

The Exception Correspondence functionality is useful in generating lists of donors who need to be sent FEC exception letters and for tracking the status of that correspondence.

- Go to the **Compliance Dashboard** and click on the **Run** dashboard button next to the **Top 5 Exception Codes** graph to open the Exception Correspondence page.

Exception Letter

Step 1 Select Exception Step 2 Contact Note Step 3 Export

Fund  
Select Fund ...

Exception  
Select Exception ...

Previous Next

- In **Step 1: Select Exception**, select a fund code from the **Fund** drop-down menu, select an exception code from the **Exception** drop-down menu and then click **Next**.

\*\*Please note: For information on customizing exception codes in Crimson, please reference the [Crimson 3 - Exception Codes](#) guide on the HelpDesk.

- In **Step 2: Contact Note**, you can check the checkbox marked **Create Contact Management Note (not required to export file)** and fields for a **Contact Note** and **Contact Date** will appear. Enter any text you wish to leave as a note on all the gifts in the list. The **Contact Date** will appear as the current date, but you can change it by manually entering a date or by clicking the calendar icon and selecting a date from the calendar. Click **Next**.

Step 1 Select Exception Step 2 Contact Note Step 3 Export

Create Contact Management Note (not required to export file)

Contact Note  
[Text Field]

Contact Date  
[Date Field] [Calendar Icon]

Previous Next

- Click  in **Step 3: Export** to export the list and open the Excel file with your results.

- Also, in **Step 3: Export**, you have the option to change the exception codes of all the gifts in the list to the code that indicates the exception letter has been sent (e.g. Change Code from C1 to C2).
  - After you've selected this option, you'll be prompted with a confirmation message asking whether to change all of the exception codes of the gifts in the list (e.g. "Are you ready to change Exception code from C1 to C2?"). Click **Yes** to change the codes or **No** to leave them as they are.
- You can then use the exported Excel file to generate the exception letters by mail merging the results into your letter template.
- The last option in **Step 3: Export**, is to use the **Mail Merge** feature to select a template and have the results directly merged into your Microsoft Word exception letter template that you previously uploaded into Crimson.

To learn more about the **Mail Merge** feature, see the [Crimson 3 – Mail Merge](#) guide on the HelpDesk.