

STANDARD OUTPUT FOR MAILINGS/SOLICITATIONS

Overview

The following notes describe details for qualification and output used for generating standard output for mailings and solicitations.

Criteria

All entities considered OK to Mail¹ who meet the specific criteria provided in the Output Request. If requested, the file will be spouse linked². Entities with a preferred zip code of 93407 or 93410 are excluded.

If a solicitation, only entities who are both OK to Mail¹ and OK to Solicit via Mail³ are included. Standard exclusions from solicitations include donors with either an active pledge on Advance or a gift to Cal Poly during the previous 75 days.

Data Elements

The following data elements are provided in all requests for output for mailings:

FIELD	DESCRIPTION	MAX. FIELD SIZE
INFO_LINE	For internal use only. Contains the output request tracking number along with the entity's Advance ID number. This field is primarily used for updating entity records based on returned mail.	15
LABEL_NAME_1	For individuals: If the spouse qualifies for this mailing, the file is spouse linked and the couple has a combined joint mail name, this field will contain the combined joint mail name. Otherwise, it will contain the preferred mail name for the qualifying entity. For organizations: This field will contain the organization's name.	60
LABEL_NAME_2	For individuals: If the spouse qualifies for this mailing, the file is spouse linked and the couple does not have a combined joint mail name, this field will contain the preferred mail name of the spouse. Otherwise, the field will be blank. For organizations: This field will contain the name of the qualifying contact person ⁴ . If no contact person is available, the field will be blank.	40
SALUTATION	For individuals: If the file is spouse linked ² , this field will contain the joint salutation. Otherwise, it will contain the salutation of the qualifying entity. For organizations: This field will contain the salutation of the qualifying contact person ⁴ .	80
EMPLOYER_NAME	If the qualifying entity's preferred mailing address is business, this field will contain the employer name.	40

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FIELD	DESCRIPTION	MAX. FIELD SIZE
PREF_STREET_1	Entity's preferred street ¹ .	40
PREF_STREET_2	Entity's preferred street ² .	40
PREF_CITY	Entity's preferred city ⁵ .	30
PREF_STATE	Entity's preferred state ⁵ .	2
PREF_ZIP5	Entity's preferred zip (only 5 digits) ⁵ .	5
PREF_FOREIGN_CITYZIP	If this address is outside of the US, will contain the properly formatted city and zip ⁵ .	40
PREF_COUNTRY	If this address is outside of the US, will contain the entity's preferred country ⁵ .	60
PREF_NAME_SORT	The preferred name of this entity to be used for sorting. Format "DOE,JOHN,L"	60

Business Rules

The following business rules are used to determine entity qualification in this program:

- ¹ Defined as an entity with an active status, active preferred address, complete address line #1. In addition, entity must neither have a Special Handling designation of No Mail nor No Cal Poly Contact (permanent or temporary).
- ² Collapse into single mailing only if both qualify for this mailing and the joint mailings indicator in entity is set to 'Y'
- ³ Defined as an entity who has neither a Special Handling designation of No Mail Solicitation nor No Cal Poly Contact.
- ⁴ The contact name of a qualifying contact person from this organization. If multiple contact people qualify from an organization, they will be listed on separate lines.
- ⁵ If a qualifying organizational contact is linked via ID and has an address type indicated, the contact's designated address will be used, not the organization's preferred mailing address.

Organizational Contacts

Qualification of organizational contacts is based on the following precedence order:

- 1) Every contact of the requesting college/unit is included. If none are available then...
- 2) Every "All Colleges/Units Contact (GO)" is included. If none are available then...
- 3) A generic label will be generated for the organization without a contact name

This may result in multiple labels being generated for one organization.

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Formatting and Suggested Uses

The provided data file is an ASCII comma delimited text (CSV) file which can be opened in most programs including Excel and Word. A header row is included which contains the field names.

In order to format an address block correctly, we suggest you format your mail merge with the following lines in the specified order. Be sure to configure your merge to disregard blank lines.

Recommended Format:

INFO_LINE	
LABEL_NAME_1	
LABEL_NAME_2	Populated if spouse listed separately
EMPLOYER_NAME	Provided if Business Address
PREF_STREET_1	
PREF_STREET_2	
PREF_CITY, PREF_STATE PREF_ZIP	Populated if US, Otherwise blank
PREF_FOREIGN_CITYZIP	Populated if Foreign, Otherwise blank
PREF_COUNTRY_DESC	Populated if Foreign, Otherwise blank