crimson

Best Efforts List Select

The **Best Efforts List Select** generates lists of donors who need to be sent Best Effort letters for FEC Compliance.

How to Run the Best Effort List Select

1. Go to the **Compliance Dashboard** menu and click the **Run** action button above the **Itemized Best Efforts** pie chart to open the Best Efforts list select search window.

2. Use the drop-down menu to select the **Fund Code** to be used for the select.

o Take note of the **Suppression** box filter. Click the box to see a series of search fields that allow you to exclude certain records (e.g. records flagged "DNM" for Do Not Mail).

o You can also use the **Output Fields** tab to select which data you want to include in the exported results. This is helpful in producing lists that will only have information you need and exclude information you do not need.
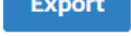

3. Once the search criteria has been entered, click the **Run** button at the bottom right corner.

Please note: The search is looking for all records that fit the criteria entered, but will only output those donors who have not previously been selected to receive a Best Efforts letter for that particular gift and those donors whose Occupation and/or Employer do not meet the FEC's requirements.

4. From your results:

   o Click on any column header to sort results based on the data in that column.
   o To change your search criteria after results have appeared, you can click the **Filters** tab to go back to the search fields.
   o At any time, clicking the [Reset] button at the bottom right corner of the window will clear all of your selection criteria and allow you to start a new Best Efforts list search.
   o To view the people record, click the [✏] button to the left of the record.

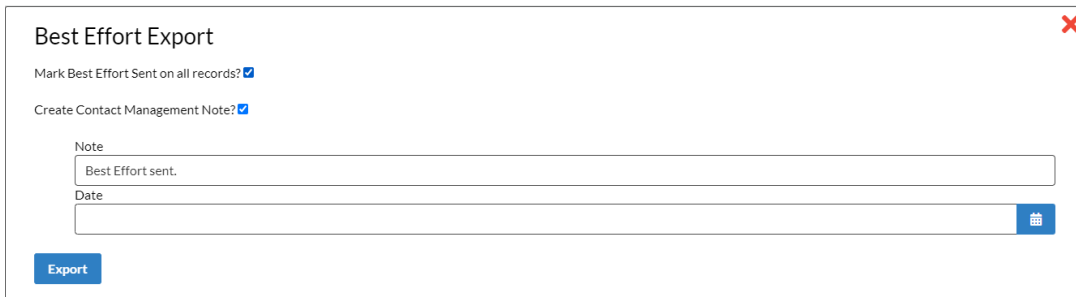5. To a list, click the [Export] button in the bottom left corner of the **Results** section.

6. A new window will appear asking:

Best Effort Export

Mark Best Effort Sent on all records? ☐

Export

   o Check the box and these donors will no longer pull in a Best Efforts List Select to receive a letter because of these contributions.

7. If you check the box, a new question will prompt you with the option to add a **Contact Management** note to all the records in the list. This option may be useful in noting what date Best Efforts letters were sent or where the list has been saved for the letters to be sent in the future. Select **Yes** and fill in the fields to save a note or just leave the prompt unchecked and click **Export**.

Best Effort Export ✕

Mark Best Effort Sent on all records? ☑

Create Contact Management Note? ☑

Note
Best Effort sent.

Date
[📅]

Export

Under the **Data Maintenance Reports** list on the **Compliance Dashboard**, there is report #**401, Best Effort Itemized Donors w/o Occupation & Employer**. While the **Best Efforts List Select** only pulls

records that have not been marked as having a best efforts letter sent, the 401 report will include all records that match the report criteria used, regardless of whether they were marked as having a letter sent or not.