

# Salutations – Overview

Updated Jul 13, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

## Overview

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Salutations are personal greetings used in written communication that can be directed at the addressee, they can be formal or informal, or in some cases they might be dynamic. There are many possible salutation formats, and the different salutations will have differing combinations of Title, First name, Last name, and more. Those fields will be included as a part of the salutation depending on its purpose and configuration.

Salutations in Veracross are highly configurable, allowing schools to accomplish their communication needs in a variety of possibilities. It is important to set the right tone in a written communication, and choosing the right salutation is often the “first impression” and most important starting point in any written communication. Veracross salutations offer many tools to configure salutations both system-wide and narrowly per-person or per-household.

There are several salutations already created on each person and household record, initially based on the standard format. This article covers default salutation configuration.

## Salutations Details

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Upon creation of a person or household record, the system will automatically create the salutations for that person and household. The name listed first in any household salutation will be the spouse configured as the “Head of Household,” (unless the “Display Female First” option is used – see below). Any time that a change is made to the Name, Prefix, Suffix, or Head of Household configuration, the salutation records are automatically updated. Salutation configuration depends on the combination of a number of different factors: the **type** of the salutation, the **context** of the salutation, and the settings for the various **options**. Additionally, salutations can be overridden per-person and per-household on a static or dynamic basis, and certain salutations may be dynamic depending on Development role.

## Salutation Types

## Standard Salutation Types

There are four *standard types* of salutation:

- Family Addressee/Salutation\*
- Addressee salutations
- Formal Salutation
- Informal Salutation

\* Note: Family Addressee/Salutation is a special type. There are only three specific formats for the Family Addressee/Salutation type. The formats for this salutation type are:

1. "Family Addressee" (in the format "The {last} Family," for example "The Smith Family").
2. "Family Salutation" (in the format "{last} Family," for example "Smith Family").
3. "Family Name" (in the format "{last}," for example "Smith").

The Family Addressee/Salutation type of salutation only exists in the Household context. The rest of this article does not concern the "Family Addressee/Salutation" type.

The other types of salutation (Addressee, Formal, or Informal) can be configured for use in either the Household or Person contexts.

## Appending Salutations

On a salutation record screen, the option exists to Append Attributes to the salutation. Turning on this option adds a particular appendage to the salutation depending on the person's role. Below is a guide for which appendages apply to which roles:

**Student:** grade level

**Parent:** (P) with their child(ren)'s graduation year

**Grandparent:** GP with their grandchild(ren)'s graduation year

**Board Member:** TR – short for Trustee

**Deceased:** prepends Deceased

## Non-Standard Salutation Types

There is another *types* of salutations: "Dynamic".

Dynamic salutations are used exclusively in Development. These are a special type of salutation with their own purpose. Learn more about [Dynamic salutations](#).

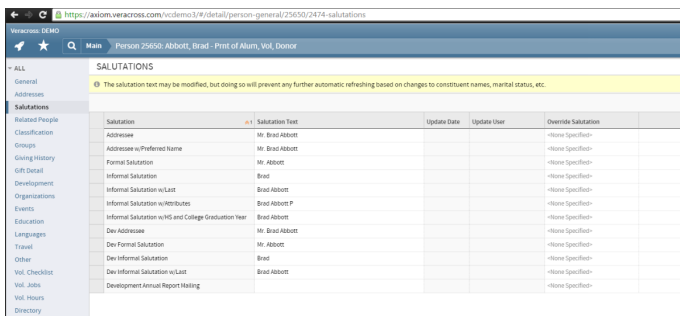
## Salutation Contexts

There are two different contexts for salutations. The contexts are:

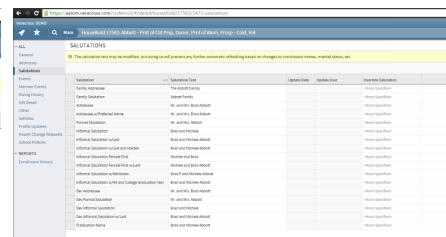
- Household
- Person

In the *Household* context of a salutation, the three main Salutation Types (Addressee, Formal and Informal) will display information about both spouses: for example, “John and Carol Smith.” By default, the spouse marked “Head of Household” will come first in any salutation.

The salutations for a Household or a Person can be reviewed on the Salutations tab on the Household or Person detail screens. In the following example Brad is marked as the Head of Household for the Abbott Household; that is why his name comes first in the Household Salutations:



Person Salutation screen



Household Salutation screen

## Salutation Categories

Categories allow for organizing the different salutations for the various different departments. The salutation category has no influence on functionality; the categories are used simply to help organize the salutations. The categories are:

- General
- Development
- Alumni
- Admissions
- Business
- Other

## Modifying Salutation Configuration

The default salutations configuration is only a starting point. Administrators have a few tools to configure salutations as needed. The tools include:

- **Options** to turn on or off certain fields to configure salutations. Options are configured based on the type of salutation. Learn more about options for each type by viewing the specific documentation article linked below:
  - [Addressee Salutation](#) configuration options.
  - [Formal Salutation](#) configuration options.
  - [Informal Salutation](#) configuration options
- **Overriding salutations** per-person or per-household (there are two kinds of overrides).
- **Disabling** unneeded or unused salutations **or-re-enabling** them again later.
- **Dynamic** salutations configuration (learn more about [Dynamic Salutations](#)).

## Overriding salutations

There are two options to set an override salutation value: Either enter specific text as an override salutation, or select another specific salutation as an override.

### Entering specific text as an override salutation

The screenshot shows a web application interface for Veracross DEMO. The main content area displays a table titled 'SALUTATIONS' for Household 17563: Abbott. A yellow warning banner at the top of the table states: 'The salutation text may be modified, but doing so will prevent any further automatic refreshing based on changes to constituent names, marital status, etc.' The table has columns for Salutation, Salutation Text, Update Date, Update User, and Override Salutation. The 'Addressee' row is highlighted with a red box, showing 'Mr. and Mrs. A.' in the 'Salutation Text' column, updated on 03/23/16 by @jschrock. The 'Override Salutation' column for this row is empty, indicating a permanent override.

Salutation	Salutation Text	Update Date	Update User	Override Salutation
Family Addressee	The Abbott Family			<None Specified>
Family Salutation	Abbott Family			<None Specified>
Addressee	Mr. and Mrs. A.	03/23/16	@jschrock	<None Specified>
Addressee w/Preferred Name	Mr. and Mrs. Brad Abbott			<None Specified>
Formal Salutation	Mr. and Mrs. Abbott			<None Specified>
Informal Salutation	Brad and Michele			<None Specified>
Informal Salutation w/Last	Brad and Michele Abbott			<None Specified>
Informal Salutation w/Last and Maiden	Brad and Michele Abbott			<None Specified>
Informal Salutation Female First	Michele and Brad			<None Specified>
Informal Salutation Female First w/Last	Michele and Brad Abbott			<None Specified>
Informal Salutation w/Attributes	Brad P and Michele Abbott			<None Specified>
Informal Salutation w/HS and College Graduation Year	Brad and Michele Abbott			<None Specified>
Dev Addressee	Mr. and Mrs. Brad Abbott			<None Specified>
Dev Formal Salutation	Mr. and Mrs. Abbott			<None Specified>
Dev Informal Salutation	Brad and Michele			<None Specified>
Dev Informal Salutation w/Last	Brad and Michele Abbott			<None Specified>
Publication Name	Brad and Michele Abbott			<None Specified>
Development Annual Report Mailing				<None Specified>

To set a permanent override, enter the override text in the “Salutation Text” field for the specific salutation on the Household or Person Salutations tab. Once an override has been entered, the change will be recorded in the audit log and the system will no longer automatically update or refresh that salutation. This is the preferred option if a specific person or family wants to be addressed in a certain way.

In order to restore an override back to the default, remove the override “Salutation Text” that has been entered and click “Update.” The system will instantly generate the configured salutation value again, as though no override had ever been entered.

Note: Because salutations will not refresh when there is a specific override value, there is the potential that when a household record changes (death in the family, divorce, etc.), the salutations could become outdated. There is an integrity check accessible via the ‘Data Integrity’ homepage in the Demographics category that looks for any households that have salutations with “and” in it, but where the spouse is blank. This allows the school to check any of these cases and set new overrides or remove the existing override as needed.

### Select another salutation as an override

Salutation	Salutation Text	Update Date	Update User	Override Salutation
Family Addressee	The Abbott Family			<None Specified>
Family Salutation	Abbott Family			<None Specified>
Addressee	Mr. and Mrs. Brad Abbott			<None Specified>
Addressee w/Preferred Name	Mr. and Mrs. Brad Abbott			<None Specified>
Formal Salutation	Mr. and Mrs. Abbott			<None Specified>
Informal Salutation	Mr. and Mrs. Abbott	03/23/16	@jschrock	Formal Salutation
Informal Salutation w/Last	Mr. and Mrs. Abbott	03/23/16	@jschrock	Formal Salutation
Informal Salutation w/Last and Maiden	Brad and Michele Abbott			<None Specified>
Informal Salutation Female First	Michele and Brad			<None Specified>
Informal Salutation Female First w/Last	Michele and Brad Abbott			<None Specified>
Informal Salutation w/Attributes	Brad P and Michele Abbott			<None Specified>
Informal Salutation w/HS and College Graduation Year	Brad and Michele Abbott			<None Specified>
Dev Addressee	Mr. and Mrs. Brad Abbott			<None Specified>
Dev Formal Salutation	Mr. and Mrs. Abbott			<None Specified>
Dev Informal Salutation	Brad and Michele			<None Specified>
Dev Informal Salutation w/Last	Brad and Michele Abbott			<None Specified>
Publication Name	Brad and Michele Abbott			<None Specified>
Development Annual Report Mailing				<None Specified>

Selecting a specific salutation value to act as the override may be the appropriate solution in some scenarios. For instance, this may be the preferred option if a person or family prefers to be formally addressed in all cases, but has not necessarily indicated a specific format they desire. In that case, the “formal salutation” might be selected as the override for the “informal salutation” for this household.

In the example, the “Formal salutation” has been selected as the override for the “Informal Salutation” and the “Informal Salutation w/Last” for this specific family. For this reason, “Mr. and Mrs. Abbott” is the salutation value for those two salutations now, the same as the value for the “Formal Salutation.”

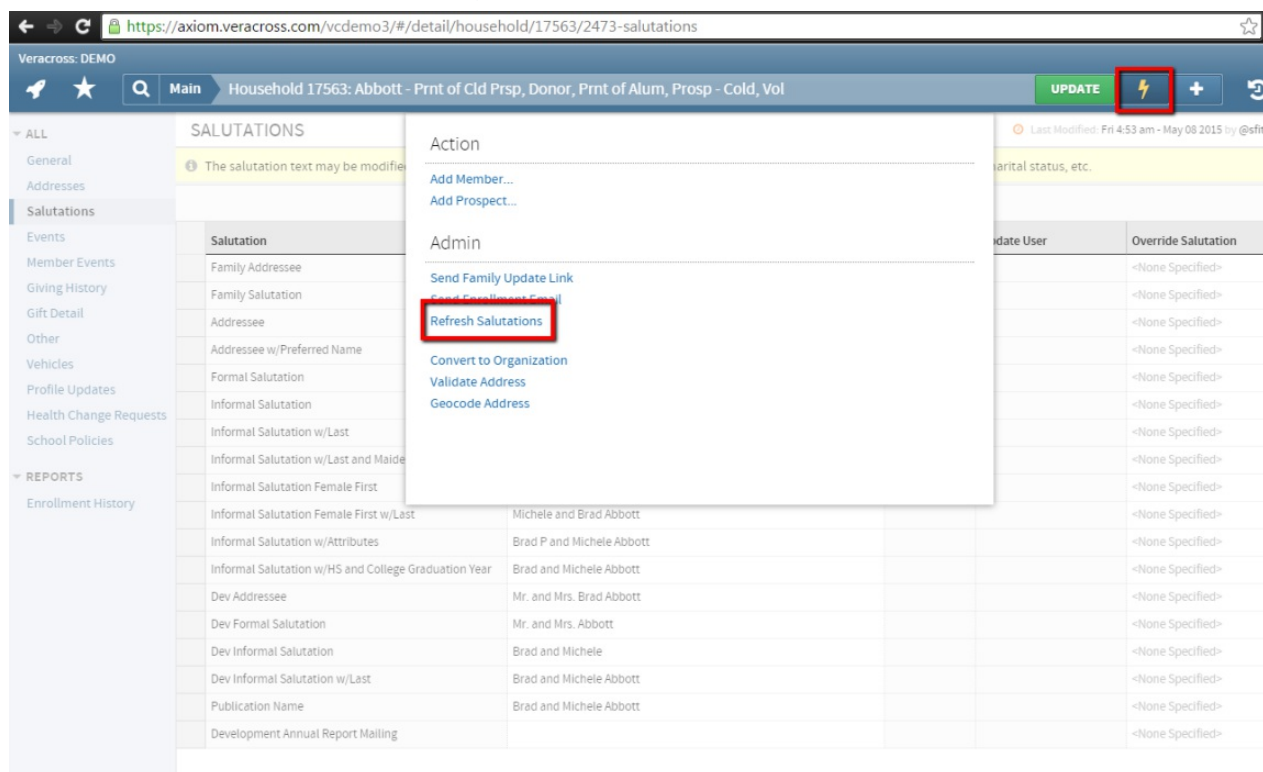
Unlike the option to enter specific text as an override salutation, selecting an override salutation will enable the values to refresh when the underlying data changes.

### Enable/Disable salutations

Some of the available salutations might not be applicable or useful to all schools. Salutations can be disabled by unchecking the “enabled” flag. To apply the change to all people/households, refresh the salutation.

## Refresh Salutations

As mentioned above, all changes to the Name, Prefix, Suffix, or Head of Household configuration triggers an instant update to both the Person and Household salutation values for that person and household. Any other changes that might affect a salutation value (for example adding a Graduation Year) are refreshed weekly during the weekly processes that run on Sundays (excluding override salutations, which are never refreshed).



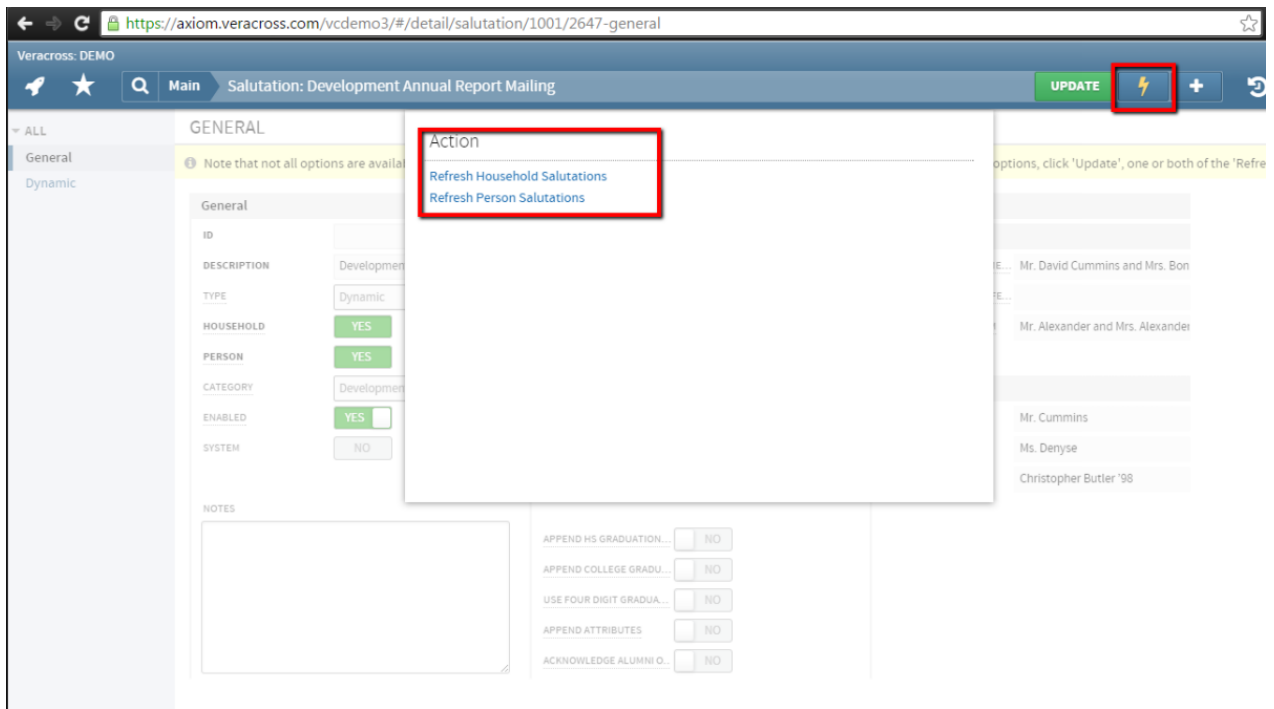
The screenshot shows the Veracross DEMO interface for Household 17563: Abbott. The 'Action' menu is open, and the 'Refresh Salutations' option is highlighted with a red box. The 'UPDATE' button in the top right corner is also highlighted with a red lightning bolt icon. The 'Salutations' table is visible in the background, showing various salutation types and their corresponding values.

Salutation	Value	Override Salutation
Family Addressee		<None Specified>
Family Salutation		<None Specified>
Addressee		<None Specified>
Addressee w/Preferred Name		<None Specified>
Formal Salutation		<None Specified>
Informal Salutation		<None Specified>
Informal Salutation w/Last		<None Specified>
Informal Salutation w/Last and Maiden		<None Specified>
Informal Salutation Female First		<None Specified>
Informal Salutation Female First w/Last	Michele and Brad Abbott	<None Specified>
Informal Salutation w/Attributes	Brad P and Michele Abbott	<None Specified>
Informal Salutation w/HS and College Graduation Year	Brad and Michele Abbott	<None Specified>
Dev Addressee	Mr. and Mrs. Brad Abbott	<None Specified>
Dev Formal Salutation	Mr. and Mrs. Abbott	<None Specified>
Dev Informal Salutation	Brad and Michele	<None Specified>
Dev Informal Salutation w/Last	Brad and Michele Abbott	<None Specified>
Publication Name	Brad and Michele Abbott	<None Specified>
Development Annual Report Mailing		<None Specified>

## Refresh Salutations per-Household or per-Person

If data used in salutations has been changed for a particular person, and the salutations are to be used in the same day (and waiting for the overnight process is not an option), the “Refresh Salutations” button can be used to manually refresh the salutations for this person or household. This can be found in the “Action” menu on the person and household detail screens in order to refresh one household’s or one person’s salutations.

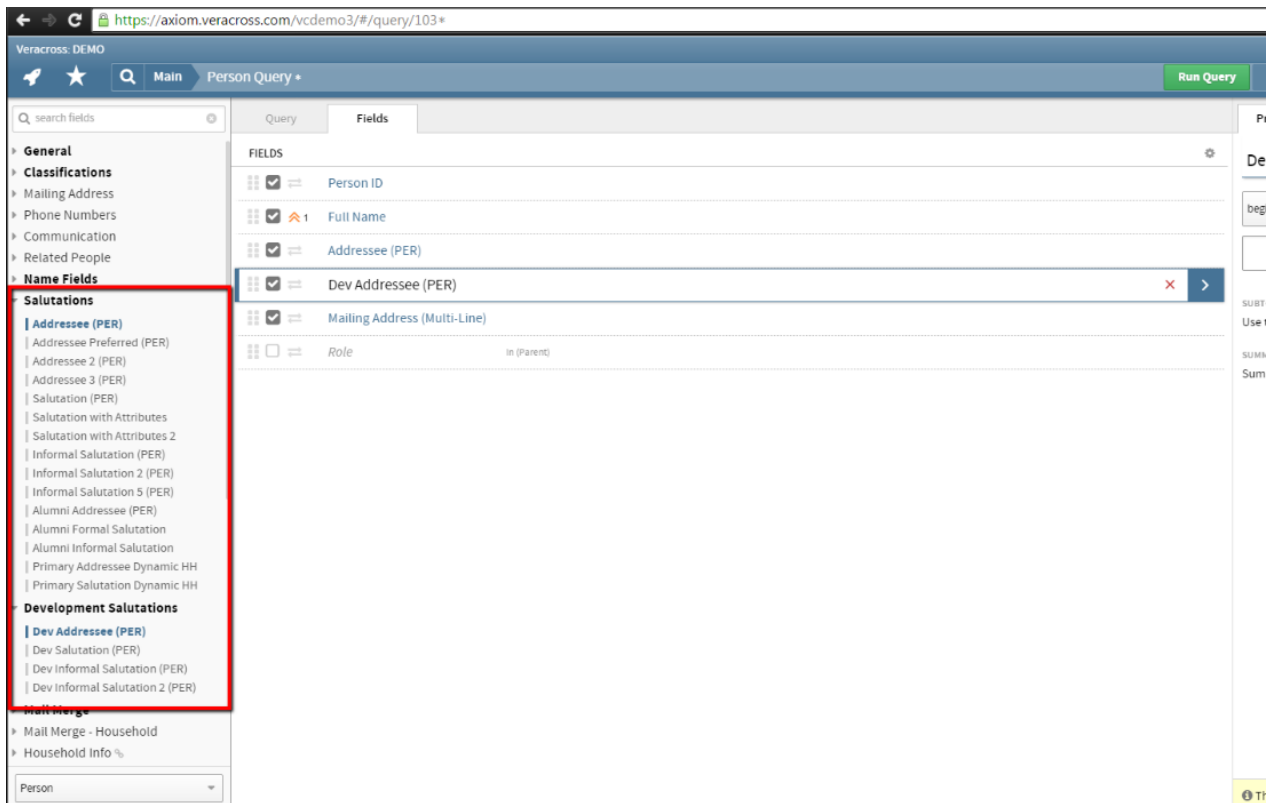
## Refresh Salutations system-wide



If a system-wide refresh of the salutation values is required for a particular salutation (due to any change in salutation configuration options) this can be accomplished via “Refresh Person Salutations” or “Refresh Household Salutations,” buttons found under the “Action” menu on the Salutation detail screen. These procedures can take a few seconds or more to complete because the salutation values may need to be refreshed for tens of thousands of households or people.

## Using salutations

Salutations are used in written communication, and can be used for printing labels, utilizing [reports for mailing lists](#), printing [MS Word Mail merge documents](#), and in [email communication](#).



Calculated query fields, allowing salutations to be used in queries for export, printing labels, mail merge and email merge will be created for each salutation. By using a salutation in a query, it is possible to produce a report that includes just the right salutation for the communication that is needed, whether it is the “Informal Salutation,” the “Alumni Addressee Salutation,” or a dynamic Development salutation.

The example illustrates a query using Person salutations, but similar reports can be built using Household salutations. If some salutations do not currently have calculated fields for use in a query for any of the above needs, ask your Account Manager to make sure the salutations are configured for use in queries.

## Frequently Asked Questions

**Question 1:** How is it determined which name comes first in a Household salutation with two spouses or adults? Will it always be the man’s name?

**Answer 1:** The name that comes first in a salutation will be whichever person is identified as the Head of Household (except for the Household Informal or Formal salutations where “Display Female First” is checked). Head of Household can be updated for any household.