**Bradley Foundation**

**Standard Operating Procedure**

**Annual Report Mail List**

In late December, or early January, the Annual Report mail list needs to be pulled so that the Program Officers can review it. Two separate reports need to be pulled. One from GIFTS and one from eTapestry.

1. Pull a list of the previous year grantees out of GIFTS
   1. Log into GIFTS
   2. Select the “requests” tab
   3. In the upper left-hand corner, click on the bifocals
   4. The “Quick find” box will appear
      1. Choose “Approval Date”
      2. Another box will appear
      3. Click on “Any date between”
      4. Enter the date range of the last 2 calendar years (i.e. 1/1/2014-12/31/2015
      5. Click “find now”
      6. Click “ok”
   5. You will be taken back to the “Quick find” box
      1. Choose “Coding sheet”
      2. Double click on “Fund”
      3. The “Select codes from table” box will appear. Choose the following funds by double clicking on them:
         1. Bradley Fellows for past 2 calendar years
         2. Regular
         3. Grant Commitment
      4. Save and close
      5. Click on “Find now”
   6. In the toolbar, click on “Edit”, select “Select all”
   7. Click on the magnifying glass located in the toolbar
   8. Click on the contacts tab
   9. In the toolbar, click on “view”
      1. Choose “apply edit views”
      2. The “Contact views” box will appear
         1. Choose “mail merge w/E-tap”
         2. Click on “apply view”
      3. In the toolbar, select the “Export to Excel” icon
      4. In the “Excel Export” box:
         1. Under options: click “Include column headings”
         2. Click “Export All Rows”
         3. Click “ok”
      5. In Excel, make sure the “header row” has the following:
         1. Sort
         2. Env
         3. Title
         4. Org
         5. Add1
         6. Add2
         7. City
         8. State
         9. Zip
      6. Select the entire spreadsheet and change the font color to RED and the font & size to “Calibri 14”.
      7. Save the document as “AR mail list from GIFTS” in corresponding year’s folder under H:\AnnualReport\(year)
2. Pull a list of individuals from eTapestry
   1. Log into eTapestry
   2. Click on “reports”
   3. Click on “custom mail merge”
   4. Find “Basic mail merge” Click on “run Report”
   5. On the “Launch Basic Mail Merge” screen, select the following:
      1. Category – Mail List Groups
      2. Query – Annual Report – A
      3. Under delivery Options – click on Report format and select: Excel file download
      4. Click Submit
   6. The exported report will be located in the lower left-hand corner of the screen, click on it to open. (It will also automatically be saved to your computer’s “downloads” file located under your “favorites” in your drives screen.)
   7. After opening, click “enable editing”
   8. Remove blank row between header row and the first data field.
   9. Update the header row to match with the GIFTS spreadsheet and remove any “extra” columns.
   10. Before merging with the GIFTS spreadsheet, be sure the column headers match on both spreadsheets.
   11. Merge the 2 lists together.
3. List cleanup
   1. Before the list is routed to the Program Managers, look through the list to find any duplicates
   2. Remove exact duplicates
   3. Highlight the same name, but different address duplicates (the POs will weed out the bad address)