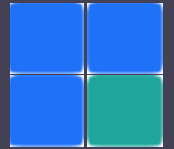


# Symmetrical Solutions

Software. Service. Simplified.



PROTIVITY™

symmetrical solutions

December 2011

## Merry Christmas and Happy Chanukah!

### this issue

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## Protivity 3.1.4 -- Coming Soon!

Our developers are industriously working on the next release of Protivity which will include the following new features:

A “Business Services” item has been added to the navigation tree with Development and Membership modules within this tab. The Development module offers the ability to generate Cultivation Letters, Pledge cards, Acknowledgment Letters, and Pledge Card Reminders. The Membership Module makes Due to Renew Notices and Register available. With the conversion of these features to browser, ASNA licensing is no longer required for any module of Protivity.

Description	Output	Style
Module: Development (4 Tasks)		
Cultivation Letters		Mail Center
Pledge Cards		Mail Center
Acknowledgment Letters		Mail Center
Pledge Reminders		Mail Center
Module: Membership (1 Task)		
Due to Renew Notices and Register		Billing

In addition, to facilitate user access to important member information, we have added Profile, Facility Usage, Program History, and Donor History “Quick List” buttons to the Individual Search Results screen. (Please note that the Facility Usage button has been moved from its original placement within the Family tab.) From the Search Results screen, the user may select a member and click on one of the newly added buttons to display Profile, Facility Usage, Program History, and Donor History for that member directly from the search results list. We feel that this new tool will greatly assist staff members, executives in particular, to quickly and easily access vital member information with just the click of a button, avoiding the need to navigate through various tabs to view these important member details. We have also added security to the Donor History button so that only users granted authority to access donor information via the Allow User to Display Donor History table file option will have the Donor History button appear on the button menu.

Name	Birth Date	Age	Preferred Address	Preferred Phone	Member Number	Picture
Anderson, Steven	09/08/1955	56 years old	10398 E 550, Locust Grove, OK		000000670-00	
Brauner, Steve	04/07/1969	42 years old	4729 Panther Place, Coral Springs, WI	414-555-0256 Cell	000000331-00	

Another new feature we are sure will be helpful to our clients is the ability to export any backend file on the system to an Excel spreadsheet, which will allow users access to a wealth of data – from Accounts Payable or Budget to Campaign, Program, or Membership information. Please contact us at [support@symsol.com](mailto:support@symsol.com) with questions you may have regarding how any of our newly offered features work. Please keep an eye out for the release of Protivity 3.1.4 at the end of January!

# NEW DONOR HISTORY QUICK ACCESS BUTTON

Individual Search Results

Donor History

Name	Birth Date	Age	Planned Address	Preferred Phone	Member Number	Picture
Cadwell, Robert	04/07/1932	78 years old	1458 Cemetery Lane, Brookfield, WI	262-555-0145 Home	000000241-00	
Dzialowski, Robert J.	05/19/1955	45 years old	222 Symmetrical Street, Pittsburgh, PA	252-871-0888 Business	000000008-00	
Hughes, Robert	01/12/1940	62 years old			000000009-00	
Hurst, Robert	05/12/1989	22 years old	2244 Linvale Lane, Waukegan, WI	545-555-1247 Home	000000029-00	
Marin, Robert	07/25/1950	45 years old	74 University Road, Parkland, WI	555-555-0025 Home	000000190-00	
Maurya, Robert M.	07/23/1990	18 years old	106, j block, japur, owpk, DL	123-123-1234 Alabama	000000010-00	
Palmer, Robert	05/23/1987	24 years old	14 Kings Road, London, WI	555-555-1147 Home	000000151-00	

A new Donor History button has been added to the Individual Search Results screen to allow users with authority to access Donor information to quickly retrieve member donation information. From the results list, a user may highlight the desired donor's name and click the Donor History button from the menu above.

The Donor History will be displayed as follows with details in a grid format along with a summary at the bottom of the page which calculates the donor's Number of Pledges, Total Pledge Amount, Total Amount Paid, Total Balance Remaining, Average Pledge Amount, Total Matching Pledge, Total Matching Pledge Paid, and Total Matching Pledge Balance Remaining. In addition, users may select for which Family IDs within the family unit they would like donation information displayed as well as the type of campaign (e.g. Annual Campaign, Strong Kids, etc.) and the date range by which they would like to filter the search results.

Donor History

Work with Activity Family ID Range: 00 to 99 Description: ALL Pledge Year Range: 1950 to 2012

Donor Name	Family	Type	Description	Year	Pledge Date	Pledge	Paid	Balance	Matching Pledge	Matching P
Dzialowski, Robert J.	00	Special Events	Black Tie Banquet	2011-01	11/22/2011	\$50.00	\$0.00	\$50.00	\$0.00	\$0.00
Dzialowski, Robert J.	00	Campaign	Annual Campaign	2012-01	11/22/2011	\$100.00	\$50.00	\$50.00	\$150,100.00	\$0.00
Dzialowski, Robert J.	00	Campaign	Strong Kids	2011-01	10/15/2011	\$250.00	\$0.00	\$250.00	\$0.00	\$0.00
Dzialowski, Linda A.	01	Campaign	Annual Campaign	2011-01	04/28/2011	\$100.00	\$0.00	\$100.00	\$0.00	\$0.00
Dzialowski, Robert J.	00	Campaign	Annual Campaign	2011-01	04/04/2011	\$50.00	\$50.00	\$0.00	\$0.00	\$0.00
Dzialowski, Robert J.	00	Grant Management	Pepsi Grant	2011-01	01/15/2011	\$25,000.00	\$5,000.00	\$20,000.00	\$0.00	\$0.00
Dzialowski, Robert J.	00	Campaign	Annual Campaign	2010-01	08/11/2010	\$90.00	\$0.00	\$90.00	\$0.00	\$0.00
Dzialowski, Robert J.	00	Campaign	Annual Campaign	2009-01	02/15/2009	\$75.50	\$0.00	\$75.50	\$0.00	\$0.00

<b>Number of Pledges:</b>	8	<b>Average Pledge:</b>	\$3,214.44
<b>Total Pledges:</b>	\$25,715.50	<b>Total Match Pledge:</b>	\$150,100.00
<b>Total Paid:</b>	\$5,100.00	<b>Total Match Paid:</b>	\$0.00
<b>Total Balance:</b>	\$20,615.50	<b>Total Match Balance:</b>	\$150,100.00

Another extremely useful new feature is the Work with Activity button on the left-hand side of the menu. This feature allows the user to select an activity from the list and click the Work with Activity button to navigate directly to and work with that particular campaign record.

Users may also click on the Grid Column Selector button on the top right of the Donor History screen to choose which columns they wish to display, as well as select by which fields they would like the selected data to be sorted for display. We look forward to our clients' executives and staff having the opportunity to take advantage of the convenient "Quick List" buttons to help them quickly retrieve important information!

ColumnSelector

Available Columns

- Pledge
- Paid
- Balance
- Matching Pledge
- Matching Paid
- Matching Balance
- Branch Number
- Branch
- Code
- Campaigner #
- Campaigner Name
- Campaign Code
- Recognition Name
- Salutation
- Anonymous Gift
- Source Code
- Pledge Type Code

Display Order

- Source Code
- Pledge Type Code
- Solicitation Code
- Award Code
- Turndown Code
- Grant Classification
- Grant Contract #
- Grant Start
- Grant End
- Grant Type
- Grant Restriction
- Donor Number
- Address 1
- Address 2
- Phone
- Email
- Birth
- Gender

Sort Results By

- Campaign Code
- Pledge Type Code



**HELPFUL HINT:** Be sure to clear your cache upon installation of Protivity 3.1.3 (or any future upgrade) to ensure that the latest version of each web page is properly loaded. To use the short cut to clear your cache in Chrome, Firefox, and Internet Explorer, simply hit the **CONTROL + SHIFT + DELETE** buttons simultaneously.

## Recommended Browser Versions

While you may utilize the web browser of your choice with Protivity, we recommend that the following versions be utilized for optimized functionality:

Google Chrome: 15.0.874.121 m

Mozilla Firefox: 6.0 - 8.0

Internet Explorer: 8

Feel free to contact us at [support@symsol.com](mailto:support@symsol.com) should you have any questions.

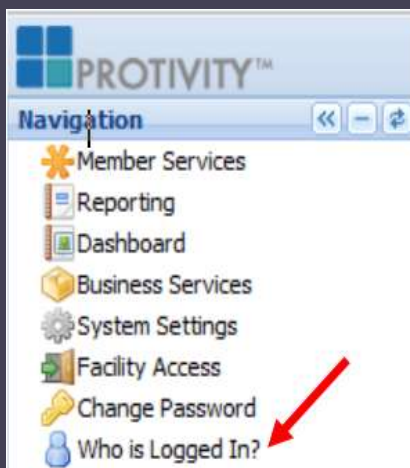
# 2012 HOLIDAYS

Symmetrical's offices will be officially closed for the following holidays through January 2013:

Monday, 1/2/12	Day after New Year's Day
Monday, 1/16/12	Martin Luther King Day
Friday, 4/6/12	Good Friday
Monday, 5/28/12	Memorial Day
Wednesday, 7/4/12	Independence Day
Monday, 9/3/12	Labor Day
Thursday, 11/22/12	Thanksgiving
Friday, 11/23/12	Day after Thanksgiving
Monday, 12/24/12	Christmas Eve
Tuesday, 12/25/12	Christmas Day
Tuesday, 1/1/13	New Year's Day
Monday, 1/21/13	Martin Luther King Day

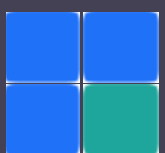
For standard support issues on these dates, please utilize the website support request form; messages will be checked periodically. For critical support issues during office closures, please call the main support line at 262-671-0699, Option 2, and your call will be returned as soon as possible.

# Who is Logged In?



Minutes Since Last Activity	Minutes Since Logged In	User ID	User Name	Environment	IP Address	Session ID
0	2	TAMMY	Tammy Fechner	Protivity Environment	10.20.30.101	E0F4894ADB/
3	4	CNX	CNX Corporation	Protivity Environment	10.20.30.108	F330DD5CC2F
0	45	CNX	CNX Corporation	Protivity Environment	10.20.30.107	1B487C5F2D6
1	2	CNX	CNX Corporation	Protivity Environment	10.20.30.108	4D91670C1E4
1	7	CNX	CNX Corporation	Protivity Environment	10.20.30.108	6DC80E7DB0C
115	186	CRAIG	Craig Ostovich	Protivity Environment	10.20.30.106	72FB90CEFD7
111	162	CRAIG	Craig Ostovich	Protivity Environment	10.20.30.106	74B8779C232
1	4	CNX	CNX Corporation	Protivity Environment	10.20.30.108	935CC985531

The above screen shot demonstrates the "Who is Logged in" option currently available in Protivity 3.1.3 located on the Navigation tree for those with access to this tool, along with a sample of how log in information is displayed for viewing and export.



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