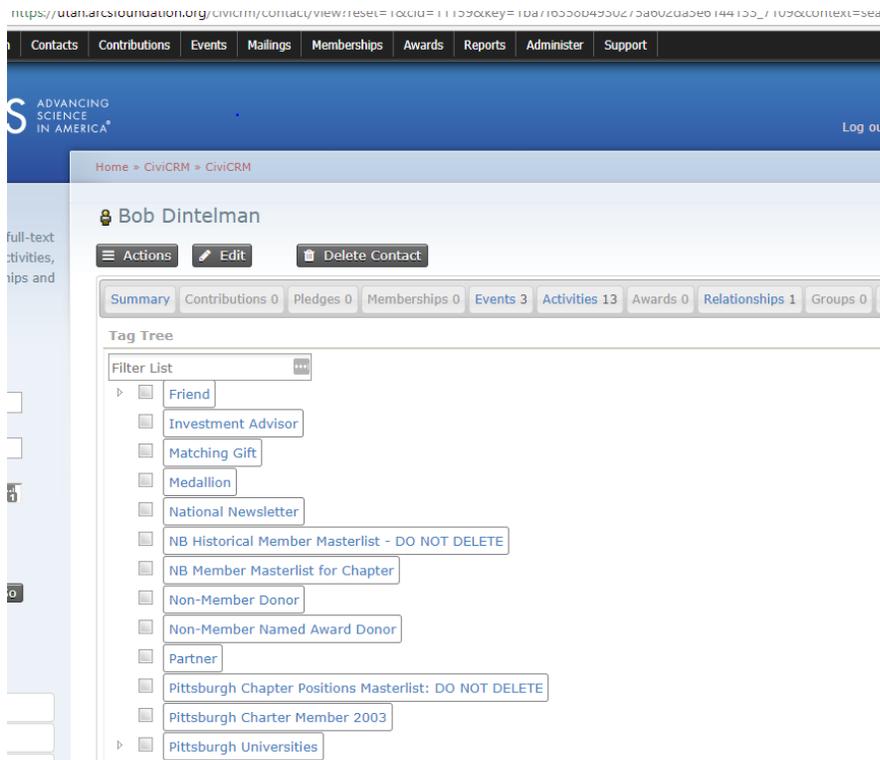


How to Set the “National Newsletter” Tag

When National sends out the newsletter, all current members and scholar emails are pulled from all chapters so you know that these important contacts are receiving ARCS news on a regular basis. But what about other friends of ARCS like donors, university administrators, potential members, etc.? Now, in addition to sending the newsletter to members and scholars, your chapter can include other contacts from your database by adding the “National Newsletter” tag to those contacts.

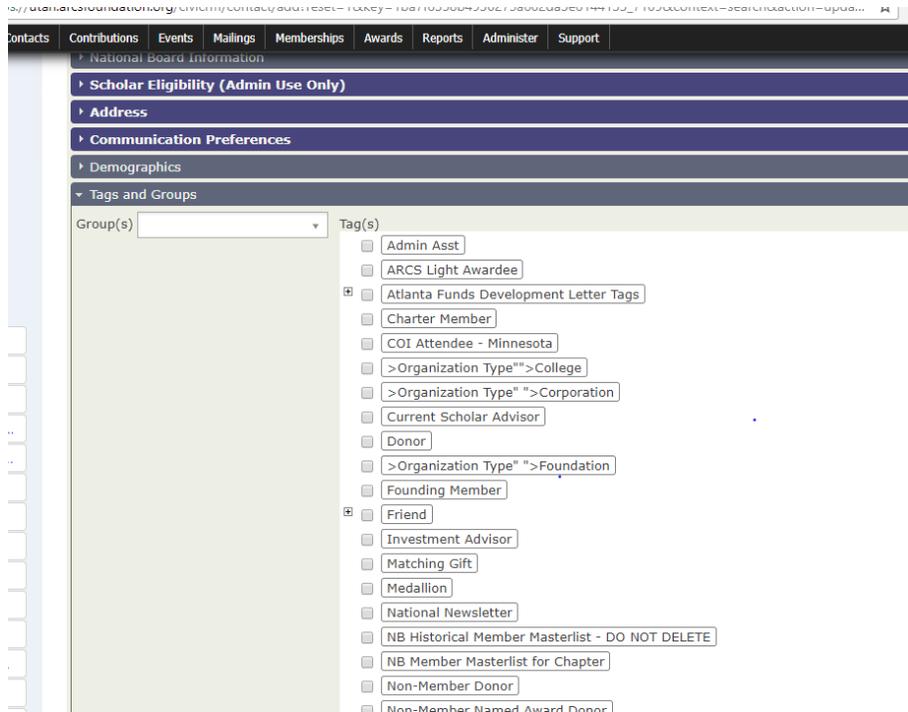
Here are the directions for setting the “National Newsletter” tag. This assumes you are signed into the website, have access to the CiviCRM menu on the black bar menu and know how to search for contacts. If you need any help with these preliminary steps or those below contact js.help@arcsfoundation.org.

For individuals: Find the individual contact record and add the tag by clicking on the "Tags" item in the menu and clicking the box in front of "National Newsletter".

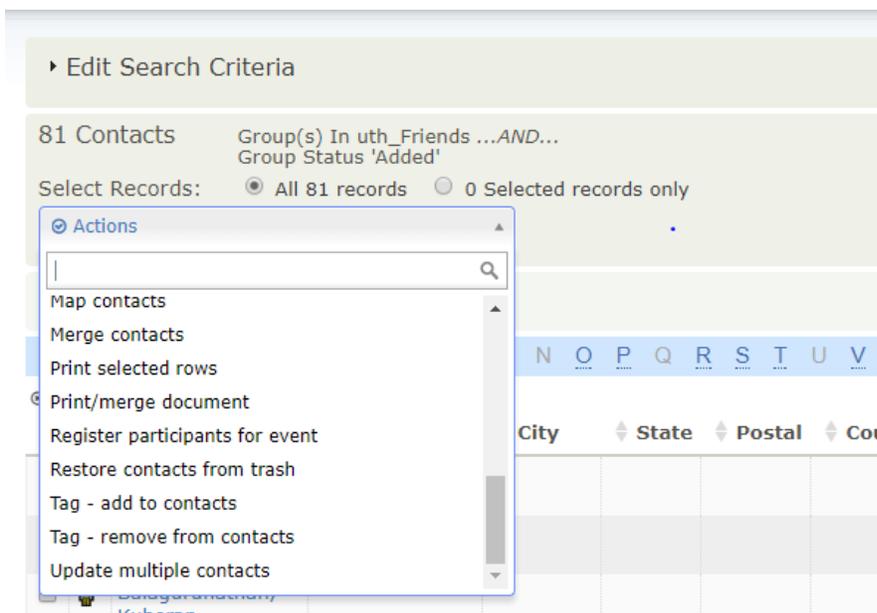


The screenshot shows the CiviCRM interface for a contact named Bob Dintelman. The top navigation bar includes links for Contacts, Contributions, Events, Mailings, Memberships, Awards, Reports, Administer, and Support. The main content area displays the contact's name and a list of tags. The 'Tags' section is expanded, showing a list of tags with checkboxes next to them. The 'National Newsletter' tag is highlighted with a blue box, indicating it is selected. Other tags include Friend, Investment Advisor, Matching Gift, Medallion, NB Historical Member Masterlist - DO NOT DELETE, NB Member Masterlist for Chapter, Non-Member Donor, Non-Member Named Award Donor, Partner, Pittsburgh Chapter Positions Masterlist: DO NOT DELETE, Pittsburgh Charter Member 2003, and Pittsburgh Universities.

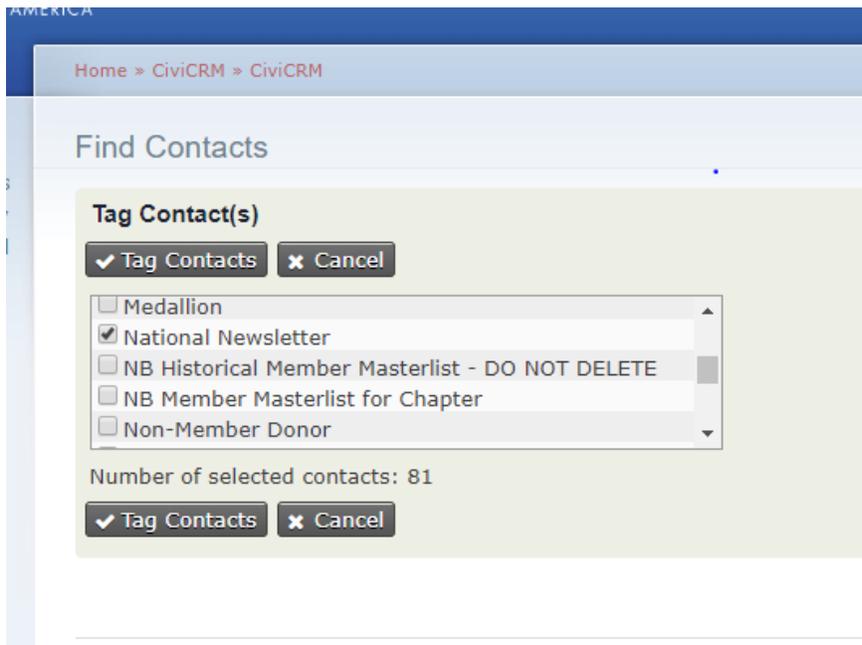
You can also add or (remove) a tag by clicking on "Edit" and then opening up the "Tags and Groups" section of the contact record toward the bottom of the list and checking (or unchecking) the box next to "National Newsletter."



For groups of contacts: If you already have a group (or groups) of contacts that you want to receive the national newsletter, use the Search/Find Contacts (or Advanced Search or Search builder, etc.) to select the group of records. Once you have a set of records selected by choosing "All" records or checking the box in front of specific records, you will see "Tag - add to contacts" in the drop-down menu of "Actions". Choosing this option brings up a menu with a list of all the defined tags.



Find "National Newsletter" in alphabetical order in the list and mark the checkbox, click on "Tag Contacts" and all the contacts in your list will be updated to have the "National Newsletter" tag.



Remember: You ONLY need to set the "National Newsletter" tag for contacts who are NOT members and NOT scholars.