

Solicit Codes & Anonymous Flags

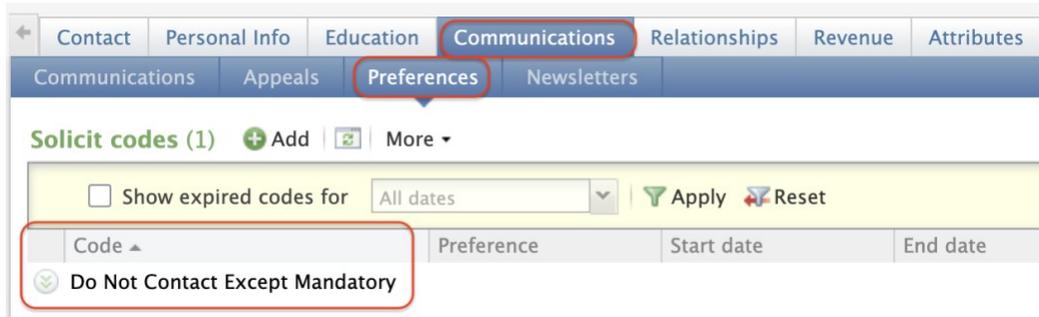
Clemson University Advancement is committed to safeguarding the privacy and confidentiality of information entrusted to the University by students, alumni, parents, donors, staff, volunteers, and prospects. Read more in the [Data Use Policy](#).

Solicit Codes apply to individual **and** mass messaging:

Solicit Code	Description
Do Not Contact Except Mandatory	Do not contact constituent at all (via any communication method) except for mandatory communication which includes gift receipts and endowment statements. Any other communication considered "mandatory" must be pre-approved as described in the policy
No Postal Mail	Do not send any postal mail to constituent
No Marketing of Products or Services	Do not send any marketing communication for products or services (via any communication method) to constituent
No Solicitation	Do not solicit constituent (via any communication method)
No Postal Solicitation	Do not send any postal mail solicitations to constituent
No Phone Calls	Do not call constituent
Omit from Call Lists	Do not include constituent in any mass phone lists
No Email	Do not email constituent
No Text/SMS	Do not text constituent

Data Consumers should check the solicit codes on a constituent's record before contacting the constituent (via any communication method).

Location on CADENCE Records:



How do I update a constituent's solicit code?

To add a solicit code:

- Send a request either through CADENCE or to the Records listserv requesting a code be added to a constituent record with an explanation of why you are making the request (i.e. the constituent called me and asked to not receive any more mail).

To remove a solicit code:

- Send a request either through CADENCE or to the Records listserv requesting a code be removed from a constituent record and include proof of the request from the constituent. An email confirmation from the constituent is sufficient. The email should be saved to the back-up either by sending it to records as an attachment to the listserv email or copying and pasting the entire email to the notes of the CADENCE request.

When Creating/Using a Mass Distribution List

- Most communication lists created by IT Team will exclude appropriate solicit codes. For example, a donor would not appear in a mailing list of event attendees if his/her Solicit Code was Do Not Contact Except Mandatory or No Postal Mail.
- When requesting new mass communication selection from IT Team, please note if the intended use is for a phone, mail, or email list.
- When activating a Direct Marketing Effort in CADENCE, the system will remove appropriate solicit codes (The recipient count will be reduced as CADENCE will remove Do Not Contact Except Mandatory and No Postal Mail constituents).

Anonymous Flags

There are 3 ways to flag anonymity in CADENCE: at the gift level, at the recognition level, and/or at the donor level.

- If an individual is 'anonymous', their spouse will be considered 'anonymous', too.
- Public reports (for example, the Honor Roll, Clemson webpages, Interactive Gift Report) will EXCLUDE anonymous gifts/donors.
- All Data Consumers that can see revenue in CADENCE can see gifts/donor records that are flagged anonymous.

Location of the Anonymous Flag on a Gift:

The screenshot displays the CADENCE Revenue History interface. At the top, there are tabs for Summary, Contact, Personal Info, Relationships, Revenue, IPTAY, Online Info, Memberships, Prospect, and Education. Below these are sub-tabs for Giving Summary, Revenue History, Recognition, Recognition History, Gifts, Tributes, and Accounts. The main content area shows a 'Revenue history (149)' section with filters for Group by, Type, Date range, Revenue type, Campaigns, Start date, End date, and Revenue filter. An 'Apply' button is visible. Below the filters is a table with the following columns: Date, Amount, Balance, Transaction, Application, and Revenue type. The first row of data shows a date of 12/11/2020, an amount of \$1.00, a transaction type of Payment, an application of Donation, and a revenue type of Gift. A red arrow points to the 'Date' column header.

Date	Amount	Balance	Transaction	Application	Revenue type
12/11/2020	\$1.00		Payment	Donation	Gift

Location of Anonymous Flag on the Recognition Level:

Recognition Programs
Clemson Legacy Society

Type: Lifetime giving
Limit program to: Individuals
Description: Clemson Legacy Societies recognize donors who document that they have

Recognition Levels | Recognition Criteria | **Recognized Donors**

Recognized donors (20) More

Search Columns Save list Open list Clear all

<input type="checkbox"/>	Nickname	Date achieved	Gives anonymously	Total amount
<input type="checkbox"/>	Ron	10/2/2007	Yes	

Location of Anonymous Flag on a Donor Record:

Ms. Tenneil L. Moody 1997

Individual Lookup ID: T433801

Constituencies: Alumnus Current Staff Donor at some

Personal Information

Ms. Tenneil Lee Moody
Nickname: T-bone
Maiden: Daniels
Gives anonymously

Contact Information

Primary phone (864) 650-4351
Primary email tenneilmood@

Note: Solicit code and anonymity notations on constituent records determine how constituents can be communicated.

- Donors have control over their solicitation and confidentiality setting. If a donor indicates that they prefer one form of communication over another or if they indicate that they want their gift or record marked confidential, then their direction must be followed by all Data Consumers.
- Data Consumers must comply with donor solicit codes and anonymity requests (e.g., “Do Not Contact Except Mandatory,” “Anonymous Giver”).
- Exceptions require documented approval from Advancement’s Executive Committee of the Data Governance Council (DGC) or designee.
- In accordance with GDPR requirements, all EU residents are defaulted to “Do Not Contact Except Mandatory” and cannot be changed without explicit written consent.