancelled, a reminder email will be sent to the email address, giving all the information that you have entered. To disable the reminder (for example when it has been acted on) uncheck the **Reminder Active** box.

2.4.8 Notes on Partners

The Notes Tab allows you to add any additional notes about a partner. When you have finished, you must press the <Tab> key on your computer, to move the cursor out of the writing area. Otherwise you will not be able to save the notes. On the Tab heading itself, (0) indicates that no notes have yet been entered. A tick mark (✓)indicates that there are already some notes entered.

Make sure that what you write is both **true** and **polite**. In some countries partners have the legal right to ask to see what an organisation has written about them, even on their internal computer system!

2.5 Finance Details (Bank Accounts, Gift Receipt Details, etc.)

2.5.1 Overview of Bank Accounts

With the release of PETRA2.1, the way of handling bank account details of partners was changed. The key features are as follows:

- All banks (and branches) at which Partners hold accounts are now themselves Partners of class 'Bank'. In many countries each branch of a bank uses a separate branch code (sort code, or routing code.) In this case, each branch of a bank is a separate partner, so, for example, for the Co-op Bank in the UK, Co-op Bank Oxford and Co-op Bank Bristol would be different branches. Some banks have just one central branch.
- Accounts are linked to the "Bank+Branch" partner at which they are held, and also to the Partner(s) whose accounts they are.
- **Main bank account** A partner can have more than one bank account, but in this case one of the accounts must be defined as the main account. This is the account that will be used in Extract Mailmerge (section 6.5, page 156) or other situations where only one bank account can be used.
- Bank accounts can be shared between more than one partner (but see warning.)

> **Warning - Shared Bank Accounts** In normal situations, where a husband and wife share a joint bank account, this should be entered only once, under Financial Details on the **Family** class record. This is NOT a shared account in PETRA terminology, since the account is only linked to one partner record (class family).

- It is possible to record the Bank Identifier Code (BIC) of a bank/branch, and the International Bank Account Number (IBAN) of an account.
- A Bank Account Find facility makes it possible to find a partner by entering an account number, branch code, or other details.
- Information (such as discounts) relating to a Partner who is a supplier and needs to be paid is now entered in the Accounts Payable part of the Finance Module, not the Partner Module.

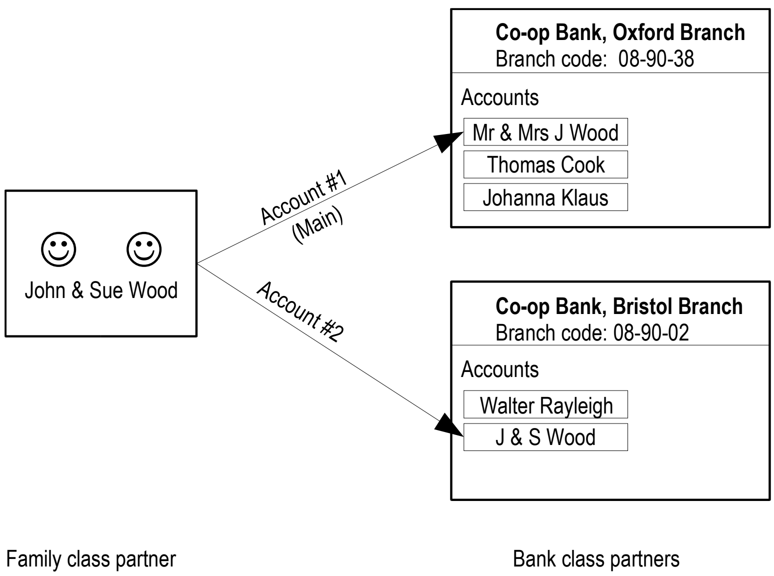


Figure 2-35 Example of a Family class partner with two bank accounts at different Bank/Branches. One of the accounts must be identified as the main account.

There are in principle two steps in recording a partner's bank account details.

Step a) First it is necessary to select the bank/branch at which the account is held, or to set up a new bank/branch partner if this is the first account at that bank.

Step b) Next the actual account name and number must be entered.

The following sections cover the operations needed in managing bank accounts:

1. **Entering a bank account of a partner** (section 2.5.2, page 51)
   Every account must be linked to a bank/branch. If the required bank/branch has not yet been entered as a partner, it is possible to create the new Bank partner, by entering only the name and branch code of a new bank/branch, as part of this operation. However, to add any further information, it is necessary to use the procedures in Operation 2.
2. **Entering or editing a bank/branch as a partner** (section 2.5.3, page 56)
   This can be done before entering any accounts at this bank/branch. In addition to the essential details of name and branch code (sort code, routing code), full information such as address, contact person, etc can be entered.
3. **Finding a Partner from a bank account name or number** (section 2.5.4, page 57)
   This allows users, especially those in finance departments, to identify a donor from the bank account number given on a bank statement of payments received.

2.5.2 Entering Partner Bank Account and Other Finance Details

It is possible to record details of a partner's bank account(s), credit/debit cards, and preferences for receiving receipts (in the case of donors) and for notification of gifts received for their support (in the case of people working with the organisation.).

> **Note** For consistency, bank accounts should normally be associated with Family records, unless there is are particular reasons why an office decides to enter gifts to Person records.

Since entering, editing and removing an account all start from the same screen, all operations will be considered in this section. Please see the various sub-headings. To enter or edit Finance Details:

1. Go to the *Partner Edit Screen* showing the partner details.
2. From the `Maintain` menu at the top, select `Finance Details`. The *Finance Related Details Screen* for the partner appears. If no bank account has been entered for the partner, the Bank Accounts section of the screen will be blank. If any accounts have been entered, they will be listed in the upper part of the screen. If there are already two or more accounts, one will be marked with an asterisk (*), to show that it is the main account. The centre part of the screen lists credit/debit cards, and the lower part deals with preferences associated with gifts from this partner (or to support this partner if they are a member of the Organisation.)

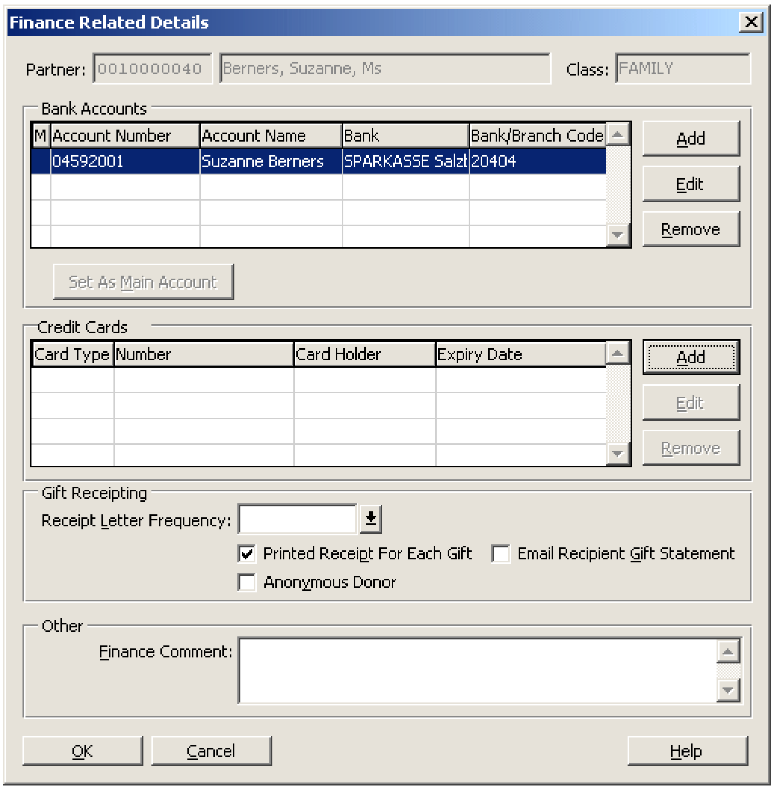


Figure 2-36 Finance Related Details Screen

3. Enter the appropriate data in the lower part of the screen. (Since the Bank Account information needs more explanation, the other items will be considered first.)

Receipt Letter Frequency Select the interval at which receipt letters are to be sent, if the partner makes donations. This field may be left blank. Common options are: `Annually` (every year) and `Quarterly` (every three months).

Printed Receipt for Each Gift If a receipt should be sent to this donor partner each time they make a donation, check this box. This will override the Receipt Letter Frequency setting.

Anonymous Donor If the donor wishes to remain anonymous, check the box**.** Their name will then not appear on the Received Gift Statements.

Email Recipient Gift Statement (For OMer partners of Class Family or Unit only.) If the partner is an OMer (or OM Unit) who wishes to receive their “Recipient Gift Statement” by email, check the box**.**

Finance Comment This field can be used for any notes relating to financial details for this partner. (Note that there are additional comments fields for each bank account - see Figure 2-39.)

To Enter a Debit/Credit Card

The following describes how to enter a new credit card. Details of cards can be edited, or cards deleted, using the Edit or Remove buttons on the *Finance Details Screen*. Only people with the required permissions can actually see the whole number.

1. Click the Add button on the right of the Card section (or highlight an existing card and click Edit.) The *Card Entry Screen* appears.

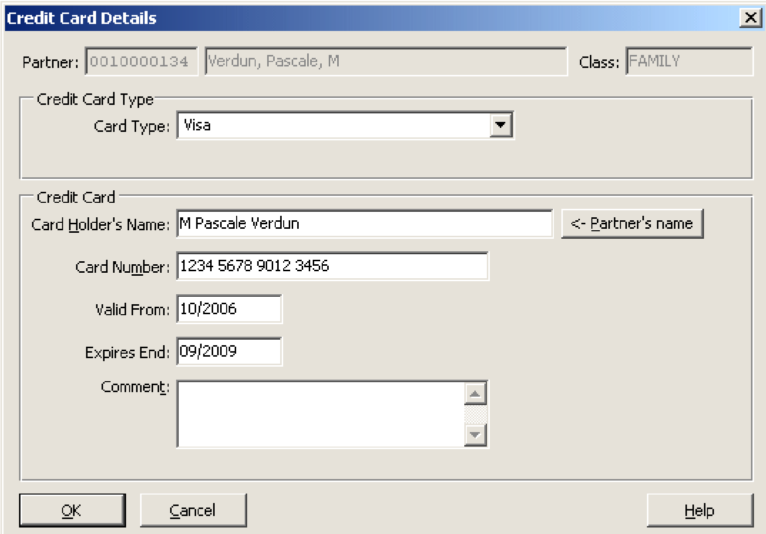


Figure 2-37 Credit Card Entry Screen.

2. Enter data as follows.

    Card Type Select the appropriate type (eg VISA) from the drop down box**.**

    Card Holder's Name This should be as it appears on the card. As a short cut, you can use the [<- Partner's Name] button on the right to enter the PETRA name, and then edit this.

    Card Number Enter this in the format used by your office (eg xxxx xxxx xxxx xxxx).

    Valid From and **Expires End** Enter the appropriate dates in the form MM/YYYY.

    Comment This can include any notes about usage of this card.

3. When complete, click [OK]. The card will appear in the list on the *Finance Details Screen*. The n number will appear blanked for security reasons, and only those with the required permissions will be able to open it and see details.

To Create a New Bank Account

4. To enter a new bank account, click the [Add] button at the top of the screen. A dialogue box appears.

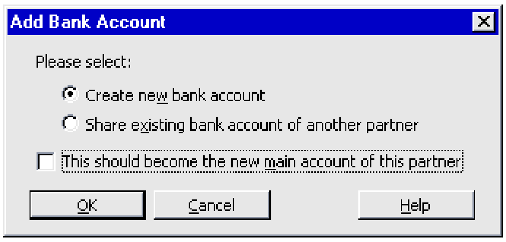


Figure 2-38 Add Bank Account dialogue box

Create or Share Normally you will select **Create** to create a new account. Although it is possible to **Share** an existing account of another partner, this should only be done in very special circumstances (see **Warning** on page 50.)

Main Bank Account The check box is only enabled if this is a second (or further) account for the partner. If this box is checked, the new account will become the main account (see page 50). If it is not checked, then the main account may need to be reset after entering the new account (see 'To Set Main Bank Account', page 55.)

To create a new account, follow the instructions below. To share an existing account, go to the sub-heading on page 55.

5. From the dialogue box (Figure 2-38), select `Create New Bank Account` and Click OK. The *Bank Account Details Screen* appears (all fields will be blank at first.).

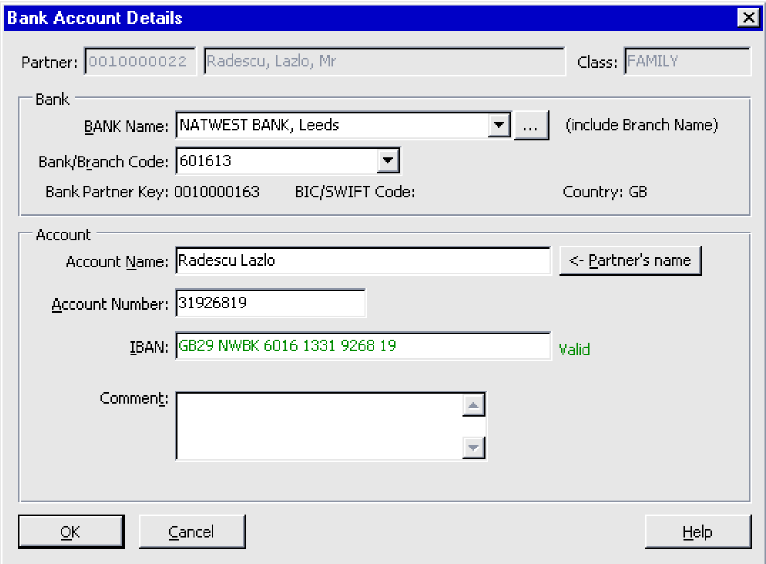


Figure 2-39 Bank Account Details Screen

This screen operates in two stages. First you must select the Bank Branch (which will be a partner of class BANK) in the upper part of the screen. After selecting this, you can enter the account details in the lower part of the screen. The lower part of the screen is not enabled until a bank has been selected in the top part of the screen.

> **Warning - Format of BANK Branch Names** It is important for an office to stick to a consistent way of entering bank and branch names, since PETRA checks to see whether this Bank+Branch partner already exists. The name is case-sensitive and is also affected by additional spaces. For example, the Austrian office might decide to enter the Bank name in upper case, followed by one space and then the branch name in lower case. So, for “Sparkasse, Salzburg Branch” they would enter: “SPARKASSE Salzburg”. Each office needs to have a standard form.

6. Enter the **BANK (Branch) Name**, then the **Bank Branch Code** using one of the following methods.

   (1) If you think that the Branch may already exist as a partner, you can use the Find facility button **...** . This brings up a Find screen, which allows you to Search for and Accept an existing branch.

   (2) You can also use the drop down boxes to search for an existing bank, either by selecting the first letter of the name, or the first digit of the sort code. After the first character has been typed, the drop down list will show all existing banks starting with the selected character.

   (3) Type in the Bank and Branch name (see Warning above). These fields are linked with an “auto-complete” facility. So, when you start typing, an existing Branch which matches your entry is displayed. If the correct one appears, use the <Tab> or <Enter> key, to accept this Bank/Branch. You can keep typing - there is no need to wait for the auto-complete function to operate, since it may be slow if there are many banks.

   While typing, if PETRA determines that this is a **new** branch, a Save button is displayed on the right. Check the details carefully (since the auto-complete can sometimes cause changes) and then click Save to create this Bank Branch as a new partner. (Full details of the bank/branch can be added later - see section 2.5.2, page 51.)

If the Bank you are entering does not use a branch code (sort, routing code), you must either type one <space> in the Branch code box or else select the 'blank' entry in the drop-down menu, in order to make the Save button appear.

> **Note - Typing text entries** If you need to correct an 'auto-complete' entry, you may find that the <Backspace> key cannot be used to delete characters, especially the first character. Use the cursor or mouse to select the required characters before deleting them, and if necessary to select and delete the entire entry.

7. When you have selected or created the Bank/Branch, the fields in the bottom part of the screen are enabled. Enter the details of the Account as follows:

   Account Name This must be the exact name of the account as recorded by the bank. This may differ from the partner's name as recorded in PETRA. However, you can click the << Partner's Name button to enter the PETRA name, and then edit it as required.

   Account Number This is the number of the account alone (excluding the branch/sort code if that is given in the upper part of the screen.)

   Savings Account If required, use this check box to indicate whether it is a savings account.

   IBAN If required, enter the International Bank Account Number. PETRA checks whether this format of this number is consistent with valid numbers, and will not accept the number if the format is invalid.

   Comments Enter any comments about this bank account. If the account is shared, this comment will also be shared between all relevant partners.

8. Click OK to return to the Finance Related Details Screen (Figure 2-36, page 52).
9. If there is now more than one account, it may be necessary to reset the correct account as the main account (see sub-heading following.)
10. Click OK to close the screen.

To Set Main Bank Account

The *Finance Related Details Screen* (Figure 2-36, page 52) lists all the bank accounts of a partner. If there is more than one account, an asterisk (*) in the first column shows which is the main account. To set a different account as the main account, highlight the account and click the Set as Main Account button. Main accounts are explained on page 50.

To Share an Existing Account

1. From the dialogue box (Figure 2-38, page 53), select `Share Existing Account`. A *Find Bank Account Screen* appears.

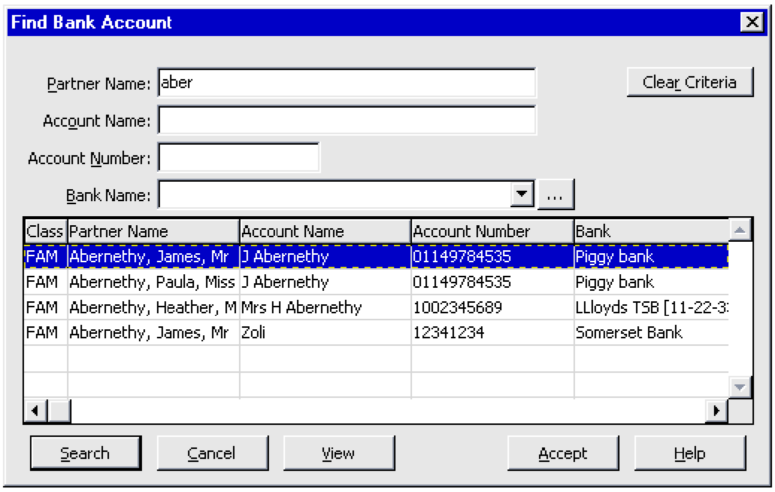


Figure 2-40 Find Bank Account Screen

2. The list part of the screen will initially be empty. Enter any known details of the account you are looking for and click Search. The list of possible accounts then appears. Find the account that you wish to share and click Accept.
3. A warning message appears. Read this carefully. It could cause **major problems** if you wrongly select an account to be shared. If you are absolutely sure that you wish to go ahead, click OK, to return to the *Finance Related Details Screen* (Figure 2-36, page 52).
4. If there is now more than one account, it may be necessary to reset the correct account as the main account. Selected the required account, and click the Set as Main Account button (see sub-heading above).
5. Click OK to exit the screen.

To Edit a Bank Account

Accounts can be edited using the *Finance Related Details Screen*, as shown in Figure 2-36, page 52.

1. Highlight the account and click the Edit button.
2. The *Bank Account Details Screen* appears. This is similar to Figure 2-39, page 54, and data can be entered or edited as described for a new account. The only difference is that an additional panel is present on the screen showing any other partners who share this account.

To Remove a Bank Account

An account can be removed from a partner using the *Finance Related Details Screen* as shown in Figure 2-36, page 52. To remove an account:

1. Highlight the account and click Remove.
2. A warning message will appear asking you to confirm that you wish to remove this account. If the account is shared with other partners, details are given.
3. If you are sure that you wish to remove the account, click Yes. If the account is shared with other partners, it is not removed from them - only from the partner you are working on.

2.5.3 Creating or Editing a Bank Partner

As described at the very end of the overview, section 2.5.1, new bank partners can be created automatically when entering a new Bank/Branch account for a partner. The bank partner information entered is the minimum necessary (name and branch code.) Alternatively banks can be created as partners in the normal way, as for Organisations. Most partner information can be added as for any organisation using the *Partner Edit Screen*. However, the *Partner Details Screen* is different from that of other partner classes. To enter or edit Partner Detail for a partner of class Bank:

1. Create or find the partner in the normal way using the *Partner Find Screen* for class Bank, so that the *Partner Edit Screen* opens (see section) 2.1, page 15.
2. From the menu bar, select `Maintain`, then `Detail`. The *Partner Details Screen* for the bank appears.

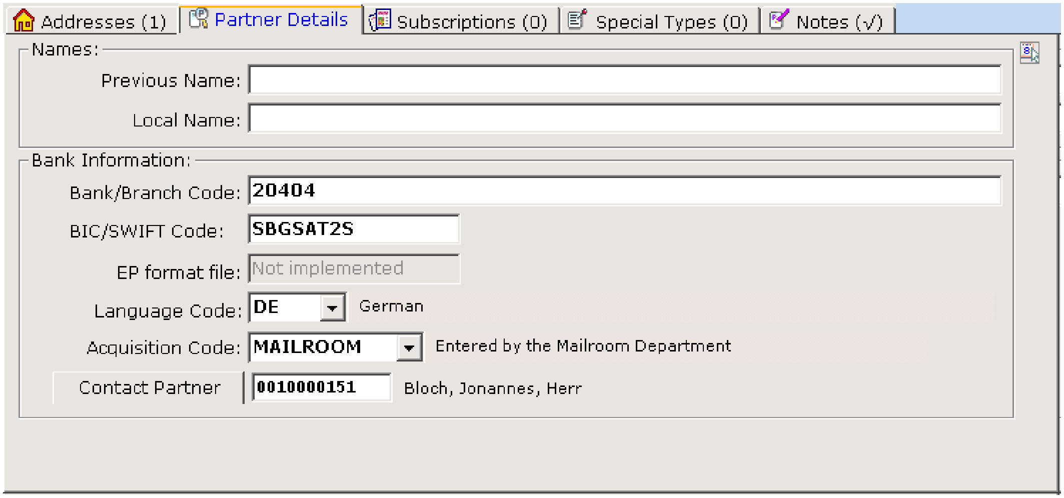


Figure 2-41 Bank Class Partner Details Screen

3. Enter data as follows:

   Bank/Branch Code Enter the code of this branch of the bank (sometimes known as the sort code or routing code). Some banks do not use this code. Make sure that you use the standard format agreed by your office (e.g. 309455 or 30-94-55).

   BIC/SWIFT Code Enter the Bank identification code if required. (This is not usually needed, unless the bank is used for international transfers, but it is a useful way of finding a bank/branch.)

   EP File format *[This feature is not used in PETRA at present.]* The Electronic payment file format may be used in the future for electronic payments using this bank.

   Language Code The language used by this bank branch.

   Contact Partner If required a link can be made to a partner who is the key contact at this bank.

   Notes Enter any useful comments. Be careful in what you write, since in some countries the bank may have a legal right to see what has been written!

4. If you have finished, click Save, and then Close.

2.5.4 Finding the Holder of a Bank Account

Sometimes it may be convenient to search for a bank account (for example to see who gave a particular gift, if the information is missing.) PETRA includes an Account Find facility, which may be accessed from the main *Partner Screen*, (**Figure 1-2**, page 12). To find an existing bank:

1. On the menu bar of the main *Partner System Screen*, select `Partner`, then `Find by Bank Account Details`. A *Partner Find by Bank Account Details Screen* appears.

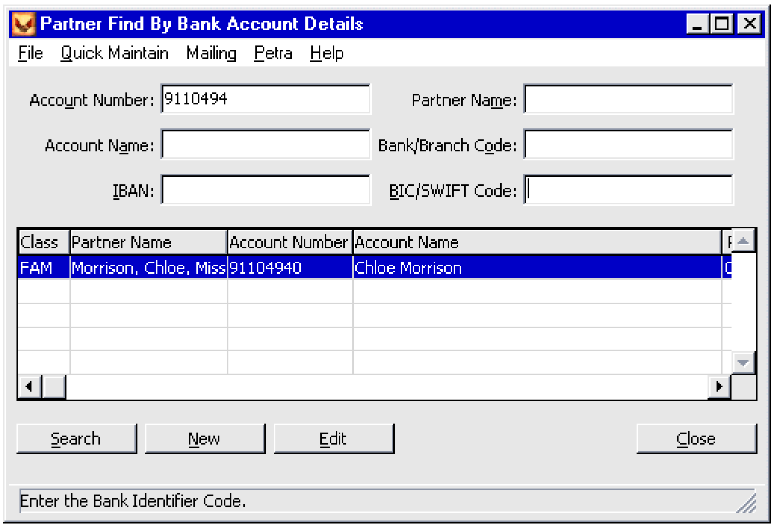


Figure 2-42 Partner Find by Bank Account Details Screen

2. Enter any information that you have about the account and Click Search. The format of the search information must be correct. If the branch code of a bank has been entered as “30-94-55”, then “309455” will not work. However, if you enter “30”, you will find all accounts at branches with branch codes beginning with “30”. The results are displayed in the list screen. If you have an account which is recorded as being shared between two different Petra partners, then the account will appear twice, once for each partner. [Note that normal joint accounts for husband and wife are entered for the family record, and so are not “shared” accounts in PETRA terminology!]
3. If the partner and account that you are looking for are listed, select it and click Edit. This opens the *Partner Edit Screen* of the partner that you selected. Alternatively you can highlight the partner you want and use the `Quick Maintain` menu, or right click to get to the screen that you need.

2.6 Merging Partner Records

Sometimes a partner is entered twice, and so has two entries and two partner keys. PETRA can merge one partner (A) into a second partner (B) to provide a single entry. Partner B is the one that remains and it is no longer possible to access the Partner A. Information from partner A is added to Partner B, but if there is a conflict, then the data for partner B is treated as the correct version. Dialogue boxes ask you to select the addresses and bank accounts of Partner A that should be retained and transferred to Partner B. Of course both partners must be of the same class.

Warning It is possible that the office has worked on both partners recently. In this case, more accurate data for some items may be lost when merged with older data on the master record (Partner B). In this case it is necessary to note the correct information from Partner A before merging, and to re-enter it after merging.

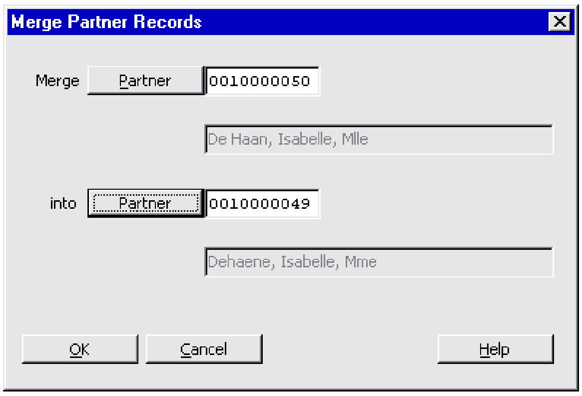
Warning After partner records have been merged, it is no longer possible to access the first partner who has been merged into the second. There is no way to undo this operation (except to restore a back-up version of the entire database, which will lose all PETRA changes since the date of the back-up.) Never merge partners unless you are absolutely sure what you are doing.

Example: To merge two records for the same partner, which have arisen on account of different spellings of the family name (Isabelle De Haan and Isabelle Dehaene). The correct spelling of the name is Dehaene.

1. Check all the data on both Partner records to decide which is the more correct.

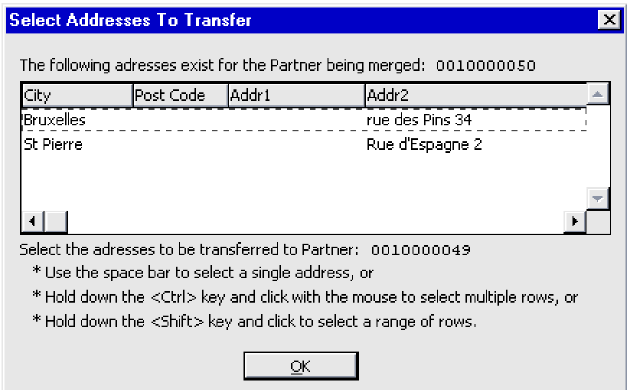
2. From the *Partner System (Welcome) Screen*, select the `Mailing Menu` and then `Merge Partners`. The *Merge Partner Records Screen* appears.

Figure 2-43 Partner record merge screen



3. Click the upper Partner button. This brings up a *Partner Find Screen* (see section 2.1.1). Use this to locate the partner to be merged (record A, *De Haan*) and click OK.
4. Click on the lower Partner button. Use the *Partner Find Screen* to locate the 'master' partner record (record B, *Dehaene*) and click OK. A message warns you that it will not be possible to undo this operation. If you are sure you wish to continue, click Yes. The *Merge Locations Screen* appears, showing the addresses that existed for partner A.

Figure 2-44 Merge Locations - highlight the address to be transferred to the new partner



Highlight those addresses of the first partner that you wish to be kept for the new partner, using the instructions written below the list. Click OK.

5. If bank accounts are being transferred from Partner A to Partner B, you may receive a warning to check the account list to make sure that the correct account is set as the Main account. (see section 2.5.2, page 51.)
6. Go to the *Partner Edit Screen* for Partner B, and review all addresses to make sure that only one address is marked as the Mailing Address.
7. If necessary edit the merged partner (B) to reinsert any correct information that may have been overwritten.

2.7 Importing and Exporting Partners

This facility is used to pass Partner details from one office to another. Data referring to a partner can be saved as a text file in a special format. The text file can be sent to another office (for example as an attachment to an email message). The file can then be imported into the PETRA system of the new office. Not all partner details are exported - only those that are relevant to a new office - see below.

This section explains how to use the *Partner Find Screen* to **import** or **export a single partner**. The same procedure is used in **import a group of partners**, but **exporting a group of partners** is done from the *Extract Master List*, and is explained in section 4.5, page 127.

> **Warning** The import/export files, and the log files are text files, and can be read easily. They may contain confidential personnel information, and so should be deleted when no longer required.

What is exported?

When a partner is exported from one PETRA installation to another, the items exported are those that are most likely to be useful to the new installation. A few items, such as subscriptions, are not likely to be relevant, and so are not exported. For other items, certain details may not be exported.

If exporting a person, the family record is automatically exported as well. If exporting a family record, PETRA asks if you wish to also export all person records associated with that family record.

Partner Items The items exported from the partner module include: basic partner information including all currently valid addresses, special types, and most items for the Details screen, including comments. Bank account details are not exported.

Personnel Items For partners of class Person, additional data exported includes: driver status and driving licence, passports, professional area qualifications, special needs, past experience, languages, abilities, vision, commitments, job assignments, progress reports, applications and forms.

For partners of class Unit, data exported includes: abilities, languages, vision, and costs. Jobs and job assignments are not exported with a unit.

Conference Items For partners of class Venue, buildings and rooms are exported.

2.7.1 To Export a Partner

This section explains how to export details of a single partner as a text file, which can then be sent to another office. It is also possible to export a group of partners (see section 4.5.1, page 128.)

1. In the *Partner Find Screen* find and highlight the partner whose details are to be exported, and then click on the `File` menu as shown below.

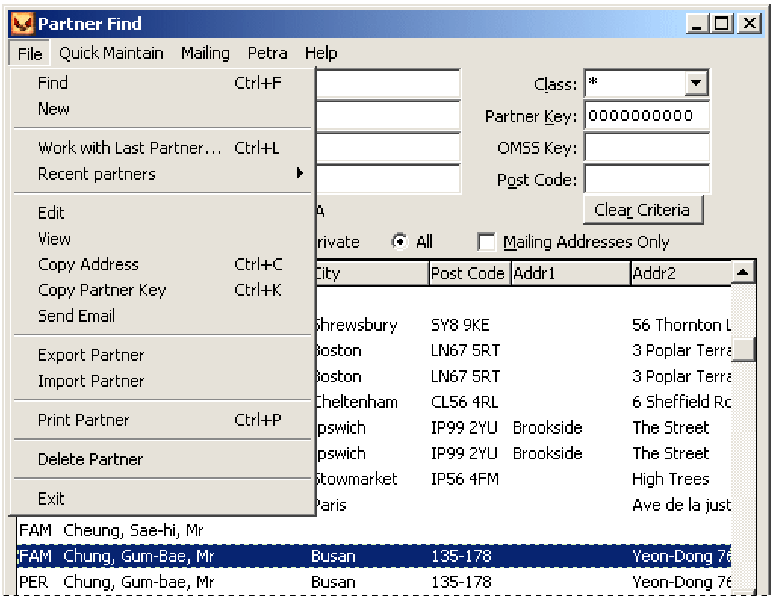
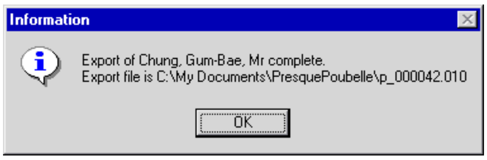


Figure 2-45 Partner Find Screen, showing partner highlighted and File menu selected

2. Select *Export Partner*. A browse screen appears, asking you to select a folder in which to place the export file. Select a folder and click OK. An information box confirms the file that the partner details have been exported to.

Figure 2-46 Export File information box



3. Click OK. The named file can now be sent to another office, as an attachment to an email.

2.7.2 To Import a Partner or Group of Partners

If another office has sent you details of partners, you can import them to your system. It is possible to import the details of either a single partner, or of a group of partners.

> **Warning - Information loss on importing** In certain circumstances information may be lost when importing a file. Read the note below carefully and always check the log file.

Remember that not all partner details are exported. Therefore after importing a partner, you may need to add certain items of additional information.

1. In the *Partner Find Screen*, select the `File` Menu, then `Import Partner` (see Figure 2-45). A file directory browse screen appears and you can select the file to import.
2. Select the required file and click OK. The partners are imported, and a log file is created. Make a note of the location and filename of the log file.
3. Check the log file to see any errors or warning.

Note - What happens when a partner is imported?

If you import a partner who already exists on your installation, the data will be updated, but it is important to ensure that important data is not lost or overwritten. Details are as follows.

If the imported Partner Status is different from the existing one, a warning message will be displayed.

If the imported acquisition code does not exist, it will be created automatically.

Care is needed with regard to comments fields (eg Personnel: medical, dietary, other needs, commitment, interview). PETRA checks the complete text in a particular field as follows.

If the complete, new imported entry is identical to the existing one (every character matches), nothing is changed.

If the new comment includes the exact text of the old comment, the new, longer comment is used.

If the old comment includes the exact text of the new comment, a dialogue box asks you when to overwrite the longer, old comment with the shorter new comment.

If the old and new comments are totally different, then the user is asked whether to replace the old with the new one, or to add the new comment after the old comment. However, the comments can only take a maximum of 256 characters, so if new comments are appended to previous ones, they may be lost if the total number of characters exceeds 256.

It is important to read the log file after the import, since this gives details of old and new comments.

2.8 Example of Partner Maintenance - Members get Married

Example: John Smithson and Fiona Jones are both members of the Organisation. Both have records of class Family, and also records of class Person giving additional details. They have recently got married, and moved to a new address. We need to amend their names and addresses and link the Person records to a single Family record. We also need to check other details.

John's Family Record

1. Find John Smithson as a partner of class Family, and bring up the *Partner Edit Screen*. Edit this to be the new record of class Family for the couple (change 'Mr' to 'Mr & Mrs'; change 'John' to 'John and Fiona' if required, change address, etc.). Click Save.
2. Select the `Partner Details` tab, and add any comments. Click Save and Close.

Fiona's Person Record

3. Edit Fiona Jones' record of type Person. Find this record and click Edit to show the *Partner Edit Screen*, as described in section 2.1.3. Edit this screen for all necessary changes to title (Miss to Mrs), name (Jones to Smithson), address and telephone details, starting date for this address, etc. (see section, or use the copy facility described on page 28.)
4. From this screen select the `Partner Details` Tab, as in section 2.4.1.2. Change **Marital status** to `M`, enter **Previous Family Name** as Jones, and add any necessary notes.
5. Select the `Family` tab, and click Move selected partner to new family. A *Partner Find Screen* appears. Find the record for Mr and Mrs John Smithson, class Family (the one you have just amended). Click Accept. A dialogue box asks you to confirm that want to move this partner. Click Yes. A second box asks if you wish to view the Family Members List. Click Yes. Modify the list if necessary so that John and Fiona have family member IDs numbers 0 and 1. Fiona Smithson's partner record is now set up correctly as belonging to the family Mr and Mrs Smithson.
6. If required, select the Maintain menu, then Relationships, and add a relationship to show that she is the wife of John Smithson as described in section 2.4.3, page 42.

Fiona's Family Record

7. Merge Fiona's family record into John's family record. First check the information on the two records. The Merge operation will add all subscriptions, special types, bank accounts, gifts, etc from Fiona's family record onto the joint family record. However, if both John and Fiona already have other information entered, such as OMer Field, then Fiona's information will be lost from the Family record - only John's will remain. Carry out the Merge as described in section 2.6, page 58.
8. Mark the address on Fiona's old family record as old, by entering yesterday's date in the 'To' field. If you do not do this, then Fiona's address will be added as a second address for the couple.

John Smithson's Person Record

9. Go to John Smithson's Person record and update this to show Married status, new address, etc.
10. You could select the `Maintain` menu, then `Relationships`, and add a relationship to show that he is the husband of Fiona Smithson as described in section 2.4.3. However, this is a reciprocal relationship to that set up in step 6, so if you did this there, it has already been done.
11. Check that OMer Field information is correct for the three current records.

John and Smithson's Family Record

12. Finally go to the new family record to check that all data has been transferred correctly.

----- End of Chapter 2 -----

Chapter 3 Maintaining Tables

3.1 Principles of Table Maintenance

When you enter data about partners, you often need to choose an item from a list of possible choices; you cannot enter an option that is not on the list. The set of possible choices is stored in a list or 'Table', in the form of short codes and descriptions. An example is the list of partner Special Types.

For most of these items, it is possible for a local office to add new choices, and to modify the descriptions. This Chapter explains how to alter the list of choices by editing (maintaining) the tables.

When you add an item to a list of possible choices, it is sometimes also necessary to include additional detail about it. For example, if you add a new publication to the list, it is not enough to give the publication name; you must also add the frequency (for example, weekly, monthly).

The chapter explains how to make changes to most of the Partner Tables. In the case of two sets of tables, **Form Letter Tables** and **Mailmerge Forms**, the tables are more than just a list of options – they are an important part of the process of sending a form letter or extracting data for mailmerge. So, these two sets of tables are not described here, but in Chapter 6, page 137, which explains these operations in detail.

3.1.1 Standard Options

Some of the choices are standard options fixed for use throughout the Organisation, and these cannot be deleted. It is also not possible to delete a choice if it has already been used in any partner's record. Sometimes choices become out-of-date (for example, a publication is no longer produced). In such cases you can mark the choice as being 'unassignable' or 'not valid'. It cannot then be used in the future. These two situations are shown on many of the Table entry edit screens (for example Figure 3-22, page 79).

Deletable - If the box is checked, it is possible to delete this option, if it has not been used. If the box is grey and is not checked, this is a standard OM option and it cannot be deleted.

Assignable - If the box is checked, it is possible to use this code.

3.1.2 The Partner Tables

The PETRA Partner System includes several different groups of Tables:

Partner Tables list of choices relating to general partner information (for example, lists of countries) and personal details (for example, special types of partner or occupations).

Subscription Tables list details of the publications that can be received from that office, including cost, frequency, etc.

Address Tables allow you to design address formats suitable for different countries. These are explained in **Chapter 5**, '**Printing Labels and Envelopes**', page 131.

Form Letter Tables are used whenever a 'mail merge' letter is written. This is a letter which is to be sent to different partners, but which includes some specific data which is different for each partner. Form letters are explained in **Chapter 6**, page 137.

Mailmerge holds forms that list the items (data fields) to be exported for use in a mailmerge (see **Chapter 6**, page 137).

Mailings is a list of mailing events that you wish to record (to see the results).

The table on the next page is an index to show which items of data are stored in which table.

Table	Contents	Page
Partner Tables		
Acquisition	How the partner was introduced to this office	Pg. 68
Business	Types of business for partners of class Organisation	Pg. 68
Contact Attribute	Contact details, such as 'Sent a book'. Details provide finer detail.	Pg. 69
Contact Method	Indicates whether a contact was made by phone, letter, fax, etc.	Pg. 69
Country	Country name, international telephone codes, postal codes and time zone	Pg. 72
Denomination	Denomination for partners of class Church	Pg. 73
E-mail Address	Commonly used E-mail domain names (e.g. for offices of the Organisation)	Pg. 73
Frequency	For sending a publication or receipt weekly, monthly, annually etc.	Pg. 74
Interest Category and Partner Interest	Types of work that partners are interested in (e.g. MEDICAL) , and broad caegories that these interests are grouped in (e.g. AIDS, EYESIGHT,)	Pg. 75
Language	Language spoken	Pg. 75
Local Partner Data Fields	Data fields that can be used to record additional items of partner data for use on a particular PETRA site only (data is not exported.)	Pg. 92
Marital Status	Used for partners of class Person to show if they are single or married.	Pg. 75
Occupation	Main occupation - used for partners of class Person	Pg. 75
Partner Special Type	Special Types of partner, for example, Board member, Pastor	Pg. 78
Partner Status	Whether a partner is Active, Private, etc.	Pg. 79
Relationship	For defining relationships between partners	Pg. 80
Subscription Tables		
Publication	Names of publications supported by the office	Pg. 81
Publication Cost	The cost of the publication, including mailing costs details	Pg. 82
Reason Subscription Given	The reason that a subscription was started for a partner (e.g. they requested it, they made a donation, etc.)	Pg. 83
Reason Subscription cancelled	The reason that a subscription was cancelled	Pg. 83
Address Tables		
International Postal Type	Lists the various world regions for which your local post office has different charge rates.	Pg. 83
Address Layout	Used to set up address formats for labels, etc.	Pg. 84
Address Title Override	Defines how to replace titles (e.g. Mr, Mrs) when sending to a different country (e.g. Herr, Frau for Germany)	Pg. 88
Addressee Type	Lists the different types of partner who may need to be addressed differently in a letter, e.g. Type 'Single Male' might be addressed Dear Sir	Pg. 89
Location Type	Lists types of address location, e.g. home, business, mobile, etc.	Pg. 90
Postcode Regions	To set up groups of postcodes relating to different areas, for use in extracts.	Pg. 91
Form Letter Tables		
Form Letter Body, etc.	Since Form Letter Tables are a key part of the whole process of sending a form letter, they are not described here, but as part of Chapter 6, 'Form Letters and Mailmerge'	Pg. 148
Mailmerge Forms	Since Mailmerge Forms are a key part of the data export process, they are described in the section dealing with this (ection 6.5, Exporting Partner Data for Mailmerge.)	Pg. 156
Mailings	List of particular mailing events that you wish to record.	Pg. 92

Figure 3-1 List of Partner Tables

The rest of section 3.1 describes the general principle for maintaining all Tables. The following sections give detailed information on all Partner Tables (with the exception of Form Letter Tables and Mailmerge Forms, which are covered in Chapter 6.

3.1.3 Checking and Printing Table Contents

Before you decide whether to add an item to a table, you need to know what is in the table already. When PETRA is installed, each table contains a standard set of choices for each list. To check the latest position on PETRA, go to the *List Screen* for the table you are interested in (see, for example, Figure 3-3). You can view the list on the screen and print it by selecting `Print` on the menu bar.

Certain table codes are exported with partner information (eg special type). If you import partners from another office you may find that additional codes have been added to your tables.

3.1.4 Table Maintenance Example

There are three main steps to maintaining a table, as follows:

Step 1 Open the table that you wish to change to show the list of entries

Step 2 Select the item to change

Step 3 Enter or change the data

The following example shows how these three steps are used. This example is followed by an explanation of a Find facility which helps in the maintenance of some tables.

The three main steps in maintaining a table will be explained using an example.

Example: The International telephone access code for Ethiopia is 251. Let us suppose that we need to change this to a different number (e.g. 256).

Step 1 - Open the table that you wish to change

From the list on page 64, find the table that contains the international access code (this is the Country table, which is one of the Partner Tables). Go to the `Maintain Tables` menu at the top of the *Partner Welcome Screen*. This shows the four groups of tables. Click on `Partner Tables` and you see a sub-menu which allows you to choose the particular table that you wish to maintain (Figure 3-2). Click on `Country`.

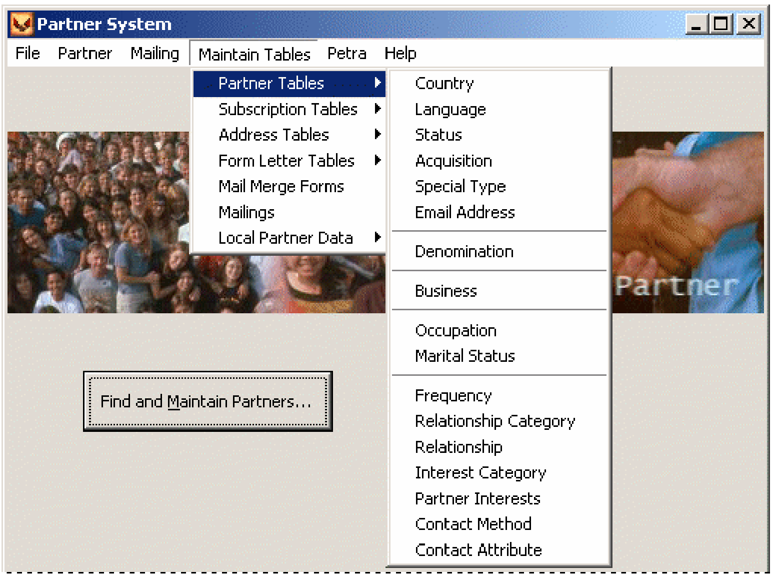


Figure 3-2 Maintain Tables Menu

When you have selected the Table that you wish to change, you see a list of the possible choices for that particular data item. As an example, Figure 3-3 shows the Country List Table (for maintaining or adding a country).

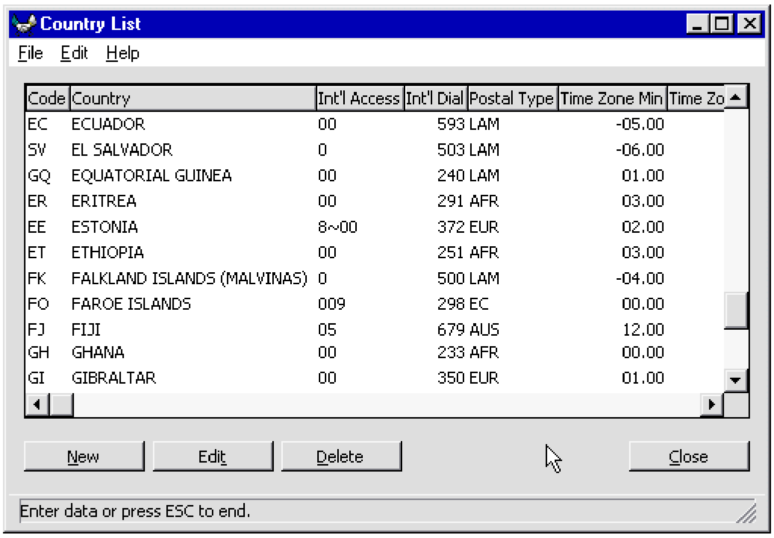


Figure 3-3 Country List Screen

Step 2 - Select the Item to Change

You can now view the existing data in the list using the scroll bars, and select a country if required using the mouse or cursor keys. You can then use the buttons at the bottom of the screen either (i) to add a new item to the list, or (ii) to select an existing item to edit it, or (iii) to select an existing item on the list and delete it. You will not be able to delete an item if it is a standard system code or if it has been used already on your system. This List Screen looks similar for all Tables (although of course the content differs.) For our example, we select `Ethiopia` and then click the Edit button.

Step 3 - Enter or Change the Data

If you choose to add a new item, or edit an existing one, you are taken to an 'edit' screen which allows you to enter (or change) the details about that item. These screens are different for each Table, and are shown in the appropriate section below. In our example, the *Country Maintenance Screen* appears, showing details for Finland (Figure 3-4). You can now edit the data in the white fields. For our example we can see the International Dialling Code for Ethiopia is 251, and we can change this as required. The Country Code is shown in grey, to indicate that this cannot be edited (country codes are part of the standard data supplied with PETRA.)

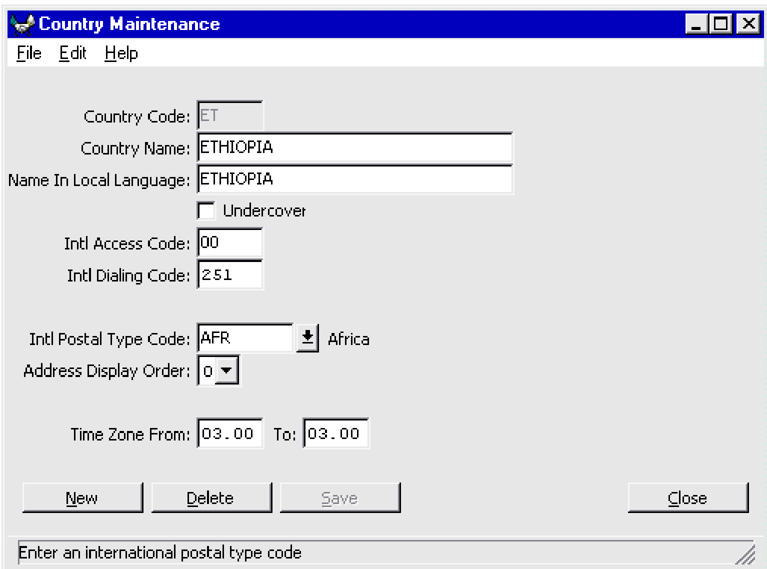


Figure 3-4 Country Maintenance Screen

Changes take effect immediately after saving.

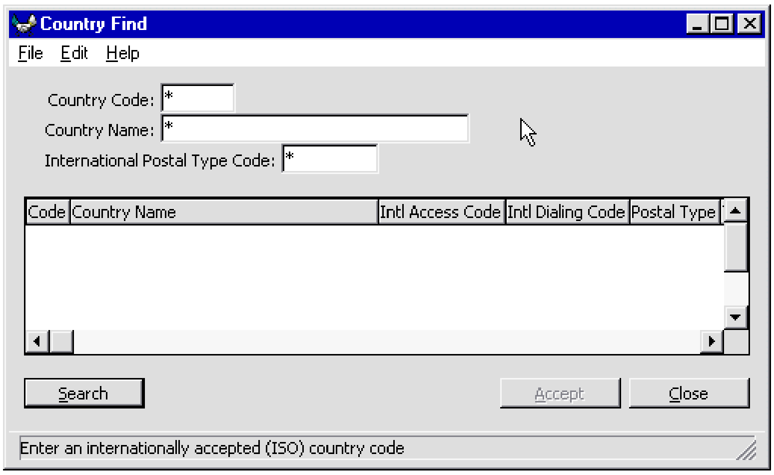
3.1.5 The Find Facility

In step 2 above, it was quite easy to find the country Ethiopia in the list. However, sometimes it is more difficult. For example, a French speaker working in an English-speaking office may not know that the English name for the 'Les Emirats Arabes Unis' is the 'United Arab Emirates' (UAE). The *List Screen* for each table has a **Find** facility to help the user to find an entry to edit.

Example: A Fench-speaking person wants to find the "United Arab Emirates" from the Country List Screen.

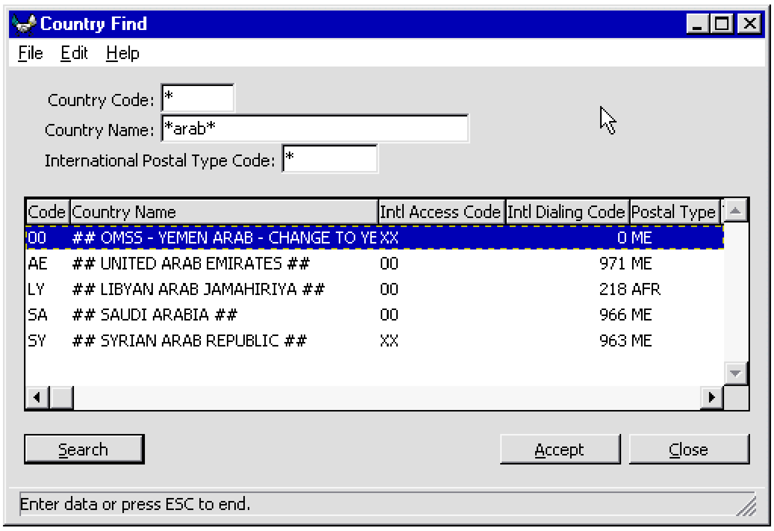
1. From the *Country List Screen* (Figure 3-3, page 66), go to the `Edit` menu at the top menu bar, and select `Find`. A *Find screen* appears:

Figure 3-5 Country Find Screen



2. You can now search for the country code, the country name or the International Postal Type (region). An asterisk (*) represents any other letters (a 'wildcard'). We do not know the English for 'Les Emirats Arabes Unis', but we may guess that it has the letters 'arab' in it somewhere. In the country name we type: *arab*, and then click Start Search. The Find facility looks for all countries with these letters in the name. The results are shown as follows:

Figure 3-6 Results of Country Search



3. You can now look for the country from the small list. Highlight 'United Arab Emirates' and click Accept. This takes you to the Maintain Screen of step 3 above.

3.2 Partner Tables

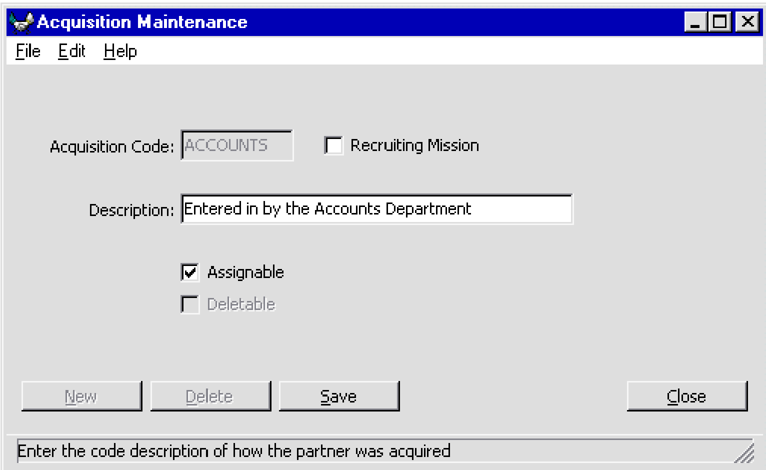
The Partner Tables relate to information which is specific to partners. The list of tables is given on page 64. The main steps have been described in section 3.1.4, ‘Table Maintenance Example’, page 65, but the following sections give specific information for each table.

3.2.1 *Acquisition Route for Partner*

Acquisition describes how the partner was first introduced, that is, how the office obtained or ‘acquired’ this partner. It may be used to record if they were introduced by a particular group or at a particular event. There is a standard list of acquisition methods and codes, and these existing codes cannot be deleted. Section 3.1.3 on page 65 explains how to view the existing list. To add to or amend Acquisition details:

1. From the Maintain menu, select `Partner`, then `Acquisition`. The *Acquisition List Screen* appears.
2. To add a new type of acquisition, click New. To edit an existing acquisition method, select it from the list and click Edit. The *Acquisition Maintenance Screen* appears.

Figure 3-7 Acquisition Maintenance Screen



3. Enter or change the various fields as required:

   Acquisition Code The short code for the acquisition method.

   Description An explanation of the code (for example, a group or an event).

   Recruiting Mission Check this box if the introducing group is a mission group that recruits people for short-term campaigns.

   Assignable Check this box to indicate if this acquisition method is still valid

   Deletable If this box is checked, then it is possible to delete this entry. If the box is grey and cannot be checked, it means the code shown is a standard entry, and so cannot be deleted.
4. Click Save , and then Close.

3.2.2 *Business*

The Business Table is used for Partners of class Organisation, to show the type of business that the organisation does. There is a standard list of businesses and codes, c To add to or amend business details:

1. From the Maintain menu, select `Partner`, then `Business`. The *Business List Screen* appears.

2. To add a new business, click New. To edit an existing business, select it from the list and click Edit. The *Business Maintenance Screen* appears.

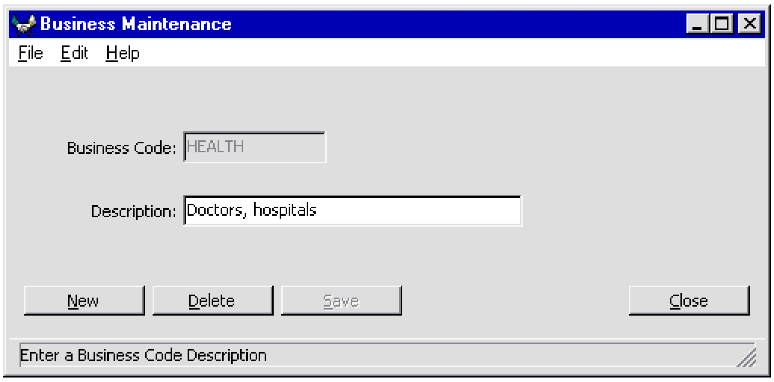


Figure 3-8 Business Maintenance Screen

3. Enter or change the various fields as required:

   Business Code The short code for the business

   Description An explanation of the type of business

4. Click Save , and then Close.

3.2.3 Contact Attributes

Contact Attributes are codes that can be added to contact information. Their purpose is to allow you to record contact 'events' in a standard way, and to be able to identify all partners involved in this 'event'. For example, the attribute 'Sendbook' may be used to record that a partner has been sent a book. In order to avoid having a very large list of attribute codes, further detail can be provided by using 'attribute details', which are like 'sub-codes' attached to each attribute code. In the above example, the attribute 'Sendbook' could have several optional attribute details, each of which would specify which particular book. The table below gives possible examples.

Example of Contact Attribute		Examples of Attribute Details	
SENDBOOK	Office has sent a book as a gift	OOTCZ	Out of the Comfort Zone
		GRACAWK	Grace Awakening
		PILGPROG	Pilgrim's Progress
EXHIBIT	Partner visited exhibition stand	MISSN04	2004 Missions conference
		ASIA2005	Asia Challenge Conference Nov 2005

There are therefore two possible stages in setting up contact attributes. First, contact attributes can be set up to broad categories. Then for each attribute, attribute details can be defined as 'sub-categories'. After defining or editing a contact attribute, PETRA will take you on automatically to a screen for defining the first attribute detail; however, it is not necessary to set up details.

To add to or amend contact attributes:

1. From the `Maintain` menu, select `Partner Tables`, then `Contact Attribute`. The *Contact Attribute Screen* appears.

2. To add a new contact attribute, click New. To edit an existing contact attribute, select it from the list and click Edit. The *Edit Contact Attribute Screen* appears.

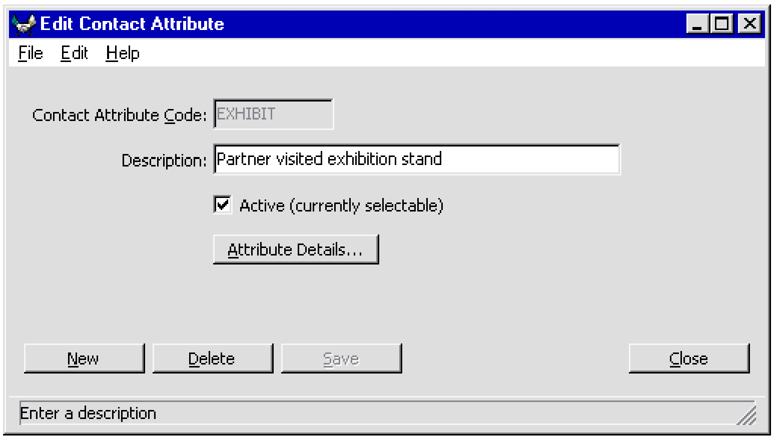


Figure 3-9 Edit Contact Attributes Screen

3. To edit an existing description, or to enter a new Contact Attribute, enter data as below.

   Contact Attribute Code Choose a code of up to 8 letters/numbers (eg EXHIBIT).

   Description Enter a description that explains the exact meaning of the attribute.

   Active If this box is checked, the code can still be used. If a code can no longer be used for new contacts (for example because it refers to a past event), then click this box so that it becomes empty.

   Attribute Details If you are editing an existing attribute, you can click this button to go to a list of attribute details (see below). If you are entering a new attribute, you must first save the description of the new attribute.

4. Click Save. If this is a new attribute, this will take you directly to a screen for entering the first attribute detail (see below, Figure 3-11). If you are just editing an existing attribute, you can click Close. To view or edit attribute details, click the Attribute Details button. The attribute details list appears.

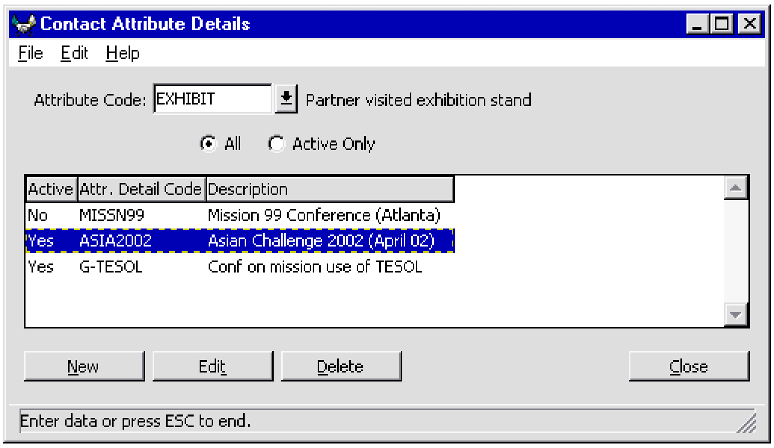


Figure 3-10 Contact Attribute Details List screen

This screen allows you to add new attribute details for a contact attribute, or to edit existing details. The Attribute Code drop down box also makes it easy to review lists of attribute details for other contact attributes. Click New or select an attribute and click Edit. The *Contact Attribute Detail Screen* appears.

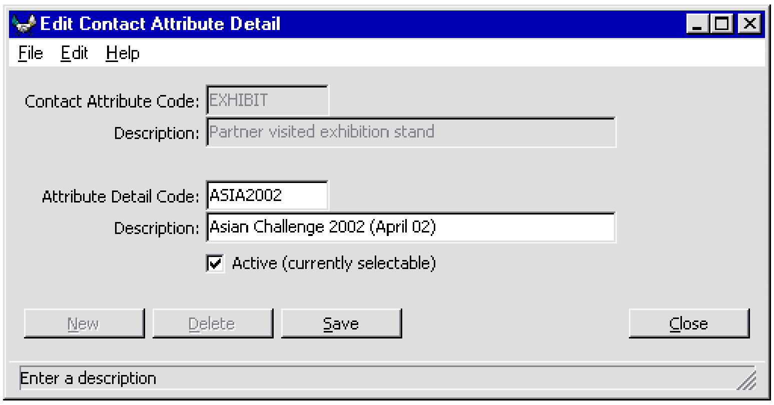


Figure 3-11 Edit Contact Attribute Detail Screen

If you do not want to enter attribute details, click Close; this will return you to the *Contact Attribute Screen*, where you can click `Close` again. Otherwise enter the first set of attribute details. The items are similar to the contact attributes. Enter data as required (in our example a code and the name of the book) and click Save , and then Close.

5. Click Close to exit, unless you wish to enter more contact attributes or contact attribute details.

3.2.4 Contact Method

Contact Method is used in partner records, and will be used more extensively in the PETRA Development Module, when contacts with partners are recorded. There is a standard list of contact methods and codes, and these existing codes cannot be deleted. Section 3.1.3 on page 65 explains how to view the existing list. To add to or amend a contact method:

1. From the Maintain menu, select `Partner`, then `Contact method`. The *Contact Method List Screen* appears.
2. To add a new contact method, click New. To edit an existing contact method, select it from the list and click Edit. The *Contact method Maintenance Screen* appears.

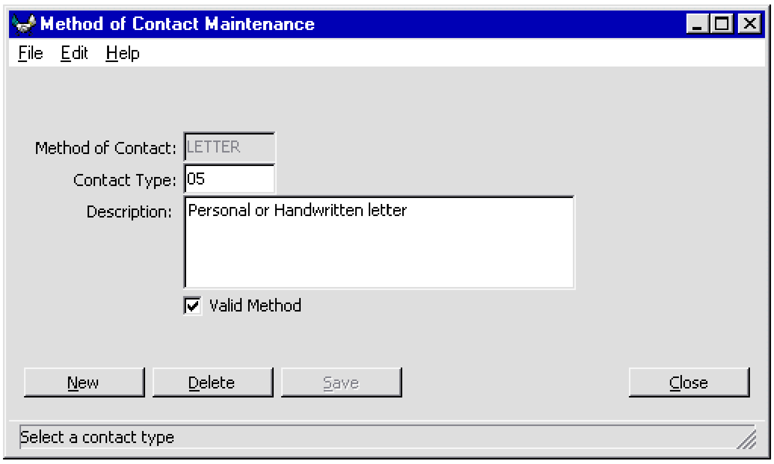


Figure 3-12 Contact method Maintenance Screen

3. Enter or change the various fields as required:

   Method of Contact The short code for the contact method

   Contact Type The use of these codes allows different methods of contact to be grouped together, but you can ignore it.

   Description An explanation of the contact method

   Valid Method Check the box if this contact method is still valid (can still be used.)

4. Click Save , and then Close.

3.2.5 Country

There is a standard list of countries and codes, and these codes cannot be changed. However, the names can be edited, and new entries can be added. In addition, an office can add the country name in its own language, which can then be used in printing address labels. To add or amend country details follow the example below.

Example: The UK Office is updating its record of Australia.

1. From the Maintain menu, select `Partner`, then `Country`. The *Country List Screen* appears.
2. To add a new country, click New. To edit an existing country (Australia in our example), select it from the list and click Edit. The *Country Maintenance Screen* appears.

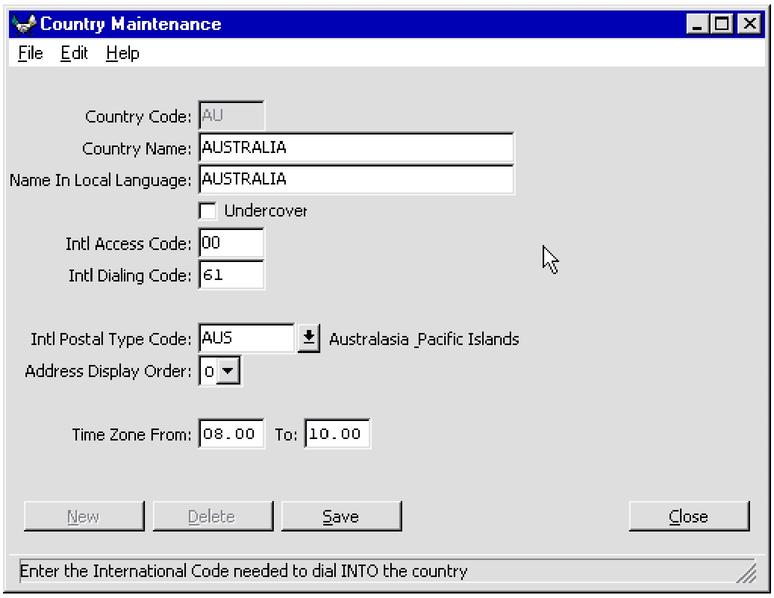


Figure 3-13 Country Maintenance Screen

3. Enter or change data in the various fields as required:

Country Code The short code for the country (these codes cannot be changed.)

Country Name The country name (in English)

Name in Local Language The country name in the language of your office. This can be used when printing address labels, which must be in the local language.

Undercover Check this box if this is a sensitive country and mail should not be sent in a normal open manner. After saving, sensitive countries appear as ##AUSTRALIA##. In this example Australia is not a sensitive country, so leave the box blank.

International Access Code The code used from within the country (Australia in the example) for accessing an international telephone line before dialling out to another country.

International Dialling Code The international telephone code used to dial into this country (Australia in this example) when dialling from another country, such as the US.

International Postal Type Code This code is used for mailing from the local office to other countries, to show the correct rate or tariff for postage costs. From the UK, Australia is Zone 2, so change this field using the drop-down menu to select Zone 2. The possible choices for this code are defined in another table (see section 3.4.1, page 83).

Address Display Order Selection of 1 or 0 shows the most usual address orders (see the message bar at the bottom of the screen in Figure 3-13.)

Time Zone From . . To . . This shows the country time zone relative to Greenwich Mean Time. The two figures are used for large countries which cover more than one time-zone.

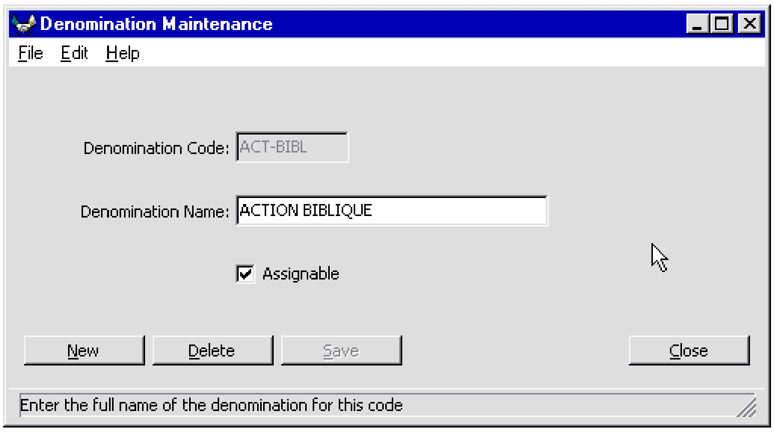
4. Click [Save] , and then [Close].

3.2.6 Denomination

The Denomination Table is used for churches (partners of class Church) to show which denomination they belongs to. There is a standard list of denominations and codes, and these existing codes cannot be deleted. Section 3.1.3 on page 65 explains how to view the existing list. To add to or amend denomination details:

1. From the Maintain menu, select `Partner`, then `Denomination`. The *Denomination List Screen* appears.
2. To add a new denomination, click [New]. To edit an existing denomination, select it from the list and click [Edit]. The *Denomination Maintenance Screen* appears.

Figure 3-14 Denomination Maintenance Screen



3. Enter or change the various fields as required:

   Denomination Code The short code for the denomination

   Denomination Name The name of the denomination

   Assignable Check the box if this denomination is still valid (can still be used.)

4. Click [Save] , and then [Close].

3.2.7 E-mail Address

The E-mail Address Table stores commonly used email domain names, particularly those of OM offices. There is a standard list of email domains and codes, and these codes cannot be changed. However, the descriptions can be edited, and new entries can be added. Each entry in the table begins with the symbol '@'. To add to or amend email details:

1. From the Maintain menu, select `Partner`, then `Email Address`. The *Email List Screen* appears.
2. To add a new e-mail domain, click [New]. To edit an existing Email domain, select it from the list and click [Edit]. The *Email Maintenance Screen* appears.

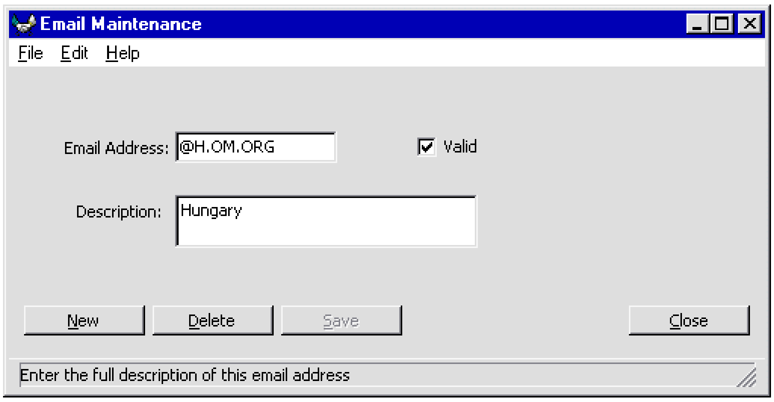


Figure 3-15 E-mail Maintenance Screen

3. Enter or change the various fields as required:

   Email Address The domain name of the office.

   Description The name of the group using this domain name

   Valid Check this box if this address is still valid (it may still be used.)

4. Click Save , and then Close.

3.2.8 *Frequency*

The Frequency Table holds a set of frequencies, which indicate how often something happens. These are used for some partners (who may wish to receive receipts of donations at regular intervals), and for certain publications (to say how many times a year a publication is produced). There is a standard list of frequencies and codes, and these codes cannot be changed. However, the descriptions can be edited, and new entries can be added. To add to or amend this list:

1. From the Maintain menu, select `Partner`, then `Frequency`. The *Frequency List Screen* appears.
2. To add a new frequency, click New. To edit an existing frequency, select it from the list and click Edit. The *Frequency Maintenance Screen* appears.

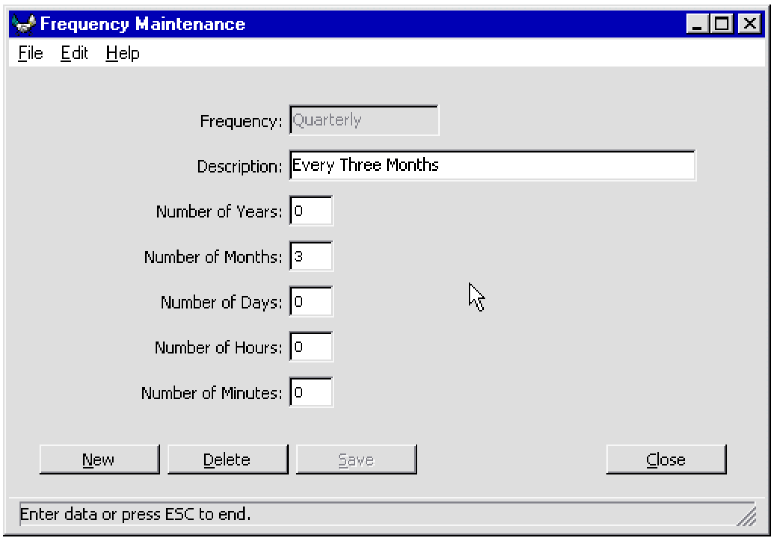


Figure 3-16 Frequency Maintenance Screen

3. Enter or change the various fields as required:

   Frequency The short code for the frequency

   Description Explanation of the code

Number of . . . Enter a number in one of the boxes to show the required time interval. Only integers are allowed: 1, 2, etc. It is possible to use more than one box; for example 1 month and 15 days means an interval of 6 weeks.

4. Click Save , and then Close.

3.2.9 *Interest Category and Partner Interest Tables*

These two tables work together. It is possible to record that a partner has an interest in one or more areas of service (see section 2.4.5, page 45). Since there are many possible **Partner Interests**, these are grouped into **Interest Categories**, so, for example, we may have an Interest Category MEDICAL and within this category we may have Partner Interests such as AIDS, EYESIGHT, MALARIA, etc. Interest Categories must be set up first. When you then set up an interest, you must assign it to an existing category.

> **Tip–Interests and Interest Categories** When entering Partner Interests on the *Partner Edit Screen*, you can select as many Interests as you like, but not an Interest Category. However, sometimes you may only wish to record a general interest, such as MEDICAL. To allow this, when you set up an Interest Category, MEDICAL, it can also be useful to set up a general Partner Interest MEDICAL within the category MEDICAL, as well as the specific interests, AIDS, etc.

Interest Category Table

To enter an interest category:

1. From the `Maintain Tables` menu, select `Partner`, then `Interest category`. The *Category List Screen* appears.
2. To add a new category, click New. To edit an existing category, select it from the list and click Edit. The *Category Maintenance Screen* appears.

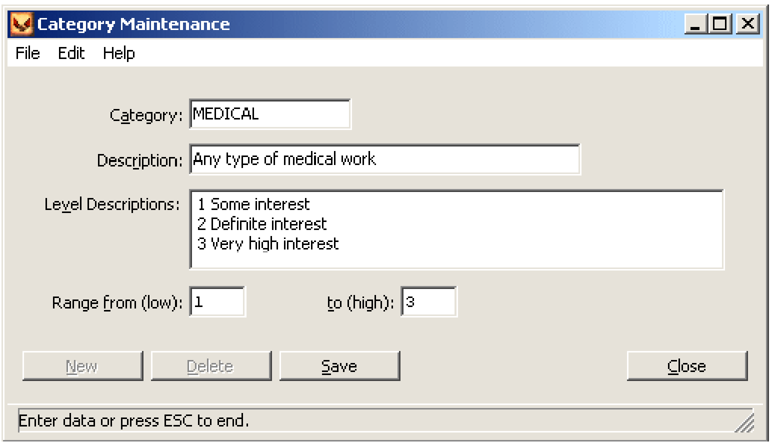


Figure 3-17 Category Maintenance Screen

3. Enter data as follows:

   Category Enter a category code (up to 8 characters). You will not be able to change this later.

   Description Enter a description, making it as clear as possible.

   Level Descriptions and **Range from (low)** and **to (high)** If you wish to record different levels of interest, then the range can be set, and Level Descriptions entered. Obviously, there is no point is setting up a level to represent 'No interest'!

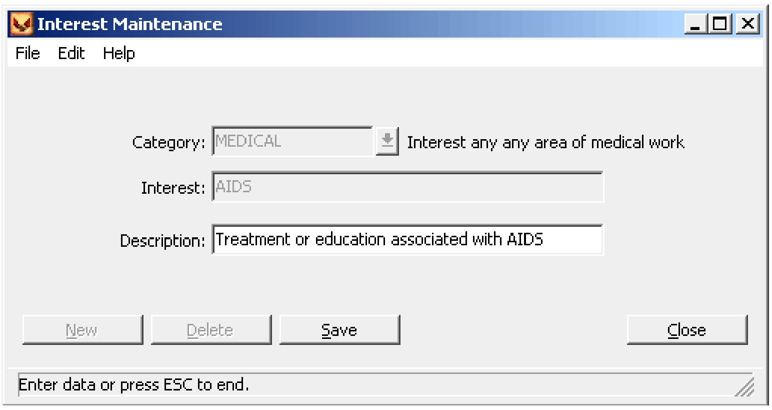
4. Click Save , and then Close. To enter another category, click `New` on the *Category List Screen*, otherwise click Close.

Partner Interest Table

To set up or edit a partner interest:

1. From the `Maintain Tables` menu, select `Partner`, then `Partner Interests`. The *Interests List Screen* appears.
2. To add a new interest, click New. To edit an existing interest, select it from the list and click Edit. The *Interest Maintenance Screen* appears.

Figure 3-18 Interest Maintenance Screen



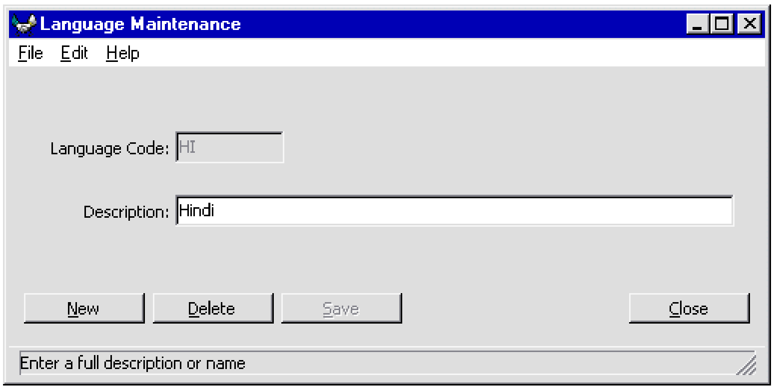
3. Select the Category, and then enter a code for the **Interest** and a **Description**.
4. Click `Save`, then Close. To enter another category, click `New` on the *Interest List Screen*, otherwise click Close.

3.2.10 Language

There is a standard list of languages and codes, and these codes cannot be changed. However, the names can be edited, and new languages can be added. To add or amend language details:

1. From the Maintain menu, select `Partner`, then `Language`. The *Language List Screen* appears.
2. To add a new language, click New. To edit an existing language, select it from the list and click Edit. The *Language Maintenance Screen* appears.

Figure 3-19 Language Maintenance Screen



3. Enter or change the various fields as required:

   Language Code The short code for the language; existing codes for main languages cannot be changed, but new languages can be added.

   Description The name of the language

4. Click Save , and then Close.

3.2.11 Marital Status

The Marital Status Table is used for Partners of class Person. There is a standard list of marital statuses and codes. These codes cannot be changed, and it should not be necessary to add a new type of marital status. However, the descriptions may be edited, and a new status can be added if it is required. To add to or amend this list:

1. From the Maintain menu, select `Partner`, then `Marital status`. The *Marital Status List Screen* appears.
2. To add a new marital status, click New. To edit an existing marital status, select it from the list and click Edit. The *Marital Status Maintenance Screen* appears.

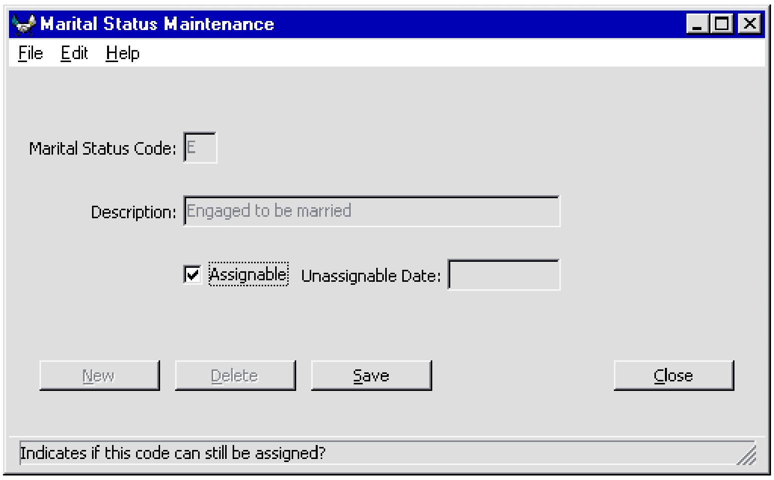


Figure 3-20 Marital status Maintenance Screen

3. Enter or change the various fields as required:

   Marital status Code The short code for the marital status

   Description Explanation of the code

   Assignable Check the box if this marital status is still valid (can still be used). If a status is later made unassignable (so that you can no longer use it) then the date that this change is made will be entered automatically.

4. Click Save , and then Close.

3.2.12 Occupation

The Occupation Table is used for Partners of class Person, to show their main occupation. There is a standard list of occupations and codes, and these existing codes cannot be deleted. Section 3.1.3 on page 65 explains how to view the existing list.

The list of occupation codes is very structured and quite complex. If you need to add more codes plan it very carefully to make sure that the structure is preserved. To add to or amend occupation details:

1. From the Maintain menu, select `Partner`, then `Occupation`. The *Occupation List Screen* appears.
2. To add a new occupation, click New. To edit an existing occupation, select it from the list and click Edit. The *Occupation Maintenance Screen* appears.

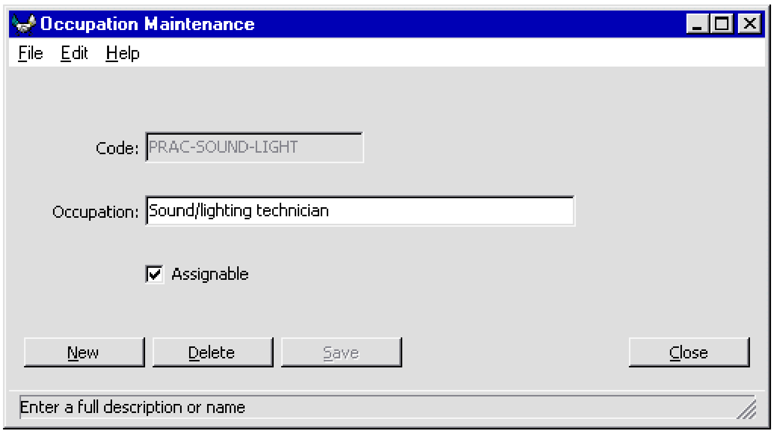


Figure 3-21 Occupation Maintenance Screen

3. Enter or change the various fields as required:

   Code The short code for the occupation

   Occupation The name of the occupation

   Assignable Check the box if this occupation is still valid (can still be used.)

4. Click Save , and then Close.

3.2.13 Partner Special Type

Partner Special Type is used to record that partners are of special types, for example local OM Board members. By adding a Type code for each person in an office you can easily identify prayer partners and create mailing labels for them. A partner can be of more than one type. There is a standard list of partner special types and codes, and these existing codes cannot be deleted. Section 3.1.3 on page 65 explains how to view the existing list.

Note When defining a new partner type, remember that this code will be exported with partners, and new codes may be meaningless to other sites. Also, it can be confusing if the number of codes becomes to great. Before adding a special code, consider whether a Contact and Mailing reference would be a more appropriate way of identifying a group of partners. (See section 2.4.6, page 46.)

To add to or amend Partner Special Type details:

1. From the Maintain menu, select `Partner`, then `Special Type`. The *Partner Type List Screen* appears.
2. To add a new type of partner, click New. To edit an existing partner type, select it from the list and click Edit. The *Type Maintenance Screen* appears.

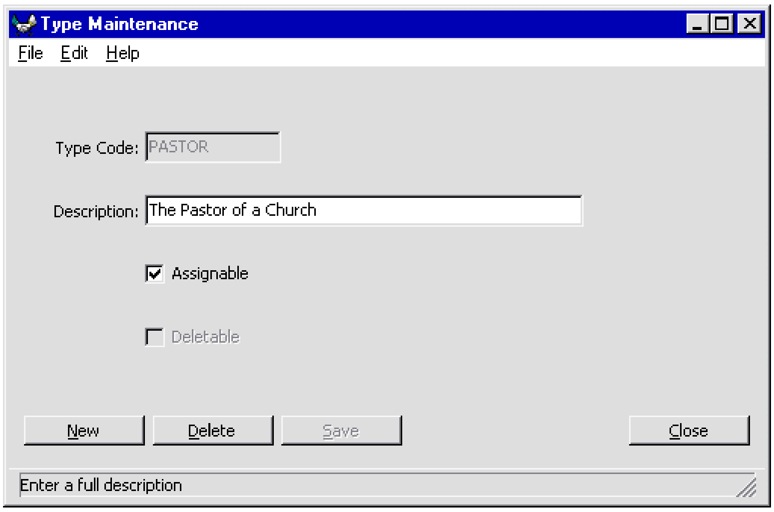


Figure 3-22 Type Maintenance Screen

3. Enter or change the various fields as required:

   Type Code The short code for the partner type.

   Description An explanation of this type.

   Assignable Check this box to indicate if this special type is still valid

   Deletable If this box is checked, then it is possible to delete this entry. If the box is grey and cannot be checked, it means the code shown is a standard entry, and so cannot be deleted.

4. Click Save , and then Close.

3.2.14 Partner Status

There is a standard list of statuses and codes, and these codes cannot be changed. Most work will be done with partners of status Active, and it should not be necessary to add a new status. However, the descriptions may be edited. **It is strongly recommended not to add any new status, since this may cause confusion if the partner is exported to another PETRA installation.** To add or amend partner status details:

1. From the Maintain menu, select `Partner`, then `Status`. The *Partner Status List Screen* appears.
2. To add a new Partner Status, click New. To edit an existing Partner Status, select it from the list and click Edit. The *Partner Status Maintenance Screen* appears.

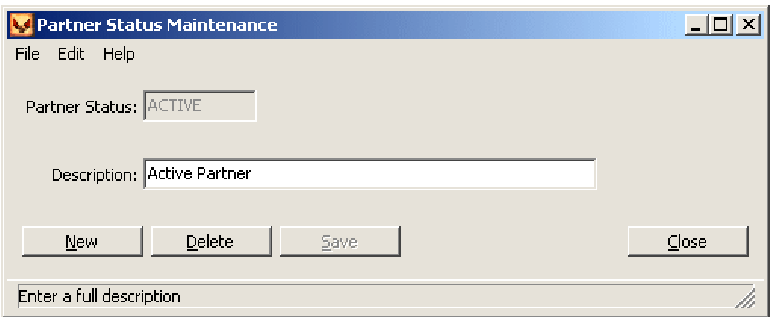


Figure 3-23 Partner Status Maintenance Screen

3. Enter or change the various fields as required:

   Partner Status Code The short code for the status.

   Description An explanation of the status

4. Click Save , and then Close.

3.2.15 Relationship

The Relationship Table is used for Partners of all classes, to show a relationship between two partners. This should not be confused with the Family Members facility (see Chapter 2). The description of a relationship between partner A and partner B depends upon the form of the sentence. The same relationship may be described in two ways. For example:

James MacDonald (partner A)	***is the secretary of***	*London Baptist Church (partner B)*
London Baptist Church (B)	***has as secretary***	*James MacDonald (A)*

For each relationship, there are two descriptions depending upon which partner is the subject of the sentence. Therefore, for each relationship description, there must also be a ‘reciprocal description’, and both must be entered in the table. There is a standard list of relationship methods and codes, and these existing codes cannot be deleted. Section 3.1.3 on page 65 explains how to view the existing list.

A relationship can be assigned to a **relationship category**. This is not necessary, but it provides a helpful way of organising the list of possible relationships, to make it easier to find the correct relationship. For example, all relationships which conern churches can be given the relationship category “church”. Setting up relationship categories is described in section 3.2.16, page 81.

To add to or amend a relationship:

1. From the Maintain menu, select `Partner`, then `Relationship`. The *Relationship List Screen* appears.
2. To add a new relationship, click New. To edit an existing relationship, select it from the list and click Edit. The *Relationship Maintenance Screen* appears.

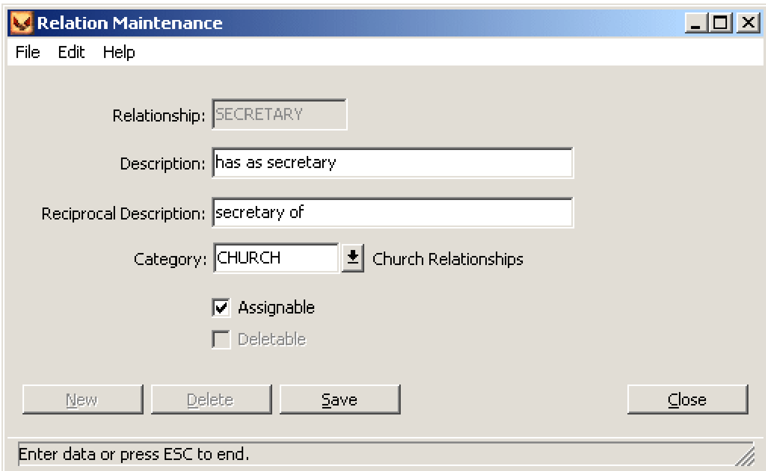


Figure 3-24 Relationship Maintenance Screen

3. Enter or change the various fields as required:

   Relationship Name The short code for the relationship

   Relationship Description The full description of the relationship between two partners (partner A and partner B)

   Reciprocal Description The reciprocal relationship (between partner B and partner A)

   Category If required, the relationship can be assigned to a relationship category (see explanation at the start of this section on relationships.)

   Assignable Check the box if this relationship is still valid (can still be used).

Deletable This box cannot be edited, but shows the status. Standard relationships cannot be deleted. New ones added by an office can be deleted provided they are not assigned to any partner.

4. Click Save , and then Close.

3.2.16 Relationship Category

Relationship categories are explained in the section on the relationships (3.2.15, page 80). To add to or amend a relationship category:

1. From the `Maintain Tables` menu, select `Partner`, then `Relationship Category`. The *Relationship Category List Screen* appears.
2. To add a new relationship, click New . To edit an existing relationship, select it from the list and click Edit . The *Relationship Category Maintenance Screen* appears.
3. Enter the Relationship Category and a clear description. Click Save, then Close .

3.3 Subscription Tables

The Subscription Tables contain information about partners' subscriptions to receive publications from offices. The list of tables is given on page 64.

The following sections explain how to maintain the different tables.

3.3.1 Publication

The Publication Table lists all the publications that an office uses (that is, all the publications that it can send out to partners who wish to subscribe to publications). There is a standard list of publications and codes, and these existing codes cannot be deleted. Section 3.1.3 on page 65 explains how to view the existing list. To add or amend a publication:

1. From the Maintain menu, select `Subscription Tables`, then `Publication`. The *Publication List Screen* appears.
2. To add a new publication, click New. To edit an existing publication, select it from the list and click Edit. The *Publication Maintenance Screen* appears.

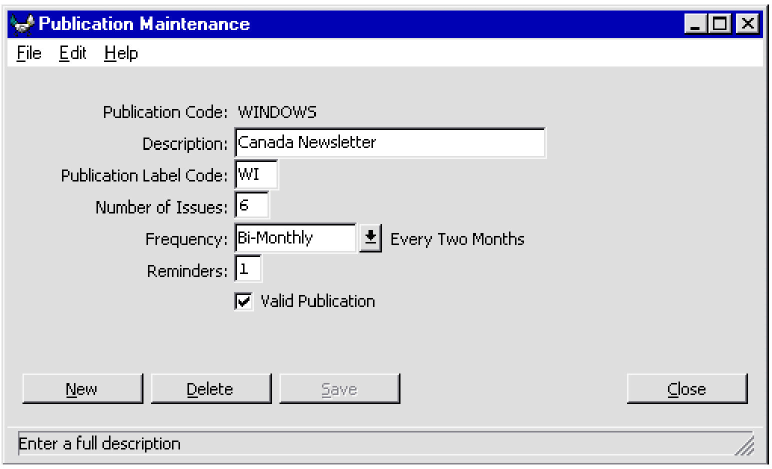


Figure 3-25 Publication Maintenance Screen

3. Enter or change the various fields as required:

Publication Code The short code for the publication. (In the figure, the code is shown in grey. Once it has been used, it cannot be changed.)

Description The name of the publication

Publication Label Code The code (normally 2 letters) that you want to be printed on labels when this publication is mailed.

Number of Issues The number of Issues published each year

Frequency The frequency of publication

Reminders Enter the number '1'. This is the number of reminder letters to be issued before a subscription is cancelled. For the early versions of PETRA it is only possible to send one reminder.

Valid Publication Check the box if this publication is still issued

4. Click Save , and then Close.

3.3.2 Publication Cost

The Publication Cost table allows cost data to be added for any publications entered in the publication table (section 3.3.1). Publication cost details will be different for every country, and so will need to be set up for each office. To add or amend cost details for a publication:

1. From the Maintain menu, select `Subscription Tables`, then `Publication Cost`. The *Publication Cost List Screen* appears.
2. To add cost details for a publication not shown on the list, click New. To edit existing cost details, select it from the list and click Edit. The *Publication Maintenance Screen* appears.

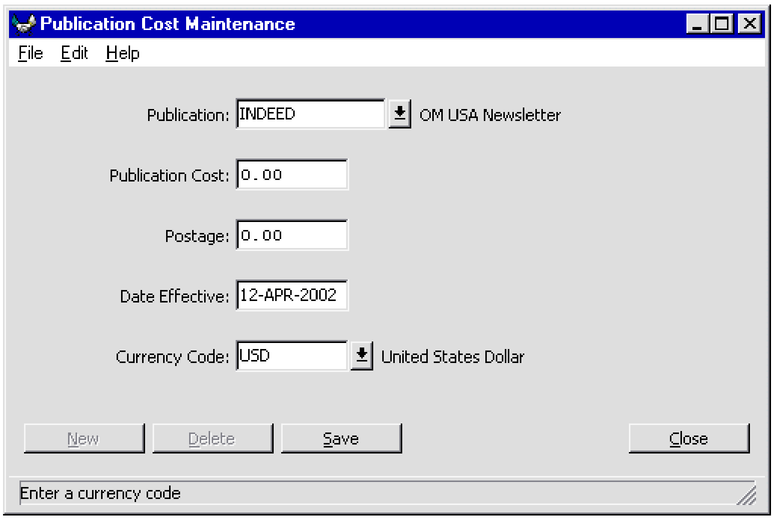


Figure 3-26 Publication Cost Maintenance Screen

3. Select the **Publication Code** using the drop down selection button. (This shows all publications that have been entered; to enter a new publication see section 3.3.1, Publication, page 81)
4. Enter or change the various fields as required:

Publication Cost If required, record the subscription cost for the publication. This may be the annual cost or the cost per issue, depending on the office's local requirements.

Postage The postage that the office has to pay for normal mailing of a single copy (within the country). As with the publication cost, this may be annual or per issue.

Date Effective The date from which that this information is correct

Currency Code This will normally be the sending field (home office) currency.

5. Click Save , and then Close.

3.3.3 Reason Subscription Given

This Table lists reasons for starting a partner's subscription to a publication. There is a standard list of reasons and codes, and these codes cannot be changed. However, the descriptions can be edited, and new entries can be added. To add or amend a reason for a subscription:

1. From the Maintain menu, select `Subscription Tables`, then `Reason Subscription Given`. The *Reason Subscription Given List Screen* appears.
2. To add a new reason, click New. To edit an existing reason, select it from the list and click Edit. The *Reason Subscription Given Maintenance Screen* appears.

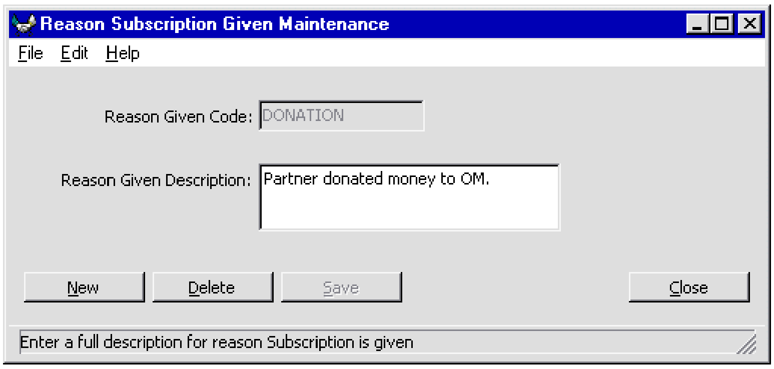


Figure 3-27 Reason Subscription Given Screen

3. Enter or change the various fields as required:

   Reason Given Code The short code for the reason

   Reason Given Description Explanation of the reason

4. Click Save , and then Close.

3.3.4 Reason Subscription Cancelled

This Table lists reasons for cancelling a partner's subscription to a publication. There is a standard list of reasons and codes, and these codes cannot be changed. However, the descriptions can be edited, and new entries can be added.

The procedure is almost identical to that of adding a reason for a subscription (see section 3.3.3), except that the Reason Subscription Cancelled Table is selected, and appropriate descriptions given.

3.4 Address Tables

The Address Tables provide options for how partners are addressed in letters or in printed labels and envelopes. The list of tables is given on page 64.

Several of the tables are simple lists, similar to the partner and subscription tables, but two are more complex. `Address Layout` is the way to set up address formats to meet local requirements, and involves several steps to design each format exactly.

The following sections explain how to maintain the different tables.

3.4.1 International Postal Type (Region)

This Table lists the different regions of the world for which the sending postal service charges different rates. This item is used in the country tables to show the postage charge band for sending mail to that country. There is a standard list of regions and codes, and these existing codes cannot be deleted. Section 3.1.3 on page 65 explains how to view the existing list. To add or amend a postal region:

1. From the Maintain menu, select `Address Tables`, then `International Postal Type`. The *International Postal Type List Screen* appears.
2. To add a new region, click `New`. To edit an existing region, select it from the list and click `Edit`. The *International Postal Type Maintenance Screen* appears.

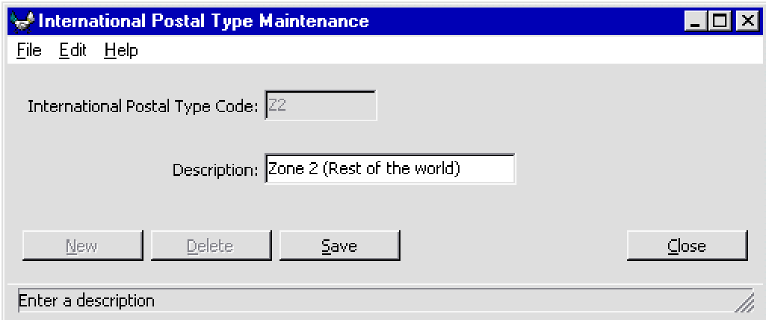


Figure 3-28 International Postal Type Screen

3. Enter or change the various fields as required:

   International Postal Type Code The short code for the postal charge group or region

   Description The cost region used by your local post office in fixing charges to this country

4. Click Save , and then Close.

3.4.2 Address Layout

This operation lets you set up address formats for mailing labels, addressing envelopes, or inclusion in Form Letters. The use of these layouts is explained in Chapter 5, 'Printing Labels and Envelopes' and Chapter 6, 'Form Letters'. Up to five different address formats can be defined, as follows:

`Envelope`	For addressing envelopes
`SmlLabel`	For printing onto small labels to be added to envelopes.
`Ltr_head`	Used inside form letters to show the address of the recipient.
`One_line`	Used in reports to show a partner's address on a single line.
`Rolodex`	For printing labels for a Rolodex machine (for printing onto small index cards).

However, an office may need to use different formats when mailing to other countries (for example the post code (zip code) needs to be put at the end of the country address for addresses in the UK, but before the town for addresses in Belgium. It is possible to define each of the above five types for any number of different countries. If a label has been set up for country 99, this will be used as a default for countries which have not been set up specifically.

To show how to create an address layout we will use an example. Additional features, such as including the name of a contact person, are explained after the example.

Example: The Belgium office wishes to create a layout for small labels for UK addresses. The required format is shown in this example:

Example	**Item in Partner Edit Screen**
`Mr John Paris`	Partner name
`Grosvenor Lodge`	Address Line 1
`52 Woodcote View`	Address Line 2
	Address Line 3
`Carlisle`	City
`Cumbria    CA1 1BJ`	County / Postcode
`Grande Bretagne`	Country

Note the following points:

Your address layout must allow for the **maximum number of lines** that you have used in entering partner data. The *Partner Edit Screen* allows for 3 address lines in addition to the city, county, postcode and country. For small labels you may have to put two lines together (for example County and Postcode in the above example).

It is not necessary to have data in every line for every partner. When an address is printed, PETRA normally does not print blank lines. So, in the example above, 'Carlisle' will be printed directly underneath '52 Woodcote View'. (If you really want to print blank lines, PETRA can be set to do this, as described later in this section.)

To create an address layout

1. From the Maintain menu, select `Address Tables`, then `Address Layout`. The *Address Layout Maintenance Screen* appears.

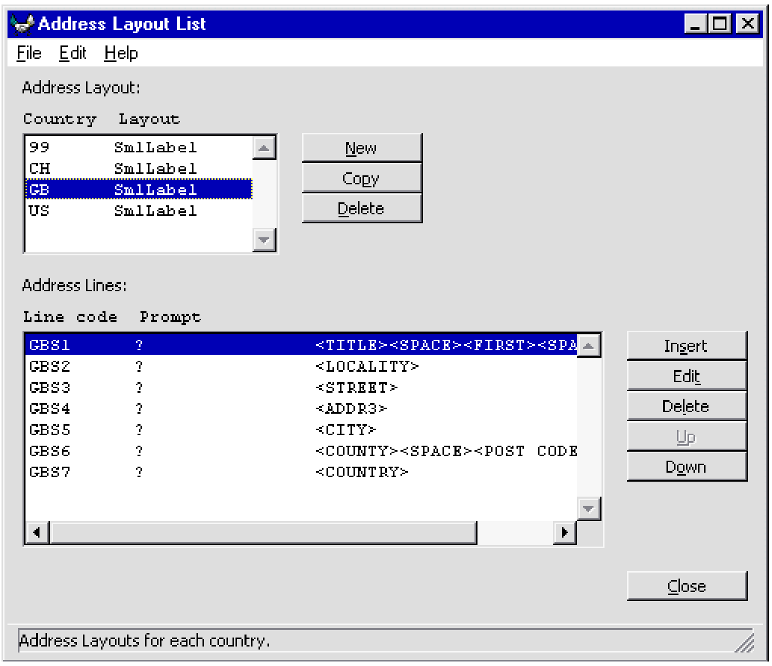


Figure 3-29 Address Layout Maintenance Screen (after adding GB Small Label layout)

The screen has two parts. The upper part shows the address layout types which have already been set up. The lower part of the screen shows the layout of the address type which is highlighted in the upper list. The use of the buttons will be explained as we work through the example, but the following table provides a summary.

Address Layout	(Lists all existing address layouts)
New	To insert a new address layout. Opens the screen to give a name and description.
Copy	Allows you to copy an existing layout to a new country/layout
Delete	Deletes an existing layout completely
Address Lines	(Shows the contents of the address lines for the layout highlighted in the upper list)
Insert	Inserts a new line at the top of the existing layout
Edit	Edits the address line highlighted in the lower screen. Allows you to change this line.
Delete	Deletes the highlighted line
Up	Moves the highlighted line up in the list
Down	Moves the highlighted line down in the list

2. We wish to add a new address layout, so in the upper part of the screen click `New`. (To copy an existing description, select it from the upper list and click `copy`. If you want help finding the correct code, then use the `Find` facility from the `Edit` menu in the Menu Bar.) The *Address Layout Screen* appears.

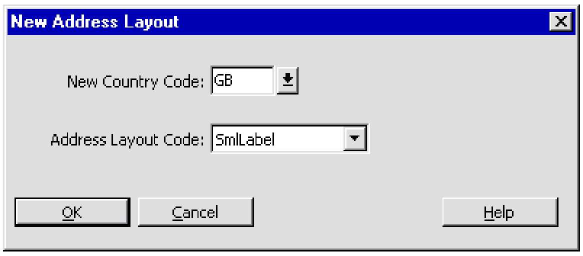


Figure 3-30 Address Layout Screen

3. Using the drop down selection buttons, select country `GB` and Address Layout Code `SmlLabel`. Click OK. The Address *Layout Maintenance Screen* reappears, as in Figure 3-29, page 85, but now including the new address layout type in the top box as:

   GB SmlLabel

   In this example, we are creating a new label from the start. Often you will find it quicker to use the Copy button to copy an existing label, and then modify the relevant lines to give the required format. In our example the bottom box is empty at this stage, because we have not yet defined address lines for this address layout.

4. We wish to set up the first line of the address layout, for example:

   Mr John Paris

   This is of the general form:

   <Title> <space> <First name> <space> <Family name>

   In the *Address Layout Maintenance Screen* go to the lower half of the screen (Address Lines) and click the Insert button. This takes you to the *Address Line Layout Screen* as shown in Figure 3-31.

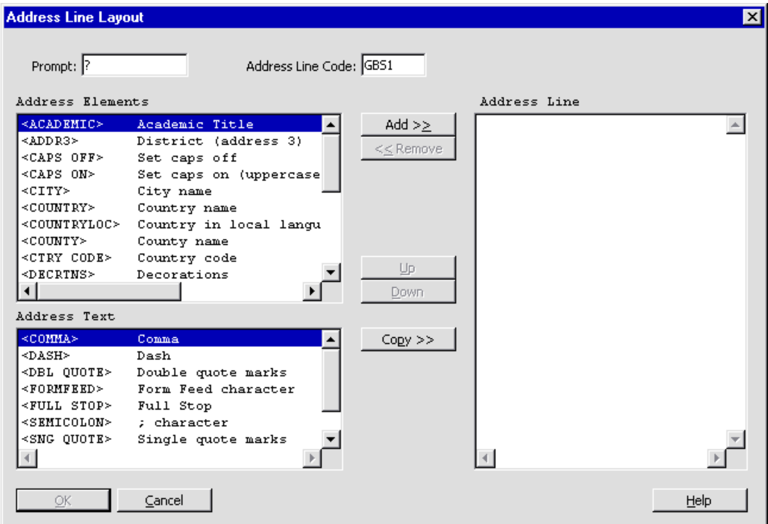


Figure 3-31 Address Line Layout Screen

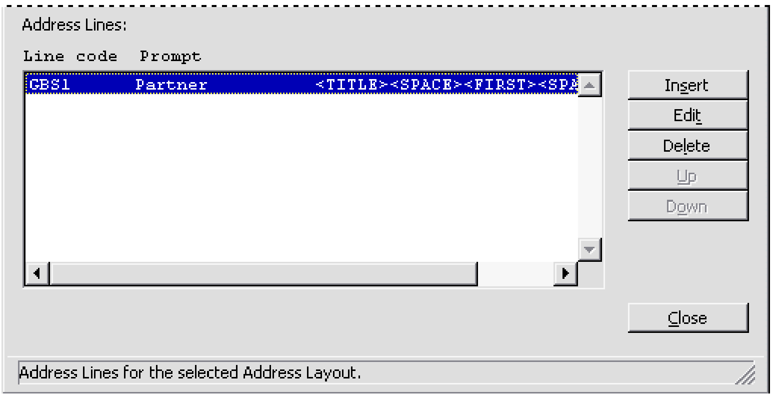
The screen has three main parts. On the left there are two boxes which show menus of items that we can use in our address line. The upper box contains the possible data items that can be used in an address (as entered in addresses during Partner Maintenance - see Chapter 2). The lower box contains punctuation items: space, comma, full-stop, and single (‘) or double (") quotation marks.

> **Note** See the end of this section for the meaning of some address elements, printing in CAPITALS, printing blank lines, form-feed when printing.)

The right hand box will show the layout of our first line. We build the address line by choosing the required items, one by one, from the left-hand boxes and moving them to the right hand box.

5. In the **Prompt** box, give a name to the first line of the layout. We will call this ‘Partner’, since this line will be the partner’s name. Type ‘Partner’ in the Prompt box. The Address Line Code is filled in automatically as GBS1 for Country GB, Small label, line 1.
6. In the top box select `<TITLE>` and then click `Add`. `<TITLE>` moves to the right hand box to show that it will be the first item in our address line (title means Mr, Mrs, etc.).
7. We must now add a space. In the lower left hand box, select `<SPACE>` and click Copy. Items in the lower box are **copied**, not **moved**, because you might want to use them more than once in a line. If you make a mistake, you can remove an item from the right-hand box; select the item to be removed and click Remove. You can move an item up or down in the right-hand box, by selecting it and clicking the Up or Down buttons.
8. Continue to add the remaining items `<First name>`, `<space>` and `<Family Name>`.
9. Click OK. The first line of the address layout is now finished, and it now appears in the lower box of the *Address Line Maintenance Screen*:

Figure 3-32 Lower portion of Address Line Maintenance Screen after entering line 1



10. To enter the second line, click Insert again. The *Address Line Layout Screen* reappears. Go back to step 5 above, and repeat the process, entering details for the second line of the address layout. Then continue with lines 3, 4, etc. For our example (page 84), the required layout is:

Line	Prompt	Elements	Notes
Line 2	Add Line 1	<Locality>	
Line 3	Add Line 2	<Street>	
Line 4	Add Line 3	<District>	
Line 5	City	<City>	
Line 6	County postcode	<County><space><space><postcode>	
Line 7	Country	<Countryloc>	Country name in local language is required for the post office.

Moving the position of lines When you click Insert, to enter the second line, the new line is added above the line that is selected - in this case line 2 will be added above line 1. When you have finished entering the lines in the address layout, you will need to move lines up or down to place line 1 at the top, line 2 below it, etc. To move a line up or down in the layout, select the line and click the Up or Down buttons.

After entering data for all lines, and moving the lines to the correct position, the lower box appears as below:

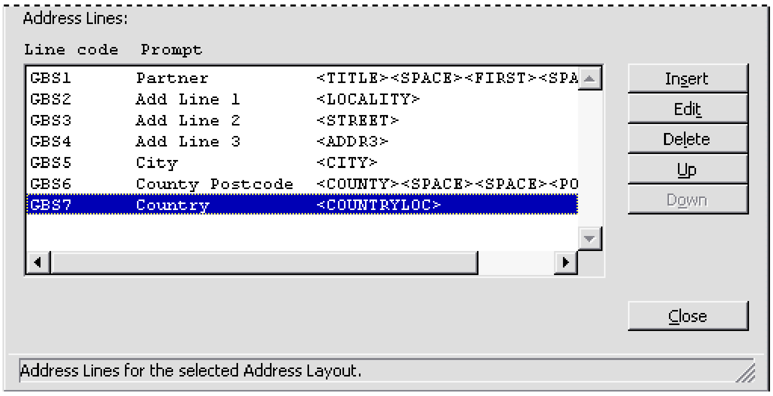


Figure 3-33 Lower portion of Address Line Maintenance Screen after entering all lines, and re-ordering

11. If you have finished, click Close. To enter another new layout, click `New`. To edit another existing layout, select it in the upper left box and click the top Edit button (see step 2 above).

Additional Notes on Address Elements

<PTNRNAME> inserts the Partner Short Name, (for example, "Smith, John, Mr".)

<PTNRNAMEL> inserts the Local Short Name.

Printing in Capital Letters (Upper Case) You may wish to print the city name or even the whole address in CAPITAL (UPPER CASE) letters. In the upper box of the Address Line Layout Screen (Figure 3-31) there are two elements <CAPS ON> and <CAPS OFF>. Move these elements to positions before and after the part of the address that you wish to be in capital letters.

Printing Blank Lines Normally blank lines with no data are suppressed (they are not printed). If you wish to print the line, even if it is blank, move <NOSUPPRESS> into the line.

Form Feed Copy the <FORM FEED> instruction from the lower box to ensure that each address appears on a new page.

Contact Person For churches and organisations you can include the name of a contact person in the address (see sections 2.4.1.3, page 46, and 2.4.1.4 for setting such a person for churches and organisations.) To use a contact's name in the address, insert <USECONTACT> before any name element, eg:

<USECONTACT><TITLE><SPACE><LAST>

This is where the name of the church or organisation would normally be used, so an additional <ORG/CHURCH> is available. When placed after <USECONACT>, this will insert the name of the organisation or church.

<USECONTACT><ORG/CHURCH>

3.4.3 Addressee Title Override

[Note: The current version of PETRA does not use this table.]

Addressee Title Override allows titles which are written in the normal language of a field (for example "Mr" or "Mrs" in English) to be changed automatically when sending to a destination using a different language (for example "Herr", "Frau" for letters sent to partners in Germany). To add to or amend address title override details:

1. From the Maintain menu, select `Address`, then `Addressee Title Override`. The *Address Title Override List Screen* appears.

2. To add a new override set, click New. To edit an existing set, select it from the list and click Edit . The *Addressee Title Override Maintenance Screen* appears.

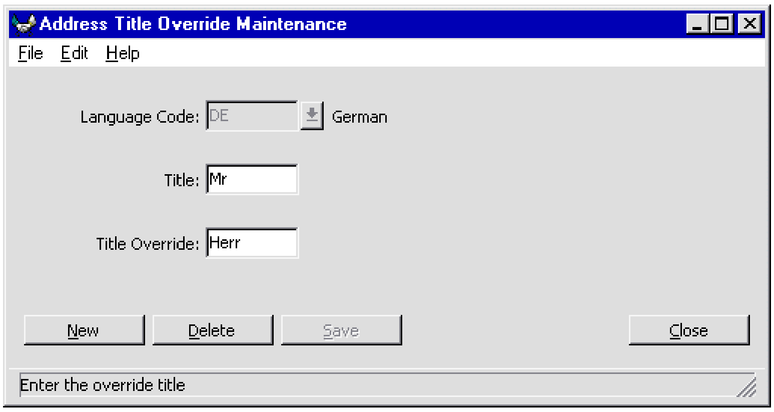


Figure 3-34 Address Title Override Maintenance Screen

3. Enter or change the various fields as required:

   Language Code The **destination** language

   Title The title as entered in the office partner system

   Title Override The actual title to be used when the address is printed

4. Click Save , and then Close.

3.4.4 Addressee Type

Addressee Type is used in form letters so that appropriate salutations can be included for different types of partner (for example ‘Dear Sir’ for a single male, ‘Dear Madam’ for a female, ‘Dear Brothers and Sisters’ for a church). Chapter 11 shows the standard list of addressee types, and these codes cannot be changed. To add or amend addressee types:

1. From the `Maintain Tables` menu, select `Address`, then `Addressee Type`. The *Addressee Type List Screen* appears.

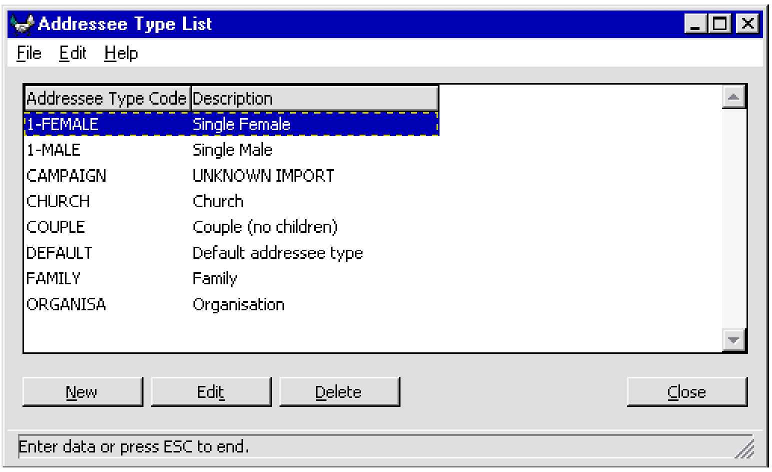


Figure 3-35 Address Type List Screen

2. To add a new Addressee Type, click New. To edit an existing type, select it from the list and click Edit. The *Addressee Type Maintenance Screen* appears.

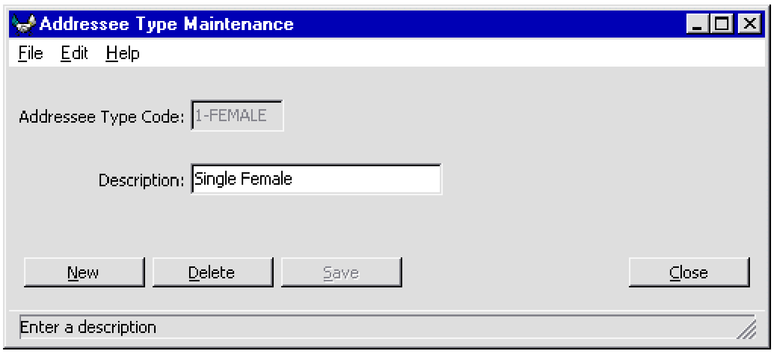


Figure 3-36 Address Type Maintenance Screen

3. Enter or change the various fields as required:

   Addressee Type Code The code for the addressee type

   Description A description of the type of addressee

4. Click Save , and then Close.

3.4.5 Location Type

Location Type is used to show whether an address/phone number is a home, business, church address, etc. There is a standard list of location types, and these existing codes cannot be deleted. Section 3.1.3 on page 65 explains how to view the existing list. To add or amend location types:

1. From the Maintain menu, select `Address`, then `Location Type`. The *Location Type List Screen* appears.
2. To add a new Location Type, click New. To edit an existing type, select it from the list and click Edit. The *Location Type Maintenance Screen* appears.

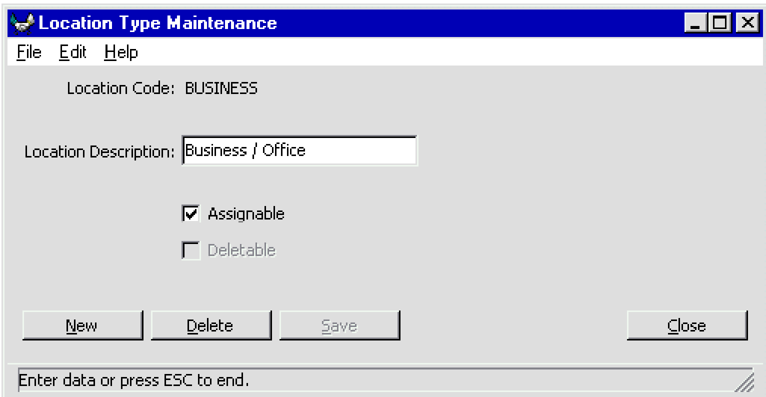


Figure 3-37 Location Type List Screen

3. Enter or change the various fields as required:

   Location Code The code for this location type

   Location Description An explanation of this type of location

   Assignable Check this box, unless you are editing an old location type that is no longer used.

   Deletable This is for information; you cannot change it. An empty box means that this is a standard code and so it cannot be deleted; a check mark means that it can be deleted.

4. Click Save , and then Close.

3.4.6 Postcode Regions

Postcode Regions are groups of postcodes, for example all postcodes in the eastern area of a country. They may be used in Extracts to select partners living in that region (for example see section 4.2.1, page 99.) Two steps are necessary to define postcode regions. First it is necessary to enter **postcode ranges**, giving each range a name (e.g. 1000-1999, “Brussels”.) After this we can define **postcode regions**, each of which can include several postcode ranges.

Example. Create a Postcode Region for the “East Anglia” region of Britain. This should include all postcodes for the areas of Cambridge (CAx xxx), Norwich (NOx xxx) and Ipswich (IPx xxx).

1. From the `Maintain Tables` menu, select `Address Tables`, then `Postcode Regions`. The *Postcode Region List Screen* appears.
2. To add a new postcode region, click New. The *Postcode Region Maintenance Screen* appears.

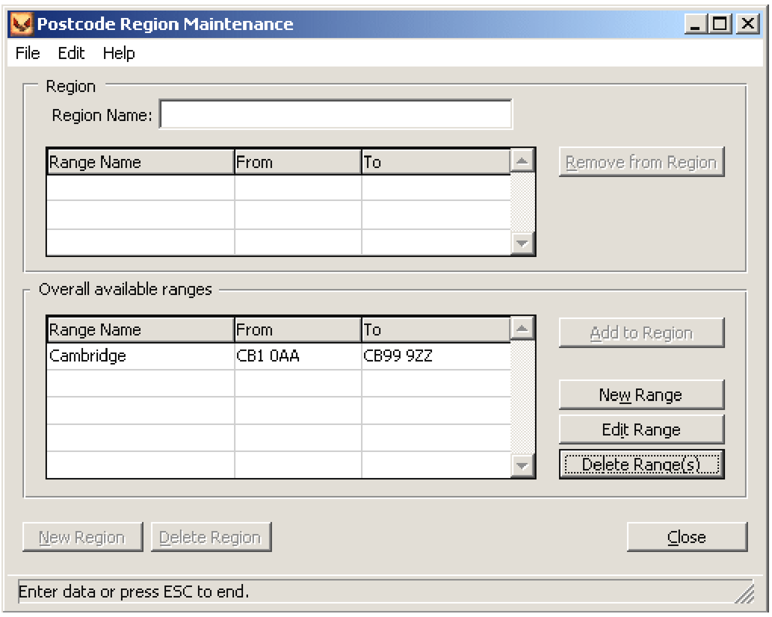


Figure 3-38 Postcode Region Maintenance Screen

3. First it is necessary to enter postcode ranges in the lower part of the screen. Click New Range. The *Postcode Range Maintenance Screen* appears.

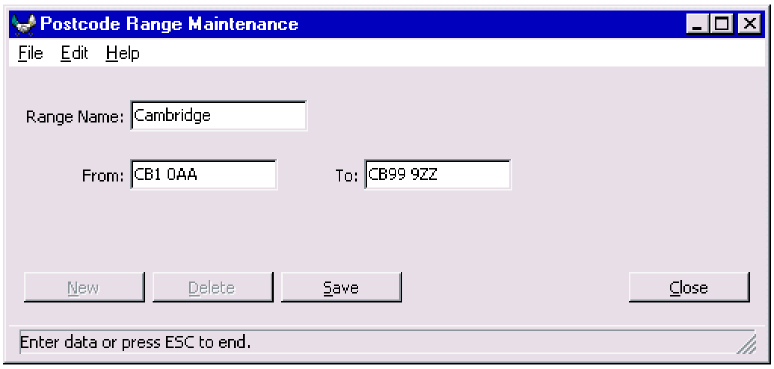


Figure 3-39 Postcode Range Maintenance Screen

4. Enter the first range. Click Save, then New. When all postcode ranges have been entered, click Close. The *Postcode Region Maintenance Screen* reappears, showing all the postcode ranges in the lower part of the screen. Enter the **Region Name** “East Anglia” at the top.
5. To add the postcode range for Cambridge to the postcode region East Anglia, select Cambridge in the lower box in the window, and click on the Add to Region Button. Cambridge now also appears in the upper box, showing that it has been added to the East Anglia postcode region. Continue to add all other postcode ranges required for East Anglia, and then click the Close button.

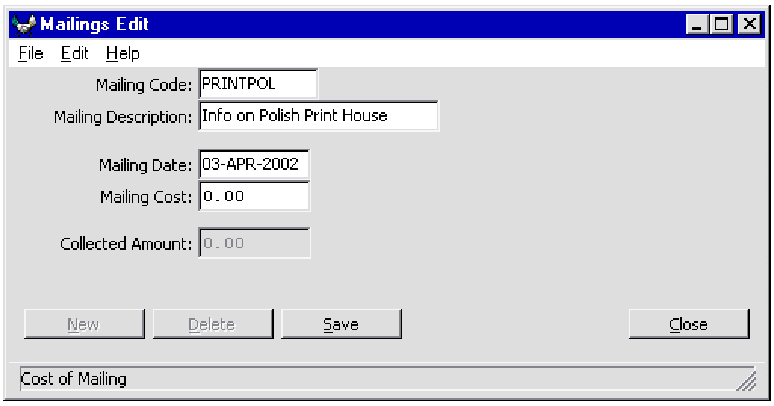
6. The *Postcode Region List Screen* reappears. This now shows all the postcode ranges which have been added to each postcode region. To add a new postcode region, click New, otherwise click Close. Note that all the postcode ranges which have been entered are available to add to any postcode region, so a range may be used for more than one region.

3.5 Mailings Table

The mailings table is a list of particular mailings that you wish to remember. For example you may send out a special appeal for funds for a new building project and wish to track the response to this particular letter. To add to or amend an entry:

1. From the Maintain menu, select `Mailings`. The *Mailings List Screen* appears.
2. To create a new insert, click New. To edit an existing one, select it from the list and click Edit. The *Mailing Screen* appears.

Figure 3-40 Mailing Edit Screen



3. Enter or change the various fields as required:

   Mailing Code The code for this mailing event. This can be up to 8 characters.

   Mailing Description Enter a description that explains exactly what the mailing was.

   Mailing Date The date that the mailing was sent.

   Mailing Cost If you wish to record the cost of this particular mailing, enter the figure here.

   Collected Amount You cannot enter anything in this field. In the future it is intended that this will display the amount that has been specifically raised as donations resulting from this mailing.

4. Click Save , and then Close.

3.6 Local Partner Data Fields

3.6.1 Introduction to Local Partner Data Fields

Local Partner Data fields are used by an office to record partner data which is only relevant to that office. It is not exported when a partner is exported. There is also Local Personnel Data and Local Application Data, which are similar, but are used in the Personnel Module. Local Partner Data is entered on the Local Partner Data Tab of the *Partner Edit Screen* (see section 2.4.4, page 45). The key features of Local Labels are as follows:

- Any number of data fields can be defined, along with their label.
- For each data field it is possible to select which partner classes it should be used for.

- The fields can be of any data type (text, date, number, yes/no, etc, or “select from list of options”). In the case of the “option lists”, any number of selectable options can be defined for each list.
- The fields can be grouped under headings that appear on the screen.
- The order of the fields in the list can easily be changed.
- A “Hide” option allows fields can be set up in advance but hidden until required.

Figure 3-41 shows a typical view of the Local Partner Data tab on the *Partner Edit Screen*, illustrating some of the features above.

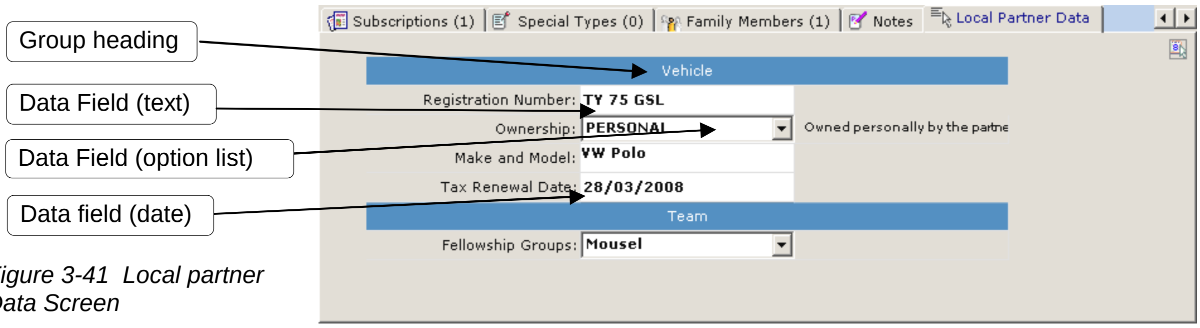


Figure 3-41 Local partner Data Screen

In this example, showing the local partner details for partner class Family, the labels have been grouped under two **Group Headings**, “Vehicle” and “Team”. Fields of three types have been used: **text** fields, a **date** field, and two drop down **option lists**. With the drop-down option list for Vehicle Ownership, the user can click on the down-arrow selection symbol and select one of two **options** (“Personal” or “Team”).

3.6.2 Setting up Local Partner Data Fields

The steps in setting up local partner data fields are as follows.

(a) **Preparation - Field Names** For each partner class, decide what fields of data you wish to store, and the type of field (including which fields are to be selections from drop-down lists of options.)

(b) **Preparation - Option Lists** For each field where you want the user to select from a drop-down option list, decide on a name for the list (e.g. “Colour”) and the actual choices to appear in that particular list (e.g. “Blue”, “Green”, etc). The list name will not appear on the screen, but it is needed as part of the setting up.

(c) **Set-up Option Lists** and **Options** Enter the names of the Option Lists. Then enter the different options for each list.

(d) **Set-up Fields** and **Labels** Define the Fields and the Labels that will appear on screen, one by one.

(e) When complete, adjust the **Field Order** if required so that the list appears as you want it to.

These steps will be illlustrated by an example.

Example: Currently Local Partner Labels have been set up as shown in Figure 3-41 for partners of class Family. It is now necessary to record the CO_2 emission class of each vehicle, because this affects the rate of car tax payable. So we need to add one more field in the Vehicles group, with a drop-down list to select the appropriate emission class.

1. Preparation–deciding what to do (steps (a) and (b) above) We wish to enter one new field which will be an option list. The data label appearing on-screen will be “CO2 Emission Class”. We will call the option list “Vehicle CO2 Emission”, and we need to enter 4 different options as follows.

Option	Description
Class A	up to 100g/km
Class B	101-120 g/km
Class C	121-150 g/km
Class D	over 151 g/km

2. We now move to step (c) above. Enter the Option List Name as follows. From the `Maintain Tables` menu, select `Local partner Data`, then `Option List Names`. The *Option List Name List Screen* appears, showing a list of the existing list names. To enter the new Option List Name, click New . The *Option List Name Maintenance Screen* appears, as follows (but with fields initially blank).

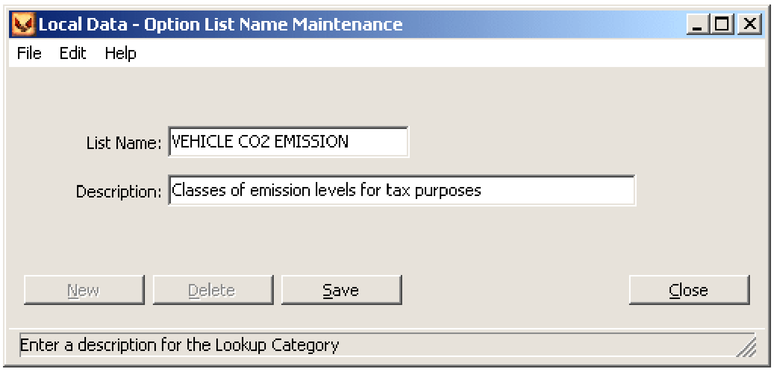


Figure 3-42 Option List Name Maintenance Screen

Enter the **List Name** and **Description**, as shown in the figure. Click Save .

3. Now enter the first of the Options. From the `Maintain Tables` menu, select `Local Partner Data`, then `Options`. The *Option List Screen* appears, showing a list of all the existing options and the names of the list(s) to which they belong. Click New . The *Local Data Option Maintenance Screen* appears. Enter data as described below.

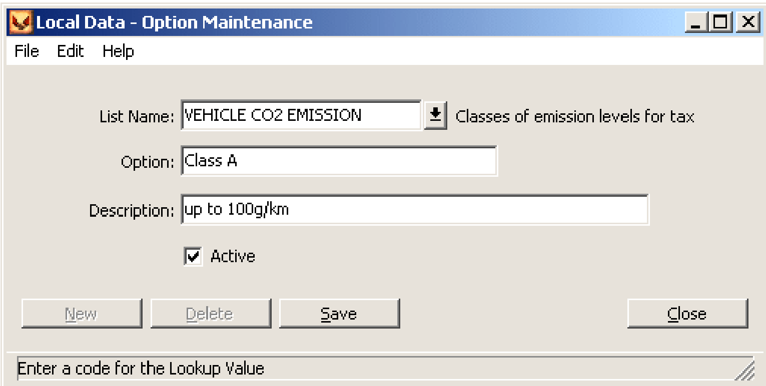


Figure 3-43 Local Data – Option Maintenance Screen

List Name From the drop down list, select the list name “Vehicle CO2 Emission”.

Option and **Description** Enter the first optionfrom the table above.

Click Save, then New to enter the second option. When all options have been entered, click Save and then Close . We have now completed step (c).

4. We are now in a position to set up the Field and Data label (step (d) above). From the `Maintain Menu`, select `Local Partner Data`, then `Fields`. The *Local Partner Data – Field List Screen* appears, showing all existing fields.

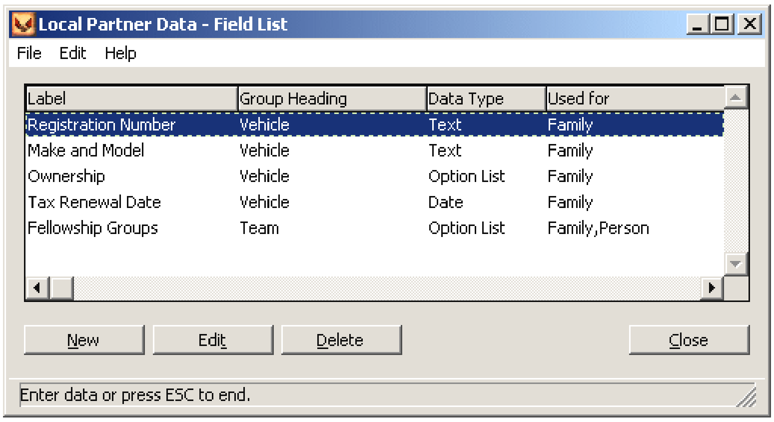


Figure 3-44 Local Partner Data – Field List Screen

The list shows all existing fields, showing the label, group heading, data type and partner class(es) for which it is used. If you scroll right, you can also check if any fields are hidden. (The above list can be compared with Figure 3-41, page 93.)

5. To enter the new field, click New . The *Local Partner Data – Field Maintenance Screen* appears. Enter data as described below.

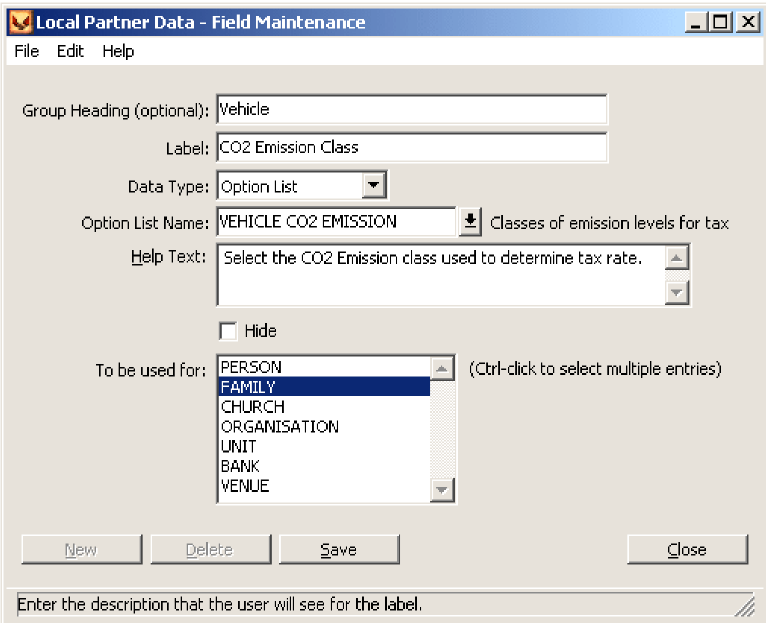


Figure 3-45 Local Partner Data – Field List Screen

Group Heading Since we wish the new field to appear under the existing heading of "Vehicle", enter "Vehicle". Be careful to type it exactly the way it appears for the existing fields on the List Screen (above), because otherwise it will appear alone under a new heading. If headings are not used, then this field can be left blank.

Label Enter the new label "CO2 Emission Class" as you wish it to appear on screen.

Date Type Select the required data type (in our case Option List).

Option List Name This field only appears if you select the data type Option List. From the drop-down box, select the list we have just set up "Vehicle CO2 Emission". This is why we need to set up the Option List Name before defining the field.

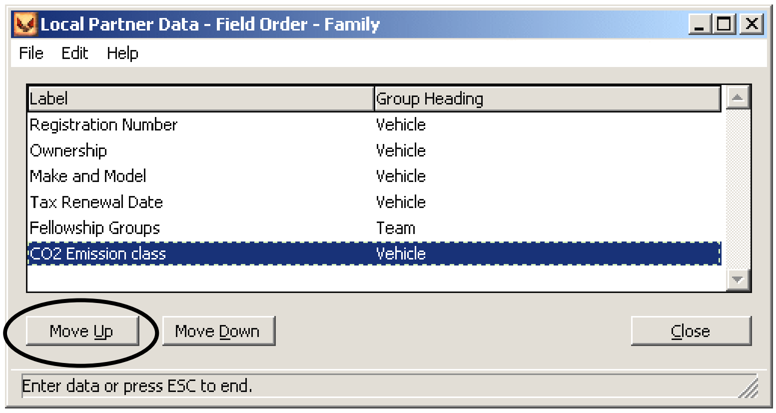
Help Text Enter the text that you wish to appear in the prompt bar at the bottom of the screen when the user is entering data in this field for a partner.

Hide Leave this box unchecked. The reason it is there is to allow you to set up a set of labels in advance, but to keep them hidden until you actually want to use them.

To be used for Select the Partner Class(es) for which you wish to use this field. To select more than one class, hold down the <Ctrl> key while you click.

6. Finally we need to adjust the Field Order, so that the new field appears where we want it, rather than at the bottom of the screen (step (e) in the list). Select `Maintain Tables` > `Local Partner Data` > `Field Order` > `Family`. (The field order is set for each partner class separataely.) The *Local Partner Data - Field Order Screen* appears.

Figure 3-46 Local Partner Data – Field List Screen



Highlight the CO2 Emission Class label, and click the Move Up button. This will move the label up one line. The position of any labels can be altered by highlighting the label and using the Move Up or Move Down buttons. The Group Heading will appear automatically before the first label in the list for that particular group. When the order is as you wish, click Save.

7. Finally check the result by going to the *Partner Edit Screen* for any partner of class Family, and selecting the Local Partner Data tab.

----- End of Chapter 3 -----

Chapter 4 Selecting a Group of Partners (Extracts)

4.1 Overview of Extracts

For many office operations it is necessary to select, or 'extract', a small group of partners from the total list stored in PETRA. A list of partners, together with their current "best" address location, is called an Extract. Usually these partners have something in common (for example, they live in the same area, they are the same Special Type, or they subscribe to the same publication.) Extracts are essential for most reports, since they define the list of partners to be included in the report. Secondly, they are used for regular events like mailing a publication, or sending receipt letters. In addition, a list may be required for a special purpose. For example, if a meeting is planned for church leaders in a particular place, you may wish to extract a list of partners of class Church (or of Type Pastor) who live in that area. An extract contains only the name and address information for the partners, but it can be used to 'call up' other information relating to the partners. Extracts are also useful for selecting a group of partners whose details you wish to export to another PETRA installation.

This chapter explains how to create extracts, and to use them to export partner details. Other chapters explain how to use extracts for other purposes - for example to produce a report or to print labels.

The PETRA Extract Facilities allow for the following:

- Automatic creation of a list of partners with something in common (partner type, subscription, donors to a field, campaign participants, etc.)
- Editing an existing extract to add or delete a partner manually.
- Combining two or more existing extracts to create a new extract.
- Exporting details of the partners in an extract to a file for use in another application.
- Verifying that addresses in an old extract are still correct, and updating them as required.
- Deleting old extracts, either one-by-one, or by 'purging' all old extracts in a single operation.
- Using an extract to update the records of a group of partners with new information like a contact.

4.1.1 Types of Extract

PETRA provides many types of extract, based on different selection criteria, and these are listed in the Table on page 146. Most are automatic extracts, which select particular groups of partners according to certain criteria. There is also a Manual Extract, which allows you to create an extract by adding partners one-by-one.

Most of these extracts are created from the *Partner Welcome Screen* by selecting `Partner`, then `Extracts`, and then the type required. As well as the special criteria (eg Partners of Type 'Board'), it is also possible to specify address information. However, for selecting on the basis of addresses alone, the *Partner Find Screen* is used and provides the Address Extract.

Two or more extracts may be combined to produce a new extract, which contains all the partners who were in any of the original ones. It is also possible to produce a new extract listing only those partners who are in all of two or more other extracts (known as intersection), or who are in one list, but not in another (difference or subtraction). Section 4.3, page 121 explains this.

The following table shows the extracts available and the relevant section in this chapter.

Extract Type	Partner Selection	Page
General Purpose Extracts		
Address Extract	Creates an extract based on address information for all partners, or for a selected partner class.	Pg. 117
General Extract	Partners of a particular country, language or partner class, or partners whose records have been changed recently.	Pg. 119
Manual Extract	Allows the user to build an extract by adding partners one-by-one.	Pg. 120
Partner Extracts		
Publication Extract	Partners who subscribe to a particular publication	Pg. 99
Partner Type Extract	Partners who are a Special Type (see Chapter 2)	Pg. 101
Contact Extract	List of partners based on recorded contact information (visit, email, etc).	Pg. 102
Interest Extract	List of partners with particular interests	Pg. 103
Family Members Ex	From existing extract of families, creates a new extract with all family members.	Pg. 104
Family Ex for Pers	From existing record of Persons, creates new extract of Family partners.	Pg. 104
Relationship Extract	Partners who have certain relationships to another partner.	Pg. 108
Local Partner Data	Partners for whom the Local Partner Data has certain values.	Pg. 109
Personnel Extracts		
Conference Extract	Partners who attended a particular conference.	Pg. 103
Campaign Extract	Partners who took part in a particular campaign.	Pg. 105
Event role	Partners with a particular role at one or more events.	Pg. 106
Field Extract	Partners working in the same OM Field (optionally, also those who previously worked there.)	Pg. 107
Local Personnel Data	Partners for whom the Local Personnel Data has certain values.	Pg. 109
Commitment Extract	Partners with a recorded commitment which starts or finishes between certain dates.	Pg. 110
Previous Experience Extract	Partners with a particular type of recorded previous experience	Pg. 111
Finance Extracts		
Donor Extract by Field	Partners who have made donations to a particular Field	Pg. 111
Donor Extract by Motivation	Partners who have made donations for a particular purpose (see Finance User Guide.)	Pg. 112
Donor Extract by Amount	Partners who have made donations of a certain value, or a certain number of gifts within a certain period.	Pg. 113
Donor Extract (Misc)	Partners extracted according to some other criteria (eg all partners to support a person, with a specific receipt frequency, etc)	Pg. 114
Recipient Extract	Partners who have sent gifts for a particular Field.	Pg. 116
Accounts Payable Extract	Partners who have accounts payable.	Pg. 116
Other Extracts		
Conference Role	For use by Conference Manager, since it only operates on partners who have been loaded into the Conference Management System.	Pg. 106
Foundation Extract	Foundations and Funding Proposal details	Pg.

4.1.2 Naming and Finding Extracts

When an extract is created in PETRA, the user gives the extract a short (8 character) name. Since extracts will be used for many purposes, and by different users, be careful in the choice of names. Offices should develop a system so that the codes are understood by all users.

An *Extract Find Screen* exists to help you find an extract that you have already created. This appears, for example when you print labels and need to select an extract. You can also access it from the

Edit menu on the *Extract Master List Screen* (see Figure 4-1). You can enter codes or words from the description (using * as a wildcard, meaning "any characters") and search for existing extracts.

Be careful about using old extracts. Should new partners be added, or others deleted since the extract was created? Have addresses changed? It is usually best to create a new extract unless you are sure that the old one is still valid. However, occasionally old extracts can be useful as historical records, eg the partners who actually attended a conference or meeting. PETRA has a facility to automatically delete old extracts, but it is possible to make an extract 'undeletable' so that it is preserved.

4.2 Creating an Extract

Most types of extract are created in the same way, although the screens showing the selection criteria are of course different. Section 4.2.1 explains in detail how to create a Publication Extract. Since most other extracts use the same technique, the later sections just explain the key special selection criteria to be used. The Address Extract is different, and is described in section 4.2.22, page 117.

4.2.1 Publication Extract

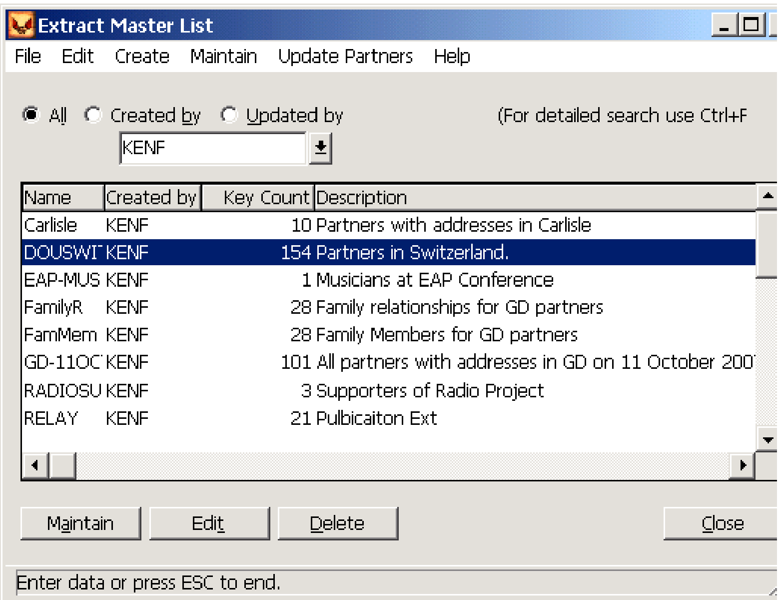
A Publication Extract lists all partners who have a current subscription to a particular publication. (If an end date has been entered for the subscription, and has passed, that partner will not be included.)

Example: To create an extract of all active partners who subscribe to the publication Ship-to-Shore.

1. From the *Partner System (Welcome) Screen*, go to the Partner menu and select Extracts. The *Extract Master List Screen* appears, showing all existing extracts (name, description and the number of partners in the extract list, known as the **key count**).

   If you wish to see just those extracts created or updated by a specific user, click the appropriate button and select the user. If you wish to search for a specific extract, select Edit> Find on the menu bar to bring up a Find screen, as mentioned in section 4.1.2.

Figure 4-1 Extract Master List Screen



2. From the menu bar, select Create. A menu shows the possible types of extract.

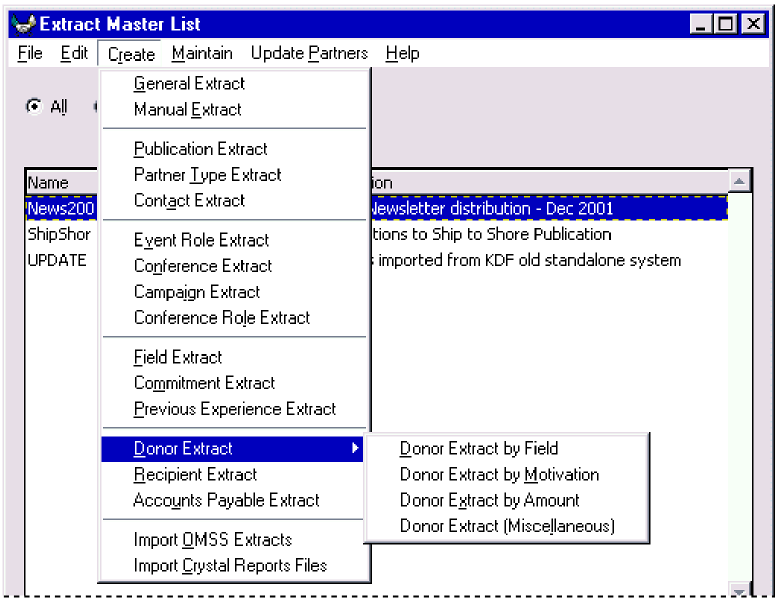


Figure 4-2 Upper Part of Extract Master List, showing the Create Menu

3. We wish to create a mailing list for the publication Ship/Shore, so select `Publication Extract`. The *Automatic Address Extraction by Publication Screen* appears.

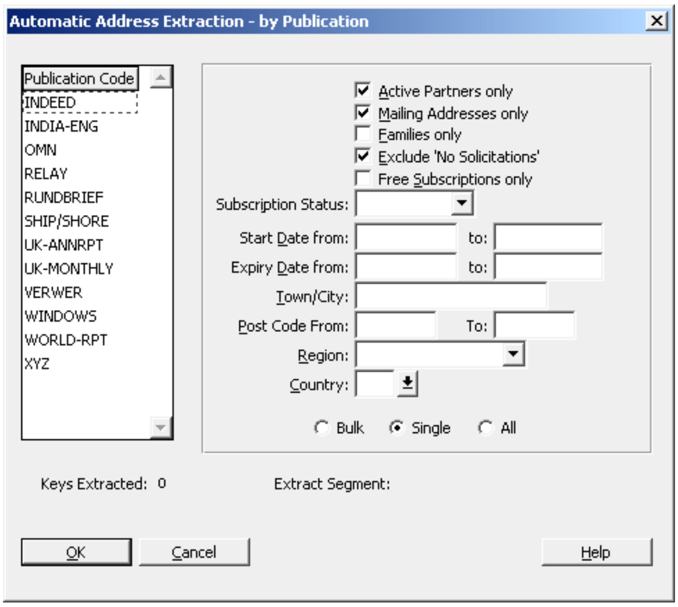


Figure 4-3 Address Extraction - by Publication Screen

In the left hand box, click on Ship/Shore to select the publication. It is possible to select more than one publication by holding down the <`Ctrl`> key while clicking on the selection.

Edit the other fields if required to define the extract. In our example, the only item we need to consider is **Bulk/Single/All**, but the others are also described.

Active Partners only If this box is checked, only partners of status Active will be found, (this is what is usually required).

Mailing Addresses only If this box is checked, only current addresses will be found (current addresses must have both valid dates and are also marked 'Mailing Address'.)

Families only If this box is checked, only partners of class Family will be found.

Exclude "No solicitations" Check this box to omit partners who have said that they do not wish to receive mass mailings or letters asking for donations (see **No solicitations**, page 24).

Free Subscriptions only Check this box to select only partners receiving free subscriptions.

Subscription Status Use the drop-down box if you wish only to select partners with a particular subscription status, (e.g. `current`, or `expired`.)

Start Date and **Expiry Date** Use these if you wish to find partners with subscriptions starting or ending at certain times.

Town/City To limit an extract to partners in a town, enter the town name.

Post Code To limit an extract to partners within a range of postcodes, enter the required postcode. The two boxes allow a range to be specified, for example from 1200 to 1900. It is not necessary to use the complete code. For the UK, entering CA will find all postcodes beginning CA1, CA2, etc. However, do **not** use * as a wildcard. See also **Regions** (next.)

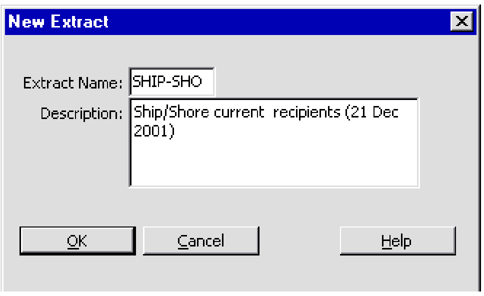
Region If Post Code Regions have been set up, then a Post Code Region can be selected. Post Code Region is a set of Post Code Ranges (see section 3.4.6, page 91.)

Country To limit an extract to partners in a particular country, select the country code.

Bulk/Single/All Click `All` to select all partners subscribing to Ship/Shore. Single or Bulk may be used to select only those partners to whom a single copy is mailed, or only those who receive multiple copies. Some mailrooms find it easier to have two extracts, and to print the two sets of labels separately.

4. Click OK. PETRA generates the extract, and then a *New Extract Screen* appears asking you to give the extract a name and description.

Figure 4-4 New Extract Description Screen



5. Enter an **Extract Name** (max 8 characters) and a clear **Description** and click OK. A dialogue box asks you if you wish to print labels now as part of this operation. Click No. (Clicking Yes takes you to the label printing procedure described in Chapter 5.)
6. The *Extract Master List Screen* (Figure 4-1) reappears, including the new extract. Click `Close`.

4.2.2 Partner Type Extract

A Partner Type Extract lists Partners who are recorded as being of a Special Type (see section 2.3.5, page 32). The extract may just list one special type (for example Field Leaders) or partners who belong to any of several special types (for example, Field Leaders and Board members).

To create a Partner Type Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Partner Type Extract`.

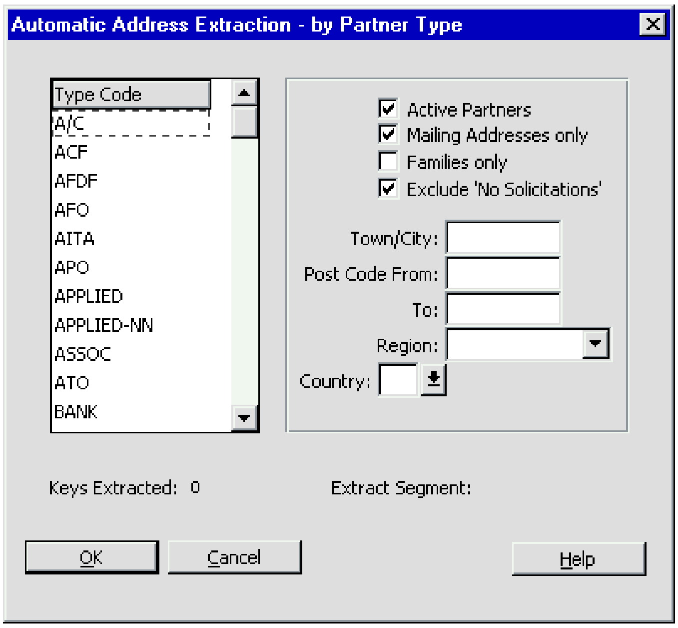


Figure 4-5 Address Extraction by Partner Special Type Screen

Select the special type(s) required for this extract by clicking on the list on the left. To select more than one type, hold down the <`Ctrl`> key while clicking on the selection. Then click OK.

4.2.3 Contact Extract

The Contact Extract lists partners who have a recorded contact of a particular type. The type may include mailing event codes and also contact attributes and attribute details, if these are used by the office. Section 2.4.6, Contacts with Partners, page 46, explains these terms in more detail.

To create a Contact Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Contact Extract`. The *Address Extraction - by Contact Screen* appears.

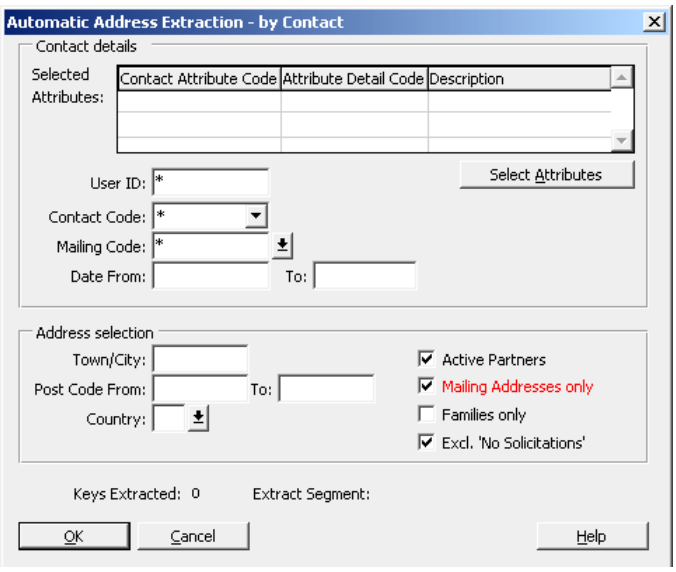


Figure 4-6 Contact Extract Screen

The upper part of the screen allows you to select the key items specified for contacts. The lower part of the screen allows to further refine the selection, by limiting the search to partners living in certain areas, etc. The key criteria for contacts are as follows:

User ID If you are only interested in contacts entered by a particular user, enter the User ID.

Contact Code The drop down button allows to select just one method of contact (e.g. by post).

Mailing Code The drop-down button allows you to select all partners contacted in a particular 'mailing event'. Of course this is only useful if offices have assigned codes to mailing events and have updated partner records with this information. (See section 3.5, page 92, for how to set up a code for a mailing event, section 2.4.6, page 46, for how to add a mailing event code to a partner's contact details and section 4.5.2, page 128 for how to add this to a complete extract of partners.)

Selected Attributes You can make an extract of only partners with specific contact attributes. To do this, click the `Select Attributes` button. The *Contact Attribute Selection Screen* appears.

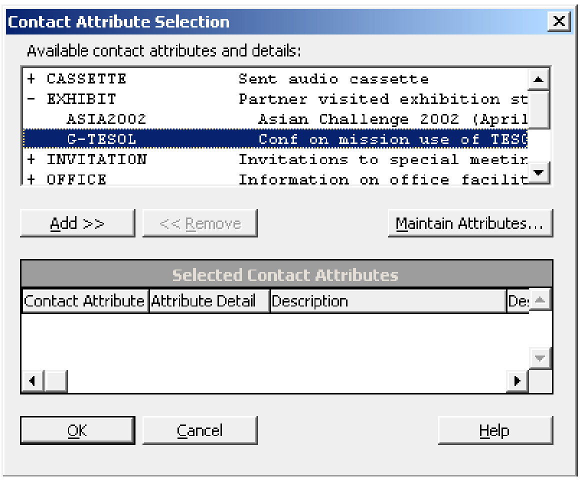


Figure 4-7 Contact Attribute Selection. For attribute EXHIBIT, there are two attribute details

The upper part of this screen shows all possible recorded attributes. A + sign indicates that this attribute has sub-attributes (called attribute details). To show the attribute details, double-click the line. The example (Figure 4-7) shows the effect of double-clicking the attribute Exhibit. To select an attribute detail for use in creating the extract, select the attribute detail (eg `Inv-Jun01` in the figure) and click Add>>. This attribute detail then moves to the lower box, showing it has been selected.

Continue adding additional attribute details if required, and then click OK.

The contact Extract Screen (Figure 4-6) reappears, now showing the selected attributes in the upper part of the screen. Click OK to create an extract in the normal way.

4.2.4 Interest Extract

An Interest Extract list partners for whom an interest has been registered (see section 2.4.3, page 42.)

To create a Conference Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Interest Extract`.

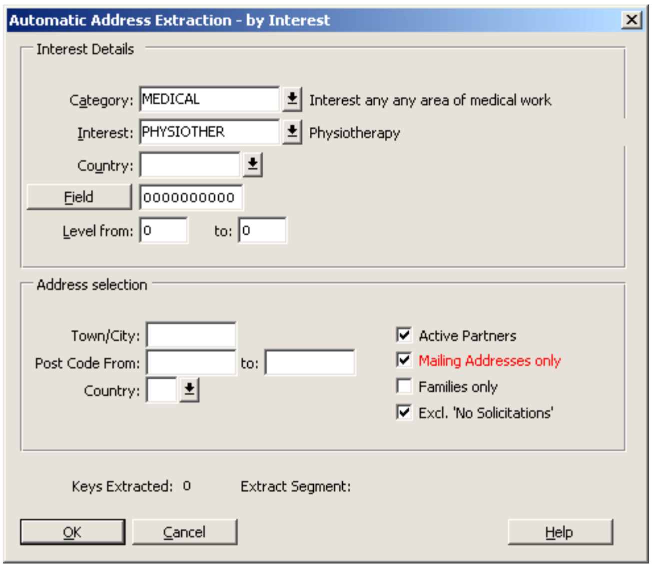


Figure 4-8 Partner Interest Extract

Check boxes allow you select partners for whom you have recorded an interest in a particular category of activity, country, field etc.

4.2.5 Family Members Extract

The Family Members Extract takes an existing extract that contains Family class partners and creates a new extract consisting of all the Persons which are members of those families. To create a Family Members Extract.

1. Open the *Extract Master List Screen* as described for Publication Extract (section 4.2.1, page 99). From the `Create` menu on the menu bar, select `Family Members Extract`. An explanatory message appears – click `OK`.
2. An *Extract Find Screen* appears. Use this to find the extract that contains Family class partners. Enter the data you know about the existing extract and click Search. When you have found the extract you want, highlight it and click Accept.
3. An *Extract Find Screen* appears. Use this to find the extract that contains Family class partners. Enter the data you know about the existing extract and click Search. When you have found the extract you want, highlight it and click Accept.
4. Give and name and description for the new extract (the one that will contain the person records of all family members.) Click OK. The new extract is now produced.

4.2.6 Family Extract for Persons

The Family Extract for Persons takes an existing extract that contains Person class partners and creates a new extract consisting of all the Families records to which the Persons belong. To create a Family Extract for Persons.

1. Open the *Extract Master List Screen* as described for Publication Extract (section 4.2.1, page 99). From the `Create` menu on the menu bar, select `Family Extract for Persons`. An explanatory message appears – click OK.
2. An *Extract Find Screen* appears. Use this to find the extract that contains the Person class partners. Enter the data you know about the existing extract and click Search. When you have found the extract you want, highlight it and click Accept.
3. Give and name and description for the new extract (the one that will contain the Families to which the persons belong.) Click OK. The new extract is now produced.

4.2.7 Conference Extract

A Conference Extract lists Partners who have an application entered in the Personnel Module to attending a particular Conference (or Campaign involving that Conference).

To create a Conference Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Conference Extract`.

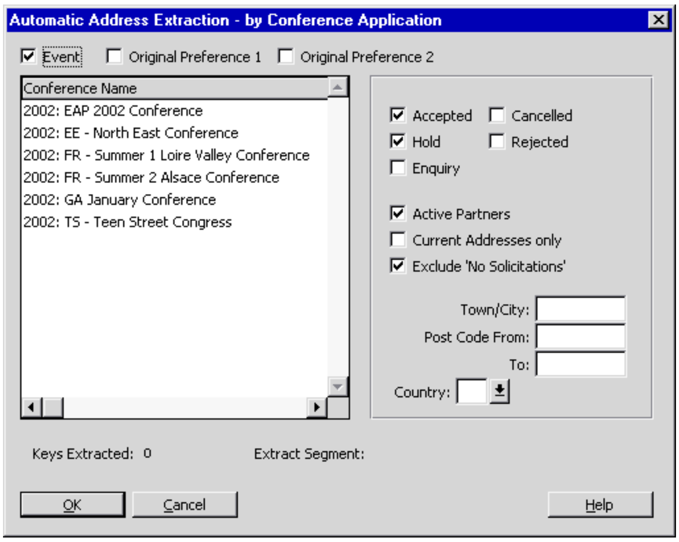


Figure 4-9 Automatic Address Extraction by Conference

In addition to selecting the conference(s) of interest, check boxes let you select applicants based on the application status (**Accepted**, **Cancelled**, etc). Remember that the organising site also needs to know about **Cancelled** applications. For the check boxes at the top, **Event** selects the partners who are due to attend the event shown, and this is what is normally required. The other boxes allow you to select partners according to the preferences on their original application.

4.2.8 Campaign Extract

A Campaign Extract lists Partners who have an application entered in the Personnel system for participating in a Campaign.

To create a Campaign Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Campaign Extract`.

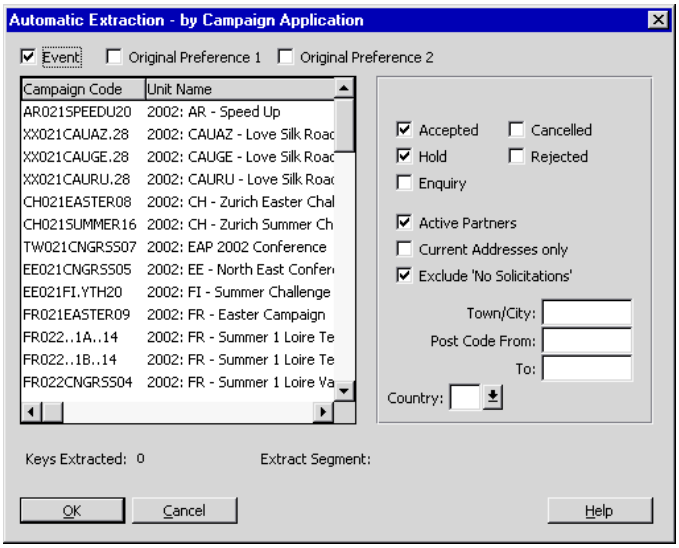


Figure 4-10 Address Extraction by Campaign

In addition to selecting the campaign(s) of interest, check boxes let you select applicants based on the application status (**Accepted**, **On hold**, etc). For the check boxes at the top, **Event** selects the partners who are due to attend the event shown, and this is what is normally required. The other boxes allow you to select partners according to the preferences on their original application.

4.2.9 Conference Role Extract

Note The Conference Role Extract only selects partners who have been loaded into the Conference Management system.

A Conference Role Extract lists partners who have been identified as having a particular role at a conference (See PERSONNEL USER GUIDE, Applications), and who have been loaded into the Conference Management System.

To create a Conference Role Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Conference Role Extract`.

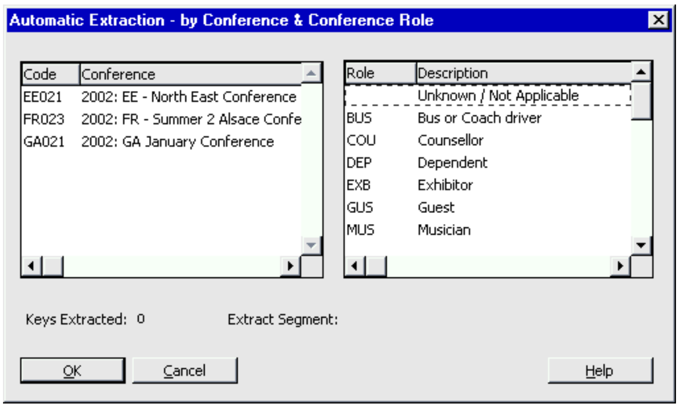


Figure 4-11 Conference Role Extract Screen

In the left hand panel select the **conference(s)** you want, and in the right hand panel select the **Conference Roles** for which you want an extract.

4.2.10 Event Role Extract (Campaign Role)

A Event Role Extract lists partners who have been identified as having a particular role at an event (See PERSONNEL USER GUIDE, Applications).

To create an Event Role Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Event Role Extract`.

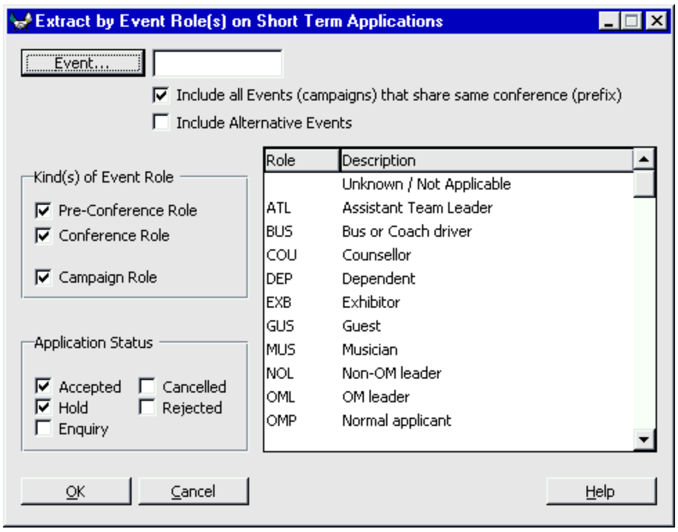


Figure 4-12 Event Role Extract Screen

Select the options for your extracts as follows:

Event Click the button to select the event that you require. If you want to include all campaigns that share the same conference (and so have the same first few characters in the code) make sure the **Include all Events** box is checked.

Kind of Event Role These check boxes allow you to distinguish between roles for the different stages of an event, ie pre-conference, conference and campaign.

Application Status These check boxes allow you to include or omit partners with various applications statuses.

Role In the main panel, select the role(s) for which you wish to extract the participants.

4.2.11 Field Extract

A Field Extract lists OMers, and therefore only extracts partners of Special Type OMer. You can choose to list either (1) those sent from a particular Sending Field (Home Office), or (2) those working in a particular Receiving Field. The extract will only select people who have a commitment record entered; it does not use the 'Field' Entry on the *Partner Edit Screen*. You can select all people on your system who have ever worked in a particular field, or those who have a current commitment record for working there.

To create a Field Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Field Extract`. The *Address Extraction - by Field Screen* appears (Figure 4-13).

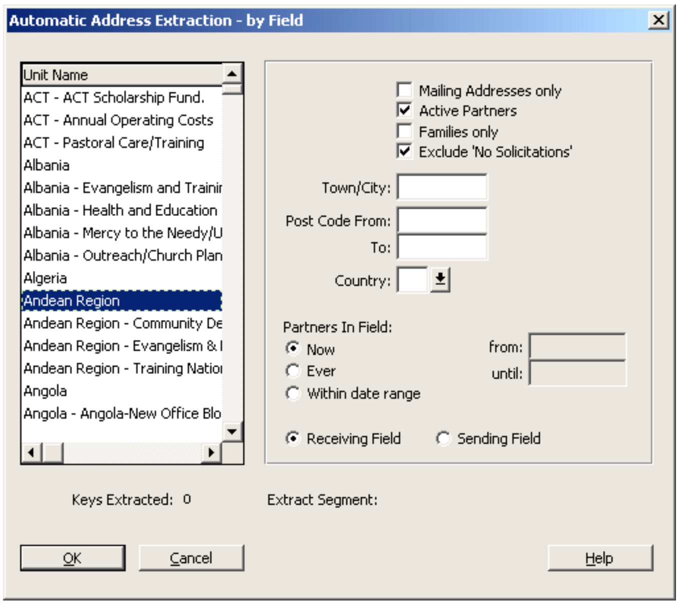


Figure 4-13 Address Extraction - by Field Screen

This is similar to the screen used for Publication Extracts, and the procedure is the same. If required, more than one unit can be selected. Some data fields are described under Publication Extracts, but the following are different.

Unit Name Select the Field(s) that you are interested in. These can be either a Sending Field (listing everyone sent from that Sending Field) or a Receiving Field (listing everyone working in that Field who is recorded on your database) - see below.

Partners in Field Select either those with a current commitment (Now), all those who are ever had a commitment (Ever) or those who have a continuous commitment for the whole period between certain dates (if you select this option, people whose commitment record only covers part of the period will not be included.)

Receiving / Sending Field Click to select either a list of those working in a Receiving Field or all those sent by a particular Sending Field (Home Office).

4.2.12 Relationship Extract

A relationship extract allows you to select one partner (or an existing extract) and then create a new extract of all partners who have specific relationships set up with any of those partners. This can be understood by an example.

Example: We already have an extract of all partners in Germany who are serving on one of the ships. We wish to create a new extract of all churches who are supporting churches of any of these.

To create a Relationship Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Relationship`. The *Relationship Extract Screen* appears.

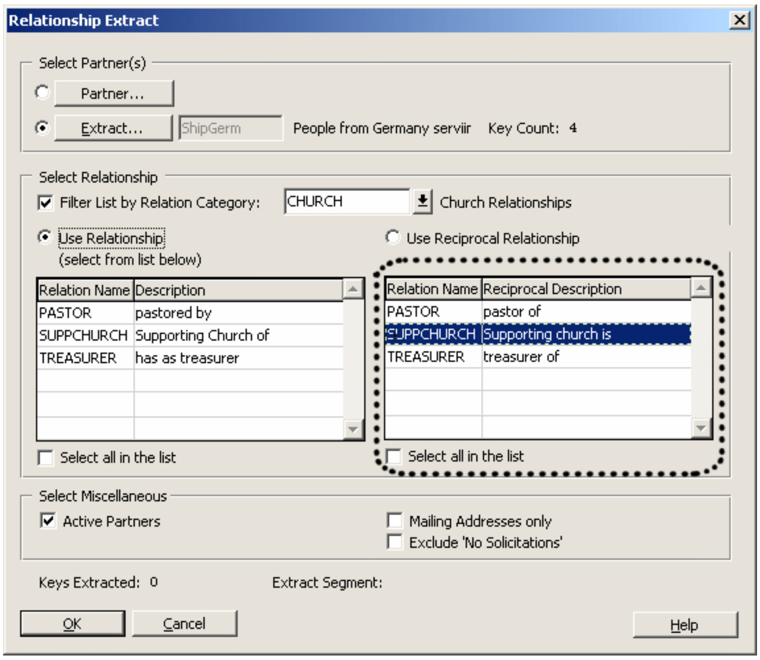


Figure 4-14 Relationship Extract Screen – composite view (Note – the area within the dotted line is the alternative view when the Reciprocal Relationship is displayed.)

Select Partner(s) Since we want an extract, click Extract and find the required extract of German partners serving on the ships.

Select Relationship – step 1 To avoid seeing lots of irrelevant relationships, check the box marked **Filter List by Relation Category**, and from the drop-down list select **Church Relationships**. It is not necessary to do this, but it ensures that only relationships which have been given the category “Church” are shown (see section 3.2.16, page 81, for relationship categories).

Select Relationship – step 2 The next step is to select the relationships. Normally the screen will have the option **Use Relationships** selected, and the possible relationships will be shown in the list on the left of the screen. However, sometimes you want to use the reciprocal relationships, and to do this you click the **Use Reciprocal Relationship** option, and a different list appears, this time on the right of the screen. Figure 4-14 is actually a composite picture showing both options, for comparison. In the example, we need to choose a reciprocal relationship. Since every relationship can be thought of as being between Partner A and Partner B, we can show this as follows:

Partner A:	For Partners in extract **ShipGerm** (selected in top of screen)
Relationship:	**“Supporting church is....”**
Partner B:	**????** We want to find which the supporting churches are, and so the extract that we will produce will be a list of all the churches which support any of the partners in the extract **ShipGerm**.

It should be possible to “read down” the screen, so that the the relationship description is followed by the “unknown” partners who we are trying to find.

If it is required to selected partners with one of several different relationships with the subject partners (top extract) then hold down the <Ctrl> key while clicking to select multiple relationships from the same list.

4.2.13 Local Partner/Personnel Data Extracts

There are two local data extracts, one based on local partner data, and one on local personnel data..

To create a Local Data Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Local Data`, and then either `Partner` or `Personnel`, as required.

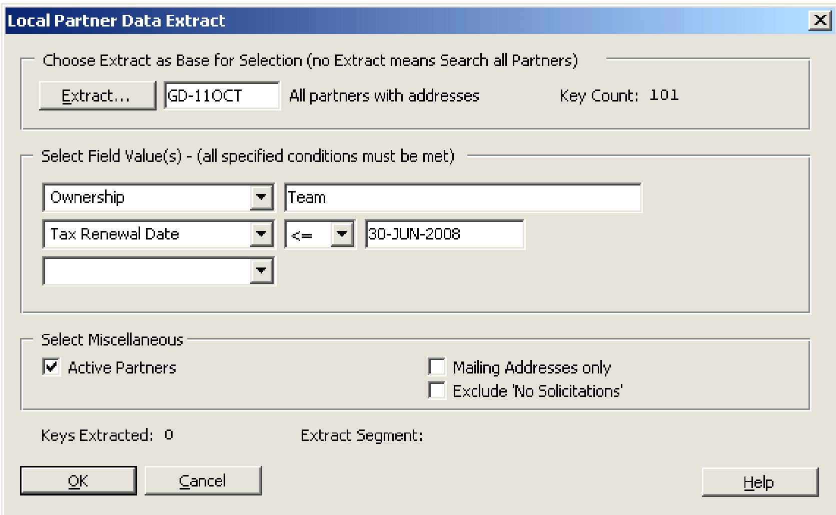


Figure 4-15 Example of Local Data Extract (The actual fields available will depend on what field have been set up as Local Data on your installation.)

To select the partners that you require, enter data as follows.

Extract Normally, if this field is left blank, the search for partners will be for all partners in the database (subject to the normal Select Miscellaneous criteria shown in the lower part of the screen.) However, if required, you can selected an existing extract of partners, and then just search within that set of partners to produce the new extract.

Select Field Value(s) Up to three selection criteria can be set, based on local partner/personnel data. A partner will only be included in the new extract if <u>all</u> the criteria entered are true. The fields in this example relate to vehicles kept by the team, and the field ‘Ownership’ has been set up with two options ‘Team’ or ‘Personal’. We are interested in vehicles belonging to the ‘Team’. The second criterion is a date, so boxes have appeared for a date and an ‘equality’. In the case shown we are seeking all partners who keep cars owned by the ‘Team’ and which have a tax renewal date on or before 30 June 2008. For dates, ‘<’ (‘less than’) means ‘before’ and ‘<=’ means “on or before”.

> **Note - Option Lists** If the field that you select is of the type "Option List" – that is, the value for a partner is entered on the *Partner Edit Screen* using a drop-down list of possible options, it is important to type the selected value in the right hand box exactly as it appears in the drop-down list. If, for example, an extra space is included at the start, then no matches will be found.

4.2.14 Commitment (Start/Finish) Extract

A Commitment Extract lists partners with recorded commitments which start between specified dates or finish between specified dates.

To create a Commitment Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Commitment Extract`.

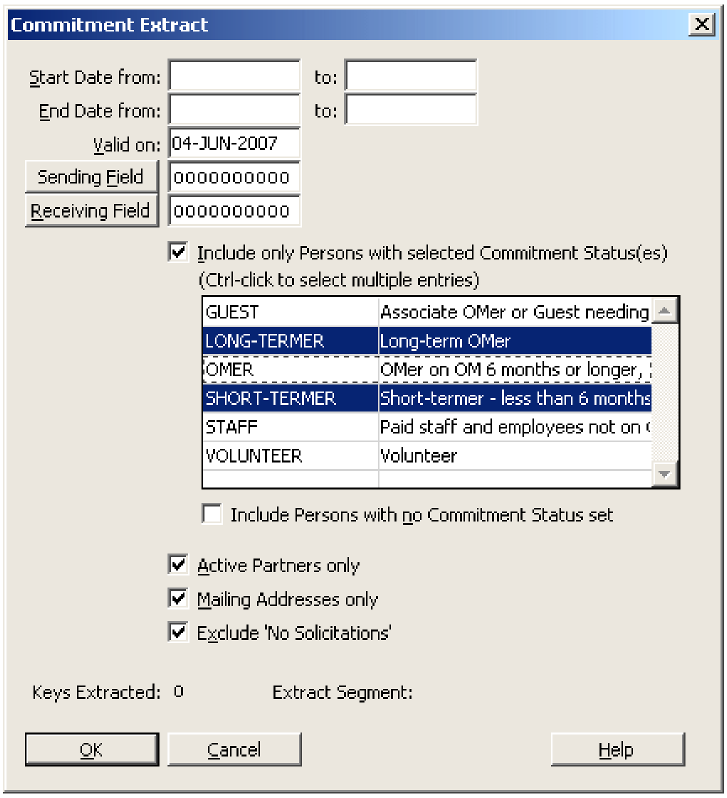


Figure 4-16 Commitment Extract Screen (first checkbox has been checked, so list of possible statuses is displayed.)

To select the partners that you require, enter data as follows. Normally you will only want to enter either a range of start dates or a range of end dates; the others can be left blank.

Start Date from/to Enter the range of start dates that you are interested in.

End Date from/to Enter the range of end dates.

Valid on This is a way of finding partners who had a valid commitment on a particular date.

Sending Field or **Receiving Field** Click the button and use the Find screen to select the Field, if you only want partners from a particular Sending Field (Home Office), or with a commitment to a particular Receiving Field.

OM Status If you check the **Include only..** checkbox, this displays the list of OM statuses. You can select only those statuses you want. <Ctrl> + click to select multiple statuses. If you want also to include partners for whom a commitment status has not been set, then also check the box below the list, **Include Persons with no Commitment Status set**.

4.2.15 Previous Experience Extract

The Previous Experience Extract selects all partners with certain types of previous experience.

To create a Previous Experience Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Previous Experience Extract`.

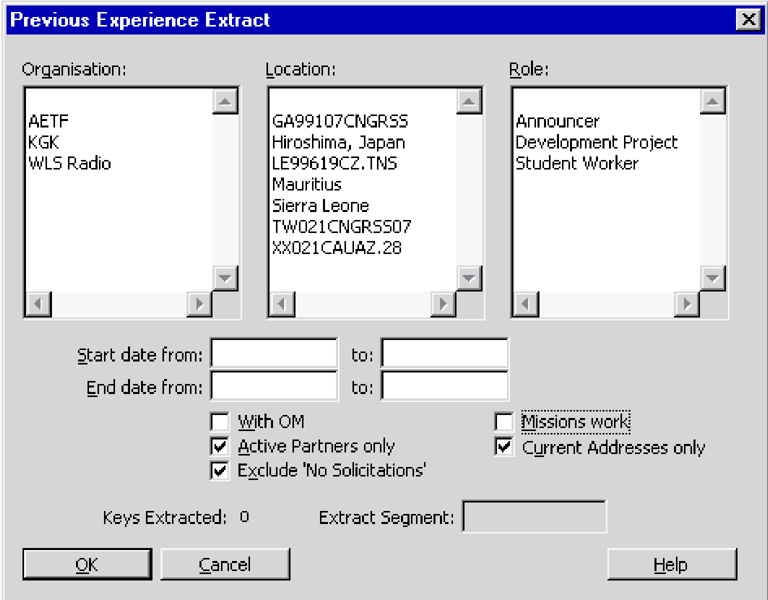


Figure 4-17 Previous Experience Extract Screen

This screen allows you to sort on the type of information included in a previous commitment record (see the PERSONNEL USER GUIDE for additional useful detail.)

Organisation, **Location**, **Role** These panels list all entries in the database. However, under Location are included the codes of previous conferences and campaigns when these applications are automatically converted to past experience, and so these can be useful for creating an extract of people who took part in a certain past event.

With OM Only includes partners with a previous experience record marked as with OM.

Missions work Only includes partners with a previous experience record marked as with missions work.

4.2.16 Donor Extract by Field

A Donor Extract by Field lists Partners who have made a donation to a particular Field (or Fields).

> **Note** This extract only selects partners who have given gifts which have been entered under the Motivation Group GIFT. (Motivation group is the purpose for which the donation is to be used.)

To create a Donor Extract by Field, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Donor Extract by Field`.

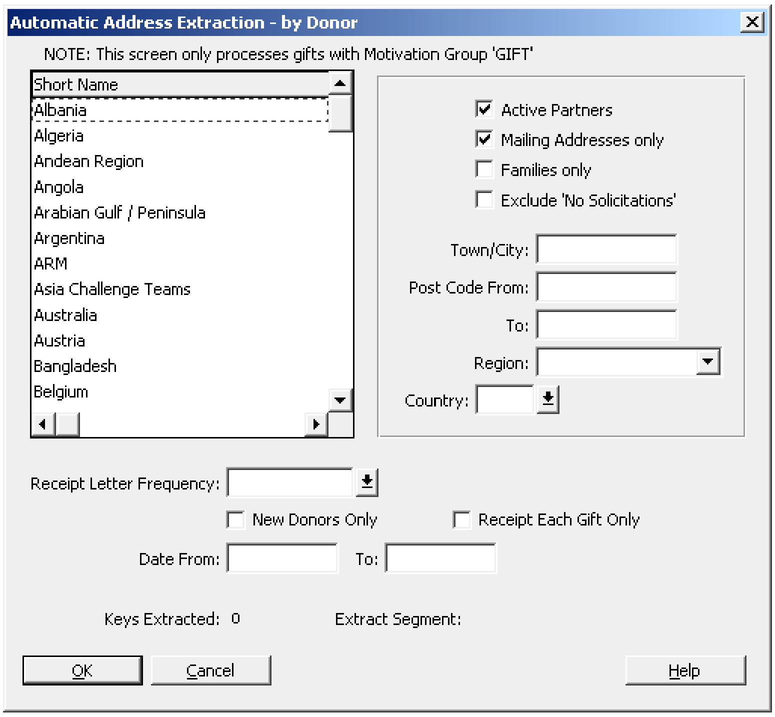


Figure 4-18 Extract by Donor and Field Screen

To select the donors that you require, enter data as follows.

OM Field to which donation was made Click to select the Field (or Fields) which you are interested in. If you wish to consider all donations, then leave the list of OM Fields blank.

Receipt Letter Frequency The menu button allows you to select only those partners who are marked as needing to receive a regular report of gifts, monthly, quarterly, annually, etc (see section 2.4.3, page 42). Leave blank to select all partners who have made donations.

New Donors Only Check the box if you wish to include only partners whose first recorded gift to this Field was made during the period specified (see Date, below).

Receipt Each Gift Only Check the box if you only want to list partners who require a receipt to be issued for each gift.

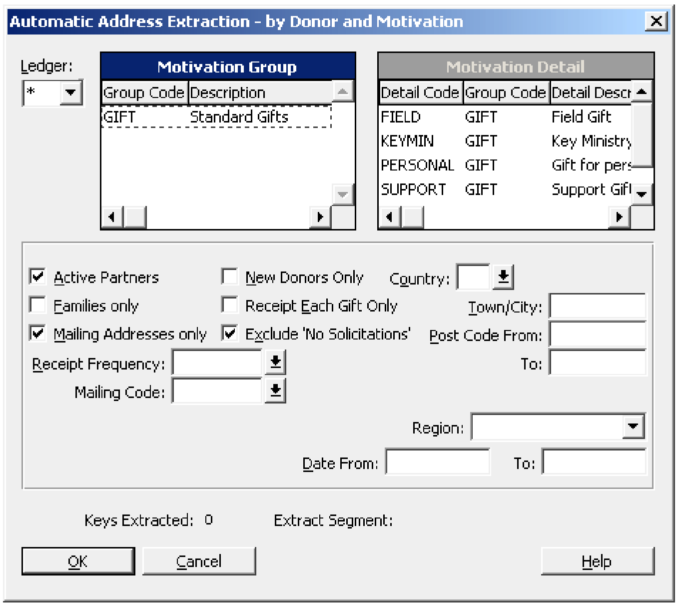
Date from and **Date to** Enter the first and last dates for donations that you wish to consider.

4.2.17 Donor Extract by Motivation

A Donor Extract by Motivation lists Partners who have made a donation for a particular purpose or fund. More information on Motivation Groups and Motivation Detail are given in the FINANCE USER GUIDE.

To create a Donor Extract by Motivation, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Donor Extract by Motivation`.

Figure 4-19 Extract by Donor and Motivation Screen



To select the donors that you require, enter data as follows.

Ledger Select the Ledger from which you wish to create the extract.

Motivation Group and **Motivation Detail** Click in the windows to select the required entries. More information on the motivation (that is the purpose of the gift) is given in the FINANCE USER GUIDE.

New Donors Only Check the box if you wish to include only partners whose first recorded gift to this Field was made during the period specified (see Date, below).

Receipt Each Gift Only Check the box if you wish to select only partners who receive a receipt for each gift made.

Receipt Letter Frequency The menu button allows you to select only those partners who are marked as needing to receive a regular report of gifts, monthly, quarterly, annually, etc (see section 2.4.3, page 42). Leave blank to select all partners who have made donations.

Date from and **Date to** Enter the first and last dates for donations that you wish to consider.

4.2.18 Donor Extract by Amount

A Donor Extract by Amount lists Partners who have made donations within a particular range of values, or a certain number of donations within a particular time period.

There are a number of criteria that can be entered to select the group of donors that you require. It is not necessary to enter data in all fields; only use the ones relevant to your needs.

To create a Donor Extract by Amount, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Donor Extract by Amount`.

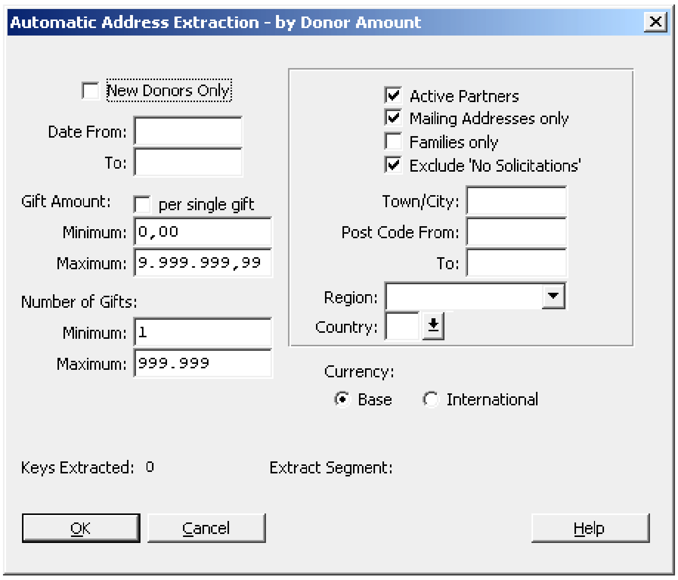


Figure 4-20 Extract Donor by Amount Screen

Enter the data to select the donors that you are interested in (not all fields need to be used.)

New Donors Only Check the box if you wish to include only partners whose first recorded gift to this Field was made during the period specified (see **Date**).

Date From/To Enter the date range for which you wish gifts to be examined.

Gift Amount If required enter minimum and maximum amounts. This refers to the total amount given during the period, even if it was made up of several smaller gifts. To find partners who have given a single gift between the minimum and maximum, check the **per single gift** checkbox.

Number of gifts This you select people who have made more than one gift during the period.

Currency Select whether the values you have entered refer to your base currency or to international currency.

4.2.19 Donor Extract (Miscellaneous)

Donor Extract (Miscellaneous) allows you to create a list of donors according to other finance criteria, eg method of giving or method of payment, receipt letter code, reference, etc. It is also possible to make a list of all partners who have given to support a particular individual.

To create a Donor Extract (Miscellaneous), follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Donor Extract (Miscellaneous)`.

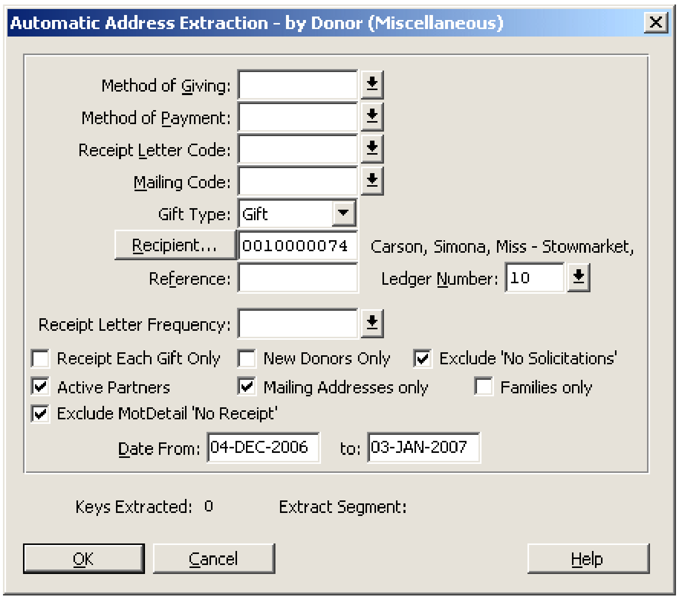


Figure 4-21 Extract by Donor (Miscellaneous) Screen

To include the donors that you require, select the criteria that apply. It is not necessary to make choices for all items; only select the ones necessary to define your extract.

Method of Giving Donors who have given by a particular method (eg tax-free agreements)

Method of Payment Donors who have given by a particular mechanism (eg by cheque)

Receipt Letter Code This selects partners for whom a gift receipt has been entered, for which it has been specified that a particular form letter should be used for receipting. See FINANCE USER GUIDE section on Entering New Gifts, *Gift Maintenance Screen*.

Mailing Code Donors from whom gifts have been received in response to a mailing which was given a reference code.

Gift Type Donors who have gifts with a particular recorded gift type.

Recipient Donors who have given to support a particular recipient.

Ledger Number If you wish to only refer to one ledger, enter the ledger number. If no ledger number is selected (0), all gifts in all ledgers are considered.

Reference This field allows you to search for anything that has been entered as a reference number on the *Gift Maintenance Screen* (FINANCE USER GUIDE), for example the donors bank account number or cheque number.

Receipt Letter Frequency The menu button allows you to select only those partners who are marked as needing to receive a regular report of gifts, monthly, quarterly, annually, etc (see section 2.4.3, page 42). Leave blank to select all partners who have made donations.

New Donors Only Check the box if you wish to include only partners whose first recorded gift to this Field was made during the period specified (see Date, below).

Receipt Each Gift Only Check this box if you only want partners who require a receipt to be issued for each gift (see Finance Details in section 2.4.3, page 42).

Exclude MotDetail 'No Receipt' Check this box if you wish to exclude partners who have indicated that they do not wish to receive receipts.

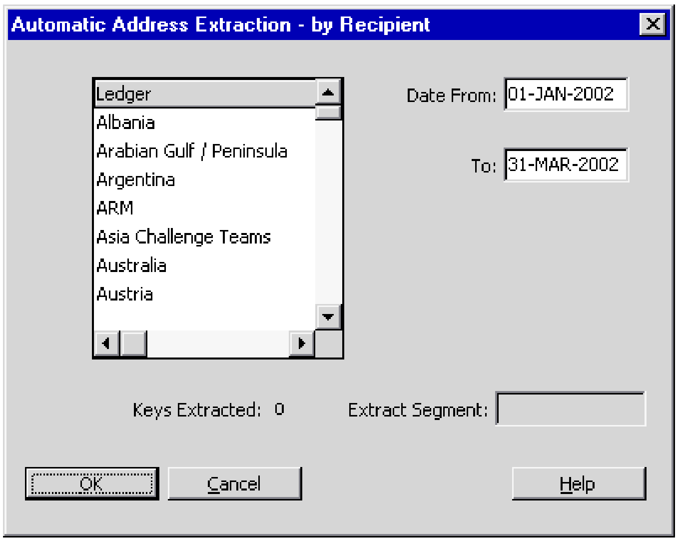
Date from and **Date to** Enter the first and last dates for donations that you wish to consider.

4.2.20 Recipient Extract

Recipient Extract provides a list of all people working in a particular Field who have received a donation from the office. More than one Field can be specified, or even all fields.

To create a Recipient Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Recipient Extract`.

Figure 4-22 Extract by Recipient Screen



Ledger Select the ledger(s) for the Field(s) that you are interested in.

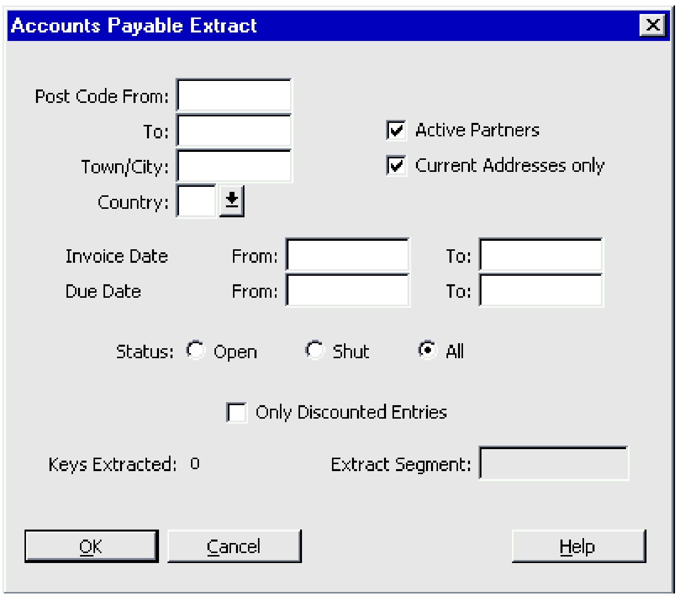
Date from and **Date to** Enter the first and last dates for donations that you wish to consider.

4.2.21 Accounts Payable Extract

An Accounts Payable Extract lists Partners to whom payments is due (for example partners who have submitted invoices).

To create an Accounts Payable Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Accounts Payable Extract`. This is similar to the screen used for publication extracts, and the procedure is the same.

Figure 4-23 Accounts Payable Extract Screen



Invoice Date or **Due Date** Enter dates in either of these boxes to show which partners you wish to extract (the dates of invoices or the dates that payment is due). If the boxes are left blank, partners for all recorded accounts payable will be extracted.

Status Select Open (for unpaid bills) Closed (for paid bills) or All for both.

Only Discounted Entries Check the box if you only wish to extract Partners who offer a discount.

4.2.22 Address Extract

Address Extracts allow you to select all partners who live in the same area. In addition, you can ask for just one class of partner to be extracted. Unlike the types of extract mentioned before, Address Extracts are generated from a menu on the *Partner Find Screen* (see Chapter 2). The Partner Find Screen is used to select the partners required. A simple operation then creates an extract of all the partners listed.

Example: To generate an extract of all supporting churches in the Bristol area of the UK.

1. From the *Partner System (Welcome) Screen*, click Find and Maintain Partner . A *Partner Find Screen* `appears`:

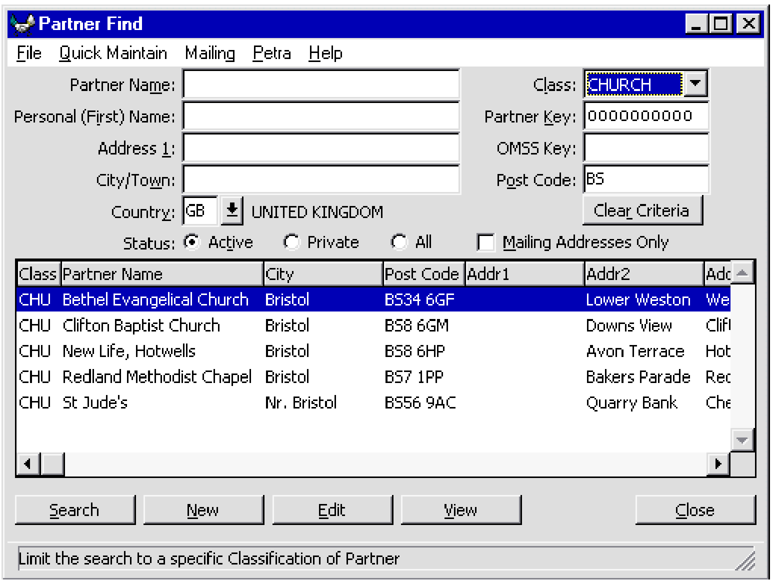


Figure 4-24 Partner Find Screen

2. The Partner Find system normally just searches for partners of status ACTIVE. To extract other partners click the status button `All` for all partners, or `Private`, to select just private partners which were entered by the current PETRA user. For this example use the default setting of ACTIVE.
3. If we click OK at this point, PETRA will generate a list of **all** active partners. However, the top half of the screen is used to restrict the search, so that only the required partners are included.
4. Under **Class**, select `CHURCH`.
5. Under **Country** select `GB`
6. To select the area of Bristol, type 'BS' in the **Post Code** box. This selects all partners with a postcode BS1, BS2, etc. We have chosen to select using the postcode. It would also be possible to type 'Bristol' in the address line City/town. However, the results may not be quite the same. In the UK, postcodes BS cover a wider area than the city itself. If we sort on the city 'Bristol' we may miss out addresses in nearby villages that do not have the city name in the address.
7. Click `Find`. PETRA now makes a list of all partners meeting the criteria, and displays the list in the lower part of the screen.

8. From the menu bar, select `Mailing` and then `Generate Extract` (see Figure 4-25).

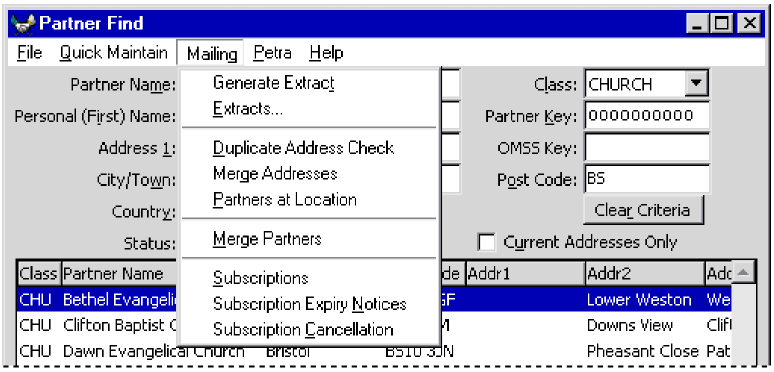


Figure 4-25 Upper part of Partner Find Screen, showing Mailing Menu

A *New Extract Screen* appears, as shown in Figure 4-4. Enter the extract code and description, and click OK.

4.2.23 Foundation Extract

The Foundation Extract can be used to select partners who are Foundations, based on specific Foundation information, such as details of Funding Proposals, Key Ministries, etc.

To create a Foundation Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `Foundation Extract`. The screen is as follows.

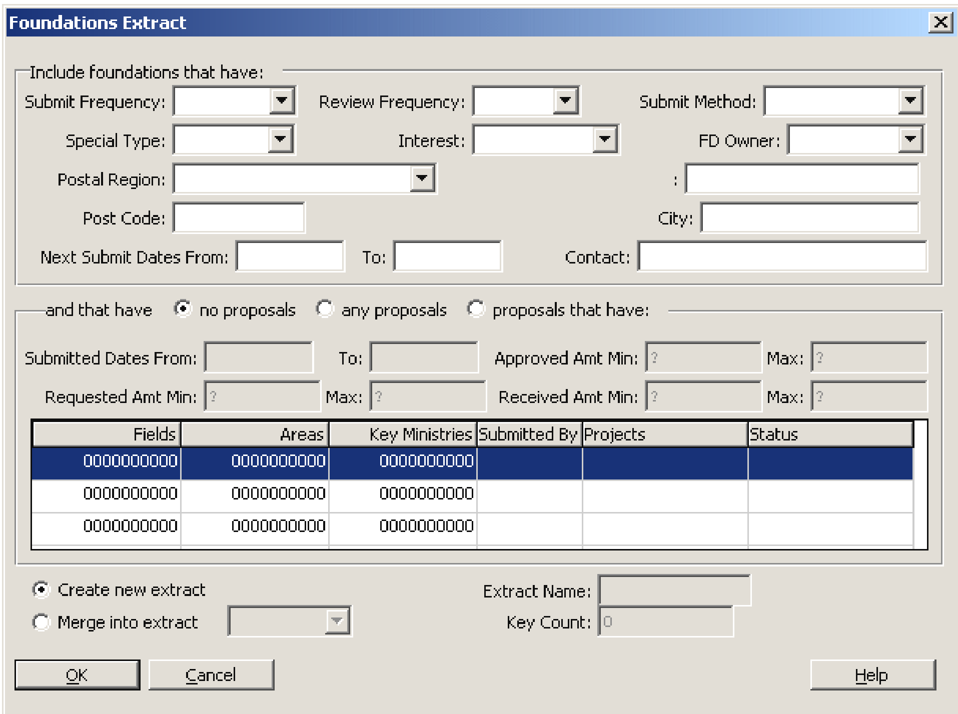


Figure 4-26 Foundation Extract Screen

The upper part of the screen allows you to select Foundations on the basis of their general information, while the lower part of the screen allows you to search for Foundations on the basis of proposals submitted for the support of specific Key Ministries, etc.

Create new extract Always use this option, since currently the facility of merging into an existing extract has not been completed. To combine with existing extracts, see section 4.3, page 121.

4.2.24 General Extract

The General Extract facility can select partners of a particular class and recorded language, but it's main use is to list all partners whose records have been edited within a selected time period. It is possible to select the time period and also the user who made the changes. This makes it easier to recover possible errors (for example if a user realises that they may have made a mistake in a batch of subscriptions entered yesterday, they can easily see which partner records they altered).

The General Extract also allows detailed specification of address information, similar to that possible in the Address Extract (which is based on the Partner Find Screen, see section 4.2.22, page 117.)

To create a General Extract, follow the instructions for a Publication Extract (section 4.2.1, page 99). However, in step 3, select the menu item `General Extract`. The screen is as follows.

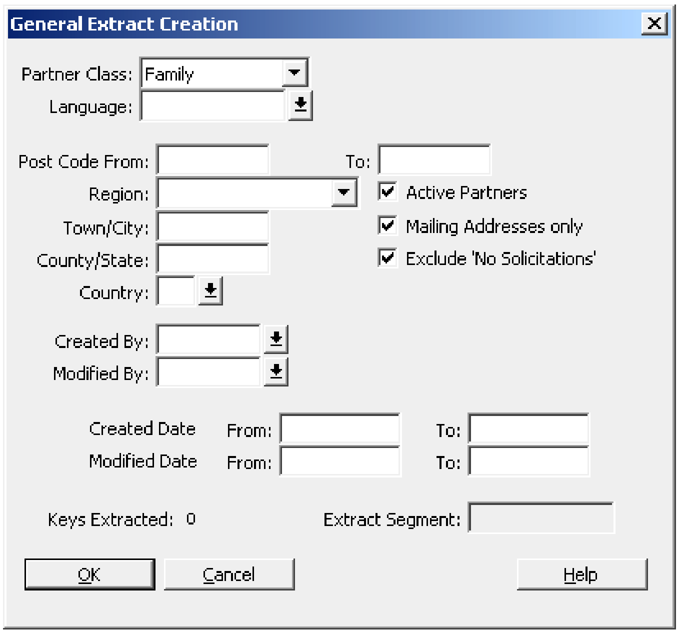


Figure 4-27 General Address Extraction

Partner Class If you wish to select by class, use the drop-down box. If you select class church or organisation, then a second box appears on the right; this allows you to select by church **denomination** or organisation **business**.

Created / Modified Date These allow you to select partners who have been added/changed between certain dates. This is described in more detail in the following example. Use either the **Created** boxes or the **Modified** boxes; it is NOT correct to use them both together. Separate searches are necessary to find partners created and partners modified.

Example: Today is 24 April 02. User JACQUES wishes to check all partners that he has maintained since 17 April 02. Some were new partners, and some were existing records, which he modified.

Jacques must first create an extract for the new partners that he entered. To do this he enters 17/4/02 in the box **Created Date From**. He then selects JACQUES from the drop down menu **Created by**. He clicks OK and continues as for other extracts.

Jacques must then create a second extract for the partners that he modified. He enters 17/4/02 in the box **Modified Date From**. He then selects JACQUES from the drop down menu **Modified by**. He clicks OK and continues as for other extracts.

As with other extracts, address criteria can be added to limit the search (for example, if Jacques was looking for a particular partner that he remembered entering from Quebec, he can enter this in the address field **Town/City**).

4.2.25 Manual Extract

The Manual Extract facility allows you to create a list of names by adding partners individually, with no automatic searching. Manual Extracts are created in a similar manner to the automatic extracts described above. However, since partners must be added individually, a separate step is needed. The partners to be included are selected one-by-one using a Partner Find Screen.

Example: At a recent meeting 30 partners asked to be sent brochures about a special activity. You wish to create an extract to print mailing labels.

1. From the *Partner System (Welcome) Screen*, go to the `Partner` menu and select `Extracts`. The *Extract Master List Screen* appears (see Figure 4-1, page 99).
2. From the menu bar, select `Create`, then `Manual Extract`.
3. A *New Extract Screen* appears asking you to give the extract a name and description (see Figure 4-4, page 101 for an example.) Enter an extract name and description. Click OK.
4. An Extract Maintenance Screen appears, as shown below.

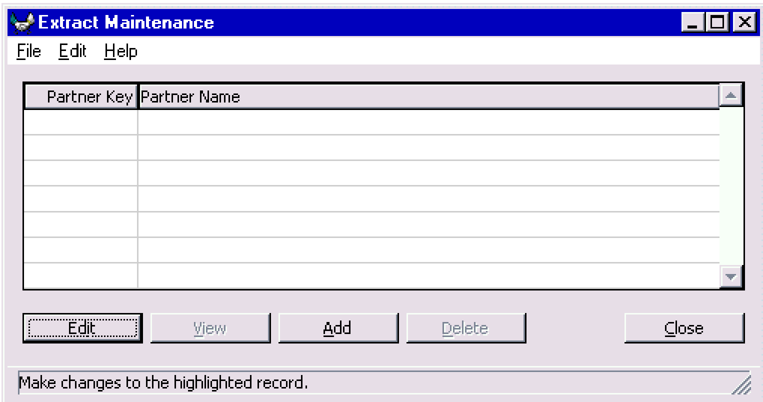


Figure 4-28 Extract Maintenance Screen

At first this list contains no names and the box is blank. To add a partner to the list, click Add.

5. A *Partner Find Screen* appears. This is similar to that described in Chapter 2, section 2.1, except that it has an Accept button at the bottom.

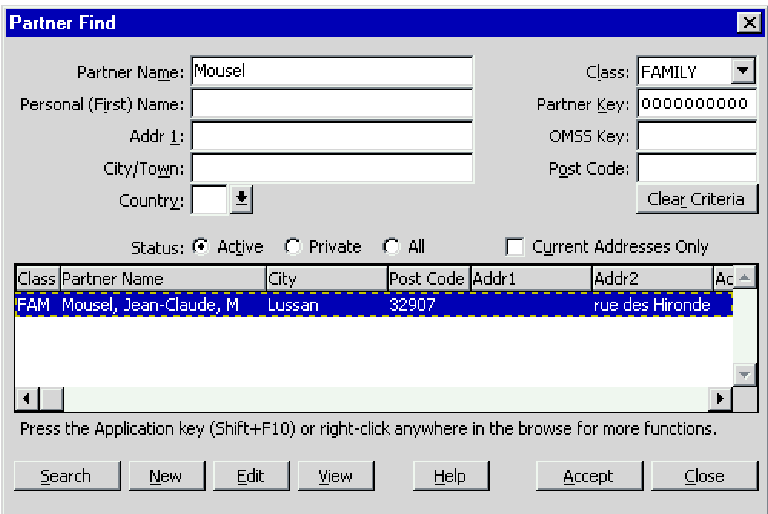


Figure 4-29 Partner Find Screen for Adding Partners to Manual Extract

6. Find the first partner who you wish to add, using the *Partner Find Screen*. Highlight the partner and click Accept.
7. The *Extract Maintenance List Screen* appears, now showing the new partner. To add another partner, click Add again, and find the next partner. To remove a partner from the list, highlight the name and click Delete.

8. Continue until the extract includes all partners. Click Close.

4.3 Extract Combination

Sometimes it is not possible to create the required extract in a single operation. However, you can make two or more extracts and combine them to give a new extract. PETRA can combine existing extracts in three possible ways.

- **Extract Addition (Merging or Combining Extracts)** This creates a new extract which contains all the partners in the original extracts. Duplicate entries (where a partner is in more than one of the original extracts) are removed.
- **Extract Intersection** This creates a new extract containing only those partners who are in all of the selected original extracts.
- **Extract Difference (or Extract Subtraction)** This creates a new extract in which we remove from one existing extract any partners who are also on a second existing extract.

The following diagram illustrates these operations based on two existing extracts:

Figure 4-30 Examples of Extract Combination

Original Extracts		⇒	New Extracts		
Extract 1	Extract 2	Merged (Combined) Extract	Intersected Extract	Extract 1 minus Extract 2	Extract 2 minus Extract 1
Partner A		Partner A		Partner A	
Partner B		Partner B		Partner B	
Partner C	Partner C	Partner C	Partner C		
Partner D	Partner D	Partner D	Partner D		
	Partner E	Partner E			Partner E
	Partner F	Partner F			Partner F
	Partner G	Partner G			Partner G

In each case a new extract is created and the user gives it a new name. The existing extracts are left unchanged. Merging and Intersecting can be carried out with more than two extracts in a single operation if required. The three operations form part of the `Maintain` menu in the *Extract Master List Screen*.

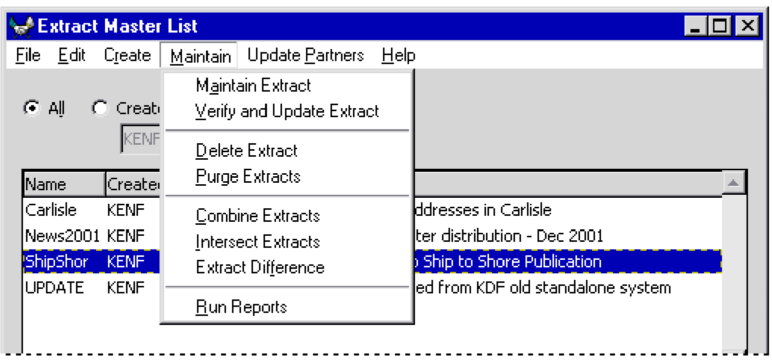


Figure 4-31 Maintain Menu on Extract Master List Screen

4.3.1 *Combining (Merging) Extracts*

Two or more extracts can be copied, and the copies combined to form a single new extract. For example, you may wish to create an extract of partners living in postcode ranges 1200-1399 and 1600-1799, but excluding those in 1400-1599. You can create two separate extracts and combine them. If a partner appears on more than one of the original extracts, they only appear once in the combined extract.

Example: To combine a mailing list for subscriptions to Ship/Shore with a list of all active Swiss partners living in Geneva; you wish to mail a special report on the first visit of the Doulos to Switzerland!

1. Create separate extracts for the Ship/Shore recipients and for all Swiss partners living in Geneva, as described in sections 4.2.1, Publication Extract, page 99 and 4.2.22, Address Extract, page 117, respectively. Give these the names SHIP-SHO and SWISSPT.
2. From the *Partner (Welcome) Screen*, select the menu item `Mailing`, then `Extracts`. The *Extract Master List Screen* appears (see Figure 4-1, page 99).
3. From the menu bar, select the menu item `Maintain`, then `Combine Extracts`. The *Combine Extracts Screen* appears.

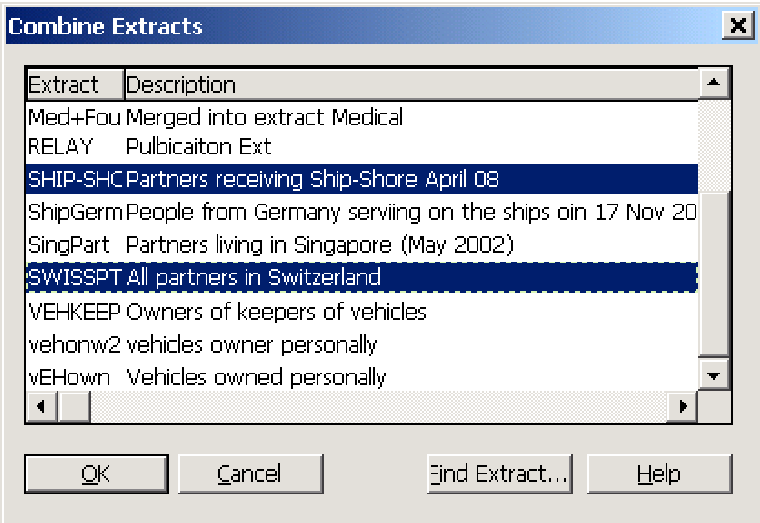


Figure 4-32 Combine Extracts Screen

4. Click on SHIP-SHO and then, while holding down the <Ctrl> key, on SWISSPT to select the extracts which you wish to combine. If you click on an extract by mistake, you can click on it a second time to de-select it. Then click OK.
5. The *New Extract Screen* appears, asking you to give the extract a name and description. Enter a new code and description, then click OK.

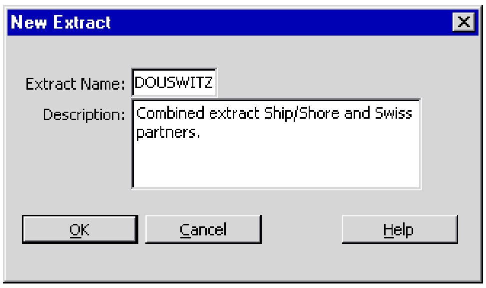


Figure 4-33 New Extract Screen after entering description

6. The *Extract Master List Screen* reappears and shows the new extract. Click Close.

4.3.2 Intersection of Extracts

It is possible to compare two or more extracts and to create a new extract which contains only those partners who are on ALL of the extracts compared.

Example: To produce a list of churches who have made a donation to a particular OM Field.

1. Create an address extract of all partners of class `CHURCH` (see section 4.2.22, Address Extract, page 117).
2. Create a donor extract of all partners who have made donations to the OM Field. (see section 4.2.16, Donor Extract by Field, 111).
3. Compare these two extracts using Extract Intersection. Do the same as in Combining extracts (section 4.3.1, page 121), but in step 3, select `Maintain` and then `Intersect Extracts`. Select the two (or more) extracts to form the new intersection extract, and give it a new name.

4.3.3 Subtracting Extracts (Extract Difference)

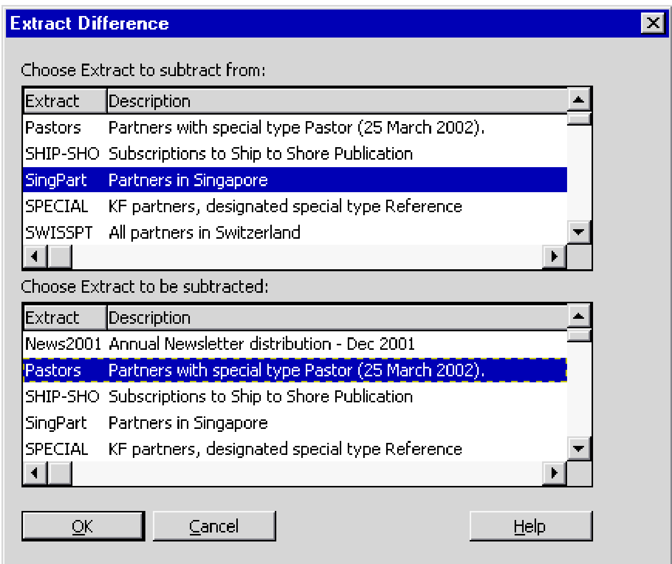
Using the Extract Difference facility you can create an extract which includes all partners from an existing extract except those on another extract (see Figure 4-30).

Example: You wish to mail a special newsletter to all active partners in Singapore. However, it is not necessary to send it to partners of special type Pastor, because it was included in a mailing which went to them last week.

You need an extract which contains all active partners except Pastors. First create an extract of all active partners in Singapore. Next create an extract of all Pastors. Then subtract this from the first extract.

1. Create an extract of all active partners in Singapore as described in Section 4.2.24, General Extract, page 119. Call it `SingPart`.
2. Create an extract of all Pastors, as described in Section 4.2.2, 'Partner Type Extract'. Call it `Pastors`
3. From the *Partner (Welcome) Screen*, select the menu item `Mailing`, then `Extracts`. The *Extract Master List Screen* appears,
4. From the menu bar, select the menu item `Maintain`, then `Extract Difference (see` Figure 4-31`)`. The *Extract Difference Screen* appears.

Figure 4-34 Extract Difference Screen



5. In the upper box, click to highlight the extract which you wish to subtract from (`SingPart`). In the lower box, highlight the extract which contains the names that you wish to remove (`Pastors`). Click OK.

Note It is possible to subtract more than one extract. To do this, hold down the `Ctrl` key while you click the extracts in the lower box, that you wish to subtract from the extract in the upper box.

6. A blank *New Extract Screen* appears, asking you to name the new extract. Enter a name and description and click OK.
7. The new extract is generated. You are returned to the *Extract Master List Screen*, which now shows the new extract. Click Close. The new extract can now be used for printing mailing labels, etc.

4.4 Maintaining an Extract

Extracts normally have short lives. They are used for generating a report, form letter or for mailing labels. The next time that at similar report is required, it is best to create a new extract, since the data from which the extract was generated may have changed. However, there are situations where it is useful to alter an existing extract. The various possibilities are:

- **Adding or Deleting a Partner** The five types of extract (publication, Field, partner type, donor and address) will meet most standard needs. However, sometimes you need exceptionally to add one or two partners to a mailing list (or to delete them from it). It is possible to manually add or delete partners in an existing extract. (See section 4.4.1, page 124).
- **Editing an Extract Description or Code** It is possible to alter an extract description or reference code without generating the extract again. (See section 4.4.2, page 125).
- **Verifying and Updating an Extract** Sometimes you need to use an old extract (for example because it lists people who participated in a campaign) but you need to make sure that the addresses are up-to-date. This facility allows the extract to be updated to include only current addresses. (See section 4.4.3, page 126).

  This does NOT update the search criteria. So, in the case of a publication mailing list, verifying and updating will not add new partners who have subscribed to the publication since the extract was generated.
- **Deleting Old Extracts** Old extracts can be deleted, either individually, or by using the `Purge Extracts` command which removes all (deleteable) extracts which are more than a specified number of days old. (See sections 4.4.4, page 126 and 4.4.5, page 127).

4.4.1 Adding or Deleting a Partner

It is possible to manually add a partner to an existing extract, or to remove (delete) a partner from an extract. To add or delete a partner:

1. From the menu bar of the *Partner System (Welcome) Screen*, select `Mailing`, then `Extracts`. The *Extract Master List Screen* appears:

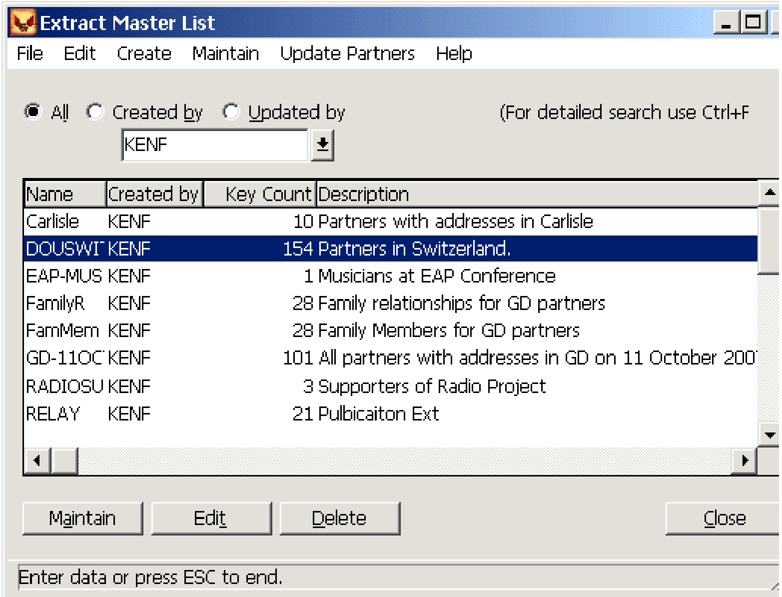


Figure 4-35 Extract Master List Screen

2. Using the buttons at the top, select whether you wish to view all extracts, those created by you or those updated (maintained) by you previously. Scroll to the right to show the date that the extracts were created. If there are many extracts of this type in the system, you can use the Find system to help you locate the extract you want. From the menu bar, select `Edit` and then `Find`. The Find procedure is described in the GENERAL USER GUIDE, section 4.2.3. To search all extracts, replace the user name with an asterisk (*).

3. Click on the extract to which you wish to add (or delete) a partner, and click Maintain . The *Extract Maintenance Screen* appears, showing all the partners in that Extract.

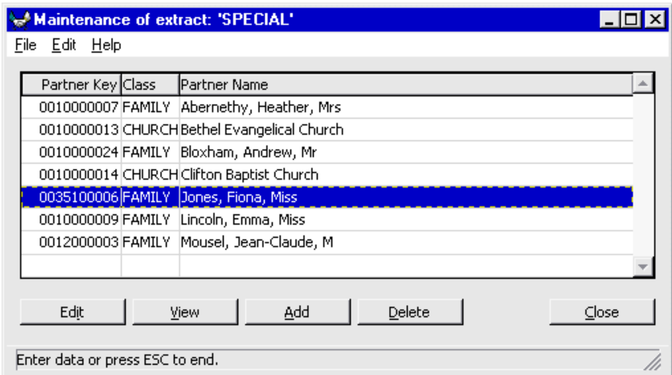


Figure 4-36 Extract Maintenance Screen

4. **To delete a partner**, click to select the partner, and then click Delete . You will be asked to confirm this. Click Yes , then Close .

   To add a partner, Click Add . A *Partner Find Screen* appears.

5. Use the *Partner Find Screen* (see Chapter 2, section 2.2) to find the partner that you wish to add; then click OK. Click `Close` to exit the *Extract Master List*.

4.4.2 Editing an Extract Description

To edit an Extract description:

1. From the menu bar of the *Partner System (Welcome) Screen*, select `Mailing`, then `Extracts`. The *Extract Master List Screen* appears (as in Figure 4-35)

2. Click on the extract for which you wish to edit the description or code, and click Edit . The *Extract Master Maintenance Screen* appears.

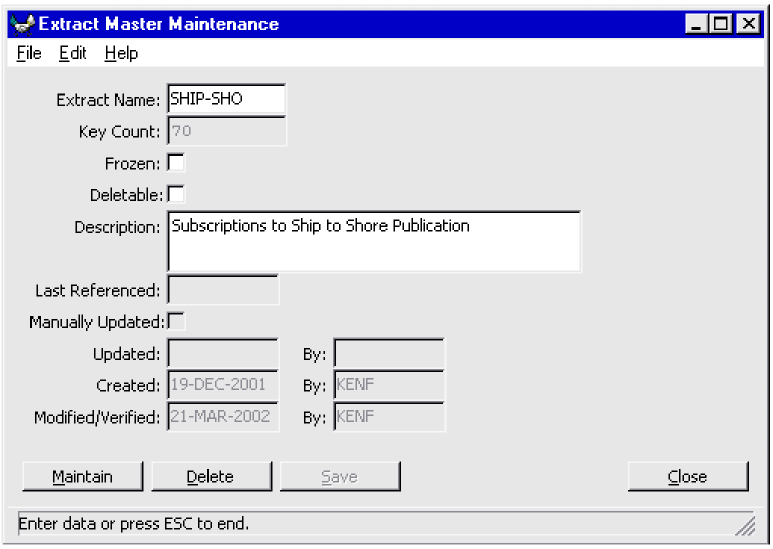


Figure 4-37 Extract Master Maintenance Screen

3. You can now alter the **Extract Name** and **Description**. This screen also shows additional information about the extract, for example, when it was created, and by whom, and whether it has been updated, manually and automatically.

   Frozen If you wish to protect the extract so that partners cannot be added or deleted in error, check the box. It is now not possible to add or delete a partner.

   Deletable If the box is not checked, the extract itself cannot be deleted (although individual partners can still be added or deleted.)

4. Click Close.

4.4.3 Verifying and Updating an Extract

PETRA can verify and update an extract so that it uses only current addresses. This does NOT 'recreate' the extract; it will not add new partners, since an extract does not store the criteria used to create it. Similarly it will not delete partners even if they have since become inactive. To verify and update an Extract:

1. Bring up the *Extract Master List Screen* as described in section 4.4.2, page 125.
2. Click to select the extract that you wish to verify and update.
3. From the menu bar select `Maintain`, then `Verify and Update Extract` (Figure 4-38).

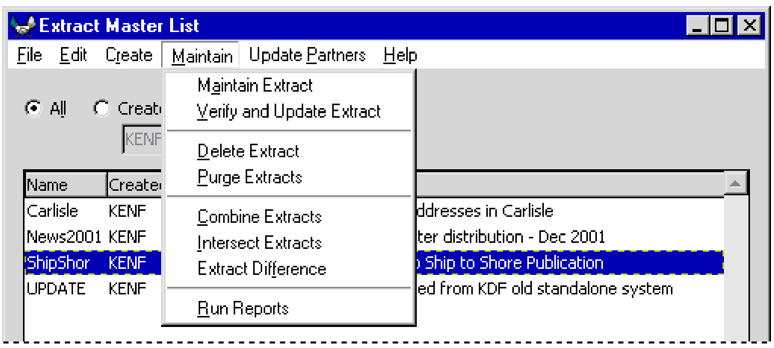


Figure 4-38 Maintain menu in Extract Master List

4. PETRA verifies and updates the addresses in the extract. If all is well, click `Close`.

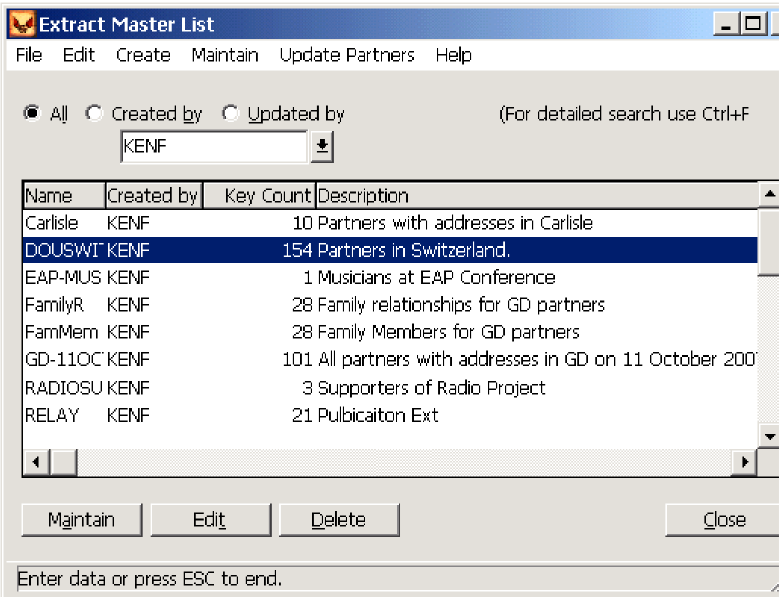
   If one of the addresses is not current, then a box appears, warning you: 'Address for partner is not current. Update the address key?' Make a note of the partner's name and Click OK. If there is no alternative current valid another box appears: 'No current address exists. Remove key from this extract?' If this happens, then it is best to click OK to remove the partner, but then to find this partner using the *Partner Edit Screen* and check that there is no valid address. If you can find a good address, then you can manually add the Partner back to the Extract.

4.4.4 Deleting an Extract

To delete an Extract:

1. From the menu bar of the *Partner System (Welcome) Screen*, select `Mailing`, then `Extracts`. The *Extract Master List Screen* appears:

Figure 4-39 Extract Master List Screen



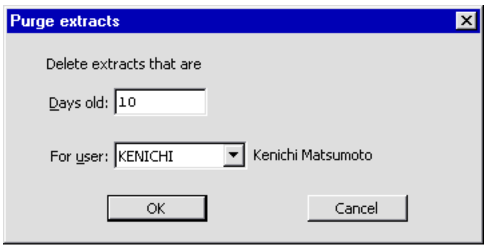
2. Click on the extract that you wish to delete, and click Delete . A dialogue box asks you to confirm this. Click Yes, then Close.

4.4.5 Deleting All Old Extracts (Purging)

It is possible to delete all old extracts with a single command.

1. To do this, from the *Partner System (Welcome) Screen*, select the menu `Mailing`, then `Purge Extracts`. A dialogue box appears:

Figure 4-40 Purge Extracts Dialogue Box, to set User and age of extracts to be purged



Days Old Enter the age of an extract. Extracts this old, and older, will be deleted, unless they have been marked 'undeletable'.

For User Select the creator of the extracts that you want to purge. In general this will be you. Do NOT select the option `All`, since this will delete other people's extracts, and you will be very unpopular!

2. Click OK.

4.5 Exporting and Importing Extracts and Partner Data

Importing data for a group of partners is done in exactly the same way as for a single partner (see section 2.7.2, page 61). Data relating to a group of partners in an extract can also be exported in order to be sent to another office, and this is explained in this section. Lists of partners, (extracts) may also be imported from OMSS or Crystal Reports using the `Create` menu on the *Extract Master List Screen* (see Figure 4-2).

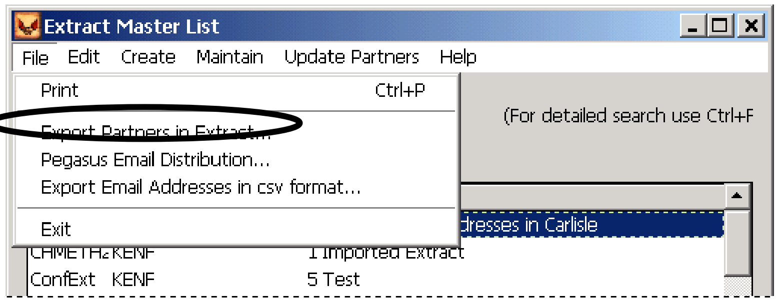
> **Note - Exporting Email Addresses** For details of how to do this, see section 10.3, page 179.

4.5.1 *Exporting Partner Data*

If you need to export details of a group of partners, it is best to begin by creating an extract of those partners. (Section 2.7.1, page 60 explains how to export details of a single partner.) The details of all partners in the extract can be exported to a text file as follows:

1. From the *Partner System (Welcome) Screen*, go to `Mailing`, then `Extracts`. The *Extract Master List Screen* appears.
2. Click to highlight the extract of partners that you wish to export.
3. On the menu bar, select `File`, then `Export Partners in Extract`.

Figure 4-41 Upper Part of Extract Master List Screen, showing the File Menu

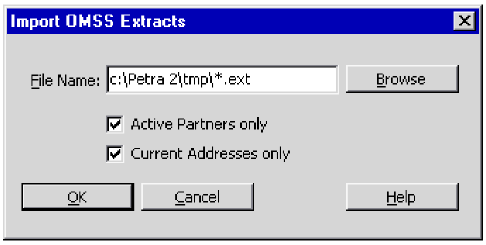


4. A question box then asks you whether, when exporting a Family record, you wish also to export the associated Person records. Click Yes or No.
5. A File Manager browse screen appears. Select the folder into which you wish the exported file to be placed. Click `Save`.
6. The export is made. An information box gives the name of the file to which the data has been exported. You can therefore copy and send this file to another PETRA installation, as required.

4.5.2 *Importing an Extract from OMSS*

1. Identify the OMSS Extract that you wish to import. It must have each partner on a separate line, with the OMSS key as the first item on each line.
2. Open the *Extract Master List Screen* as described in section 4.2.1. From the `Create` menu, select `Import OMSS Extracts`. A dialogue box appears, asking you to select the file containing the extract that you wish to import.

Figure 4-42 Import Extract from OMSS File Finder



3. Use the browse button to find the OMSS extract file. If you do not want the options of Active Partners Only and Current Addresses Only, then click to change these. Click OK twice (on the browse screen and then on the *Import OMSS Extracts Screen*).
4. A *New Extract Screen* appears, asking you to name the new extract and give a clear description (see Figure 4-4 as an example). Click OK.
5. The new extract appears in the list in the *Extract Master List Screen*.

4.5.3 Importing an Extract from Crystal Reports

1. Identify the Crystal Report containing the partners that you wish to import. It must have each partner on a separate line, with the Partner Key as the first item on each line.
2. Open the *Extract Master List Screen* as described in section 4.2.1, page 99. From the `Create` menu, select `Import Crystal Reports Files`. A dialogue box appears, asking you to select the file containing the extract that you wish to import.

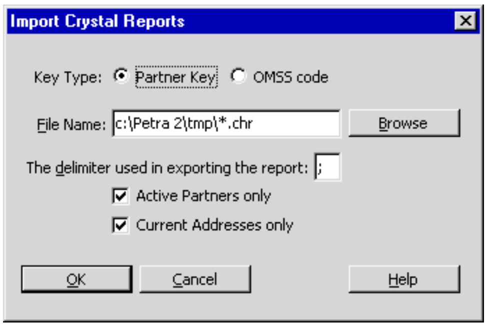


Figure 4-43 Import Extract from Crystal Reports

3. Use the browse button to find the Crystal Reports file. If necessary change the options for Active Partners and Current Addresses. Click OK**.**
4. If necessary change the delimiter character to that used in Crystal Reports. Click OK.
5. A *New Extract Screen* appears, asking you to name the new extract and give a clear description (see Figure 4-4, page 101 as an example). Click OK.
6. The new extract appears in the list in the *Extract Master List Screen*.

4.6 Using Extracts to Update Partner Information

Sometimes it is useful to be able to update the records of a number of partners in the same way (for example to add a contact record to all partners who attended a meeting). If an extract is made, which contains the partners to be updated, then certain information can be added to each partner’s record in a single operation. The operations which are possible are described below.

To update the records of all partners in an extract.

1. From the *Partner System (Welcome) Screen*, go to the `Partner` menu and select `Extracts`. The *Extract Master List Screen* appears, showing all existing extracts.
2. Highlight the extract that contains the partners that you wish to update, and click `Update Partners` on the menu bar. This then shows the different operations that you can carry out for all the partners in the extract (see Figure 4-44). The different options are described below.

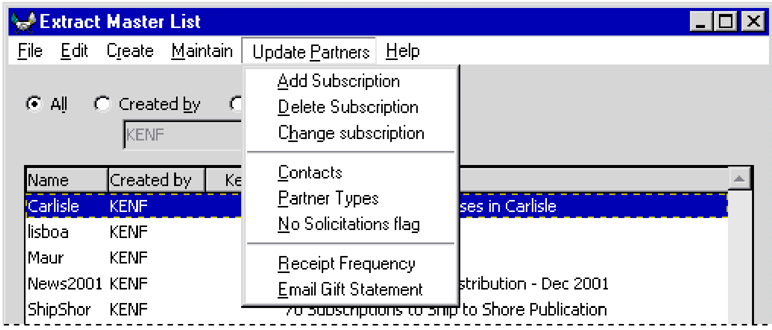


Figure 4-44 Upper part of Extract Master List Screen , showing the Update Partners Menu

Menu Item	Operation
`Add Subscription`	Add a subscription to all partners in the extract. If a partner already has had a subscription to this publication, the previous details are not changed, even if the previous subscription has been cancelled. A list of all such partners is displayed on the screen. (See Subscriptions, section 2.3.4, page 29).
`Delete Subscription`	Allows you to delete a subscription for all partners. **Warning**: This will delete all reference to the subscription. It is **not** the same as cancelling a subscription (see section 2.3.4.2, page 31).
`Change Subscription`	Enters new details for a subscription for all partners (Subscriptions, section 2.3.4, page 29).
`Contacts`	Adds a new contact record to all partners in the extract (see Contacts, section 2.4.6, page 46).
`Partner Types`	Adds or deletes a special type designation to all partners in the extract. Takes you to *Type List Screen*. Select the special type and click Add or Delete (or `Close` to cancel the operation.) Adding or deleting will put all the partners in the same state; it doesn't matter whether or not they had this type before.
`No solicitations`	Allows you to mark all partners as 'no solicitations', which means that they do not wish to receive requests for donations (see **No solicitations**, page 24.)
`Receipt frequency`	Allows you to change all partners with regard to (1) the frequency at which gift receipts are sent, and (2) whether all gifts should be receipted for this partner (see section 2.5.2, page 51).
`Email Gift Statement`	Allows you to set or cancel this condition for all partners. Setting this condition means that the partner receives notification by email of gifts made to them (see **Email Recipient Gift Statement**, page 52).

----- End of Chapter 4-----

Chapter 5 Printing Labels and Envelopes

5.1 Printing Addresses - Overview

PETRA can print labels and envelopes in a number of different formats. It can print sets of labels from extracts or labels for an individual partner (either a single label or a number of identical labels with the same address).

The act of printing requires three inputs.

- An **Extract** listing the partners to whom the mailing is to be sent, or the **Partner Key** for an individual partner.
- An **Address Layout**, which describes the format of the address (which parts of the address will be on line 1, line 2, etc.) There are different address layouts for small labels, envelopes, etc.
- A **Label Code**, which describes the size of paper or form on which the addresses are to be printed, for example, A4 sheets of labels with 2 labels across and 6 down on each sheet.

To print labels you tell PETRA which Extract (or partner), which Address Layout and which Label Code to use.

Labels are printed in a standard order but this can be altered to meet the particular requirements of a country office for post-code mail sorting (see section 5.3.4, page 135).

If a mailing includes addresses in different countries, PETRA will automatically choose the correct format for any country, provided that it has been set up in the Address Tables. If not, it will use a default format (eg for country code 99). Similarly, titles will be automatically changed (for example 'Mrs' will be changed to 'Frau' or 'Madame', etc.) if this has been set up in the Address Title Override Tables. If these have not been set up, then PETRA will use an existing (default) format. Chapter 3 explains how to maintain the Address Tables.

Labels will be printed to a printer that can use sheets of labels. However, it is also possible to 'print' the labels to the computer screen to check that output is correct. This can be a useful way to avoid wasting labels, especially on a large print run, and for new users.

When you print labels, either to printer or to screen, PETRA stores the output data in a **Label Report**. It is possible to reprint this report without having to select all the input items a second time.

This Chapter only explains how to print address labels and envelopes. You may wish to print an address at the top of a letter (so that it can be seen through a window envelope). Printing in letters is explained in Chapter 6, Form Letters. Section 5.2 explains what to do before printing. Section 5.3 explains the different steps in printing labels, using an example.

5.2 Preparing to Print Addresses

Before beginning to print you must make sure that everything needed for printing is ready. Normally you will have to create a new Extract to give an up-to-date list of partners and their addresses. The Address Layout and Label Code will already exist unless this is the first time that your office has done this sort of printing.

The Extract (Partner List) Chapter 4 explains how to create an Extract. It is normally best to create a new Extract every time that you wish to print, in order to make sure that it contains the correct list of partners and up-to-date addresses.

It may be easier to make several printings using different Extracts, than to combine everything into one Extract. For example, if you are mailing a publication, it will be easier to use one set of labels for all partners who require a single copy, and a second set for those who require multiple copies. However, to do this you will have to create two different Extracts.

Address Layout When printing you must say which layout you wish to use. Chapter 3 explains how to set up layouts. The standard address layout types used for printing labels and envelopes are:

- **Envelope** For printing directly onto envelopes
- **SmlLabel** For printing onto small labels.

Label Code In order to print onto sheets of labels, you need to know the code for the type of label sheet. This will already be set up, unless this is the first time that your office has used this sort of label sheet. Envelopes also need a 'label code' to define where the address is to be printed. Setting up Labels is explained in the SYSTEM MANAGER GUIDE.

5.3 How to Print Addresses

New users should read the GENERAL USER GUIDE, which explains the basic steps in printing. Section 5.3.1 gives a worked example of printing labels. Section 5.3.3 explains special steps when printing labels for a subscription mailing.

5.3.1 Printing Labels from an Extract

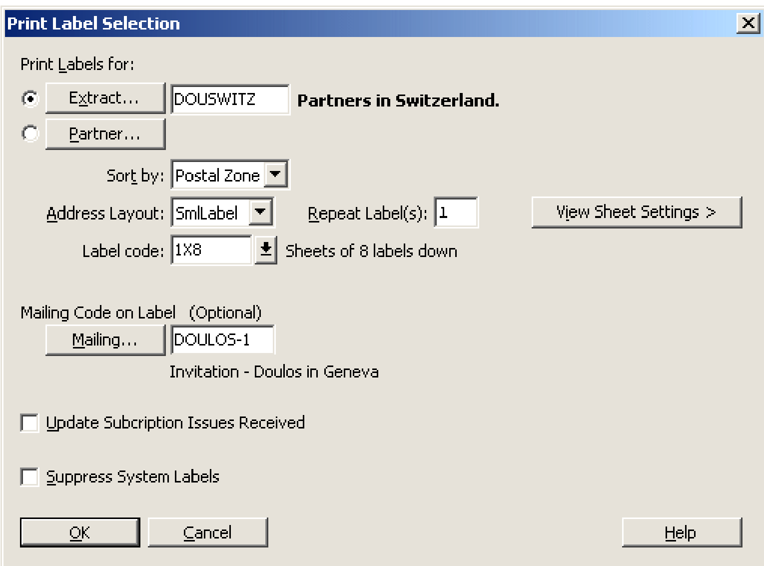
In the following example the labels will first be 'printed' to the screen to check that the format is correct. The Label Report is then re-printed to the computer printer.

5.3.1.1 Set up and Print to Screen

Example: You wish to print some small labels for mailing a letter to a group of partners. The letter tells them about a special meeting about a future visit of the ship Doulos to Switzerland.

1. First you must create an Extract of the partners to be mailed. Section 4.2, page 99, explains how to do this, and here we assume that you have already created an Extract DOUSWITZ.
2. From the menu bar of the *Partner System (Welcome) Screen*, select `Mailing`, then `Label Print`. The *Print Label Selection Screen* appears.

Figure 5-1 Print Label Selection Screen



3. Fill in the data fields as follows:

Extract Click on the [Extract] button. An *Extract Find Screen* appears. Use this to find the extract DOUSWITZ, or just click the [Search] button to see all extracts. Highlight DOUSWITZ and click the [Accept] button. (If you are only printing labels for one partner, then click [Partner] instead of [Extract].

Sort by Select whether you want the labels to be sorted by `Name` of by `Postal Region`. If by postal region, then this groups by country and postal code.

Label Code Select 3x7. This is the code that the office uses for sheets of small labels, with 3 label across and 7 down on each A4 page. To check the details, select a Label code and then click [View Sheet Settings >] . This displays the label detail.

Address Layout You are printing small labels, so use the drop-down button to change `Envelope` to `SmlLabel`.

Mailing (This step is not essential.) It will be useful to use a Mailing code so that you can easily record who received this mailing. Click [Mailings] . Select the code from the list, or, if it has not been created, click [New] and then add a new code as described in section 3.5, page 92). This code will be printed on the labels, and will help office staff to know what to put in the envelope.

No of Labels for Partner Leave this at 1 for our example. If you wish to print more than one label for each partner, the number can be entered here.

Update Subscriptions Received Do not check the box, since you are not mailing a Publication.

Suppress System Labels PETRA normally prints a heading showing the extract used and the number of partners. If you do not want this, check the box to suppress these (**Note**: Petra also prints 'end of group' labels after each address group. These can be switched off in the System Manager module, by going to System Parameters, and changing Gap Labels to the value 0.)

4. Click [OK]. The *Start Print Job - Labels Screen* appears. Select destination Screen, and print in the normal way (see GENERAL USER GUIDE). The addresses are now printed to the computer screen.

5. Check that the print looks to be correct. Click [OK]. This returns you to the *Partner System (Welcome) Screen*. Now reprint the Label Report and print to the computer printer (see the following section).

5.3.1.2 Reprinting a Label Report

Note: Reprinting is explained fully in the GENERAL USER GUIDE, along with typical screen shots.

1. From the menu bar of the *Partner System (Welcome) Screen*, select `Mailing`, then `Label Print`. The *Print Label Selection Screen* appears (see step 2, in section 5.3.1.1, above).

2. Since we are printing an existing report, ignore steps 3, 4, 5 and 6, and just click [OK]. This takes you to the *Start Print Job - Labels Screen.*

3. In the top left of the screen click `Reprint`, and then the [Select Report] button. The *Select Report Screen* appears.

4. Select the report that you printed to the screen, by reference to the date and time. Click [OK]. This returns you to the *Start Print Job - Labels Screen*, which has now been updated to show the selected Label Report.

5. Change the destination to the printer, as described in the GENERAL USER GUIDE, and click [OK]. The labels will now be printed to the printer.

5.3.2 Printing Labels or Envelopes for One Partner

It is possible to print a single label, or a set of identical labels for one partner, without needing to create an extract. The method is similar to that described in section 5.3.1, but the following stage is different.

1. When the *Print Label Screen* is shown (Figure 5-1), instead of selecting an extract, click the [Partner] button. This brings up a *Partner Find Screen*
2. Use the *Partner Find Screen* to select the required partner and click [OK].
3. Enter the number of labels required for this partner (say 12) and click [OK]. Then continue as before.
4. In the *Start Print Job Screen,* select 1 copy (each copy will contain the number of labels that you have asked for. If you ask for 12 copies of the report you will get 12 x 12 or 144 labels!)

5.3.3 Labels for Subscriptions

PETRA provides extra facilities for use when printing labels to mail Publications.

- With bulk mailing, labels can be printed which show the number of copies to be sent to each partner, to help the people filling the envelopes.
- PETRA can automatically update the partners' records to show that they have received an additional issue of the publication.
- PETRA can print on the label the **publication label code(s)** so that office staff know what to put in the envelope. (This is useful if several publications are being mailed at the same time.)

The following procedure explains the key differences from 'general' label printing, and it will be useful to refer to the example in section 5.3.1 as you read it.

1. Create a Publication Extract (see section 4.2.1, page 99). You can create a single extract if you have several publications to send at the same time. This avoids sending two items to the same address, which can be wasteful in postage. You can produce different extracts for those partners who receive a single copy of a publication and those who receive more than one copy (bulk mailings) if you wish, or a single extract can include both.

> **Note** When you create a Publication Extract you will be asked if you wish to print labels. If you say [Yes], this takes you directly to the Label Print Screen.

2. When you bring up the *Print Label Selection Screen* you can use the special publication facilities.

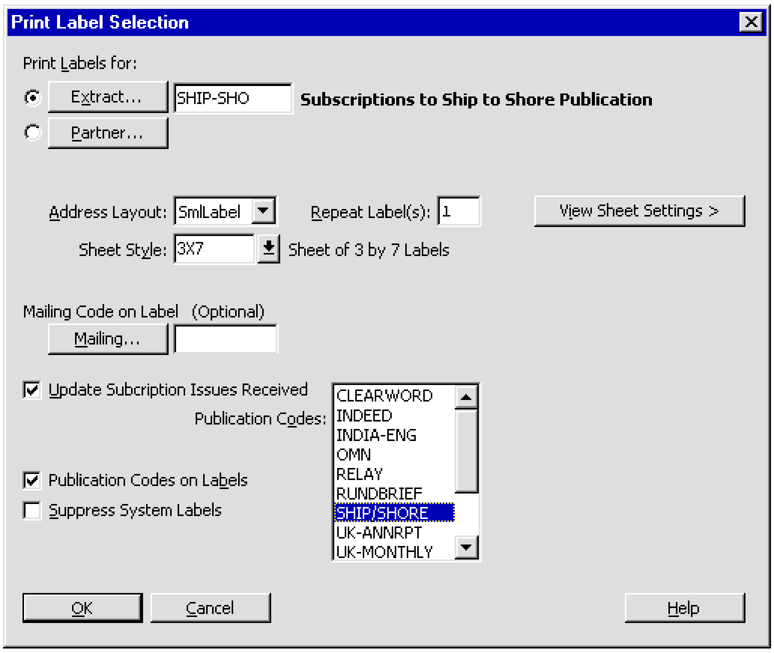


Figure 5-2 Print Label Selection Screen after selecting subscription

When printing labels for a publication, click on the **Update Subscription Issues Received** box. When you do this, the panel at the lower right appears, showing the different publications. Select the publications for which you created the extract. To select more than one, hold down the <Ctrl> key as you click on the publication. This causes the following:

- When the labels are printed, PETRA will check to see which of the partners in the extract receives each of the publications highlighted on the list. Partner's records will be updated to show that they have received an additional copy of the publications that they are being mailed.
- If you also check the **Publication Codes on Labels** box, then on each label the publication code will be printed showing which of the publications they should be mailed. If a partner receives several copies of a publication, this will also be shown. This helps the mailroom staff to know which publications to send to each partner. For example, imagine that the publications Indeed and Ship-Shore are both being mailed.

  `Carmen Gonzales  (IN  SH:4)`

  indicates that Carmen should be sent one copy of Indeed and 4 copies of Ship-Shore.

> **Warning!** If you select **Update Subscription Issues**, the partners' records will be updated, even if you print to screen. Be careful only to do this once for each mailing. If you print first to screen as a check, the partners' records are updated at that time. To avoid updating the partners' records twice, you should not start again from the Label Print menu. Instead, reprint the report (section 5.3.1.2, page 133).

5.3.4 Mailsort Label Printing

When using the `Print Labels` menu command, labels are printed after sorting in the following order.

1. Undercover countries - which will be handled separately
2. Sort by International Postal Type (area of the world for which different postage rates apply)
3. Sort by country
4. Sort by postcode

In some countries the post office charges a reduced rate if items are sorted in a particular order. **Mailsort Label** printing is used to allow the items for the home country to be sorted in a particular order.

Before Mailsort Label Printing can be used, the correct data must be entered into PETRA by the System Administrator (see SYSTEM MANAGER GUIDE).

To print in mailsort order, go to the *Partner Welcome Screen*, and from the `Mailing` menu, select `Mailsort Label Print`. After choosing this command, the procedure is exactly the same as for normal label printing.

----- End of Chapter 5 -----

Chapter 6 Form Letters and Mailmerge

6.1 Introduction to Form Letters and Mailmerge

Form letters are standard letters which can be sent to a number of different partners; the main text for each is the same, but all letters are slightly different (for example they include the name of the person to whom the letter is sent). The operation is the same as that of ‘mail merge’ in a word-processing program. PETRA can itself produce form letters, and can also export some partner data in a form that can be used in a separate word-processor or spread-sheet, etc.

Form letters are usually sent to a group of partners using an extract, but it is possible to send a standard letter just to a single partner.

Form letters almost always include the name and address of the individual recipient at the top. However, it is possible to include other specific information relating to that partner in the body of the letter. Details of gifts from a partner can be included, and so form letters can be used to generate acknowledgement letters, which include gift summaries. However, the system for Gift Receipting in the Finance Module gives greater flexibility in layout for designing formal receipts (see the FINANCE USER GUIDE).

Section 6.2 explains in general terms how PETRA generates form letters; it is important that users understand the process before actually creating letters. Section 6.3, page 140, gives detailed instructions on how to create and print form letters, both simple letters and more complex ones including inserts. Some of the items used in a form letter are set up and saved in Form Letter Tables. These are explained where necessary as part of the instructions, but a more complete description of each of the Form Letter Tables is given section 6.4.

An alternative Instead of using PETRA’s Form Letter facility, you may prefer to use PETRA’s Mail Merge facility to export the relevant data in a form that you can then import into your word-processor, spreadsheet, etc. This **Extract Mail Merge** facility is described in section 6.5, page 156.

6.2 Understanding Form Letters in PETRA

6.2.1 Parts of a Form Letter

This section explains how the different parts of a form letter fit together. It is suggested that new users read this section, then the examples in section 6.3, page 140, and then this section again.

To print a form letter up to six items may be needed. These are illustrated in Figure 6-1.

- **Extract** or **Partner Key -** the list of partners (+ addresses) to whom the letter is to be sent, or the individual partner if the letter is only being sent to one partner. Chapter 4 explains how extracts are generated. For each printing of a form letter, one extract is used, but the same form letter may be printed several times with different extracts.
- **Address Layout** The address layout to be used on the printed letter. Form letters will normally use the address layout, **Ltr_head**, but may use any other layout that has been set-up by the local office. Section 3.4.2, page 84, explains how address layouts may be set up. If an address layout such as **Ltr_head** has been defined for several different destination countries, PETRA will automatically use the correct one when printing the letter for each partner.

- **Formality** Form letters normally start and close with phrases of greeting, which may include a name. The formality level allows an office to set up different greetings for formal or informal situations, and for men and women, e.g. Dear Sir or Dear Madam (formal), Dear George or Dear Mary (informal). When printing a form letter, you just select the level of formality required. [A PETRA user can also set up a special set of **Greetings** to be used for one particular partner, such as a relative. This is explained in section 6.4.4, page 153.]
- **Body** The body text is the main part of the letter. The main text is the same for all recipients, but it can include markers to show that additional words should be inserted at one or more places in the letter at the time of printing (see next item, inserts).

Since a **Form Letter Body** is almost always used with the same **Formality** and **Address Layout**, these three items are selected together and called a **Form Letter Design**.

- **Inserts** These are small, variable items such as dates, places, events or amounts of money, that may be inserted into a standard body text. Inserts allow a standard letter body (such as an invitation to a training seminar) to be used for different occasions (for seminars in different places). Inserts may be the same for all recipient partners in the extract or different for each one.
- **Sender** The name of the sender, to be included at the end of the letter.

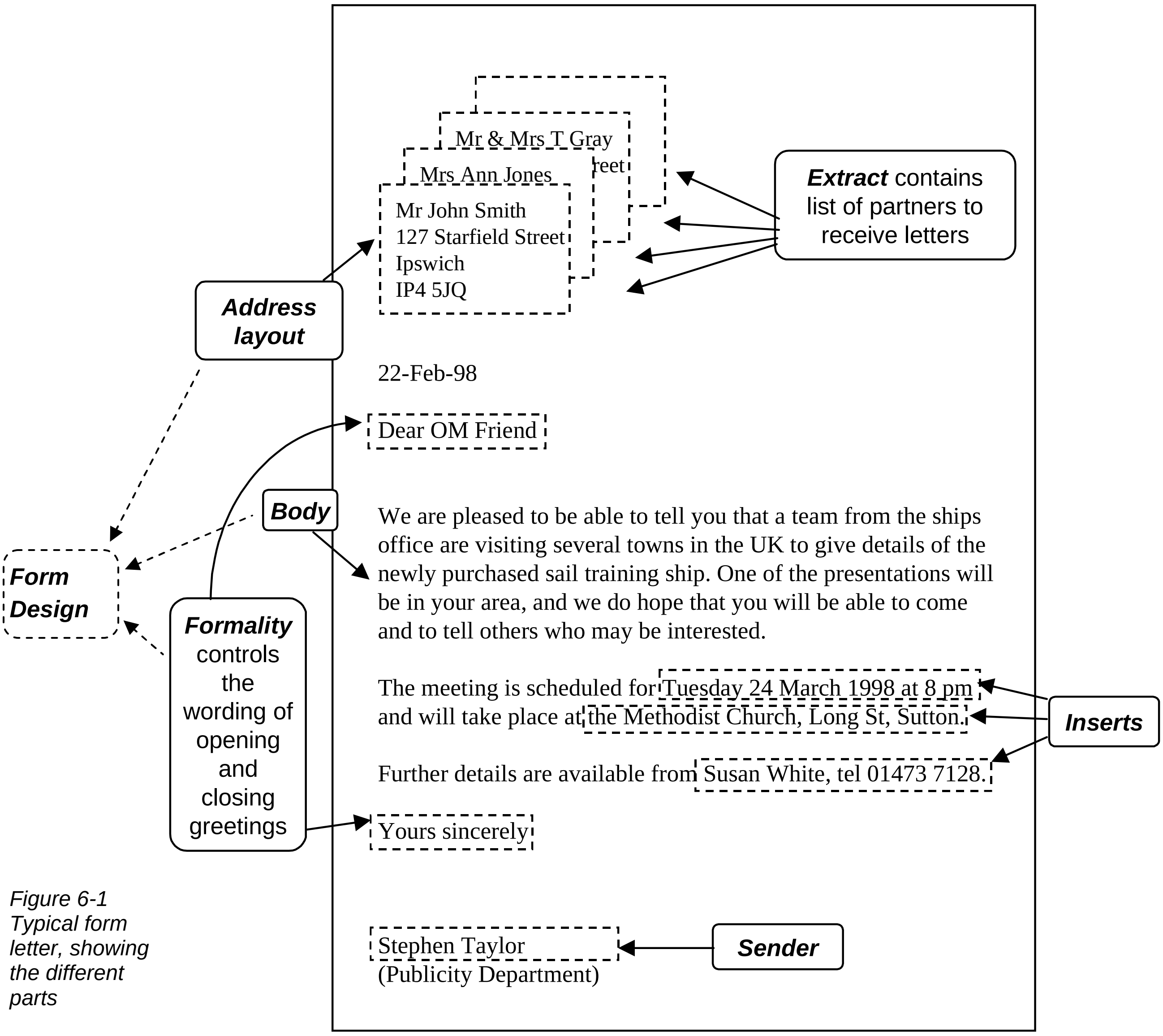


Figure 6-1 Typical form letter, showing the different parts

The example in Figure 6-1 explains these different parts. The **Extract** controls how many different letters are printed, and to whom they are addressed. The **Address Layout** controls the format of the address (for example, where the post code is put). The **Body** is the main message. The **Formality** controls the opening and closing greetings used. The **Sender** is the name that appears at the end. The **Inserts**, if used, may be the same for each recipient or different for each.

6.2.2 Main stages in Producing a Form Letter

The main steps in creating and printing a form letter are listed below. Figure 6-2 shows how the different items are used. A number of items (e.g. Body and Form Design) must be set-up before the printing operation, and these are saved as entries in Form Letter Tables. Detailed instructions are given in section 6.3, page 140; the following description is an overview of how to print.

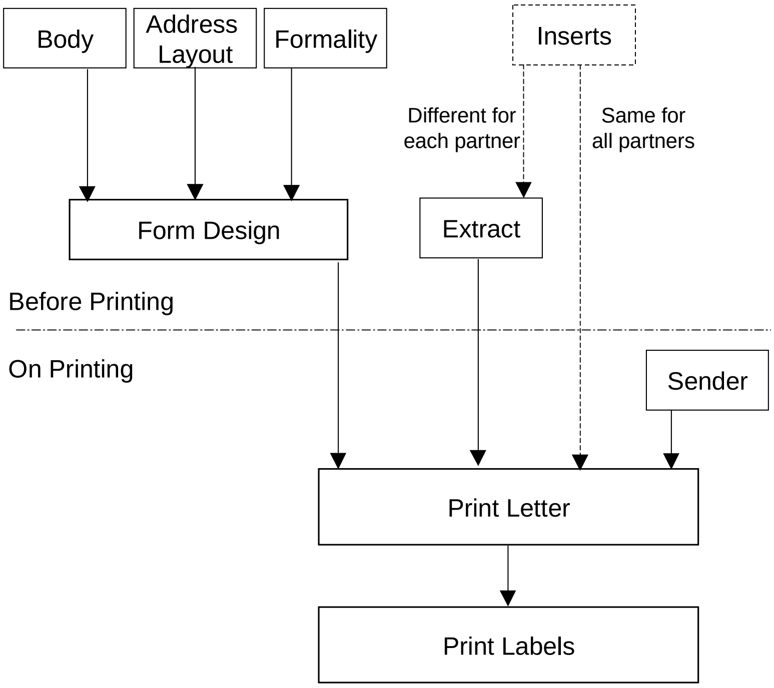


Figure 6-2 Items required for printing a form letter

Before Printing

1. Create the **Body** of the form letter, using the Form Letter Body Table.
2. Check that a suitable **Address Layout** and **Formality** already exist.
3. Use the Form Letter Design Table to create the **Form Design** by grouping together the three items mentioned in 1 and 2.
4. If your letter is to go to more than one partner, create an **Extract** of partners who you wish to send to.
5. If you are using **inserts**, make a note of exactly what information you wish to include at each insertion point in the body text. If the inserts are different for each partner, use the Load Inserts into Extracts commands before printing. See **Understanding Inserts** later in this section.

At the Time of Printing

6. When you use the **Form Letter Print** command, you first need to select the required **Form Design** and **Extract** (or individual partner).

7. Enter the **Sender's** name. On the print screen you can also make any adjustments necessary to the layout of the letter(margins, position of date, etc) using the options provided.
8. If you are using **inserts**, PETRA will then prompt you to enter the insert contents, unless you have already done this.
9. Print to screen to check the layout.
10. Print the form letter again, this time to the printer.

Understanding Inserts

Figure 6-2 shows two ways of using inserts – they can either be entered at the time of printing, or "loaded into the extract" at some time before printing. Here is a brief description of how this works.

If **the same** (identical) inserts are being used for all partners, they are normally entered at the time of printing. Suppose a letter contains 3 inserts that are the same for all partners (for example a standard invitation letter contains a date, a time and a place, all as inserts). When you print, a series of three dialogue boxes appears, each asking you to enter the data for the next insert. When you have entered the last of the three, all the letters print. The insert information is stored automatically in the Form Letter Insert Table, so if you then need to reprint the same letter body with the same extract, there is no need to enter the insert data again.

If **different** inserts are being used for each partner, then it is possible to use the same procedure as with the identical inserts. In this case, when you print, PETRA will display dialogue boxes for each insert for each partner. So, if there are 3 inserts and 25 partners, you will see a series of 75 dialogue boxes, asking you for: "Partner 1 insert 1", "Partner 1 insert 2", "Partner 1 insert 3", "Partner 2 insert 1", etc. Since this may take some time, PETRA allows you to enter the inserts for each partner as a separate operation before printing. You can then check or edit them before finally printing.

Once inserts have been entered, either at the time of printing or beforehand, they are stored automatically in the Form Letter Insert Table, which has a separate record for each combination of "Form Letter Body + Extract + Partner Key". (These entries can be accessed from the `Maintain Tables` menu, so it is possible to correct any errors without entering everything again.)

What actually happens is as follows. When you print a form letter, PETRA looks in the Form Letter Insert Table for a record containing the required insert information, for each combination of "Form Letter Body + Extract + Partner key". If it finds the record it needs, it will print the letter for that partner. If it does not find it, then it will present dialogue boxes asking you to enter the missing insert information. Incidentally, when the same (identical) inserts are used for each partner PETRA actually does the same thing. In this case the insert information is also stored in the Form Letter Insert Table as a single record with the Partner Key 0000000000.

Tip In cases where the same inserts are to be used for each partner, it is sometimes quicker just to edit or create a new body text, and to include all information as part of the body. However, in the case of a standard letter which is used regularly, it is best to leave the body unchanged and to use inserts, in order to avoid the risk of printing a letter containing old information.

6.3 How to Write and Print a Form Letter

The first part of this section describes how to write a simple letter, with no inserts. The later sections describe how to use inserts, first where the inserts are the same for all partners, and then for the more complex case where inserts are different for each partner.

As explained in section 6.2, to create and print a form letter it is necessary to use Form Letter Tables. The instructions in this section explain in simple terms how to use these tables, but a fuller description of each table is given in section 6.4, page 148.

6.3.1 Simple Form Letters (No Inserts)

This section explains how to write a simple form letter, with no inserts, to be sent to a number or partners. An example is used to explain the operations.

Example: You wish to send a short letter to a number of partners living in Winnipeg, Canada, to invite them to a meeting.

1. **Form Letter Body** First create the **Form Letter Body**. On the menu bar of the *Partner Screen* select `Maintain Tables`, then `Form Letter Tables`, then `Form Letter Body` and click New. The *Form Letter Body Screen* appears.

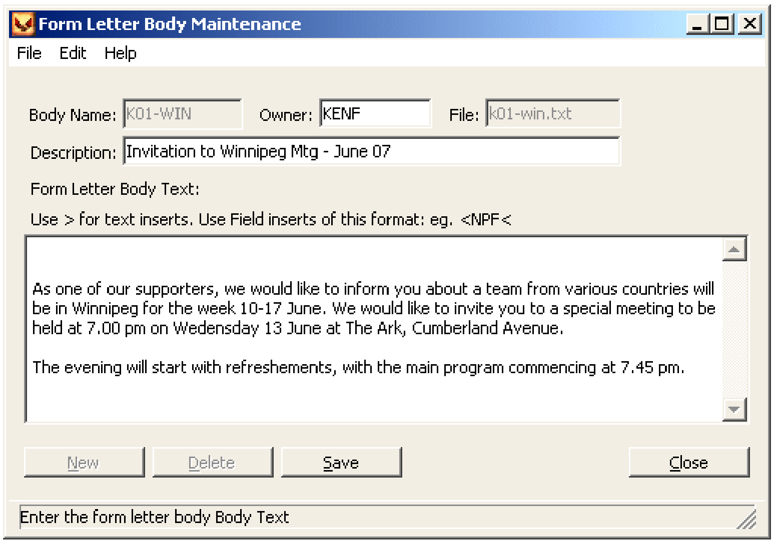


Figure 6-3 Form Letter Body Screen (example with no inserts)

Choose a **Body Name** (code) and enter a clear **Description**. Then type your letter in the box.

It is not possible to use text formatting such as **bold**. If you require a new paragraph, press the <Enter> (or < ↵ >)key twice. For how to add indents, see section 6.4.1, page149.

Do NOT include an opening or closing greeting (Dear Peter, yours sincerely, etc), unless you are going to use a 'blank' formality. Click Save and Close, then Close again.

2. **Form Letter Design** Next, we prepare to create an appropriate **Form Letter Design**. In this example we assume that an appropriate **Address Layout** has been set up (for more information on this see section 3.4.2, page 84.) We need to check which **Formality** level to use. Select `Maintain Tables`, then `Form Letter Tables`, then `Form Letter Formality`, to see existing formalities. In our case we will choose level 3. (For more on Formality Levels, see section 6.4.3, page 150.)

3. From the `Form Letter Tables` menu, select `Form Letter Design`, and click New. The *Form Letter Design Screen* appears.

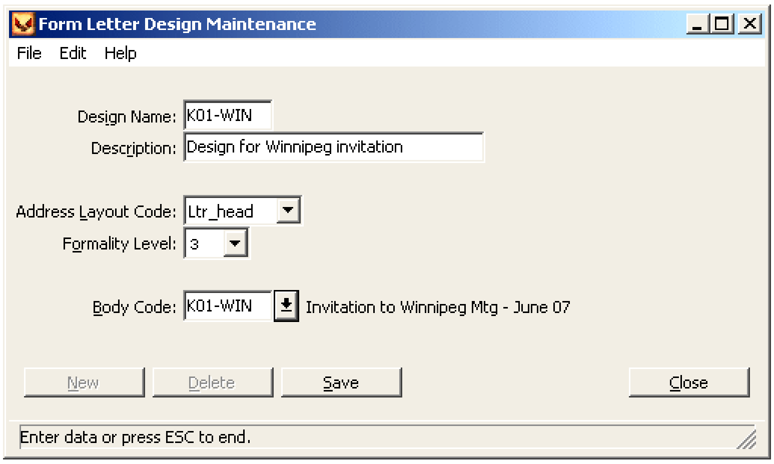


Figure 6-4 Form Letter Design Screen

Enter an appropriate **Design Name** and **Description**. In this case we have used the same code as for the Body (K01-WIN). Select the Formality Level that you checked just now (level 3), and the required Form Letter Body (also K01-WIN in our example.) Click Save and Close, then Close again.

4. **Extract** Next we must create an extract of the people to send the mailing list to, as described in Chapter 4, page 97. The extract name we have chosen is K-WINNI. We are now ready to print the form letter.
5. **Printing** From the `Mailing` Menu, select `Form Letter Print`. The *Form Letter Print Screen* appears.

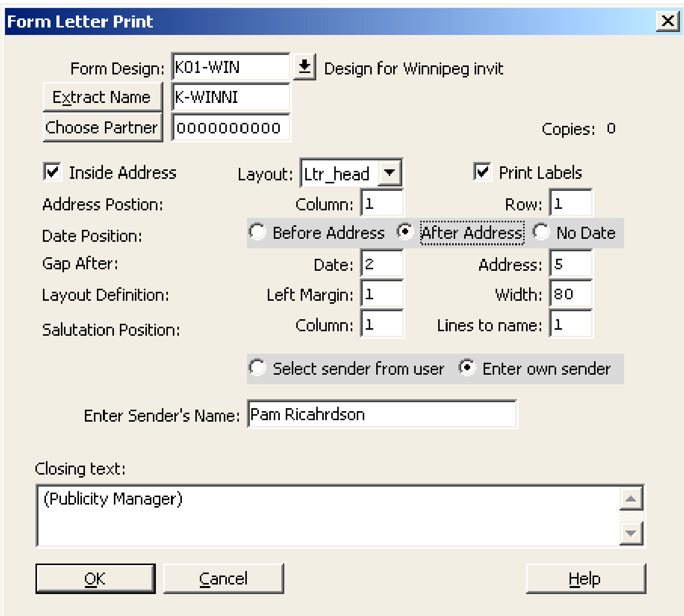


Figure 6-5 Form Letter Print Screen

This screen allows you to select the letter that you want to print, who to send it to, and a number of options about the actual layout. We will first consider the main items of content, and then the additional items which allow you to control the layout.

Form Design Select the required design (K01-WIN) using the drop-down list button.

Extract Name K-WINNI is the extract in our example. You can type this, but you can also click the Extract name button; this will bring up a Find screen to allow you to search for the extract. If your letter is just to go to one partner, then instead of an extract, click Choose Partner to bring up a find screen to select the partner and address required.

> **Tip** If this is the first time you are printing a form letter, instead of the extract, first print for just one partner to check that the letter appears on paper as you want. The print again using the whole extract. The **Partner** option is also useful if you need to reprint a single letter to correct an error.

Inside Address Check this box, since we wish the letter to start with the partner's name and address.

Address Layout The Address Layout to be used (enter the one used in the Form Design, normally **Ltr_head**).

Print Labels If you check the box, PETRA will offer to print labels after printing the letters.

Sender's Name Click **Enter Own Sender** and in the box type the name of the publicity manager who has set the visit up. (The alternative is to select a name from the user list.)

Closing Text This allows you to put a final line following the name. For our example, delete the text which is there and type 'Publicity Manager'.

The remaining items allow you to make adjustments to the layout of the letter. Figure 6-6 illustrates how these items affect the layout of the letter.

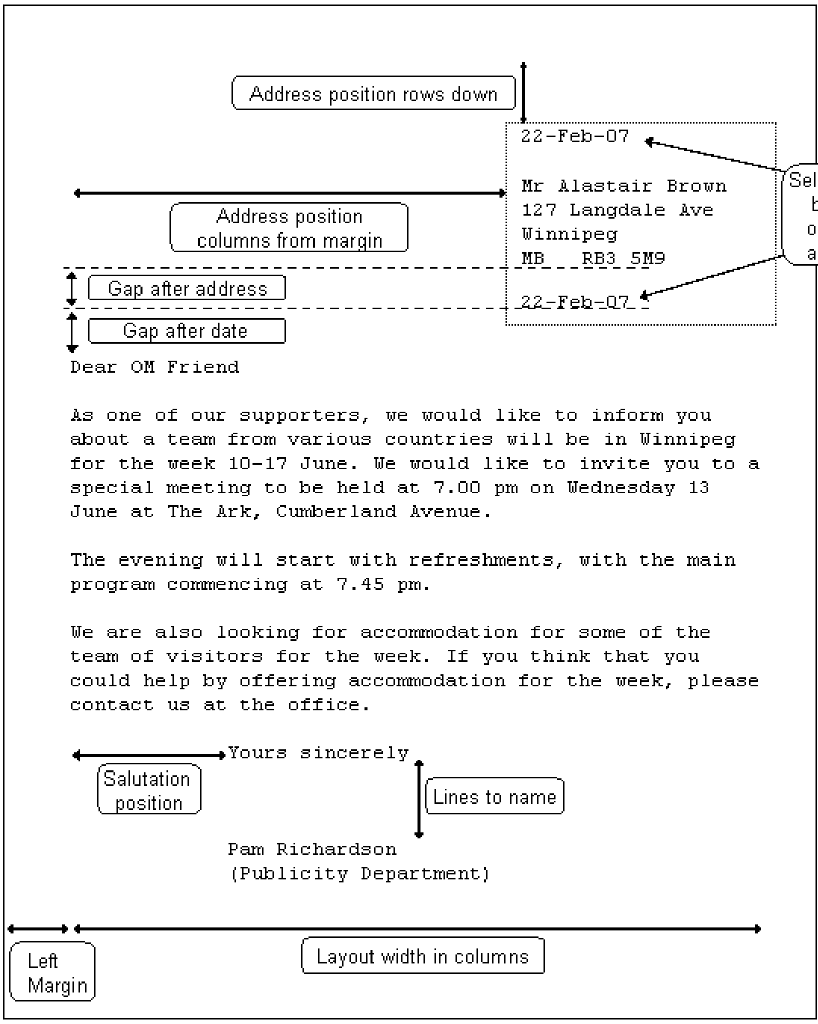


Figure 6-6 Layout measurements in Form Letter Print Screen

Date Position Click to show if you want the date to be printed before or after the address.

Address Position Enter the position on the page (row and column number) where you want the address to be printed. If you have chosen to have the date before the address, this will be the position of the date, not the address. The number of rows will be from the top of the 'printable area'.

Gap After Enter the number of lines to be left blank after the **Date** and after the **Address**.

Layout Definition If necessary, adjust the **Left Margin** and **Page Width** (number of characters). For our example we use a left-hand margin of 1 column and a width of 80 columns.

Salutation Position Enter the position on the page where you want the closing salutation to be printed. **Column Number** is the distance from the left-hand margin. **Lines to Sender** is the number of lines between the closing salutation (eg Yours sincerely) and the Sender's Name.

Click OK. This takes you to a *Start Print Job Screen*.

6. Select the Printer and Click OK, then OK again to print in the normal way. It is usually a good idea to print to the screen first, so that you can check that the content of the letter is what you want. You can then print again to the actual printer.

Tip – Faster Reprinting If you print to screen and all is correct, there is no need to use the Form Letter Print command a second time. You can just reprint the "Report" of your previous printing to screen. This avoids the risk of making a mistake. From the PETRA main menu (not the Partner menu), select `File` then `Reprint Report`. You can now select the Form Letter that you just printed, according to the time of printing, and print it again, this time to the printer.

6.3.2 Form Letters with Identical Inserts for all Partners

Suppose that you have a standard letter that you use on many occasions, but with slight variations. For example, a presentation is to take place is several towns. You want to send an invitation to partners in each of the towns, but the dates and venues will be different for each town.

It is possible to create a letter body which has 'blanks' for the dates, and venues. When you print the letters for partners in a particular town, PETRA prompts you to enter the data relevant for that particular printing. The items entered into these 'blanks' are known as inserts. The following example is for a situation such as that described, where the inserts are the same for each partner in a particular town. PETRA also allows you to use inserts which are different for each partner, and this is described in the next example (section 6.3.3, page 147.)

Example: A drama group is making 8 presentations in the UK. The first is to take place in Bristol on 8 May 2007. There will then be 7 other similar performances in different towns later that month. You need to send a similar letter to partners in each of the 8 towns.

Since many of the steps are the same as in the previous example, references are given to the previous example where appropriate.

1. First create the **Form Letter Body**. On the menu bar of the *Partner Screen* select `Maintain Tables`, then `Form Letter Tables`, then `Form Letter Body` and click New. The *Form Letter Body Screen* appears.

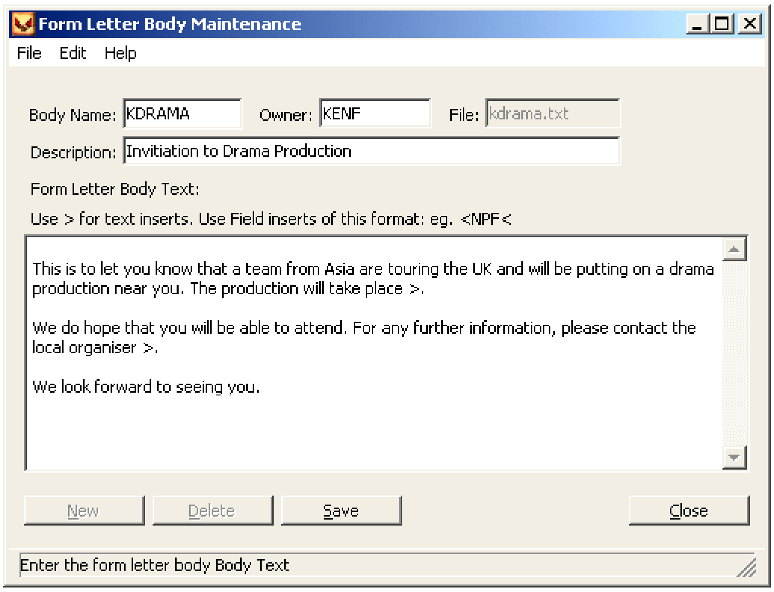


Figure 6-7 Form Letter Body Screen, for creation of form letter body (Note the use of > symbols to show where inserts will be used.)

1. Choose a **Body Name** (code) and enter a clear **Description**, and type your letter as described in the previous example (page 141.) There are two items of information that will be different for each of the 8 cities in the tour (the date and the name of the local organiser). Where this data is to be inserted, enter a > symbol, as shown in the example. PETRA will enter the insert text in place of the > character, with no additional spaces before or after, so remember to add a space where you need it.
2. Prepare the data that you want to add in the inserts for all the different places. You can type this when PETRA asks for it, but it may be easier to use a word-processor to get it all ready in advance. Then you just need to copy and paste the relevant items. It is not possible to use formatting like **bold** or *italics*.

Inserts for Bristol
Friday 8 May 2007 at 7.45 p.m. in Bethel Chapel, 35a Cliftonwood Road, Bristol
Mrs Paula Ruddock (Tel. 0117-299-56743)

Figure 6-8 Data for Inserts, prepared in text file

Inserts for Glasgow
Wednesday 11 May 2007 at 7.30 p.m. in Bothwell Street Baptist Church, Glasgow
Dr Iain Henderson (Tel. 0131-996-79345)

etc.

3. Create a **Form Letter Design** and then an **Extract** of partners for the first city (Bristol), as described in the previous example. In our example these are named DRAMA-1 and KDRAMBRI respectively.
4. From the `Mailing` Menu, select `Form Letter Print`. The *Form Letter Print Screen* appears.

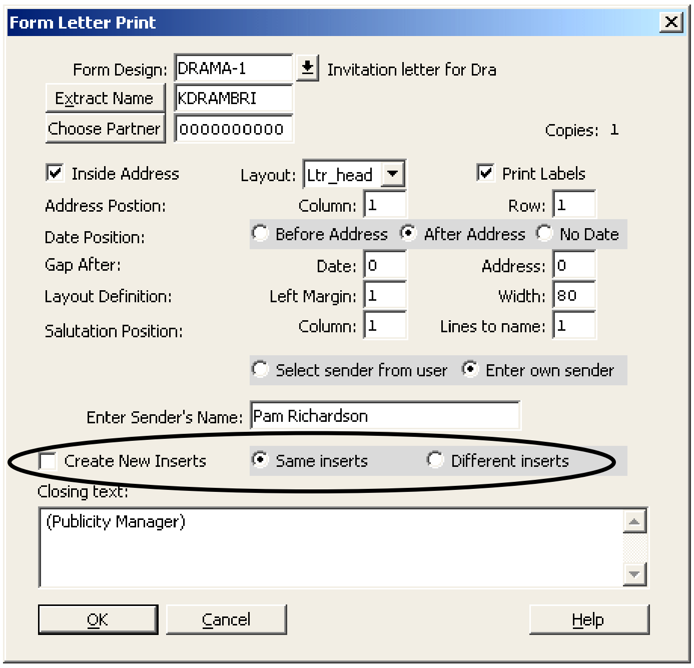


Figure 6-9 Form Letter Print Screen for case with simple inserts, the same for all partners in the extract.

Select the Form Design and Extract Name, and other data as in the previous example. However, since the selected form body contains inserts, PETRA displays an additional line of entries on the screen (circled in Figure). Select the option **Same inserts**, since we want to use the same inserts for each partner. Do not check **Create New Inserts** – this relates to **reprinting a form letter**, as explained at the end of this example. Click OK.

5. A dialogue box appears, for you to type in the text for the first entry. If you have prepared the data already, then you just need to copy it to the clipboard and paste it in. The size of the insert is not limited to the length of the box – the text scrolls within the box. If necessary use the left/right cursor keys to scroll beyond the edges of the box.

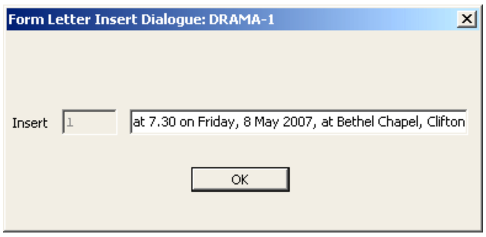


Figure 6-10 Insert Dialogue Screen after Pasting First Insert

6. Click OK and a new dialogue box appears for the second insert (name of contact person), which you enter in the same way. Click OK again.
7. The *Start Print Job Screen* appears. You can then print the form letters – either to screen to check them, or to a printer.
8. If you selected **Print Labels** on the *Start Print Job Screen*, then after printing the letters, the label print screen appears, allowing you to continue and print the labels for the extract you are using.

Reprinting a form letter which includes inserts

As described earlier (‘Understanding Inserts’, page 140), when you enter inserts for a particular combination of form letter body + extract, these are stored in the Form Letter Inserts Table. If you reprint the same form letter with the same extract, PETRA will not ask you to enter the inserts again, because it already has them. However, if they contain an error, you might want to correct them. In this case when printing for the second time, check the **Create New** box on the *Form Letter Print Screen* (see Figure 6-9). In this case PETRA will ask once again ask for the insert information, even though is already has an earlier version. Remember to uncheck the box if you do not want to have to enter the data again!

6.3.3 Form Letters with different inserts for each partner

Sometimes you want to send the same letter to a number of different partners, but with certain items changed for each partner. There are two ways to do this.

1) The first is virtually the same as for a letter with an identical insert for each partner (see previous section.) The only change is that on the *Form Letter Print Screen* (Figure 6-9, page 146) you select **Different Inserts**. When you print, PETRA will present you with the insert dialogue boxes for each partner in turn, so you can enter different data for each partner. If the letter has 2 inserts, and there are twelve partners, the same 2 boxes will be presented 12 times. The partner key and name is displayed to show which box is being displayed.

2) The second allows you to view the dialogue boxes for each partner in the extract and enter the data before printing, rather than as part of the main printing operation. This method is particularly useful when there are many partners, and is explained in the following example.

Example: You want to write the same letter to 30 different people inviting them to come for a personnel interviews at different times and on different days.

1. Create the form letter body, form letter design and extract of partners in the same way as for the previous example (for identical inserts). Use the > character wherever there is to be an insert. There will be two inserts, one for the time and one for the date.
2. Prepare a list showing the date and time to enter for each individual partner in the extract.
3. From the menu bar of the *Partner Screen*, select `Mailing` then `Load Inserts into Extracts`. The *Load Inserts into Extracts Screen* appears.

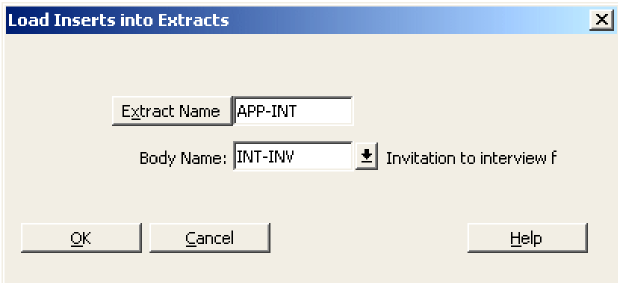


Figure 6-11 Load Inserts into Extracts Screen

Select the **Extract Name** and the **Form Letter Body Name**, and click OK. The Form Letters Inserts Dialogue box appears, for the first partner and the first insert, the time of interview. (Note – the partners may appear in ascending order of partner key.)

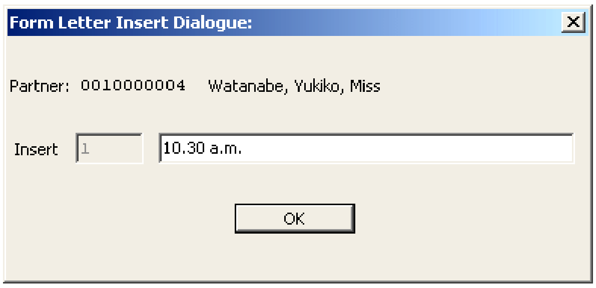


Figure 6-12 Form Letter Insert Dialogue Screen

4. Enter the required data, and click OK. You will then see the second insert for this partner. Enter the date of the interview. Continue until you have entered all the inserts for all the partners.

> **Note – pre-existing data** If insert data has already been entered for this partner in this "extract + body" combination, then you see a dialogue box asking if you wish to edit it. If you click Yes you will be taken to the *Form Letter Insert Table*, which allows you to edit the inserts. This is shown in Figure 6-18, page 154, in the section which describes this table.

5. The data has now been loaded. When you are ready to print the letters, follow the instructions for actually printing in the previous example (identical inserts). When the *Form Letter Print Screen* appears (Figure 6-9, page 146), make sure that the **Create New** box is cleared, and that **Different Inserts** is selected. If the **Create New** box is checked, then you will be presented with all the dialogue boxes and have to enter the data again.
6. **Editing Data before Printing** Suppose that you have loaded inserts for 50 partners into the extract and are ready to print, and then you realise that the inserts for one partner need to be changed. You do not have create new inserts for all partners again. Instead you can find the record in the Form Letter Inserts Table for that partner for the extract and form letter body you are using and edit it. This is explained in 6.4.5, page 153.

6.3.4 Form Letters Including Partner Data

Sometimes it is necessary to include individual partner details in the body of a form letter. If Petra contains the data, it is not necessary to enter it as an insert; instead a special code can be used.

An example is printing a batch of letters acknowledging the receipt of gifts; each letter must contain finance information relating to the individual partner. In the body of a form letter it is possible to include codes to indicate that details of a partners gifts are to be included. For example including <G87SQ< in a letter will include **G**ift information for the individual partner from ledger **87** in the form of a **S**ummary of gifts over the last **Q**uarter (3 months). Full details of the options are included in section 6.4.6, page 154.

Individual names are often included in salutations (e.g. 'Dear Dr Livingstone'), and this is explained in section 6.4.6, page 154.

6.4 Form Letter Tables

> **Note** This section describes all the form letter tables in detail. If you are learning how to use form letters for the first time, it is recommended **not** to read this section at one sitting, but to follow the instructions in section 6.3, page 140. These will explain when you need to refer to the more detailed information explained in this chapter.

The Form Letter Tables sub-menu allows the following tables to be edited:

Table	Contents
Form Letter Body	This is the main text of a form letter. It may be just one or two sentences, or several paragraphs. The body can include inserts (see Form Letter Insert Table below).
Form Letter Design	Selection of various items to give the overall design of a letter (i.e. which letter body to use, which formality level, which address layout type.)
Form Letter Formality	The opening and closing greetings may be defined for different levels of formality (from very formal to informal).
Form Letter Greeting	This allows special greetings to be used for letters to particular partners (for example those who are special friends or relatives of the sender). These greetings are only work when used by the PETRA user who created them.
Form Letter Insert	One or more inserts which can be inserted into a letter. This allows a single letter body to be used in different situations, by using different inserts.

6.4.1 Form Letter Body

The Form Letter Body Table contains the ‘body’ or main text of a form letter. It does not include opening and closing greetings (which are defined in the Formality Table). It can contain references to ‘inserts’. This allows the same letter body to be used in different situations by using different inserts (inserts may be small items of text, or data). Section 6.4.5, page 140, explains how to include inserts.

To create a new Letter Body (or to edit an existing one).

1. From the Maintain menu, select `Form Letter Tables`, then `Form Letter Body`. The *Form Letter Body List Screen* appears.
2. To create a new Form Letter Body, click New. To edit an existing body, select it from the list and click Edit. The *Form Letter Body Maintenance Screen* appears.

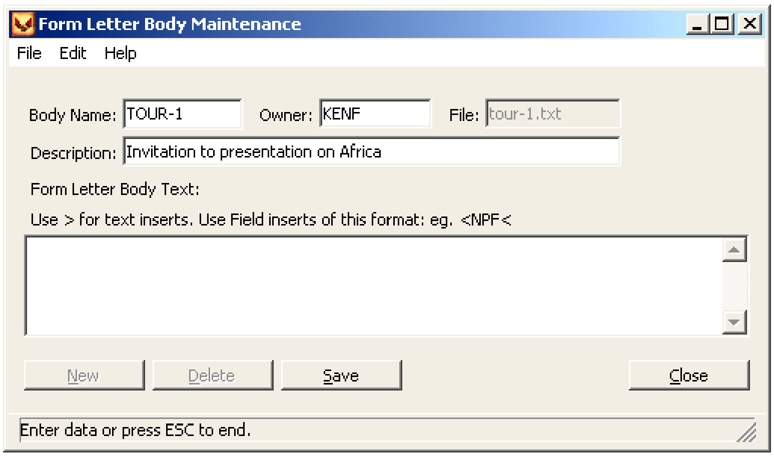


Figure 6-13 Form Letter Body Maintenance Screen

3. Enter or change the various fields as required:

   Body Name The code for this Form Letter Body. This can be up to 8 characters. If you type a code that already exists, then the existing Letter Body will appear for you to edit.

   Owner Shows who created this letter.

   File PETRA shows the file in which this letter will be stored as <Body Name>.txt

   Description Enter a clear description of the contents of the letter.

   Form Letter Body Text Write the text of your letter. Form Letters only allow you to use a simple text; formats like **Bold**, or Underline or *Italics* are not possible.

   If you require a **new paragraph**, press the <Enter> (or < ↵ >)key twice. This will leave a blank line and then start a new paragraph.

   To start a **new line**, without leaving a complete blank line before it, you cannot use the <Enter> key. It is necessary to type in a special code, which is “~n.” without the quotation marks, that is: tilde-n-period. So, to include the following:

   ```
   Happy Christmas
   and Best Wishes for the New Year
   ```
   type in the form letter body:
   ```
   Happy Christmas~n.and Best Wishes for the New Year
   ```
   To **indent** a whole paragraph, at the beginning of the paragraph type: `<.In<` where n is the number of spaces to be indented (typically 4).

4. Click Save , and then Close.

6.4.2 Form Letter Design

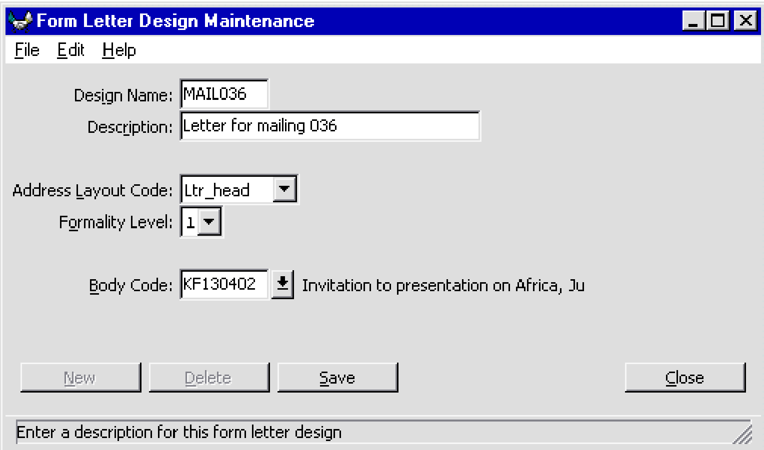
The Form Letter Design is used to set up a form letter before printing. This is the way that you select:

- The form letter body for this printing
- The level of formality required
- The address layout to be used on the letter

To create a Form Letter Design (or edit an existing one).

1. From the Maintain menu, select `Form Letter Tables`, then `Form Letter Design`. The *Form Letter Design List Screen* appears.
2. To create a new Form Letter Design, click New. To edit an existing design, select it from the list and click Edit. The *Form Letter Design Maintenance Screen* appears.

Figure 6-14 Form Letter Design Maintenance Screen



3. Enter or change the various fields as required:

   Design Name Enter a design name which is easy to use.

   Description Enter a clear description of the Form Letter Design

   Address Layout Type Select the required type of address layout (normally Ltr_head.)

   Formality Level Select the formality level required for this design (see section 6.4.3, page 150.)

   Body Code Select the form letter body that you wish to include in the design.

4. Click Save , and then Close.

6.4.3 Form Letter Formality

6.4.3.1 Formality Principles

The Form Letter Formality Table allows you to alter how a letter starts and finishes. For example, in English a very formal letter might start ‘Dear Sir’ for a single man, and ‘Dear Madam’ for a single woman. A less formal letter would be ‘Dear Mr Bennett’ or ‘Dear Mrs Cook’. An informal letter might start ‘Dear Abraham’ or ‘Dear Sarah’. The system is very flexible, in the following ways:

- PETRA can provide up to five levels of formality; however it is best to keep things simple, and to start with just setting up one or two. Others can be added later if the need becomes clear.
- Different greetings can be set up for different countries. For countries that use more than one language, different greetings can be added for each language.

- Different salutations (initial greetings) and endings can be specified for all different addressee types (see section 3.4.4, page 89).
- If no formality is set up for a particular country or language or addressee type, PETRA will use the nearest appropriate one or a default formality such as 'Dear OM Friends'.
- If required, a PETRA user can give an individual partner their own 'customised' greeting, which will override other formalities when that user is sending a letter. This special option is provided so that individual users can send prayers to personal friends, and is explained in section 6.4.4, 'Form Letter Greeting', page 153.

6.4.3.2 Planning Formality Levels

If no formalities are set up, PETRA will use default settings for the opening 'salutation' and closing text; these may be 'Dear OM Partner' and 'In His Name'. The following points are recommended.

- **Keep it Simple** Only set up those formalities that you need. At first, just set up one 'normal' formality level for each addressee type. Additional levels which are more formal or less formal can be added if it is necessary.
- **Write it down** Before you set up any formality levels, write down exactly what you want using a table such as that shown in Figure 6-15. There are many combinations of addressee type, formality level, language, etc, so keep a very careful note of which ones have been set up.
- **Defaults** Decide which you wish to be the default greetings, and set these up first.

Figure 6-15 Typical Planning Table for English Opening Salutations

Addressee Type	1 very informal	2 informal	3 normal	4 formal	5 Blank
Church		Dear Brothers and Sisters	Dear Brothers and Sisters	Dear friends	
Couple		Dear John and Sue *	Dear Mr and Mrs Smith	Dear Sir and Madam	
Family		Dear Smith family	Dear Mr and Mrs Smith	Dear Mr and Mrs Smith	
Organisation		Dear Friends	Dear Friends	Dear Sir or Madam	
Single female		Dear Sue *	Dear Friend	Dear Madam	
Single male		Dear John *	Dear Friend	Dear Sir	
Default		Dear Friend	Dear Friend	Dear Sir or Madam	
		* Warning - see following warning box regarding problems with use of personal names			

It is not necessary to set up all formalities. If a particular formality has not been defined exactly , PETRA will look for the nearest appropriate one in the following order:

Same addressee type and language code; looks for higher formality level first, then lower level

Same addressee type and correct formality level

Same addressee type; looks for higher formality level first, then lower level

Default type, correct level

Default type; higher formality level first, then lower level

General Default type ('Dear OM Partner', 'In His Name')

Tip – Blank Formality It is useful to have one formality level which every entry is completely blank. This lets you put any special greeting in the form letter body itself. PETRA always adds opening and closing greetings, and the only way to prevent this is to select a formality level in which every entry is blank.

> **Warning – Personal Names** Only use Personal Names when you know that these have been entered in PETRA for all relevant partners. Some of the examples above use names (Mr Smith, Mary, etc). PETRA takes the names from the partner records. If personal names are used (as in level 2 in the above example), there can be problems. For example, a couple, James and Alison Smith may be entered as ‘Mr and Mrs James Smith’ or even ‘Mr and Mrs J. Smith’. If you just use the first name, this will give ‘Dear James’ or ‘Dear J.’, neither of which is acceptable for addressing a couple.

6.4.3.3 To Set up Form Letter Formalities

Example: The New Zealand office wishes to set up a normal (level 3) formality for each addressee type. The opening salutations should be as in Figure 6-15, and the closing greeting will be ‘Yours sincerely’ for all addressee types.

1. Write down clearly exactly what you wish to do (make a table like that shown) and keep a careful record. For formality level 3, each addressee type must be set up separately. So, the following procedure must be repeated several times.
2. From the Maintain menu, select `Form Letter Tables`, then `Form Letter Formality`. The *Form Letter Formality List Screen* appears.
3. To create a new Form Letter Formality entry, click New. (To edit an existing Formality, select it from the list and click Edit.) The *Form Letter Formality Maintenance Screen* appears.

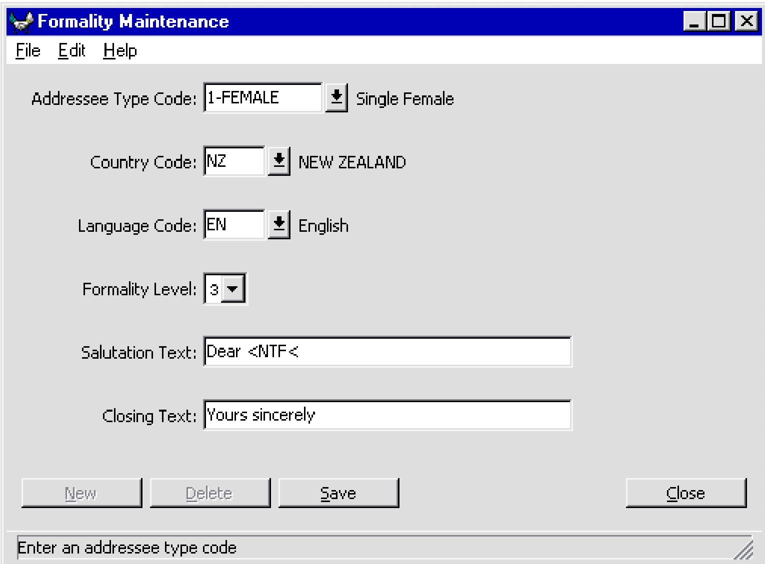


Figure 6-16 Form Letter Formality Maintenance Screen

4. Enter or change the various fields as required:

   Addressee Type Code Use the drop-down button to select the addressee type for which you wish to enter or edit formality details.

   Country Code The destination country for which this formality will apply (for our example, select GB, for the United Kingdom)

   Language Code The language of the letter (used for multi-lingual countries). It is not necessary to enter this unless you are using more than one language.

   Formality Level Select the formality level that you wish to define: for our example we will use level 3.

   Salutation Text Enter the greeting to begin a letter. In this case we wish to include the Partner’s name, so we need to use special codes (see section 6.4.6.1, Inserting Names, page 155, for details of special codes to include). No special codes are necessary for a fixed salutation such as ‘Dear Brothers and Sisters’.

Closing Text Enter the closing text (‘Yours sincerely’).

5. Click Save , and then Close.

6.4.4 *Form Letter Greeting*

The Form Letter Greeting Table allows a PETRA user to use a special ‘customised’ greeting for a particular partner (for example, ‘Dear Dad’ if their father is a partner). This will override the normal Formality setting for that partner, but only when used by the PETRA user who defined this.

To create a Customised Greeting (or edit an existing one).

1. From the Maintain menu, select `Form Letter Tables`, then `Form Letter Greeting`. The *Customised Greeting List Screen* appears.
2. To create a new customised greeting, click New. To edit an existing greeting, select it from the list and click Edit. The *Customised Greeting Maintenance Screen* appears.

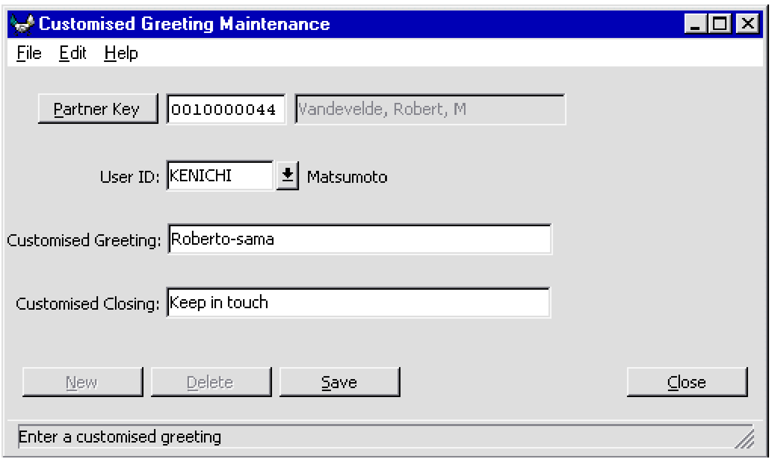


Figure 6-17 Customised Greeting Maintenance Screen

3. Enter or change the various fields as required:

Partner Key Enter the partner for whom you wish to set up a customised greeting. If you know the partner key you can type it in. If not, click on Partner Key. This will take you to a *Partner Find Screen* from which you can find the partner. (Chapter 2 explains the use of *Partner Find Screen*.)

User ID Enter the User ID of the PETRA user who will use this customised greeting when sending to the partner. The customised greeting override will only operate when this PETRA user is logged on and sending a letter.

Customised Greeting Enter the required opening greeting for a Form Letter.

Customised Closing Enter the required closing greeting for a Form Letter.

4. Click Save , and then Close.

6.4.5 *Form Letter Insert*

Form Letter Inserts are described in ‘Understanding Inserts’, page 140 with examples of their use starting in section 6.3.2, page 144. Inserts are inserted in places where markers have already been placed in the Form Letter Body (see Figure 6-7, page 145.)

Inserts are normally entered as described in these sections 6.3.2 and 6.3.3. When entered inserts are stored as entries in the Form Letters Insert Table. There is a separate entry in that table for each combination of Partner Key + Extract Name + Form Letter Body. If the same inserts are to be used for each partner in an extract, there is not a separate entry for each partner key. Instead there is a single entry using the partner key 0000000000, which PETRA understands to mean 'all partners in the given extract'.

It is sometimes useful to edit inserts which have already been entered, and this explains how to do this. Inserts are normally text, but can contain data such as gifts given by a partner. This is explained further in section 6.4.6, page 154.

To create Inserts for a partner (or edit existing inserts).

1. From the `Maintain` menu, select `Form Letter Tables`, then `Form Letter Insert`. The *Form Letter Insert List Screen* appears.
2. To create a new insert, click New. To edit an existing one, select it from the list and click Edit. The *Form Letter Insert Maintenance Screen* appears.

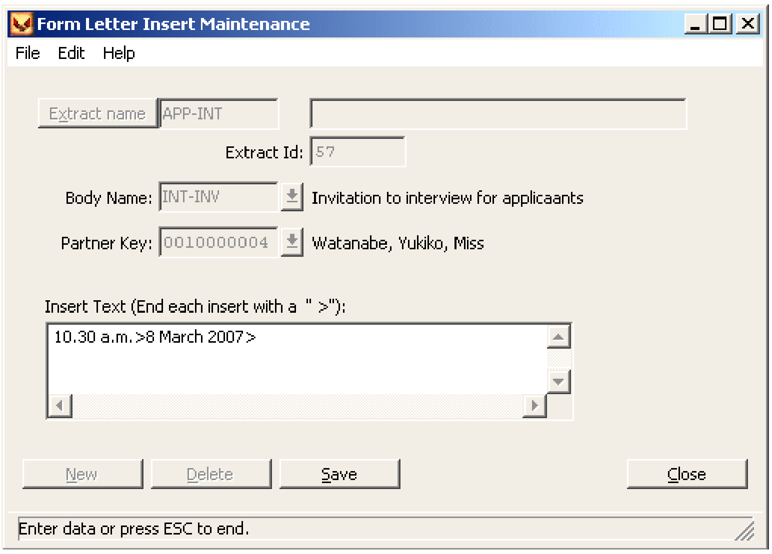


Figure 6-18 Form Letter Insert Maintenance Screen

3. Enter or change the various fields as required:

   Extract Name Type in the name of the Extract that you wish to use, or click the `Extract Name` button to use the Extract Find facility.

   Body Name Select the code of the Form Letter Body that this Insert will be inserted into.

   Partner Key Enter the partner key if these inserts relate just to one partner. If all partners will have the same inserts, then enter partner key 0000000000.

   Insert Enter the required inserts, each one finishing it with >. If a form letter body contains more than one insert, then each one must end with >. Do not use extra line breaks in the table unless you wish extra line breaks to appear that are not in the Form Letter Body.

4. Click Save , and then Close.

6.4.6 Inserting Partner Data in Form Letters

Form letters will usually insert the individual name and address for each recipient as part of the **address** at the top of the letter, which is specified in the Form Letter Design. However, it is also possible to use individual information in the salutation greeting, known as the **Formality** (section 6.4.3, page 150) or in the **Form Letter Body** (section 6.4.1, page 149). This allows you to use a salutation like 'Dear Mr Jones' in the Formality and to include gift information in the body of an acknowledgement letter. Special codes are used to show the information to be inserted.

6.4.6.1 Inserting Names

Names can be included in both the Form Letter Body and in the formality (salutation greeting).

To insert Name data in the text, put two ‘less than’ symbols ‘< <‘ at the appropriate point, and between them ‘N’ followed by the options that you wish to insert. This gives the form <N{options}<. Options may be one or more of the following:

T	Title
P	Personal name
I	Initial (first letter of personal name)
F	Family name
A	Academic Title

Example: A typical formal salutation greeting text is:

```
Dear <NTF<
```

The printed output will be a Name with the Title and Family name as in the following examples:

```
Dear Mr and Mrs Hui
Dear Family Bucher
Dear Dr Fernandez
. . .
```

For churches, organisations and units, the name insert only inserts the name of the partner.

6.4.6.2 Gift Information

Codes to insert Gift information should only be used in the body of a form letter. These may be used in producing regular gift receipts.

To insert gift information in the text, put two ‘less than’ symbols ‘< <‘ at the appropriate point, and between them ‘G’ followed by your ledger number (the office receiving the gift) and the options that you wish to insert. The form is therefore: <G[ledger]{options}<. Options allow you to choose the type of report (summary or detail) and the period covered.

S	Summary of gifts given
D	Details of all gifts
M	gifts during the previous Month (31 days)
Q	gifts during the previous Quarter (3 months, or 91 days)
A	gifts during the previous 366 days (Annual report)

Zdd-mm-yyyy (Zmm-dd-yyyy for US format) modifies M, Q or A to give the period up to dd-mm-yyyy.

L	includes the name of the ledger in which the gift is recorded

You must specify either S or D or both of them. You should choose only one of M, Q or A (if you do not specify, then A will be assumed). The period for which gifts are printed ends on the day that the report is generated.

Example: You wish to print out both detail and summary of gifts given during the year up to 31 May 1999 from the New Zealand ledger (Ledger 74).

The insert to do this is:

<G74SDAZ31051999<

Summary Information If only summary information is required, it will be printed in line with the text. For example: the Form Letter Body contains the following:

```
Thank you for your total donations of <G78SQ< given to Operation
Mobilisation in Singapore over the last quarter.
```

The printed output in the form letter might be:

```
Thank you for your total donations of   2,000.00 SG$ given to Operation
Mobilisation in Singapore over the last quarter.
```

Details If details are required, these will be printed out one per line. If a summary is also requested, this will be printed immediately following the details. For example: the Form Letter Body contains the following:

```
Thank you for the following gifts over the last year:  <G78SDA<
```

The printed output might be:

```
Thank you for the following gifts over the last year:
06-Nov-1997    500.00 SG$  Melissa Bong (East Asia Pacific Area)
30-Apr-1998    300.00 SG$  Ships Fuel Project
22-May-1998    400.00 SG$  Singapore (Singapore)

Total:   1,200.00 SG$
```

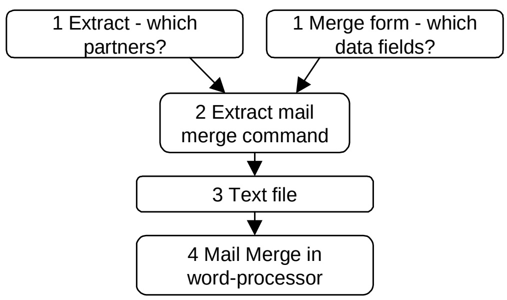
For a periodic receipt letter, one possibility is to have an insert for the summary (total amount) in the main body, and to have a second insert with the details at the bottom of the letter. The name codes can also be included in the same form letter if required.

6.5 Exporting Partner Data for Mailmerge

6.5.1 Introduction to Mailmerge Export

Although PETRA can produce Form Letters to meet many needs, you may prefer to export the key data in a form that you can use in a spread-sheet or the mailmerge facility of a word-processor. This may allow greater flexibility in layout, etc. PETRA allows quite a number of basic items to be exported. The specific list of data items to be exported for each partner is created as a **Mailmerge Form** in PETRA. A Mailmerge Form is not the actual data itself, but just a list of the data fields that will be obtained if this form is used (for example, Family Name, Personal Name and Telephone Number). It is a sub-set of the total number of data fields that can be exported from PETRA.

The stages are illustrated in the following diagram:



1. First create (a) an extract of the partners that you want, and (b) a Mailmerge Form, listing the data fields that you wish to export.
2. Start the Extract Mailmerge procedure. In this you select the extract that you want and the mailmerge form that you want. You also give the name and location of the text file to which the data will be exported.
3. PETRA exports the data, normally as text items, separated by commas.
4. Use this text file as the data source and do a mailmerge using your word-processor, or import it into a spreadsheet.

The data fields which can be exported are divided into different categories. For example, the "communication" category allows you to select items such as phone number and email address. Although most of the fields relate to partner data (eg address, contacts, etc), it is also possible to include the special codes for name and gift information, as for form letters (see section 6.4.6, page 154).

> **Important - Confidentiality** The text file that you produce contains personal data about partners and is not secure, since it can be read by anyone. Therefore be very careful where such a file is stored, and make sure it is deleted as soon as it is no longer required.

6.5.2 Using Mailmerge to Export Partner Data

The use of the Mailmerge export facility is best explained by an example. It will be useful to refer to the diagram above to follow the different stages.

Example: You wish to write a letter to a number of partners, to check that the bank account number and e-mail address that you hold are still correct. Instead of using a form letter, you wish to use your word-processor, but need to extract the name, address and bank details of the partners from PETRA.

1. **Extract** First create the extract of partners. We will call this extract BANKCHK.
2. **Mailmerge Form** On the partner system menu bar select `Maintain Tables`, then `Mailmerge Forms`. The *Mailmerge Form List Screen* appears. This is a list of all the MergeForms that already exist on PETRA.

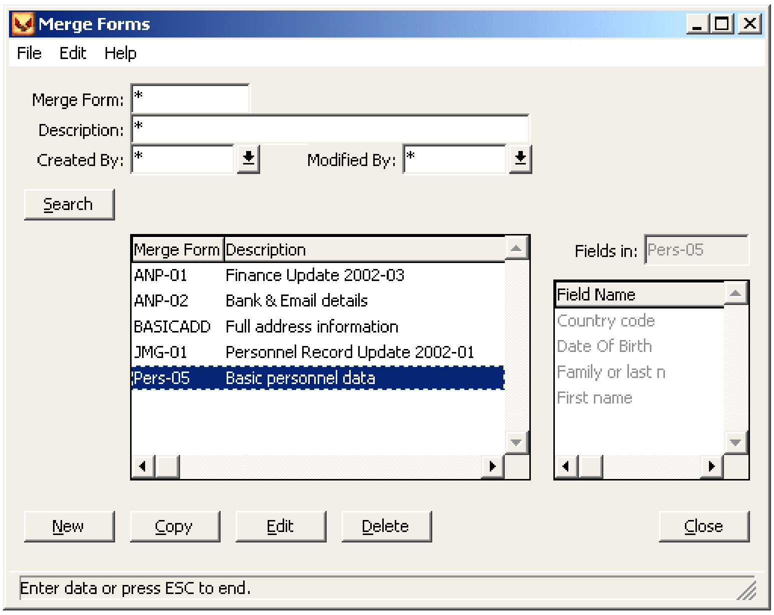
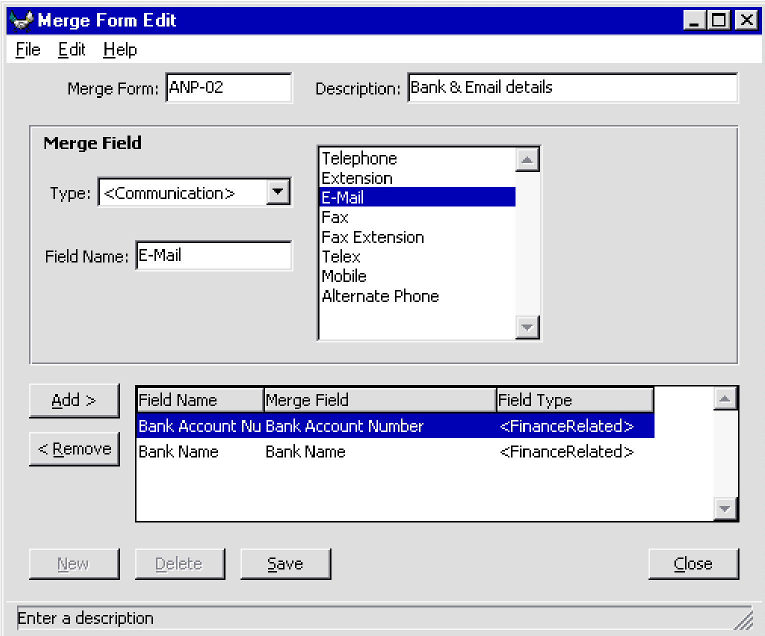


Figure 6-19 Mailmerge Form List Screen

The central panel lists the existing forms. When you highlight an existing form, the panel on the right lists all the data elements that will be exported if you use that form (for the list of possible elements, see below.). You may find that a suitable form already exists. If many forms have been created and stored, you can use the upper part of the screen as a to search for a form. For example, to find a form that has the word ‘email’ in the description, enter *email* in the **Description** and click [Search] to see all the possible forms that already exist. For our example, we assume that a suitable form does not exist.

3. To create a new form, click [New]. The *Merge Form Edit Screen* appears.

Figure 6-20 Merge Form Screen



4. Type in a **Merge Form** code and **Description**. Here we choose the code ANP-02.
5. The next step is select the data fields that we wish to export for each partner. The possible fields are grouped into different types as follows:

Type	Available Data Fields
Address element	Title, First Name, Family Name, Address Line 1, Address Line 2, City, etc.
Address	These options give the complete address as see up in the available address layouts, eg Small Label, and One-line (see section 3.4.2, page 84.)
Communication	Telephone number, email, Fax number, etc
Personal Data	Date of birth, etc (as entered in the Additional Detail screen of a PERSON record).
Finance Related	Gift receipting details, and bank account number, etc of MAIN account (as entered in the Finance Related Details screen of a partner record). **Warning: Where a partner has more than one bank account, only details of the account marked as the main account will be exported.**
Text	Allows you to enter special codes to extract partner information, as described in section 6.4.6, page 154.

For our example, we need to select and add a number of fields as follows:

Address elements:	Title, First Name, Family Name
Address:	Ltr_head format (to put at top of letter)
Finance Related:	Bank account name, etc, (to quote in letter).
Communication:	E-mail address (to quote in letter)

Add the elements one by one. For example, to add the Email address:

(1) From the Type drop-down box, select `Communication`. A panel on the right opens showing the different fields of this type.

(2) Select `E-mail`. Click on this, and it will appear in the box marked **Field Name**.

(3) Click on the Add button. `E-mail` will then be listed in the lower panel, joining the fields already selected.

Continue until all required fields have been added to the form. If you add the wrong field, highlight it in the lower panel and click Remove.

6. When the form is complete, click Save , and then Close.

7. **Extract Mailmerge Operation** We can now start the main Export operation. From the *Partner Screen*, select `Mailing`, then `Extract Mail Merge`. The *Mail Merge Screen* appears. Select or enter the required data as follows:

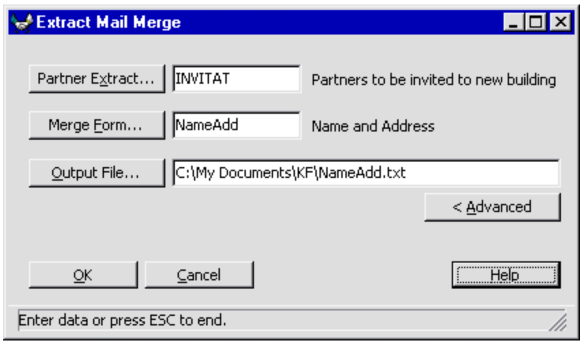


Figure 6-21 Extract Mail Merge Screen (after entering required data)

Partner Extract Click on the [Partner Extract] button. A Find screen appears to help you sort through all existing extracts. Click on [Start Search], and then look for BANKCHK. Highlight it and click [Accept] to return to the *Extract Mail Merge Screen*.

Merge Form Click the [Merge Form] button. This brings up the *Merge Forms List Screen*, which is similar to Figure 6-19, except that there is an additional [Accept] button. Highlight the MergeForm that we require (ANP-02), and click [Accept] .

Output File Click [Output File] and browse to the location where you wish to store the output text file. Enter a suitable name. There is no need to add a suffix (.txt or .csv) to the name because this is added automatically, depending on what you select as **File Type**, in the box below the name. For more information on output file types, see box below.

Click [OK] to start the export operation. This may take a few moments, depending on the size of the extract. When the operation is complete, the screen closes.

> **Short Cut** In this example we created the Mailmerge Form in advance. However, you can do it as part of the main operation, by selecting the [New] button on the *Merge Form List Screen*.

8. **Use File in Other Application** You can now use the output file as the source data file for a mailmerge operation using your word-processor, or import it into a spreadsheet.

> **Output File Types** The exported data fields are put into the output text file, which normally has one partner on each row. Each data filed is surrounded by quotation marks, and usually separated by a comma (see last paragraph in this box), e.g.
>
> ```
> "Willliam","Smith","12345"
> "Martha","Stone","38709"
> ...
> ```
>
> Choosing a suffix .txt or .csv (comma separated variable) makes no difference to the contents of the file. However, some spreadsheets may import a file named xxxxx.csv more easily, automatically removing the quotation marks. Otherwise you may need to use your word-processor to replace all quotation marks with nothing (leave empty). (In Microsoft Word do this using the Find and Replace menu, **Find what** [“] **Replace with** [ ] then click [Replace All] .)
>
> **csv Files** If your computer system normally uses a comma “,” as a decimal point marker, then you should not use commas to separate the data items. To change the format, select the [Advanced] button shown in Figure 6-21. This gives you the opportunity to change the character that separates the data items (known as the **Delimiter**) from a comma, to, for example, a semi-colon “;”.

----- End of Chapter 6 ----

This page is blank.

Chapter 7 Partner Reports

7.1 Introduction to Partner Reports

PETRA provides various forms of lists and summaries of the data that it holds on partners. This can assist the local team in strategic planning for organising where to hold meetings with partners as well as the more detailed work of checking that everything is up-to-date.

The standard reports cover the most commonly required lists for addresses, publications, etc. They can be displayed on the computer screen for a quick visual check, or sent to a printer if a paper copy is required. Long reports can take some time to print, so PETRA allows the printing of reports to be delayed and run in Batch Mode at a time when the office is less busy (for example, overnight.)

Many reports are lists of partners; these may be either for all partners recorded on PETRA, or else for a limited group of partners. To run a report on a limited group it is necessary first to create an Extract of the required partners (see Chapter 4). Partner lists may be sorted by name, by postcode or by partner key.

Once a report has been generated it is stored for a short time and can be reprinted (for example if the printer has not been working properly). Old reports are deleted under the control of the System Manager. Old reports are stored in PETRA in date order, so it is useful to note the date and time of a report if you think you may want to run it again.

New Style Flexible Reports A new type of report is being introduced in PETRA, which allows the user to change the items that are displayed. At present there is only one partner report that allows this. In the following, section 7.2 introduces the standard reports and section 7.3 explains how to print them. Section 7.4 introduces the new style report, which is currently only used for the Local partner Data report.

Confidentiality The Organisation has a responsibility to protect the privacy of its partners. Reports contain useful lists of partners' personal data such as addresses, phone numbers and sometimes other data. Reports containing partner details must only be used in an authorised manner and should not be left in public areas. Old copies should not be used as scrap paper if there is a chance that it will find its way outside the Organisation.

7.2 Standard Reports on PETRA

The basic installation of PETRA provides a number of commonly used reports. These will be added to as required. The reports currently available in the Partner module are as follows. Other reports are available in other modules (for example, for **Birthday report**, see the PERSONNEL USER GUIDE.)

`Mabupr`	**Bulk Address Report** Prints details of all partners who receive bulk mailings of periodicals.
`Machpr`	**Supporting Churches Report** Prints a list of all churches supporting members.
`Mailp1`	**Brief Address Report** List of partners showing partner key, name, address and phone number
`Mailp1e`	**Brief Address Report**, as Mailp1, but with address printed on the second line.
`Mailp2`	**Full Address/Subscription Report** List of partners showing key, name, address and phone number, together with other details, such as special type, subscriptions and last gift.
`Mailp7`	**Phone Number Report** List of partners showing partner key, name, address and phone number.
`Mailp8`	**Email Address Report**
`Mapconr`	**Partner Contact Report**

`Mastpr`	**Statistical Report by Publication** Report of Publications, showing the number of partners subscribing to each and the number of bulk copies provided. This analysis is done by County/State/Province to give a regional distribution.

7.3 To Print a Partner Report

7.3.1 Worked Example of Partner Report

The procedure for printing a report is described using an example.

Example: We wish to print a Brief Address Report for all our partners resident in Singapore.

1. If you wish to run a report for a certain group of partners, create an Extract to include that set of partners (see Chapter 4 for creating an Extract). We have already created an Extract called `SingPart`.
2. From the menu bar of the Partner System (Welcome) Screen, select `Partner`, then `Reports`. The *Partner Report Selection Screen* appears.

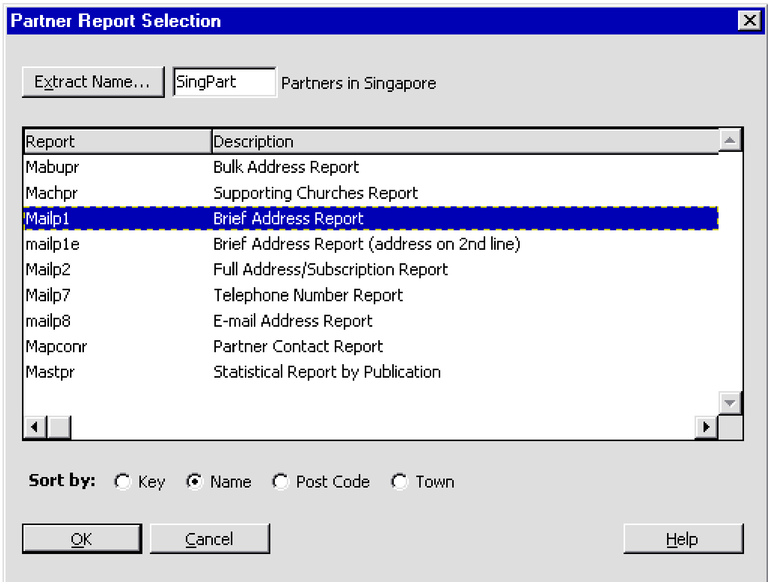


Figure 7-1 Partner Report Selection Screen

3. Select the details to define your report.

   Extract Name Select the name of the extract of partners to be included (`SingPart`).

   Report Select the type of report that you wish to run (e.g., Brief Address Report).

   Sort Order Select the order (alphabetical or numerical) in which records are to be sorted (by partner key, name, post code or town). We will sort by name for our example.

4. Click OK.
5. The *Start Print Job Screen* appears. Follow the standard printing procedure as explained in the GENERAL USER GUIDE. For most reports, the report will now be printed. Figure 7-2 is an example of how a report will appear if printed to screen.

   Partner Contact Report In the case of the Partner Contact Report, an additional dialogue box appears, allowing to report on the contacts entered by a particular person, or between certain date ranges (see Figure 7-3). To print all contacts, leave the fields blank.

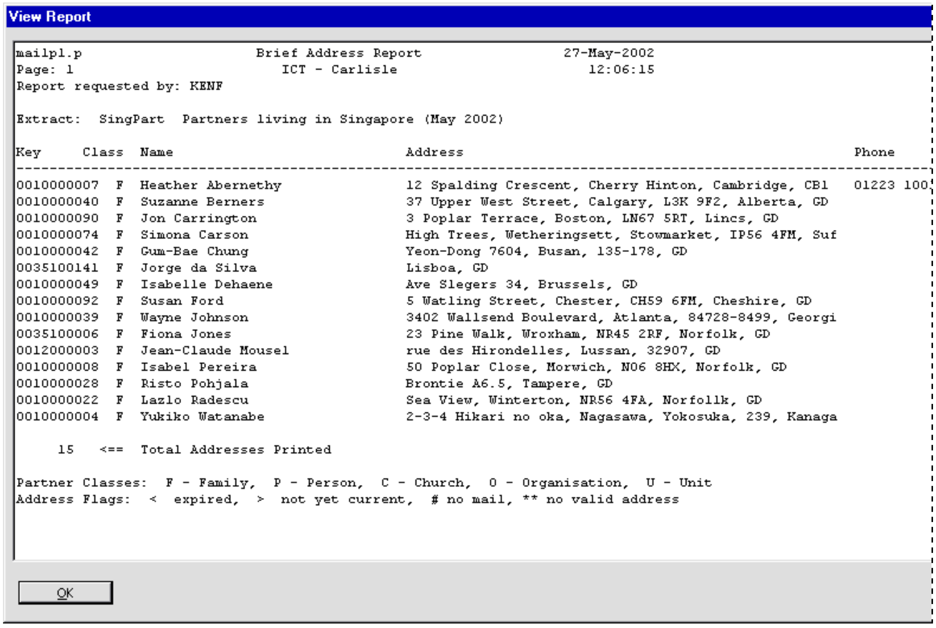


Figure 7-2 Brief Address Report Displayed on Screen (left-hand part of screen only is shown.) (For this screen-shot the addresses are not in Singapore, because of the sample data used!)

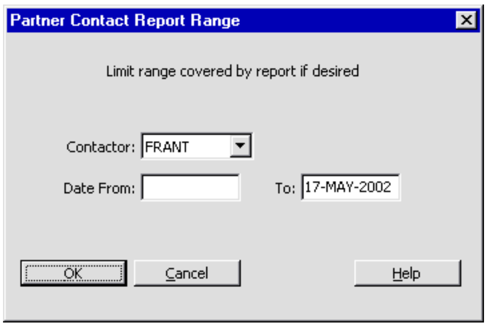


Figure 7-3 Additional dialogue box in the case of Contact report

7.3.2 Options for Printing Reports

PETRA saves all reports; they can be reprinted up until the time that they are deleted by the System Manager (typically every few days). The procedure for printing old reports is explained in the GENERAL USER GUIDE.

Long reports should be run as batch jobs, to keep the printer free during normal office hours.

7.4 New Style Flexible Reports

At present the only partner report that uses the new style report is the Local Partner Data Report.

7.4.1 Principles of New Style (Extended) Reports

The new style report allows the user much more control over the generation of a report. The way the reports work is as follows:

- For the selected report, PETRA lists **all the relevant elements**, and offers a default layout.
- The user can choose to **add additional items** from the list of possible ones, or delete them, so that the report will include exactly what is required.
- The user can adjust the **size and position of the columns** showing the different elements, and then save the report layout for future use.

- The user can select which **order** the partners should be sorted in.
- Finally the user can select the partner or relevant extract of partners, and generate the report.

The following explains how to create an Local Partner Data Report (Partner).

7.4.2 Local Partner Data Report

Example: Local Partner Data has been set up to record details of vehicles owned or kept by team members. We wish to print a report showing this data.

1. From the menu bar of the *Partner Screen* select `Extended Reports`, then `Local partner Data`. The *Local Partner Data Report Screen* appears.

Control buttons >

Tabs >

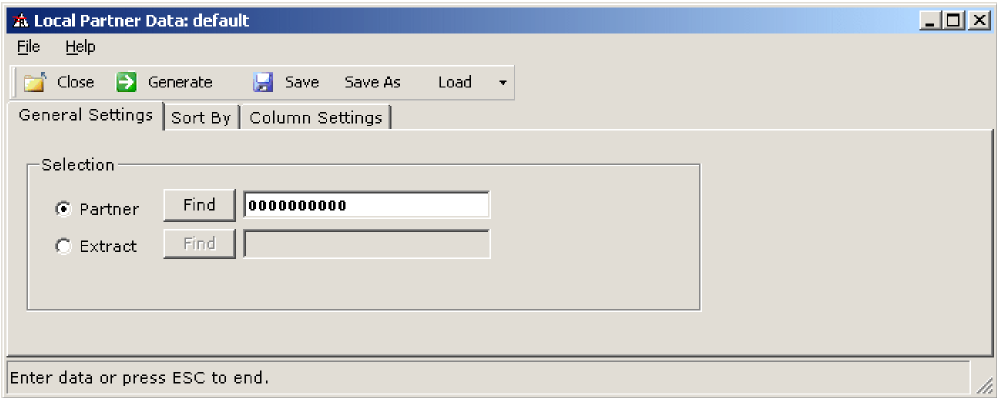


Figure 7-4 Local partner Data Screen – General Settings tab

The screen has three Tabs, which allow you to set up the content and layout of the report you require. The control buttons allow you to save these settings, load previously saved settings and to generate the report. (See note at end of this section on saving and reloading settings.)

2. Use the **General Settings Tab** to select the partners to be included in the report. For our example we assume we have already set up an extract of team members. Select **Extract**, then Find to go to a find screen to select the extract..
3. Select the **Column Settings Tab**. This screen is used to select which fields are to be displayed (the columns in the report), the width of each column, and the order in which they are displayed.

Layout of columns >

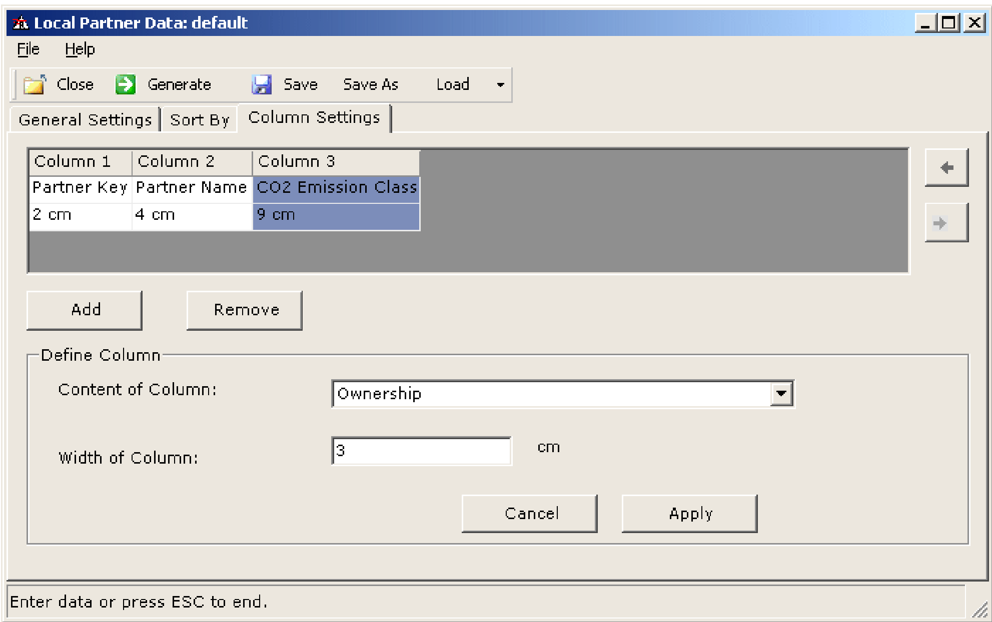


Figure 7-5 Local partner Data Screen – Column Settings tab, after clicking the Add button.

When the tab opens, it shows a default layout for that report. In the case of the Local Partner Data report, there is no way of knowing which of the items is most likely to be of interest, so the default layout only shows the Partner Name and Partner Key (the two white columns in the figure – Column 3 is not there initially).

4. Click Add . This will add a new column 3, which is highlighted in blue, indicating that it is “being edited” (see figure). At this point Column 3 may show the first data label (in an alphabetically sequence), but what is shows is not important, since it is now going to be changed.

5. Use the drop down list of possible fields to select the **Content of Colum** (the data field to be placed in Column 3) and type the **Width of Column**. For our example (see Figure) , we select the field “Ownership” (shows whether the vehicle is owned privately or by the team) and a column width of 3 cm. Click Apply to update the settings in the column layout. Column 3 will now appear in white, showing “Ownership” and “3 cm”.

6. Continue to add colums as required, by first clicking Add then selecting the **Content** and **Width**, and finally clicking Apply. Do not worry about the order of the columns at this stage, since this will be adjusted in the next step. If you wish to edit a column, highlight it, change the data in the lower part of the screen, and click Apply .

7. To move a column to the left, first click on it to highlight it, and then click the ← button at the right of the screen, to move the column to the left. Again, click Apply . Similarly, columns may be moved to the right using →. If you need to remove a column, highlight it and click Remove .

8. Select the **Sort By Tab**.

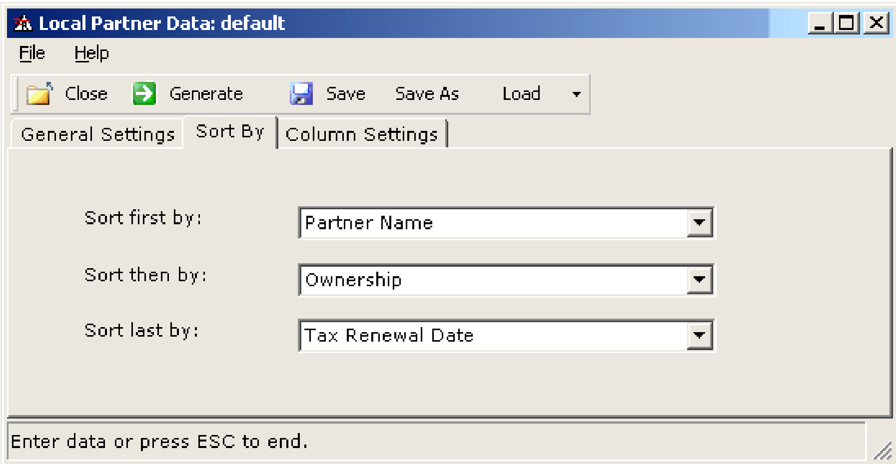


Figure 7-6 Local partner Data Screen – Sort By tab

Using the drop down boxes, you can select the order in which partners should be listed in the report. In the example, the second and third levels shown here are not very meaningful, because all partner keys are unique, so there is no point in have a second or third sort order.

9. If you wish to store the settings of the three Tabs, to use them again in the future, then click the Save As button on the ribbon above the tabs. A dialogue box appears asking you to give a name to this report structure. If you later wish to delete or rename this report structure, from the menu bar select `File`, then `Maintain Settings`.

10. To generate the report, click the Generate button. The report appears on the screen. Two versions are available – plain text or formatted. Buttons at the top of the screen allow the report to be saved as a text file, or the data to be exported as a CSV file. [At present, if you export to CSV, and have Microsoft Excel installed, the file opens in Excel. You must then save as a CSV file.]

Saving Settings

After setting up a report, you may want to save the settings to reuse on another occasion. To do this, click the Save As button. A dialogue box appears, asking you to choose a name. To reload these settings at a future date, click the Load button, and select the name that you gave for the settings.

> **Tip – Saving Settings** Saved settings are available to all users printing this report. Therefore, there is a danger that another user may delete or change the settings that you have saved. It may be useful to include your User ID in the settings name, so other users know who first set them up. You may also like to make a separate note of the column widths so as to be able to recreate it.

----- End of Chapter 7 -----

Chapter 8 Subscriptions to Publications

8.1 Overview of Subscriptions

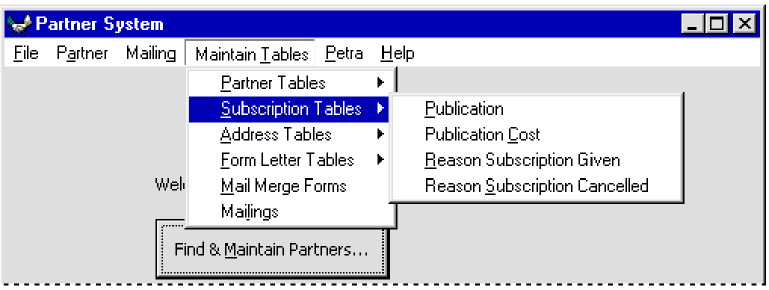
A local office manages the subscriptions to OM newsletters and publications, and mails them to partners. There are several different things to do and some of the operations are described in other chapters of this User Guide. The different parts of Subscription management are as follows.

- **Publications to be supported** An office must decide which publications it will support. The chosen publications must be entered in the Subscription Tables, as described in Chapter 3, section 3.3. These tables record the names of the selected publications and also details of subscription and postage costs to assist in the mailing.
- **Partner Subscriptions** If a partner wishes to receive a publication, this is entered in the Partner Maintenance Procedure (section 2.3.4, Entering and Cancelling Subscriptions, page 29). This allows the PETRA User to record the reason for starting the subscription, and the number of copies to be sent to a partner (bulk mailings). If required an expiry date can be entered. PETRA automatically records the number of issues that have been sent.
- **Publication Mailing** Section 8.4, later in this chapter, explains how to print labels for mailing a publication.
- **Subscription Expiry Notices** If required, expiry notices can be sent to all partners whose subscriptions have expired. This is described later in this chapter (section 8.5, Subscription Expiry Notices, page 169).
- **Subscription Cancellation** Subscriptions can be cancelled at any time as part of the Partner Maintenance Procedure (section 2.3.4.2, page 31). In addition, PETRA can automatically cancel the subscriptions of all partners whose subscriptions have expired (see section 8.6, Subscription Cancellation, page 171).
- **Reports** PETRA can print reports to allow an office to see a list of partners who subscribe to a particular publication. This is explained in Chapter 7, Partner Reports, page 161.

8.2 Publications to be Supported

Details of the Publications supported by an office are entered in Subscription Tables. These are accessed from the `Maintain Tables` Menu in the *Partner (Welcome) Screen*.

Figure 8-1 Upper Part of Partner Welcome Screen with Menus for Subscriptions and Publications



The Subscription Tables sub-menu allows the following tables to be edited:

Table	Contents
Publication	Names of publications supported by the office
Publication Cost	The cost of the publication, including mailing costs details
Reason Subscription Given	The reason that a subscription was started for a partner (e.g. they requested it, they made a donation, etc.)
Reason Subscription cancelled	The reason that a subscription was cancelled

Section 3.3, Subscription Tables, page 81, explains the use of these tables and how to add or amend entries in them.

8.3 Partners' Subscriptions

8.3.1 Viewing a List of Subscriptions

If a partner has several subscriptions, you may wish to view the details of all of them. To do this, use the *Partner Find Screen* to show the partner, and from the `Mailing` Menu, select `Subscriptions`. (This option is only available from the *Partner Find Screen*.) The *Subscription List Screen* appears, listing all the partner's subscriptions. From this list it is possible to edit each subscription if required.

8.3.2 Entering or Cancelling a Subscription

Adding a subscription for a partner (or cancelling one) is done from the *Partner Edit Screen* (see Chapter 2, section 2.3.4).

8.3.3 Renewing a Subscription

For free publications, a subscription is renewed by updating the dates in the *Subscription Maintenance Screen* (see section 2.3.4.1, page 29). The renewal date is changed, normally to extend the period for one more year.

For those subscriptions where there is a cost, partners should send in the payment in order for the subscription to be renewed. There is no automatic link to the Finance module, so the following steps are necessary.

1. Update the Subscription Maintenance Screen for the partner.
2. Pass the payment to the Finance department, who will enter it as a gift (see the FINANCE USER GUIDE).

8.4 Mailing a Publication

Mailing publications is a regular event, and will be a common activity for most offices. There are two stages necessary:

- Create one or more lists (extracts) of partners who are to receive a publication
- Print mailing labels and update partner records

In fact, when you create a publication extract, PETRA asks if you want to go directly on to the second step of printing labels.

8.4.1 Creating Publication Extracts

Chapter 4, section 4.2.1, Publication Extract, page 99, explains how to create an extract of partners who should receive a publication. In general it is best to create two extracts, one for partners who receive just one copy, and one for partners who receive several copies to distribute locally.

A new extract should be created each time a mailing is made, so that it takes account of the latest changes to the mailing list.

8.4.2 Printing Labels for Publication Mailing

Chapter 5, section 5.3, explains how to print labels from the extract, including use of the Mailsort Label Print command (which prints labels in the order of postal code required by a local post office - see section 5.3.4). There are two special requirements for printing labels for subscriptions, which are different to other sorts of label printing.

- **Updating Partner Records** When printing labels for publication subscriptions, PETRA can automatically update partner records to show that they have received a further issue of the publication.
- **Format of Printed Labels** As was explained above it is best to have a separate extract for bulk mailing. When this option is selected, PETRA prints a number on the labels to show how many copies should be sent to that address. This helps those who are putting the items into an envelope.

These special aspects for printing labels for mailing a publication are explained in Chapter 5, section 5.3.3, Labels for Subscriptions, page 134. When you come to the *Print Label Selection Screen* be sure (1) to click on Update Subscription Issues Received, and (2) to select the publication being mailed. PETRA will then automatically update the partner records to show that they have received an additional issue.

Remember that Partners' records may be updated when you print, even if you print to screen as a check, or if the printer jams part way through the printing operation. If you need several attempts to print the labels, make sure that the Update Subscription box is only checked (**x**) for one of the attempts. Otherwise the 'number of issues received' in the partners' records will be increased by 1 for every attempt that you have to make.

8.5 Subscription Expiry Notices

8.5.1 Purpose of Subscription Expiry

It is necessary to review subscriptions to publications now and again, to check that it is still appropriate to send the publication to a partner. This is essential in cases where a charge is made for receiving the publication, but is a good idea in other cases. This can be done by means of Partner Reports (see Chapter 7), but PETRA provides a tool to assist with this.

When a partner is entered as having a subscription (section 2.3.4.1, page 29), the *Subscription Maintenance Screen* gives you the opportunity to enter an expiry date (see Figure 8-2).

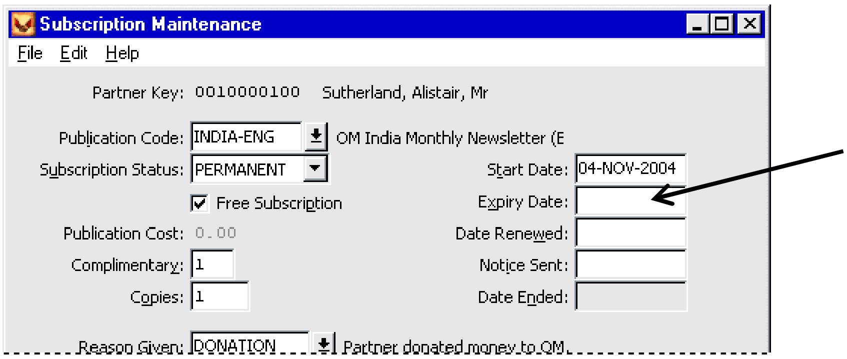


Figure 8-2 Upper part of Subscription Maintenance Screen, showing Expiry Date field

If an expiry date is entered (say one year later), then PETRA can assist in sending renewal letters and in cancelling the subscription automatically once the expiry date has passed.

The main parts of PETRA's Subscription Expiry Notice Procedure are:

1. Decide which publication you wish to review and select a date a few weeks in the future.
2. PETRA looks at all subscriptions to that publication which have an expiry date before the chosen date, and saves the partner's details in an Extract.
3. PETRA prints out labels so that you can send a letter to these partners
4. PETRA updates the partners' records to show that a reminder letter has been sent.

8.5.2 To Issue Subscription Expiry Notices

Example: It is 18 April 2002. We wish to send an expiry notice to all partners whose subscriptions to Ship-to-Shore are due to expire by 23 May 2002.

1. From the menu bar of the *Partner Welcome Screen*, select `Mailing`, and then `Subscription Expiry Notices`. A box appears showing a date.

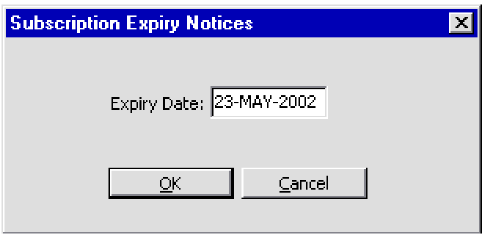


Figure 8-3 Subscription Expiry Notices

2. Enter the date of 23 May 2002.
3. A *New Extract Screen* appears asking you to give a name to the Extract which will hold the names of the partners whose subscriptions are expiring.

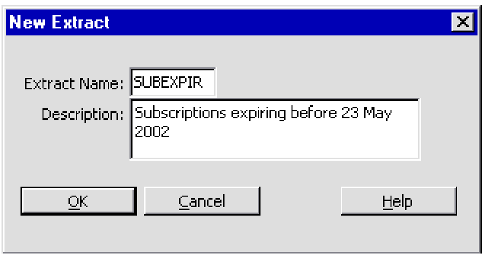


Figure 8-4 New Extract Screen

4. Enter a name and description and click OK. A *Print Label Screen* appears.

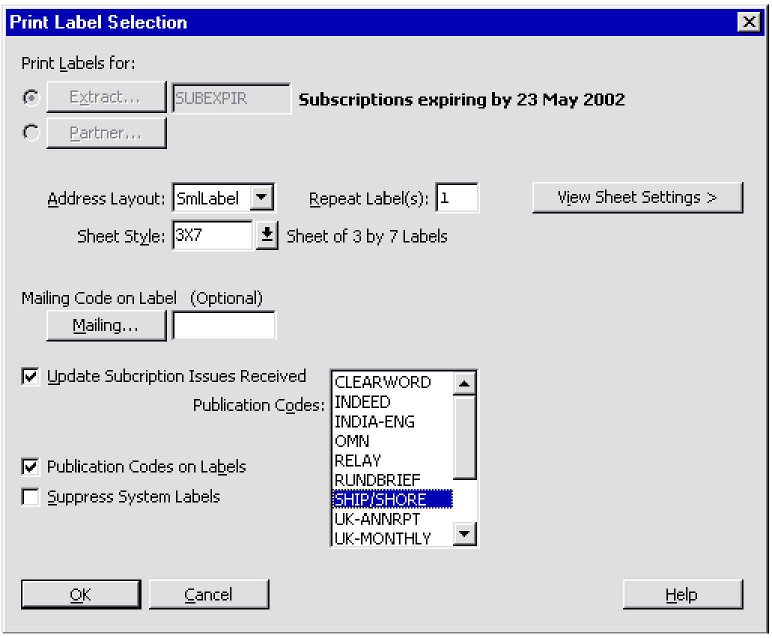


Figure 8-5 Print Label Screen for Subscription Expiry Notices, shown after clicking on 'Update Subscription'

5. Select the label sheet design and the address layout required (see Chapter 5 for further details).
6. Click on **Update Subscription Issues Received**. This will automatically update partners' records to show that an expiry notice has been sent. (NB It will also, incorrectly, increment the number of issues received by 1.)
7. Select the publication for which you are looking at the subscriptions (Ship-to-Shore). Click OK.
8. The *Start Print Job Screen* appears. Continue with the print job in the normal way (see GENERAL USER GUIDE).

8.6 Subscription Cancellation

Offices may prefer to study a report and decide on an individual basis whether to cancel a subscription. However, in the case of some publications an automatic procedure is useful.

To cancel all expired subscriptions:

1. From the menu bar of the *Partner Welcome Screen*, select `Mailing`, and then `Subscription Cancellation`.
2. All expired subscriptions are immediately cancelled, and partner records are updated to show this.

----- End of Chapter 8 -----

This page is blank

Chapter 9 Address Management

9.1 General Principles

Partners addresses are entered and amended as part of the Partner Maintenance described in Chapter 2. Address Management, the subject of this chapter, has two different functions.

- To check for duplicate addresses
- To remove old addresses (for example when a partner has moved).

Duplicate Addresses Sometimes addresses are used more than once (for example several OMers may live in one house; parents and young children will have the same address.) PETRA therefore stores addresses as 'locations' and several partners may share one location. Saving a full address only once helps to improve the efficiency of PETRA and makes it easier to change to address for all partners if they move.

PETRA can compare all the address locations stored in it to see if they are similar, and possibly the same. A report is produced listing all addresses that look similar. The office can study the report, and if the same location has been entered twice the entries can be merged to form a single location entry.

Old Addresses PETRA can store more than one address for each partner. Sometimes a partner will have more than one current address (a home address and a business address) and there may be good reason to store both. However, sometimes it is known that, say, a home address will cease to be correct after a certain date. A partner may write in and say that they will be moving in 4 weeks time. PETRA can add the new address immediately, and entries are made that the old address will expire in 4 weeks time and the new address will become valid in 4 weeks time.

PETRA can automatically remove dates that expired before a given date.

9.2 Duplicate Addresses

When a new address is entered, PETRA warns you if there is a similar address (see section 2.3.3.2, page 27). However, if you are not sure that it is the same, you should enter it as a new address. Over time, duplicate addresses may be entered into PETRA. The operation described in this section is a housekeeping operation to help you to keep the addresses in good order.

PETRA checks for duplicate addresses, by comparing the contents of important parts of the address (e.g. Address Line 2, City and postcode). If two addresses are a little different (for example different numbers in the same street) they will still be identified as possible duplicates (although of course they are not duplicates and should not be merged). The 'level of match' is set in the System Manager Module.

9.2.1 Checking for Duplicate Addresses

Checking for duplicate addresses can take a long time, since each address is checked against every other address. This job should therefore ideally be carried out overnight or at a weekend (see printing, batch mode, in the GENERAL USER GUIDE). However, it is possible to do the job in stages, and Petra allows you to select the percentage of addresses to check.

Performing a duplicate address check results in a report being printed out. This lists addresses that may be duplicates, in the form:

```
Address location Number 109
   34 Northgate Street, Bath

may duplicate the following addresses

   Address Location Number 5301
      34 Northgate Street, Bath

   Address Location Number 489
      34 Northgate St, Bath
```

This report can then be studied to decide which addresses are duplicates and should be merged.

To check for duplicate addresses,

1. From the menu bar of the *Partner Welcome Screen*, select `Mailing`, then `Duplicate Address Check`. The results of the duplicate address check will be presented in a report, and so a *Start Print Job Screen* appears. Enter data as follows:

   Report Select New Report

   Run Mode Select Batch. The duplicate address check takes a long time and should be run at a time when the office is not busy (overnight).

   Destination Since the report may be very long, it is best to print to screen first. The report can be reprinted later (reprinting a report is much quicker than generating it).

2. Click OK. A dialogue box appears, asking you to select the percentage of address to be checked. It is best to select a small percentage until you know how long this sort of job will take.

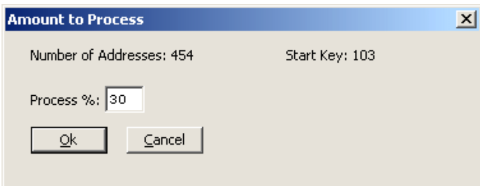


Figure 9-1 Dialogue box to select percentage of addresses to check.

3. Select the percentage and click OK.

4. When the check is finished, the duplicate address check report will appear on screen. If the report is not too long you may be able to study it on screen. If not, the report can be reprinted.

Warning: The duplicate address check will indicate some addresses that are NOT duplicates. For example there may well be two different partners who live in the same street; their addresses look similar, but they are not the same. The report will therefore need to be studied carefully. The following step of merging locations should only be done on the authorisation of the office manager.

9.2.2 Merging Addresses

The duplicate address check may indicate that some locations are the same as others, and should be merged. This is done by PETRA one at a time.

Tip - Finding the Location Key If you want to check the location key for the address of a partner, first use the *Partner Find Screen* to list the partner with all their addresses (clear the Mailing Address only check box.) Scroll to the extreme right to see the location keys.

To merge addresses:

1. From the menu bar of the *Partner Welcome Screen*, select `Partner`, then `Merge Addresses`. A *Merge Locations Screen* appears.

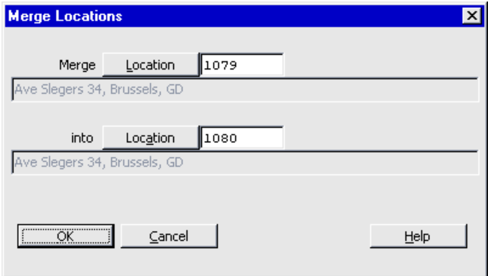


Figure 9-2 Merge Location Screen

2. The dialogue box asks you to enter the location keys of two locations that should be merged. The location entered in the upper box will be merged into the lower box. Thus the details of the lower box will be the ones that remain. Click the upper Location button.
3. A Find screen appears. Find the first location (the one you wish to remove), and click Accept.
4. Find the second Location (the one to retain) and click Accept. A *Merge Address Screen* appears.

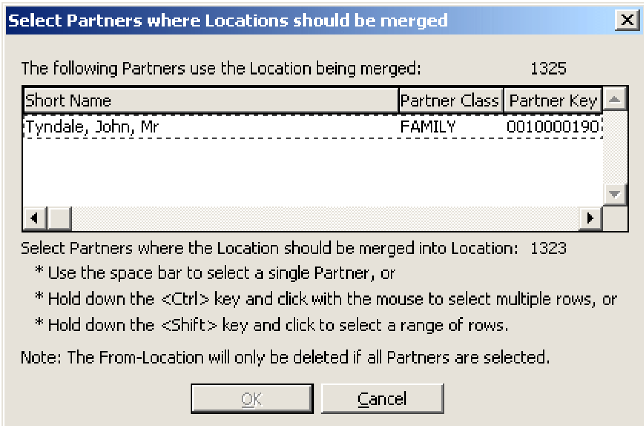


Figure 9-3 Merge Address Screen

This screen serves as a check. It shows all the partners who are using the address that is to be merged. If the two addresses are just duplicate entries of the same location (the real purpose of this function) then you can select all partners using the mouse, and click OK. The two addresses will then be merged. If there are any partners who you do not select, then for those partners, the original location will continue to be used, and so the two locations will continue to exist independently.

5. Continue with each set of locations that need to be merged. If in any doubt, do NOT merge locations.

9.3 Purging Expired Addresses

Addresses remain in PETRA after their 'expiry' date until they are 'purged'. Purging expired addresses is a System Manager function. The SYSTEM MANAGER GUIDE shows the menu to use this.

----- End of Chapter 9 -----

This page is blank

Chapter 10 Sending Email from PETRA

There are three facilities to make it easy to send an e-mail when using PETRA. These relate to: sending an individual message to a partner; creating an e-mail distribution list from an extract, and sending a report directly to a partner (normally this will be an internal member of an OM Unit).

10.1 Sending an E-mail message to a Partner

A link to the Pegasus mail program makes it easy to send an email to a partner on the PETRA database.

1. From the menu bar of the *Partner Welcome Screen*, click Find and Maintain Partner. Enter search criteria as described in 2.1.1, page 15, and click the Search button. The partner will now be listed on the screen.

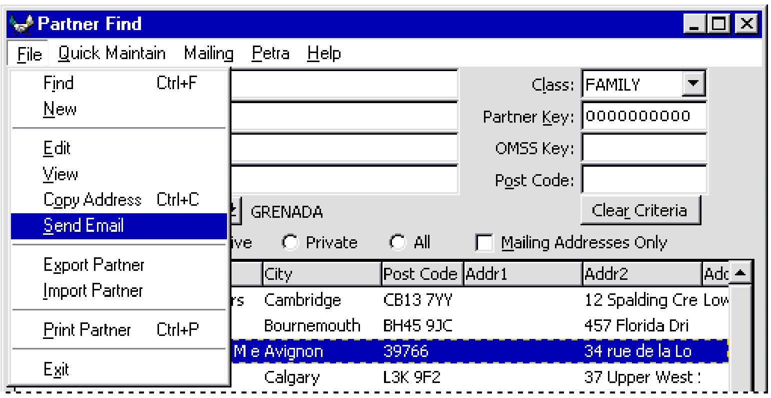


Figure 10-1 Upper part of partner Find Screen showing Send Email on File menu

2. Highlight the partner, and select the File menu, then `Send Email`. The Pegasus email program will be opened with a new message window addressed to this partner. Send your email message in the normal way. The option is also available from the `File` menu of the *Partner Edit Screen*.

10.2 Sending a Report by E-mail

It is often useful to send a report by e-mail to another person. There are two ways of sending a report by e-mail.

- The report can be saved as a text file (using the print destination ‘File’, as described in the GENERAL USER GUIDE chapter on printing). The file can then be sent as an attachment to an e-mail message, using your normal e-mail procedure, and including any other comments that you wish to write.
- If your local system is set up for it, and you use Pegasus Mail, the above can be done automatically to an e-mail address by using the print destination ‘Email’. The report is sent as an attachment to a very simple standard message.

The second method is explained below.

1. The starting point is the *Print Job Screen*. Normally you will only email reports that you have already printed (at least to screen) to check that they are correct. If the report exists already, then go to the PETRA main menu (the opening PETRA screen, not the Partner Screen.); select `File` and then `Reprint Report`. A list of reports appears; highlight the one you want and click `Print`. It is possible to email a new report directly, since the act of creating a report takes you to the screen automatically.

2. On the *Start Print Job Screen* (see), select the destination `Email`. This opens the *Select Email Address* Screen. When this first appears, it is rather simpler than the example shown in Figure 10-2, since the centre panel of addresses is not visible.

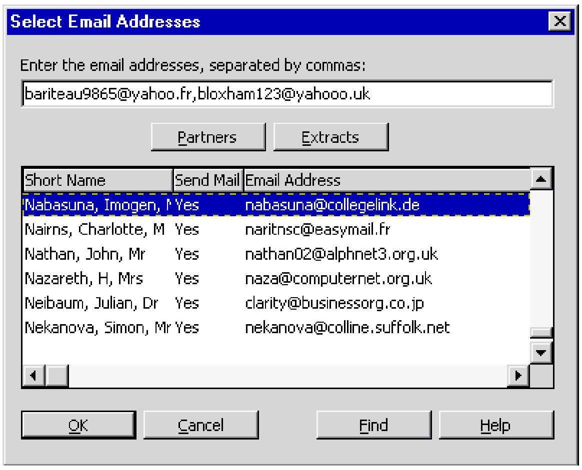


Figure 10-2 Select Email Address Selection

There are now three ways to select e-mail addresses: browsing partners, browsing extracts and finding partners. (You can also type e-mail addresses directly into the top box.)

To browse partners Click on the Partners button. A panel opens in the screen as shown in Figure 10-2. One or more partners can be selected. You can move up and down the list with the cursor keys or with `<Home>` and `<End>`. Typing a letter will take you to the next item beginning with that letter. Typing it again will take you to the second entry. To select an item, press `<Enter>` or `<Space>` or double-click with the mouse.

To browse extracts Click on the Extracts button. This opens a panel similar to the partner panel, but listing extracts. Select in the same way, but note that the extracts may not be in alphabetical order.

To find a partner or e-mail address Click on the Find button. A Find Screen appears. This allows you to search for a partner's e-mail address as shown in Figure 10-3.

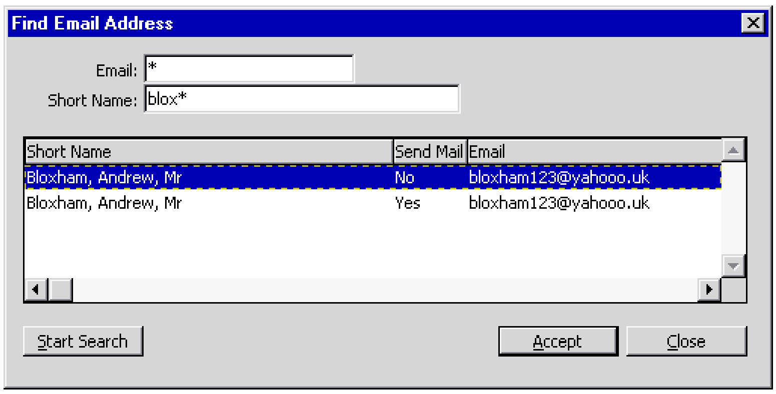


Figure 10-3 E-mail Address Find Screen

To search for a partner, enter some text and click `Start Search`. An asterisk represents a 'wildcard' or any text. To search for all CompuServe addresses, you can enter *compu* in the Email field. When you have found the correct address, highlight it and click Accept. This returns you to the *Select E-mail Address* screen.

3. When you have selected all addresses, click OK. This returns you to the *Start Print Job Screen*. The **Selected Destination** box now shows the selected e-mail address(es).

4. Click OK on the *Start Print Job Screen*. If Pegasus Mail is not open already, PETRA will open it and place the message in the print queue. The report will however, not be sent immediately, depending upon your settings of Pegasus. If Pegasus is already open, you may see a warning

message about different settings. This can generally be ignored, but if the report is important it is recommended that you check with the recipient that the message has been received.

Warning: The e-mail addresses for a single mailing cannot exceed a total of 4096 characters (about 150 e-mail addresses).

10.3 Creating E-mail Lists from Extracts

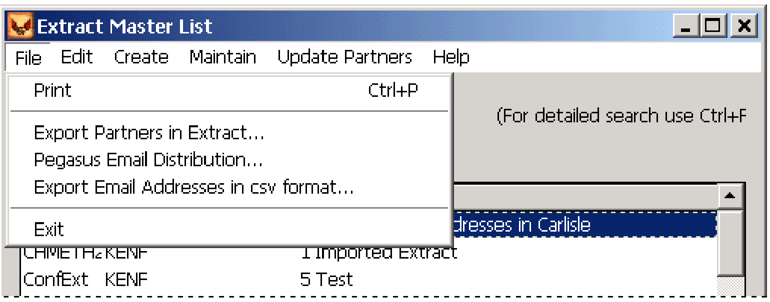
It is possible to export email addresses either (1) in CSV format, or (2) in a format which can be imported directly into Pegasus Mail. Either of these can also be edited for importing into other applications or email clients, and examples are given later based on the Pegasus format.

10.3.1 Creating an E-mail List for Pegasus Mail

If you wish to send an e-mail message to a group of partners, it is best to create an extract of those partners (see Chapter 4, page 97). A distribution list for use in the Pegasus Mail program may then be set up as described here (see the next section for exporting to other email clients):

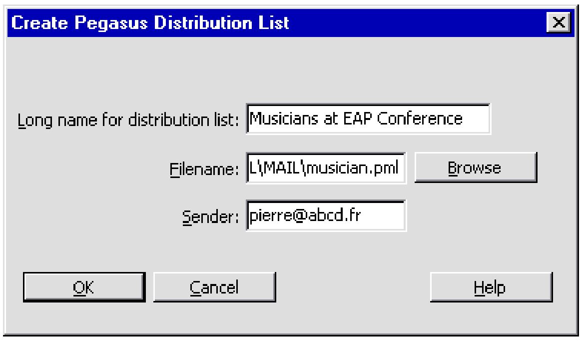
1. Open the *Extract Master List Screen* (see Figure 4-1, page 99).

Figure 10-4 File Menu on Extract Master List Screen



2. From the `File` menu, select `Pegasus Email Distribution`. The *Pegasus Distribution List Screen* appears.

Figure 10-5 Pegasus Email Distribution List Screen



Long Name for Distribution List Enter a suitable name for the list

Filename Click the Browse button, find the Pegasus mail file where your distribution lists are kept, and provide a suitable file name. If you enter the full path for your email directory, the list will automatically appear in Pegasus. For the example in Figure 10-5:
For network : `h:\mail\musician.pml`
For stand-alone `c:\pmail\mail\musician.pml`

Sender Enter your full e-mail address.

Click OK. The distribution list will be added to your Pegasus email program.

10.3.2 Exporting E-mail Addresses in CSV Format

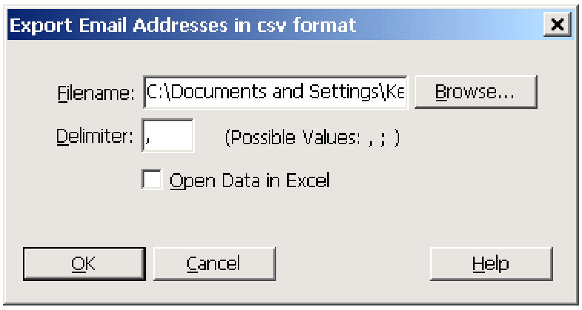
This will produce a text file, with a CSV suffix, with the format as follows (column heading first, and then one line for each entry):

```
Name,Email
"Mousel, Jean-Luc, M.","jeanluc22975@.ing.nantes.ac.fr"
```

Note that although this is called a CSV file (comma separated variable) commas are also included in the name field, so quotation marks (") are used either side of the name and email address. This file can be imported directly into MS Excel, but in other cases it may be necessary to Find and Replace certain characters (see next section based on Pegasus file format, but the same ideas apply.)

1. Open the *Extract Master List Screen* as described in the previous section for Pegasus Mail, and highlight the extract of partners whose email addresses you wish to export. Select the item `File` > `Export Email Addresses in CSV Format`. The *Export Email Addresses in CSV Format Screen* appears:

Figure 10-6 Pegasus Email Distribution List Screen



2. Enter data as follows:

   Filename Click Browse and select the folder you wish to store the file in and enter a file name. There is no need to add the .csv suffix – it is added automatically.

   Delimiter Choose comma (,) or semi-colon (;). Semicolon may be better if you will need to modify the file, since commas will be present in the short name.

   Open Data in Excel If you check this box, PETRA will automatically open the file in MS Excel if that application is installed on your computer.

3. Click OK. The file will now be exported.

10.3.3 Exporting E-mail Addresses to Other Applications

The file produced for Pegasus Mail (as described in section 10.3.1) is actually a text file, and it may be possible to import it into other applications. The exact requirements depend on what you wish to do with the file, but the following steps may help.

1. Produce the list as described in section 10.3.1 for Pegasus Mail. This is a file with a name ending in `.pml`.

2. Open a word-processing program, and from within that application, open the new pml file. The file is of the form:

   \TITLE aaaaaaaa.
   \SENDER bbbbb
   \REPLYTO ccccc
   \NOSIG Y
   "Smith, John, Mr" <johnsmith@claritymusic3.org>

"Abernethy, Heather, Mrs" <abernethyha@cambridge.isp2.co.uk>
etc.
“name” space <email address>

3. Delete the first 4 lines of the file, those beginning with \. You now have a list of all the email addresses, one on each line, with the following format:
4. Save the file as a new text file (`.txt`.)
5. Review the file, to check for anomalies, such as email addresses starting with an *. This sort of list may be recognised directly by some email programs if you wish to import addresses. However, other possibilities exist, such as the following.

Using a word-processor

The following applies to Microsoft Word, but similar operations may be possible in other word-processors.

1. Use Find and Replace to replace all occurrences of < with #< (assuming that # is not used in the list.) The purpose of # is to act as a delimiter, to show where to start a new column.
2. Select all rows of the list and the select `Table` then `Convert Text to Table`. In the dialogue box, select 2 **Columns**, and enter # in the box labelled **Separate Text at** . Click OK.
3. Word now converts the text into two columns.
4. Use Find and Replace to remove the # characters. Replace all occurrences of # with nothing (an empty field). You now have a table of email addresses.

Using a spread-sheet

The following applies to Microsoft Excel, but similar operations may be possible in other spreadsheet programs.

1. Open Excel. Then go to File, then Open, and select the text file. The Text Import Wizard starts up.
2. In step one of the Wizard, chose Original Data Type DELIMITED. Click `Next`.
3. As the delimiter, select Space. The data preview should show that this will make two columns. If so, select `Finish`.
4. You can now either use the Excel file, or save it as CSV file.

----- End of Chapter 10 -----

Chapter 11 Foundations

11.1 Introduction to Foundations

Note: Although basic data for Foundations can be entered, the functionality to record individual proposals has not yet been implemented (as of November 2007).

Foundations are organisations that can help with the funding of mission work. To help them organise their work, they may ask for requests for funding (proposals) to be submitted by particular dates and they may require proposals to be submitted in a particular format.

Foundations are entered into PETRA as partners of class Organisation. If under Partnre Details they are marked as being foundations, the *Partner Edit Screen* shows the Foundations Tab, which allows you enter the requirements of the Foundation and details of any Proposals that you submit. This chapter explains how to use the Foundations Tab.

Relationships with Foundations can be quite sensitve. For this reason, each foundation is assigned two "Owners", who are PETRA users and who "own" the relationship with the Foudation.

11.2 Entering Foundation Information and Proposals

As described under Partner Details - Organisations (end of section 2.4.1.4, which begins on page 38), the Foundations Tab only appears when an organisation is marked as being a foundation. The Foundations Tab allows you to enter details about how to apply for grants, and to keep a record of proposals submitted.

To add or edit foundation details for a partner of class Organisation, first find the partner and go to the *Partner Edit Screen*. Then continue as follows.

1. Select the Foundation Tab, so that the screen appears as follows.

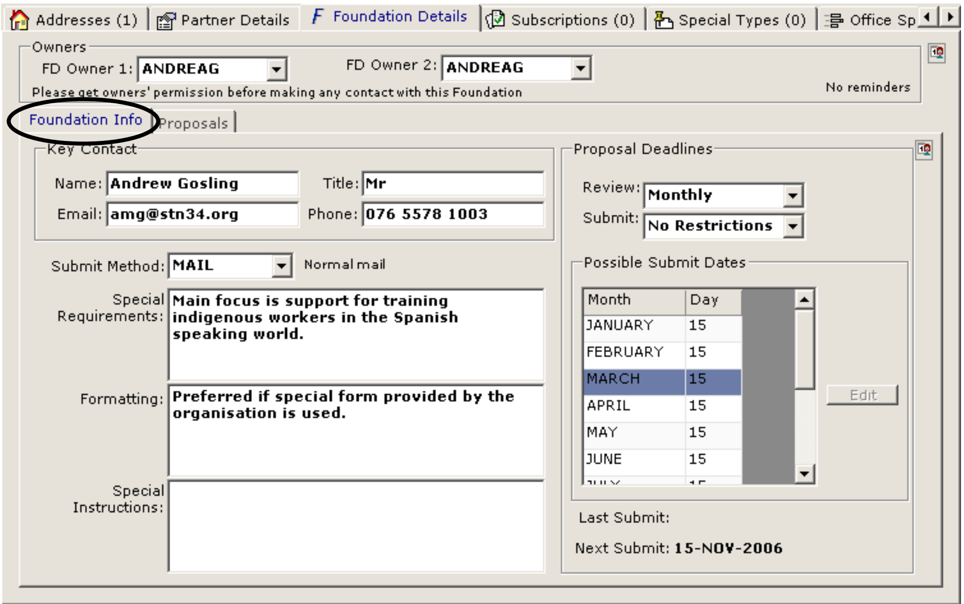


Figure 11-1 Foundation Tab pf Organisations which are Foundations, showing the sub-tab for Foundation Information

The screen has three parts – the "Owners" at the top, and two Tabs, one for general foundation information and one for specific proposals. Enter information in the three areas.

2. First select the person who is the **Financial Development Owner** for this foundation using the drop down list of users on your system. A second (deputy) owner can also be entered. Users will only appear on the drop-down list if their User ID has also been linked to a Person record (see System Manager Module, then `Security`>`User`>`Edit`>`Partner Key`). Foundation information can only be edited by one of the Owners.

3. Using the **Foundation Info** tab, enter basic information as follows.

   Key Contact Enter the **Name**, **Title**, **Email** address and **Phone** number of the key contact in this foundation.

   Submit Method Select the preferred method for submitting proposals for funding.

   Special Requirements, **Formatting**, **Special Instructions** Enter in these fields any specific information regarding how to apply for a grant.

   Proposal Deadlines Select the time interval for **Reviews** and the dates by which it is possible to **Submit** a proposal. The actual **Possible Submit Dates** can then be set up.

4. Use the **Proposals** Tab to submit an actual Proposal. When selected the screen appears as follows.

[The Proposal Tab has not yet been implemented.]

Screen not yet available.

Figure 11-2 Proposal entry on Foundations tab.

5. Enter data as follows.

   Details not yet available.

6. Click Save , and then Close.

----- End of Chapter 11 -----

Index to Partner User Guide

Tip If using Acrobat Reader to view on line, you can jump to the page. Find the item in the index, click once in the box at the bottom of the Reader screen to highlight the field, type the page number you want, and then press the <Enter> or <Rtn> key. This takes you immediately to the page.

This page is blank