

Fundraising Guide

02/19/2020 Blackbaud CRM 4.0 Fundraising US

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Fundraising: The Big Picture



Full Circle View 10

When you add transactions, such as donations, pledges, or recurring gifts to the database, you must specify how you plan to use the revenue received. For example, a constituent may request you use a donation for a specific purpose or perhaps the gift is in response to a solicitation used to raise funds for a specific cause.

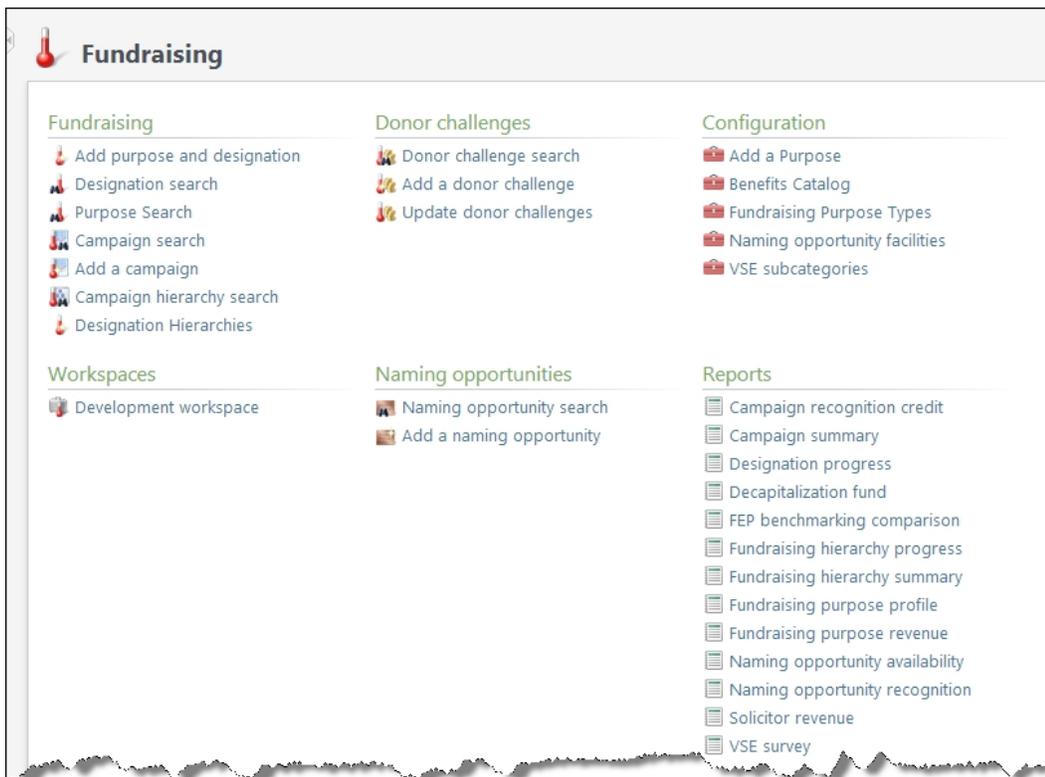
You apply the funds that you raise to a purpose and designation. To help you direct the flow of revenue, you use fundraising hierarchies to manage your purposes and designations.

Fundraising purposes are the reasons your organization raises money and these purposes indicate how to designate your donors' gifts. You can specify the purpose types your organization uses (such as funds, initiatives, programs, projects, etc.) and then add instances of those types, such as the Library Building Fund.

You establish relationships between your purposes to reflect the way your organization handles designations. For example, you may want to break some purposes down into sub-purposes that support a larger cause. This hierarchy enables you to track totals for individual purposes in the context of the larger effort. You can specify goals for your purposes and track recipient, donor, and financial information. You can run a variety of reports to determine the effectiveness of your fundraising activities.

Full Circle View

You work with purposes and designations, campaigns, hierarchies, and most all of your fundraising efforts in *Fundraising*. This section offers a full circle view of *Fundraising* and includes a description for each main area, such as **Configuration**.



➤ Fundraising Configuration

Before you can manage fundraising information, we recommend you use configuration options, such as fundraising purpose types and naming opportunity facilities. From *Fundraising*, you can access these options under **Configuration**.

You use configuration options to set up *Fundraising* for your users. Use these options to manage the various elements necessary to organize and maintain your fundraising efforts. For more information, see [Fundraising Configuration on page 13](#).

➤ Purposes, Designations, and Hierarchies

Designations reflect the specific ways that donors give revenue. In some cases, you can create designations to receive funds on high-level or broad terms using a designation such as Capital Project. Other times, designations require a specific use of funds such as a Library Construction Fund or Stem Cell Research Program.

Designations have characteristics or "purposes" that describe the different ways designation funds can be used. You establish relationships between your purposes to reflect the way your organization handles designations. For example, you may want to break some purposes down into sub-purposes that support a larger cause. This hierarchy enables you to track totals for individual purposes in the context of the larger effort. You can specify goals for your purposes and track recipient, donor, and financial information.

At times, you may need to specify that a purpose should not directly receive revenue. For example, you may create a "Research" purpose, but you do not want the purpose to directly receive funds. In this case, you can create the purpose for roll up reporting for a hierarchy. For more information, see [Fundraising on page 23](#).

➤ Fundraising Campaigns

Campaigns represent your organization's planned efforts to raise money for specific programs or causes. You can set goals for each campaign and track the progress your organization makes toward each of these goals over time. For more information, see [Fundraising Campaigns on page 63](#).

➤ Naming Opportunities

Naming opportunities enable you to raise funds and provide constituents the chance to have their names placed in a physical location or on a fundraising purpose. Smaller-value, higher-volume opportunities may include bricks in a courtyard or seats in an auditorium. Higher-value, lower-volume opportunities may include buildings or exhibits. With naming opportunities, you can track information about opportunities and the donors who receive recognition. For more information, see [Naming Opportunities on page 75](#).

➤ Donor Challenges

A donor challenge is a fundraising tool to help increase support for a specific cause. A major donor or corporate sponsor can pledge a large sum to challenge the organization to raise a specific amount from other donors. A donor challenge can have an internal sponsor rather than an external one. For example, the president's office can challenge the organization to raise an amount that the department will match. The program includes two types of donor challenges: "Match per gift" and "Lump sum match." For more information, see [Donor Challenges on page 90](#).

➤ Fundraising Effectiveness Project

To measure and compare your organization's fundraising gain and loss ratios year to year and against similar organizations, you can participate in the Association of Fundraising Professionals (AFP) annual Fundraising Effectiveness Project (FEP) survey. The survey collects consecutive annual data from many organizations throughout the United States. As a participant, your organization receives the annual report of compiled data from AFP, which you can use to help identify areas to improve and to help increase revenue. For more information, see [Fundraising Effectiveness Project on page 102](#).

➤ Fundraising Reports

You can track the effectiveness of your fundraising activities, as well as the performance of individual fundraisers. A variety of reports are available to help you measure your organization's progress toward meeting specific goals. For more information, see [Fundraising Reports on page 114](#).

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Before you can manage fundraising information, we recommend you set up configuration options. From *Fundraising*, you can access these options under **Configuration**.

You use configuration options to set up *Fundraising* for your users. Use these options to manage the various elements necessary to organize and maintain your fundraising efforts.

Fundraising Purpose Types

Fundraising purpose types are the basis for fundraising purposes. When you add or edit a type, you select characteristics to determine the information that purposes (based on the type) include.

For example, your organization has multiple endowment funds. You create a fundraising purpose type of "Endowment Fund" and select to include donor and financial information. When you create a fundraising purpose based on the Endowment Fund type, the purpose record contains tabs for donor and financial information. Once you create the fundraising purpose types your organization uses, you can create fundraising purposes. For information about how to add fundraising purposes, see [Fundraising Purposes on page 15](#).

➤ Add a fundraising purpose type

1. From *Fundraising*, click **Fundraising Purpose Types** under **Configuration**. The Fundraising Purpose Types page appears.
2. Under **Types**, click **Add** on the action bar. The Add a fundraising purpose type screen appears.
3. Enter a unique name to help identify the fundraising purpose type.
4. Under **Characteristics**, select the parameters for the purpose type. The characteristics you select determine the options available when you create a fundraising purpose based on this type as well as the tabs that appear on the purpose record.
 - **Has administrator** - To enter an administrator for fundraising purposes based on this type, select this checkbox.
 - **Has recipients** - To add recipients to fundraising purposes based on this type, select this checkbox. When you select this, records of purposes of this type include a Recipients tab. For information about fundraising purpose recipients, see [Recipients on page 47](#).
 - **Has donor information** - To include donor information for fundraising purposes based on this type, select this checkbox. When you select this, records of purposes of this type include a Donor Information tab. For information about fundraising purpose donor information, see [Donor Information on page 39](#).

To link a stewardship package process to purposes, you must select both this checkbox and **Has financial information**.
 - **Has financial information** - To enter or import financial activity for fundraising purposes based on this type, select this checkbox. When you select this, records of purposes of this type include a Financial Information tab. For information about fundraising purpose financial information, see [Financial Information on page 44](#).

To link a stewardship package process to purposes, you must select both this checkbox and **Has donor information**.
5. Click **Save**. You return to the Fundraising Purpose Types page.

Fundraising Purpose Types for Stewardship

Before you steward donors and other constituents associated with a fundraising purpose, you configure fundraising purpose types to support the information your organization tracks and provides in stewardship efforts.

To create a purpose type to support stewardship, select **Has donor information** and **Has financial information** on the Add a fundraising purpose type screen. For fundraising purposes you base on this type, you can provide donors financial information such as fund balances, gains and losses, contributions, and disbursements. For information about how to add a fundraising purpose type, see [Fundraising Purpose Types on page 13](#).

Fundraising Purposes

You can create fundraising purposes based on purpose types, and specify date ranges and goal amounts for these purposes. You can also group purposes by category, such as annual, operating, or endowment, so you can quickly view all purposes in the same category in searches and reports.

After you add fundraising purposes, you can arrange them hierarchically so multiple purposes roll up under one overarching purpose. For example, you may have an annual fund as a top-level purpose. Within that fund, you can have several sub-purposes for various initiatives, such as your Building Initiative and Student Life Initiative. For every fundraising purpose, you can specify designations and determine how to distribute funding and credit revenue to goals in reports.

Before you add a fundraising purpose, you must configure the fundraising purpose types. The selected type determines the characteristics and options available for the purpose. For information about how to configure purpose types, see [Fundraising Purpose Types on page 13](#).

➤ Add a fundraising purpose

1. From *Fundraising*, under **Configuration**, click **Add a purpose**. The Add a purpose screen appears.

Note: When you add a purpose from **Configuration**, the system does not include your purpose in a hierarchy, create a designation, or map to the General Ledger as it does with the "Add a purpose and designation" wizard. For more information about the wizard, see [Add purpose and designation on page 26](#).

Add a purpose

General

Type: Fund Category: Annual

Name: 2015 Annual Stewardship package: Annual Fund Email

Description: Site: Administrator:

Defaults

Lookup ID: 55645 Report code 2: Biochemistry

Report code 1: Arts & Sciences

Financial Information

Statement wording: Frequency: Annually

Public name: Minimum amount for endowment: \$0.00

Income to principal Target date for endowment: mm/dd/yyyy

Income to principal %: 50.00 Date minimum amount met: mm/dd/yyyy

Help Save Cancel

2. Under **General**, select the type of fundraising purpose to add. For information about how to configure purpose types, see [Fundraising Purpose Types on page 13](#).
3. Enter a unique name to help identify the purpose.
4. To further help identify the purpose, enter a description for the purpose.
For example, enter an explanation of how your organization uses it.
5. To group the purpose with similar purposes, in the **Category** field, select how to categorize the purpose.
6. In the **Stewardship package** field, select the stewardship package to use with the purpose. When you select a package, **Financial Information** options such as statement wording, public name, and frequency are enabled.

Note: A stewardship package is a mail merge process you create for a purpose. You can configure and manage stewardship packages in *Marketing and Communications*.

7. To restrict use of the purpose to a specific site at your organization, in the **Site** field, select the site to use the purpose.
System administrators can establish security access for each site. The settings defined for the site you select take effect after you save the purpose.
8. For a purpose type that can have an administrator, the **Administrator** field appears. Search for and select the staff member or constituent to manage the purpose.

Tip: When you configure fundraising purpose types under **Configuration** in *Fundraising*, you can select to associate a purpose type with an administrator.

9. In the **Lookup ID** field, enter a unique lookup ID to use as the default for designations that include the purpose.
For example, for a Library Building Fund, enter LBF. The designation combines the IDs of its purposes to create a unique ID. Users can use the lookup ID to quickly find the purpose or designation in searches.
10. To enhance the reporting for the purpose, select the default report codes to use for designations that include the purpose. For example, you can track different schools or departments and filter reports based on these codes.
You can also create a KPI for a fundraising purpose based on report codes. For information, see [Key Performance Indicators on page 36](#).
11. When you select a stewardship package for the purpose, **Financial Information** options are enabled. Configure the stewardship of the purpose.
 - a. In the **Statement wording** field, enter the text to appear on the stewardship report, such as how your organization measures investment performance for purpose funding.
 - b. In the **Public name** field, enter the name to use to identify the purpose in reports and correspondence you send to constituents, such as the stewardship report.
This name can differ from the name you enter in the **Name** field. For example, you may enter "Townsend Endowment Fund" in the **Name** field and "Meredith and Arthur J. Townsend Endowment for the Advancement of the Arts" in the **Public name** field.

- c. To allocate a percentage of the investment income to the purpose's principal, select **Income to principal** and enter the percentage of the income to allocate to the principal.

For example, when the benefactors require your organization to add 95% of the total amount earned from investment back to principal, enter "95." The investment can either be the corpus or the return generated from the corpus.

- d. In the **Frequency** field, select how often to distribute financial information to the stewardship recipients.

- e. Select whether the funding of the purpose is fully funded or endowed.

Fully funded signifies that funds are no longer needed and can either become unrestricted or subject to conditions for spending elsewhere.

Endowed signifies support through the corpus or original funding. This can also represent funds that generate income over time.

- f. In the **Minimum amount for endowment** field, enter the minimum amount that must be raised for the endowment.

- g. In the **Target date for endowment** field, select the date by which to raise the minimum amount for endowment. After you raise this amount, in the **Date minimum amount met** field, select the date by which you raised the minimum amount for endowment.

12. Click **Save**. The record of the purpose appears.

Fundraising Purposes for Stewardship

When you create a fundraising purpose based on a type that includes donor and financial information, the Donor Information and Financial Information tabs appear on the purpose. The Donor Information tab displays the constituent name, gift amount and date for each donation to the purpose. On this tab, you can identify which constituent established the purpose and which donations represent the corpus or original funding of the purpose. From the Financial Information tab, you can enter financial data about the fund. The stewardship report, which is part of the stewardship package you link to the purpose, includes the information from these tabs.

From the Add a purpose screen in *Fundraising*, you can link a stewardship package to a fundraising purpose, define the statement that appears at the top of the stewardship report, determine how often the package should be sent to stewardship recipients, and define funding information. From the purpose's Stewardship tab, you can select which donors and other constituents receive the stewardship package you selected. For information about how to add a fundraising purpose, see [Fundraising Purposes on page 15](#).

Benefits Catalog

Benefits are gifts you give to constituents in return for a donation to your organization, such as a free shirt or coffee mug to thank them for the donation. You associate benefits with appeals in *Marketing and Communications* or transactions in *Revenue*. You can assign benefits a monetary or percentage value. Some benefits may have a value equal to a percentage of the transaction amount. When you add a revenue transaction and associate it with an appeal, the program automatically calculates the value of

its benefits and deducts the value from the receipt amount. When you add a transaction, you can waive benefits or modify the receipt amount if needed.

The Benefits Catalog page displays all the available benefits offered by your organization. To access the Benefits Catalog page from *Fundraising*, click **Benefits catalog** under **Configuration**.

On the Benefits Catalog page, you can view the category, description, and value of each benefit. The **Send benefit** column indicates whether constituents receive the benefit when you commit a pledge or after the pledge is fully paid. To help find a specific benefit, you can filter the grid by criteria such as name and category. To filter the grid, on the action bar, select the criteria of the benefits to view and click **Apply**. To remove the filter, click **Reset**.

From the grid, you can add and manage benefits as necessary.

Add Benefits to the Catalog

From the Benefits Catalog page, you can add all benefits to associate with appeals and revenue transactions. When you receive revenue in response to an appeal, the program automatically determines which benefit applies to the transaction, based on the benefit levels you defined for the appeal, and deducts the monetary value of the benefit from the amount received.

➤ Add a benefit

1. From *Fundraising*, click **Benefits catalog** under **Configuration**. The Benefits Catalog page appears.
2. On the action bar, click **Add**. The Add a benefit screen appears.

3. Enter a unique name and description to help identify the benefit.
4. In the **Value** field, enter the value for the benefit, based on a monetary amount or a percentage of the revenue transaction amount.

From an appeal record, when you associate a benefit with an appeal, the value you enter when adding a benefit appears on the appeal record by default. From the General tab on the appeal record, you can edit the value on the benefit level as necessary. If you edit the value from the appeal, the new value applies only to the appeal; the original value remains on the benefit in the Benefits Catalog.

When you associate the benefit with an appeal and then add a revenue transaction associated with the appeal, the program automatically calculates and deducts the value of the benefit from the receipt amount of the transaction. When you add a revenue transaction, you can waive benefits or edit the receipt amount as necessary.

5. In the **Category** field, enter a category for the benefit.

Benefit categories, such as Apparel or Service, help define and organize the benefit.

Tip: You define benefit categories from the Code Tables page in *Administration*.

6. Under **Benefits on pledges**, select whether to send the benefit when the pledge is committed or fully paid.

To send the benefit immediately when the constituent makes the pledge, select "Committed." To send the benefit after the constituent pays the final installment of the pledge, select "Fully Paid."

With either option, the program generates a benefit expense distribution. When you select "Committed," the distribution is generated when the pledge is saved. When you select "Fully Paid," the distribution is generated once the pledge is paid in full.

7. To restrict use of the benefit to specific sites at your organization, under **Site**, select the sites to use the benefit.
8. On the Fulfillment tab, you can specify the vendor who will provide the benefit, such as the company who produces the T-shirts. You can also specify who the fulfillment vendor is. This is the company who will actually send the benefit to the constituent.

Tip: You can create vendor records from the Marketing and Communications page.

In the **Benefit ID** field, you can enter an identification number for the benefit.

In the **Cost** field, you can enter the amount it cost to produce the benefit.

9. Click **Save**. You return to the Benefits Catalog page.

Edit a Benefit

After you add a benefit, you can edit its information as necessary.

Note: When you edit the value of a benefit, the new value does not appear on instances of the benefit already associated with an appeal, membership, event, or revenue transaction. You must manually update those records to reflect the benefits changes.

To edit a benefit, from the Benefits Catalog page, click the double arrows next to a benefit to expand its row. On the action bar that appears, click **Edit**. The Edit benefit screen appears. Make any necessary changes and click **Save**.

Benefit Search

To associate a benefit with a record, such as an appeal or a revenue transaction, you can search for and select the benefit to use. On the Benefit Search screen, enter the criteria of the benefit to use, such as name and category, and click **Search**.

Under **Results**, the benefits that match the search criteria appear. Select the benefit to use and click **Select**.

Note: When the benefit does not appear under **Results**, click **Add** to add it to the Benefits Catalog.

Benefit Page

From the Benefits Catalog, you can click on a benefit to go to the Benefit page. The summary at the top displays information such as the benefit's name, description, and value. On the Benefit page, you can also view and manage any benefit attributes as well as benefit fulfillment information. Benefit attributes are available only if the attribute category has been created in *Administration*.

Benefit Attributes

From the Attributes tab, you can add, edit, and delete benefit attributes. Benefit attributes are available only if the attribute category has been created in Code Tables in *Administration*.

➤ Add or edit a benefit attribute

1. From *Fundraising*, click **Benefits catalog** under **Configuration**. The Benefits Catalog page appears.
2. Click a benefit to go to the Benefit page.
3. On the Attributes tab, click **Add**. The Add benefit attribute screen appears.

Tip: When you need to edit an attribute, click the double arrows beside the attribute to expand its row. From the action bar that appears, click **Edit**.

4. Select the category for the benefit attribute. Your system administrator configures the attribute categories in *Administration*.
5. In the **Value** field, select a value or description for the attribute.
6. Enter start and end dates for the attribute, when necessary.
7. In the **Comment** field, enter any additional information or comments about the attribute.
8. Click **Save**. You return to the Attributes tab.

Benefit Fulfillment Information

From the Benefit page, you can click the Fulfillment tab to view benefit fulfillment information. To access the Fulfillment tab on the Benefit page, from the Benefits Catalog page, click a benefit.

Naming Opportunity Facilities

Naming opportunity facilities are the physical locations where donors are recognized. When the name of the facility is a building, you may specify an area, such as the wing of the building, and a unit, such as a lecture hall in the selected wing. You can also include the facility's address.

Add Facilities

When you add naming opportunity facilities, you can specify location information. After you add a facility you can associate it with a naming opportunity.

➤ Add a naming opportunity facility

1. From the Fundraising page, click **Naming opportunity facilities** under **Configuration**.
2. From the Naming Opportunity Facilities page, click **Add** on the action bar. The Add a naming opportunity facility screen appears.
3. In the **Name** field, enter a name for the facility.
4. When the facility is a building, you may also specify an area and a unit, such as a library.
5. In the address fields, select and enter address information to complete the facility.
6. Click **Save**.

The facility can now be associated with your naming opportunities.

VSE Subcategories

When colleges, universities, and secondary schools add designations to fundraising purposes, they can assign the designation to a pre-defined category of the Voluntary Support of Education (VSE) Survey. A list of predefined categories is provided and cannot be edited. These categories help determine how the VSE Survey handles revenue received toward the designation. You can, however, further specify a category by creating subcategories for internal use at your organization. To view and manage subcategories your organization uses for the VSE Survey, from the Fundraising page, click **VSE subcategories** under **Configuration**. The VSE Subcategories page appears.

Under **VSE subcategories**, you can view the categories of outright giving used by the VSE Survey, such as Capital Purposes - Loan Funds. To view subcategories your organization uses with a VSE category, click the single arrow next to the category. To update the information under **VSE subcategories**, click **Refresh**.

Note: VSE subcategories are for internal use at your organization and do not appear in the VSE Survey Report. For more information about the VSE Survey Report, see [VSE Survey Report on page 127](#).

From this page, you can add subcategories to further define the VSE categories. You can also edit or delete subcategories as necessary. You cannot add a subcategory to another subcategory.

Note: We recommend you configure VSE subcategories during database setup.

➤ Add VSE subcategories

1. From the Fundraising page, click **VSE subcategories** under **Configuration**. The VSE Subcategories page appears.
2. Under **VSE subcategories**, click the double arrows next to a VSE category to expand its row. From the action bar that appears, click **Add**. The Add a VSE subcategory screen appears.
3. Enter a name to identify the subcategory.

Note: Each subcategory under a specific VSE category must have a unique name. However, you can use the same name for multiple subcategories under separate VSE categories.

4. Click **Save**. You return to the VSE Subcategories page.
The VSE category now appears with a single arrow next to it which designates its association with a subcategory.

Fundraising



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Fundraising purposes are the reasons your organization raises money and these purposes indicate how to designate your donors' gifts. You can specify the purpose types your organization uses (such as

funds, initiatives, programs, projects, etc.) and then add instances of those types, such as the Library Building Fund.

You establish relationships between your purposes to reflect the way your organization handles designations. For example, you may want to break some purposes down into sub-purposes that support a larger cause. This hierarchy enables you to track totals for individual purposes in the context of the larger effort. You can specify goals for your purposes and track recipient, donor, and financial information. You can run a variety of reports to determine the effectiveness of your fundraising activities.

When a purpose needs a designation to directly accept revenue, you can create and associate a designation with a purpose. A designation is not always necessary. At times, you may need to create a purpose for roll up reporting for a hierarchy.

Note: You create appeals, which are the means to reach out to constituents, separately from purposes. You can associate appeals with designations to make revenue entry faster. When you enter an appeal on a revenue record, the available designations default to those associated with the appeal. You can also search for designations to select one not associated with the appeal. For more information about how to add and use appeals, see the *Communications Guide*.

Add Purpose and Designation

The Add purpose and designation wizard streamlines the process of adding purposes and designations. By following the steps in the wizard, you can create a purpose, designation, and map the purpose or designation to a General ledger account.

In the wizard you can specify if the purpose is only for reporting, or if you need a purpose and a designation to accept revenue. You can also choose where to put the designation or purpose in the hierarchy.

Here are things to consider when creating purposes and designations:

- When you create purposes and designations from the Fundraising page using the **Add purpose and designation** wizard, the system assumes you want to create a designation to accept revenue that will go under a current fundraising hierarchy. The wizard defaults to "Yes, this purpose will need a designation to accept revenue" and "This purpose belongs under a current hierarchy." You can change these options if that is not what you want to do.
- When you create purposes and designations from the Fundraising Hierarchy page using the **Add** button at the top of the list, the system assumes you want to create a top level hierarchy for reporting only and therefore defaults to "No, this purpose is only for roll up reporting and will not need a designation to directly accept revenue" and "This purpose will start a new hierarchy (top level)." You can change these options if that is not what you want to do.
- When you create purposes and designations from the Fundraising Hierarchy page, the system assumes you need a revenue-accepting designation under that hierarchy and will default the options to "Yes, this purpose will need a designation to accept revenue." The system will also default in and lock down the location in the hierarchy where you clicked **Add**. You can change the options to allow you to only add a purpose for reporting, but the location in the hierarchy that the purpose or designation will go under is locked down.

- When you create purposes and designations from the Hierarchy tab on the purpose or designation record, the system assumes you need a revenue-accepting designation under that hierarchy and will default the options to "Yes, this purpose will need a designation to accept revenue." The system also defaults in and locks down the location in the hierarchy where you clicked **Add**. You can change the options to allow you to only add a purpose for reporting, but the location in the hierarchy that the purpose or designation will go under is locked down.

➤ Add purpose and designation

This screen has three steps which allow you to enter all the necessary purpose, designation, and General ledger mapping information to be able to accept revenue. The Designation information tab appears only when you need a designation to accept revenue. The Map to General ledger tab appears only when you use designations or purposes in your accounting structure.

Note: To include stewardship information on a purpose, finish setting up your purpose in the wizard and then access the Stewardship tab on the purpose record. You could also add a purpose from the **Configuration** section of *Fundraising*, but adding a purpose from **Configuration** will not put your purpose in the hierarchy, create a designation, or map to the General Ledger as it does with the wizard.

1. From Fundraising, click **Add purpose and designation**. The Add purpose and designation wizard appears.

Add purpose and designation

Purpose information Designation information Map to general ledger

Will this purpose be accepting revenue?

Yes, this purpose will need a designation to accept revenue
 No, this purpose is only for roll up reporting and will not need a designation to directly accept revenue

Where in your fundraising hierarchies should this purpose go?

This purpose belongs under a current hierarchy
Please choose the hierarchy this purpose should go under.

This purpose will start a new hierarchy (top level)

How would you like this purpose name to display?

Internal purpose name: [Reuse an existing purpose](#)
Displays in the fundraising hierarchy

Purpose lookup ID:
You can use this to search for purposes

Public purpose name:
Displays on mailings and on the web

Purpose description:

What site should be able to manage and add revenue to this purpose?

Site:

How would you like to report on this purpose?

Purpose type: Purpose report code 1:

Purpose category: Purpose report code 2:

Help Previous Next Save Cancel

2. Under **Will this purpose be accepting revenue?**, specify whether or not you need a designation. When you want to accept revenue, you will need a designation.
 - a. When you select **Yes, this purpose will need a designation to accept revenue**, the Designation Information tab appears at the top of the form, and from there you can add the designation information. With this option selected, the designation and purpose will show in the fundraising hierarchy.
 - b. When you select, **No, this purpose is only for roll up reporting and will not need a designation to directly accept revenue**, no designation is created and only the purpose will display in the fundraising hierarchy.

3. Under **Where in your fundraising hierarchies should this purpose go?**, specify where the purpose should appear in your fundraising hierarchy. You can place the purpose on a top level, or under a current hierarchy. When you choose to place the purpose under a current hierarchy, you can access the Designation Hierarchy Search to locate which hierarchy you would like to put your purpose and designation under.
4. Under **How would you like this purpose name to display?**, enter how you want the purpose name to display in the fundraising hierarchy, on mailings, and on the web. You can also enter a lookup ID to use when searching for the purpose and a description.

When you choose to reuse an existing purpose, click the **Reuse an existing purpose** link to access the Fundraising Purpose Search screen to locate the purpose. Only purposes that have not already been used in that level of the hierarchy can be used because otherwise there is potential to create a duplicate designation. Therefore, only purposes that would not result in duplicate designations will be available in the search results. Once you select the purpose you want to reuse, the information defaults into the fields and is not editable.

5. If you are creating a new purpose, select the site that will manage this purpose. You can use the drop-down arrow, or access to Site search screen to select a site.
6. If you are creating a new purpose, enter how you want to report on the purpose.
 - a. Select the type and category of fundraising purpose. The purpose type determines the characteristics and options available on the purpose. Purpose types are created in *Configuration*.
 - b. To enhance the reporting for the purpose, select the default report codes you want to use. For example, you can track different departments and filter reports based on these codes.
7. When you need to add revenue information for the purpose, select the Designation information tab. When this purpose does not require a designation, proceed to the Map to General ledger tab. Keep in mind, the Map to General ledger tab appears only when you use designations or purposes in your accounting structure.

8. On the Designation information tab, enter the **Public designation name**.
The public designation name defaults to the internal purpose name. When the purpose is being reused, the public designation name requires a unique name.
9. In the **Designation lookup ID**, the id defaults to the purpose lookup id.
When the purpose is being reused and has an associated designation, the designation lookup ID requires a unique value.
10. To enhance the reporting of the designation, select the report codes to associate with the designation.
11. For a college, university, and secondary school that participates in the Voluntary Support of Education (VSE) Survey, in the **VSE category** field, select the category of the survey to associate with revenue received toward the designation.
To further define a VSE category, select a subcategory as necessary. Your organization determines the subcategories available for each VSE category. For information about how to manage VSE subcategories, see [VSE Subcategories on page 21](#).
12. If your organization identifies designations related to planned gifts, in the **Use code** field, select the code to indicate how to allocate the planned gifts.
13. In the **Campaign** field, select the campaign to associate with the designation.
14. Select the start and end dates for the designation.

- On the Map to General ledger tab, you can specify the default GL accounts for all of your purposes and designations. Any account segment that was set up to use designations or purposes appears on this screen.

Add purpose and designation

Purpose information Designation information **Map to general ledger**

Segment mappings for account system: MB_FundraisingSystem

Designation:

Purpose:

Composite-Purpose:

	Name	Segment value	Fundraising Pu...	Inbound Chan...
*				

Composite-Designation:

	Name	Segment value	Designation	Inbound Chan...
*				

Segment mappings for account system: MB_Performance

TestSegment:

	Name	Segment value	Fundraising Pu...	Inbound Chan...
*				

Segment mappings for account system: System Generated Account System

Designation:

Help Previous Next Save Cancel

- Click **Save**. When the purpose is for reporting only, you will go to the purpose record. When a designation is associated with this purpose, you will go to the designation record.

Search for Fundraising Purposes

After you add fundraising purposes, you can locate them with the Fundraising Purpose Search screen.

To access the Fundraising Purpose Search screen, select **Purpose Search** under **Fundraising** on the Fundraising page.

To locate a specific purpose, you can base your search on criteria such as name, public name, or lookup ID. In the **Search for** field, you can enter any portion of a lookup id, name, or public name to return valid results.

Using **Advanced search options**, you also use type, category, and site filters to narrow your search. Keep in mind, the name, public name, and lookup id fields in the advanced search options work differently than the single **Search for** field above. In order to return fewer results, these fields return results based on what your entry "begins with." For example, when you enter "2015" in the advanced search option **Name** field, only those purposes that begin with 2015 appear in the results.

Click **Search** to locate the purposes that meet your criteria.

Fundraising Purpose Search

Search for: Search Clear

Advanced search options

Name: Type:

Public name: Category:

Lookup ID: Site:

Match all criteria exactly

Results + Add

Name	Type	Category	Lookup ID	Site	Public name

All purposes that satisfy your criteria appear in the search grid. Choose a purpose and click **Select** to open it. If necessary, you can add a new fundraising record from this screen. When you select **Add** from this screen, you are taken to the [Add purpose and designation wizard](#).

Purpose Record

After you create and save a fundraising purpose, such as a fund, project, or program, you can access the purpose's page to view and manage the details. To access a purpose's page, click the purpose

hyperlink on the Fundraising Hierarchies page or click **Purpose search** on the Fundraising page to search for a purpose.

You can add and edit goals; view information about donors and designations; enter financial information related to the purpose; view naming opportunity information; select donors or constituents to steward; and view and manage all other information related to the purpose.

Fundraising Hierarchies

A fundraising hierarchy is a visual representation of how you organize your fundraising purposes. To manage hierarchies for all of your purposes from *Fundraising*, click **Fundraising hierarchies** under **Fundraising**. The Fundraising Hierarchies page appears.

Note: Inactive designations in the hierarchy appear in italics. For more information about inactive designations, see [Mark a Designation as Inactive on page 1](#).

On the **Fundraising Hierarchies** page, you can view the fundraising purposes and hierarchies your organization uses. You can create hierarchies up to five levels deep. For purposes that accept revenue, revenue totals at each level of the hierarchy roll up and are included in a purpose's parent total toward a goal. A purpose type can appear anywhere in a hierarchy, exist in the same hierarchy multiple times, and exist in multiple hierarchies. After you establish your designations, you can associate revenue transactions with them.

Tip: To determine the effectiveness of your fundraising efforts, you can use a variety of Fundraising reports and KPIs to track performance. For information about Fundraising reports, see [Fundraising Reports on page 114](#). For information about Fundraising KPIs, see the *Reports and KPIs Guide* or the KPIs section of the help file.

You can select whether to view inactive hierarchies in the list. To exclude inactive hierarchies, select **Only show active designations** and click **Apply**. To remove the filter, click **Reset**.

To access a designation record from the list, click the designation to open the record. For information about the items on the designation record, see [Designation Record on page 33](#).

From the record of a top-level purpose in a hierarchy, you can easily navigate through the designations in the hierarchy using the tree view. To access the record, click the top-level purpose. To access the record of a child purpose from the record of the top-level purpose, click the child purpose.

Add Designations

To add designations, select the purpose to position at the top of a designation hierarchy and then specify the combinations of this purpose and other purposes that form the child-level designations in the hierarchy. For example, from the Building Fund, you can select Facilities Development Initiative to create the Building Fund / Facilities Development Initiative designation. After you create the designation, you can create sub-purposes for it and apply it to revenue records.

You add designation information to the Designation information tab of the Add purpose and designation screen. For information about how to add a designation, see [Add Purpose and Designation on page 25](#).

Add Fundraising Hierarchies

From the Add purpose and designation screen, you can add fundraising purposes or designations and nest them in hierarchies. To add a top level purpose or designation to a new hierarchy, you must add the hierarchy.

For more information about how to add hierarchies, see [Add purpose and designation on page 26](#).

Fundraising Hierarchy Search

Each Fundraising Hierarchy you have defined in the system appears on the Fundraising Hierarchy page. To save time locating hierarchies, we recommend you use the search filters located above the grid. For example, in the **Search for** field, you can enter a purpose, designation, lookup ID, or public name. You can also sort the grid by purpose, designation, lookup ID, public designation name, and type.

Purpose	Type	Designation	Designation lookup ID	Public designation name	Report code 1
2001 Membership Fund	Fund	2001 Membership Fund	2001MEMBER	2001 Membership Fund	
1999 Membership Fund	Fund	2001 Membership Fund \ 1999 Membershi...	5556	1999 Membership Fund	
2002 Membership Fund	Fund	2002 Membership Fund	2002MEMBER	2002 Membership Fund	
2005 Membership Fund	Fund	2005 Membership Fund	2005MEMBER	2005 Membership Fund	

Designation Record

From the designation record, you can view and manage information about the designation. To access a designation record from the Fundraising Hierarchies page, the Hierarchies tab on a fundraising purpose, or the Hierarchy tab on a designation record, click the designation name.

At the top of the record, profile information about the designation appears, including lookup ID, public name, and start and end dates. For a college, university, and secondary school that participates in the Voluntary Support of Education (VSE) Survey, you can also view the VSE category. You can view and manage the goals, hierarchy, and other information associated with the designation. To help you navigate through this information, the record contains multiple tabs.

Depending on your system role and security rights, you can perform additional tasks to manage information about the designation from its record.

Search for Designations

You can search for designations from the Fundraising page by clicking **Designation search** under **Fundraising**.

Note: You can also access the Designation Search screen from other records, such as a revenue transaction or an appeal, when you specify the designation.

In the **Search for** field, you can enter any portion of a lookup ID, designation, or public name to return valid results. For example, when you enter "Appeal," any lookup ID, designation, or public name in your database that contains the word "Appeal" appears in the search results.

Using the Advanced search options, you can also use **VSE category**, **Use code**, **Purpose type**, **Purpose category**, **Purpose site**, and **Report code 1** and **Report Code 2** fields to narrow your search. Keep in mind, the designation, public name and lookup ID fields in the advanced search options work differently than the single **Search for** field above. In order to return fewer results, these fields return results based on what your entry "begins with." For example, when you enter "Appeal" in the advanced search option **Public name** field, only those designations that begin with Appeal appear in the results.

Select the **Include inactive** checkbox to make designations marked as inactive appear in the search results. Click **Search** to locate the designations that meet your specified criteria.

All designations that satisfy your criteria appear in the search grid. Choose the designation you want and click **Select** to open it.

Note: You can use additional criteria such as **Revenue designation** and **VSE subcategory** to narrow your search. To add these additional search fields to the Designation Search screen, from *Administration*, click **Search list configuration** under **Data**. On the Search list configuration page, click **Configure search list fields**. The Search List Fields page appears where you can edit the search

criteria for the Designation Search screen. For information about how to edit search list settings, see *Administration*.

Designation Hierarchy Search

In order to view additional detail about designations and their hierarchies, you can view several designation reports. For these reports, you first search for and select a designation hierarchy from a search screen. To narrow the results, you can include information on the search screen such as designation hierarchy name or type.

Purpose and Designation Record Tabs

The following sections describe information and tasks for each tab on a purpose or designation record.

Goals

Goals are the cornerstones that enable you to effectively analyze your progress. On the Goals tab of a fundraising purpose or a designation, you can view and add goals. When you have security rights, you can specify that a Key Performance Indicator (KPI) for the total amount raised toward a goal displays along with your goal information. For more information, see [Key Performance Indicators on page 36](#).

From the Goals tab, you can create and manage KPIs to track the effectiveness of the designation toward a goal. To view the KPI for a goal, click the double arrows next to a goal to expand its row. KPI details display under the row. To hide the details, click the row again. For information about how to add and manage KPIs, see [Key Performance Indicators on page 36](#).

Tip: When you click the double arrows next to a goal to expand its row, you can click **Go to KPI** from the action bar that appears.

Add Goals

From the Goals tab of a fundraising purpose or designation, you can add multiple goals. For example, a particular school may be responsible for raising a certain amount of money for a purpose that benefits an entire university. You can enter an overall goal as well as separate goals for the schools.

When a purpose is the top level of a designation, its goals cascade to items below it in a designation hierarchy. When you add goals for a child-level designation, the available goal names are limited to those defined in the purpose at the top of the hierarchy. For more information about designation hierarchies, see [Fundraising Hierarchies on page 32](#).

➤ Add a fundraising purpose goal

1. From the Goals tab of a fundraising purpose, click **Add**. The Add a goal screen appears.

2. Enter a name for the goal. When the fundraising purpose is at the top level of a designation hierarchy, this title appears as an available name when you add goals to any sublevel of the hierarchy.
3. Enter a goal amount. When you do not enter an amount, the goal defaults to zero.
4. Enter start and end dates to specify the period in which you intend to raise the goal amount.
5. Click **Save**. You return to the Goals tab.

➤ Add a designation goal

When you add a goal to the top level of a designation hierarchy, you are adding a goal to that purpose. You can also add a goal to a child-level purpose.

1. From the Goals tab of a designation, click **Add**. The Add a goal screen appears.
2. Enter or select a name for the goal. The top-level item in this designation hierarchy determines the goal names available for selection.
3. Enter a goal amount for this designation.
4. Click **Save**. You return to the Goals tab.

Key Performance Indicators

With Key Performance Indicators (KPIs), you can quickly check the performance of certain aspects of your fundraising efforts. When you associate a KPI with a defined goal on a fundraising purpose or designation, the KPI displays automatically in the **Details** view on the corresponding record's Goals tab.

You can also create KPI instances such as "Total Revenue for a Purpose" or "Total Count for a Purpose" that can be viewed on a KPI dashboard rather than on the purpose itself. These KPIs enable you to filter on all aspects of your fundraising purposes so, for example, you can create a KPI to show the total amount raised for a purpose by a business unit or school, depending on the information you track in the **Report code** fields.

You can create processes to specify how often a KPI will be updated with the latest information.

Note: When you build a KPI directly from a fundraising purpose or designation page, the program filters the available KPI instances to include only those used in that context. However, when you build a KPI from the KPI Instances page in *Analysis*, be sure to select a designation or purpose goal. For example, if you are configure a KPI for the Annual Fund, and this fundraising purpose is the root of a hierarchy, you would select a “Purpose goal” type so the KPI will appear in the **Details** view of the fundraising purpose page. In this case, if you chose a “Designation goal” type, the KPI would not appear on the fundraising purpose page, although it would be available on the KPI Dashboard.

➤ Add a fundraising purpose KPI

This procedure explains how to add a KPI for “Total Raised Towards a Fundraising Purpose Goal” to display on a purpose’s Goals tab. When you create other fundraising purpose KPIs, the workflow is similar, but you select different criteria and the KPI may appear on the KPI Dashboard instead of the purpose.

In addition to the workflow outlined in this procedure, you can also add a KPI to a goal directly from the Goals tab of a fundraising purpose.

1. From a fundraising purpose, click **Manage KPIs** under **More information**. The KPI Instances page appears.
2. Click **Add**. The Select a KPI screen appears.
3. Under **Fundraising**, click **Goals**. Select **Total Raised Towards a Fundraising Purpose Goal** and click **OK**. This KPI will appear on the fundraising purpose Goals tab.
4. Click **OK**. The New KPI Instance screen appears.

5. On the General tab, enter a KPI name and description, and select a folder for the KPI.
6. On the Criteria tab, select a fundraising purpose for this KPI. The fundraising purpose from which you are creating the KPI is the default in the **Purpose** field. You can search for and select a different purpose.
7. In the **Goal** field, select the goal for which you want to create a KPI. Only goals defined for the selected purpose appear.
8. On the Preview tab, select today’s date to see the current status of how much revenue has been raised.
9. Click the Goal tab.

10. The **Overall goal** defaults from the selected goal for which you are creating the KPI. In the corresponding field, select "High values are good."
11. In the Good target and Satisfactory target fields, you can enter amounts or percentages to indicate warnings for under-performance when the KPI displays. The color bar displays the progress.
12. You can add milestones that contain dates and values to your goal.
13. On the History tab, select how you want to handle the history records generated with each instance update. You can select **Archive all values** to keep all instance values or **Archive only the last "X" values** to save only a select number of instance values. Your selection here determines how many values for the KPI instance the program saves and uses to create a trend graph when the KPI instance displays.
14. Click **Save**. You return to the fundraising purpose. Before you can view the actual KPI on the fundraising purpose, you must generate values for it.

➤ Generate values for a Fundraising Goal KPI instance

1. From the Goals tab of a fundraising purpose, select a goal for which you created a KPI and click **Update KPI value**. The Update KPI screen appears.

2. To view data based on the current date, select **Process once using current date**. This creates one history record relative to the current date.

To enter specific date information, complete the following steps:

- a. Select **Back-date**. This creates several history records relative to the date determined by the interval provided, such as every 3 months or every 7 days. For example, back-dating a KPI between 1/1/2014 and 1/1/2015 with an interval of every 3 months creates four history records—one for each quarter.

Note: Back-dating is typically used for new KPI instances, when trend information does not exist. After you create a KPI instance, you can update it by scheduling a business process. Each time the process runs, the values are updated to reflect the most recent data.

- b. In the **From** field, enter the start date from which you want to view data.
- c. In the **To** field, enter the end date to which you want to view data.

- d. In the **Calculate value every** fields, select how often you want to take data snapshots. For example, if in the **From** and **To** fields, you select to view data for a year, in the **Calculate value every** fields, you can select to view information for every 3 months.

Warning: Back-dating a KPI erases any values that fall within the specified date range previously stored for the selected KPI instance.

3. Click **Start**. An updated version of the selected KPI instance appears.

When you click the double arrows next to the goal for which you created this KPI instance from the Goals tab, KPI details appear.

Alternate Lookup IDs for Designations

When you add a designation, you specify a lookup ID. This primary lookup ID appears in the **Lookup ID** field on the designation record. From the Lookup IDs tab of a designation record, you can manually assign alternate lookup IDs to the record. For example, if you previously used a different system, you can assign the ID associated with the record in this system as an alternate lookup ID.

You can create as many alternate lookup IDs as necessary and use the IDs when you perform a designation search. For information about how to search for a designation, see [Search for Designations on page 33](#).

➤ Add a lookup ID

1. From the Lookup IDs tab on a designation record, click **Add**. The Add alternate lookup ID screen appears.
2. In the **Type** field, select the type of alternate lookup ID to add.
3. In the **Lookup ID** field, enter an alternate lookup ID.

Note: You can enter only one lookup ID for each type.

4. Click **Save**. You return to the designation record.

Donor Information

Donors are the constituents who contribute to a fundraising purpose. When you select the **Has donor information** checkbox on the Add fundraising purpose type screen, the Donor Information tab appears on fundraising purposes based on the type.

Donor information (6) Filters [X] [2] [3]

Search: Type:

Date range: From: To:

Designation: Campaigns:

Donor	Date	Transaction type	Application	Amount	Total paid	Write offs	Balance	# of payment..	Last payment d...
Adeptus Administratum - Lookup ID: 8-12020183									
Adeptus Admi...	1/30/2013	Matching gift c...	Donation	\$2,500.00	\$2,300.00		\$200.00	1	1/30/2013
Adeptus Admi...	1/30/2013	Matching gift c...	Donation	\$0.00	\$0.00		\$0.00	0	
Cain, Ciaphas - Lookup ID: 8-12020182									
Cain, Ciaphas -...	1/30/2013	Payment	Donation	\$500.00					
Collier, Michael - Lookup ID: 8-12020186									
Collier, Michae...	1/30/2013	Payment	Donation	\$122.00					
Jack, Ailene - Lookup ID: 8-10529844									
Jack, Ailene - L...	11/7/2012	Payment	Donation	\$515.00					
Nike - Lookup ID: 8-12020184									
Nike - Lookup I...	1/30/2013	Matching gift c...	Donation	\$122.00	\$0.00		\$122.00	0	

On the Donor Information tab you can review information about the revenue a purpose has received from donors. For example, you can see the highest gift given to the purpose, what type of gift was it, if there were any write-offs, when the last payment was made, and when the most recent gift was made.

To make reviewing revenue information easier, use the filters located just above the **Donor information** grid. In addition to the **Search** field, you can filter the results by designation, campaigns, transaction types, or date ranges. Using the filters, you can quickly access information about the transactions, such as gifts made in the last week, all pledges made towards this purpose, or all gifts for a particular designation or campaign. Once you select your filters, click **Apply** to filter the grid.

Note: When you apply filter criteria the data in the columns will not change, unless the "Designation" filter is applied. For more information about how information in the grid is calculated, see the **How is column information calculated?** section below.

The **Donor information** grid includes columns for Donor, Date, Transaction type, Application, Amount, Total paid, Write offs, Balance, # of payments made, Last payment date, Original transaction amount, Designations, Campaigns, Corpus, and Benefactor. In the grid, use the arrows next to each donor to expand and collapse the information as needed. If any of the transactions from the constituent were made anonymously, the anonymous icon appears by the constituent name. If any of the payments had splits, the revenue splits icon appears by the constituent's name.

Note: When a pledge is not marked anonymous, but a payment on that pledge is anonymous, the anonymous icon displays on the individual payment in the details section, but does not display on the pledge or next to the donor's name.

The **Recurring gift** details panel displays a breakdown of the transaction date for each payment, the amount of each payment and the designation ID for each payment. The **Pledge** details panel displays four columns of information: summary and split information, total of the payments made, total amount of write-offs with the date the write-offs were made, the amount each write-off was made for, and the designation ID for the designation the write-off was made towards.

You can select any transaction in the grid that appears as a link to drill down to the original transaction record. Household records do not show up in the data list unless the transaction was made by the household.

Note: Transactions display in the currency in which they were made. For example, if a donor makes a donation in Japanese yen, the transaction amounts display in yen, while other transactions display in US dollars. Keep in mind, this means that if you export the data and try to sum the columns, the numbers will not match until you find all the yen transactions and convert them manually to US dollars. All payments shown in the details section will display in the currency in which the original transaction was made, regardless of the currency in which payment was made. This allows the amounts, total paid and balances to add up correctly.

➤ How is column information calculated?

Donor. This column displays the constituent's name and lookup ID for the person who made the payment, or owns the commitment. For example, Cindy Smith pays one of John Smith's pledge installments. Cindy Smith does not show on the Donor Information tab. However, if you were to search for Cindy Smith, John Smith's pledge would be included.

Date. This column displays the transaction date of a commitment or payment. For recurring gifts, the **Date** column is the date of the first installment. For example, if John Smith says he wants to make a recurring gift to the Lab designation, but has yet to make a payment toward that recurring gift, the recurring gift does not display on the Donor Information tab.

Amount. This column displays the amount of the payment or commitment designated toward the specified purpose. Since recurring gifts do not represent an actual valued commitment, the **Amount** column is blank. Because there is no guarantee that the installment will come in or stay the same, only payments made towards recurring gifts display on the Donor Information tab.

Total paid. On commitment rows, this column displays the sum of all payments designated toward the specified purpose, regardless of date. To see all the payments made toward that commitment, click the chevron next to the donor name, which expands the details panel. The balance displayed reflects the balance as of today's date.

Write-offs. This column displays the sum of all write-offs that meet the criteria specified and that were made toward that commitment. To see more details about the write-offs, expand the details panel for that transaction. Recurring gift write-offs do not display. For example, if John Smith had a pledge of \$1,000 split between the Lab designation and the Equipment designation and John had a write-off of \$250 for each of those designations, which were both part of the research purpose, and you filtered to see only the Lab designation, then the write-off amount would show as \$250.

Balance. For commitments, this column is the difference between the Amount column and the sum of the **Total paid** and **Write offs** columns. This reflects the balance as of today's date.

of payments made. This column displays how many payments, which meet the criteria specified, were applied to that commitment.

Last payment date. This column displays the date the last payment, which meets the criteria specified, was made for that transaction.

Original transaction amount. Some transactions allow you to enter an original transaction amount. For those transactions, that amount displays in this column. Please note, when present, this value is not effected by any filters – it will be the value entered as the 'original amount' on the transaction.

Designations and Campaigns. These columns display all of the designations and campaigns that the transaction goes towards within that purpose. If part of the transaction was split to a designation outside of the purpose you are looking at, open the details panel to see what other designations the transaction went towards.

➤ More information about the split designation icon

The splits displayed in the details panels on the Donor Information tab reflect the number of designations to which a commitment is split. It does not reflect the number of applications a payment was split toward. For example, if John Smith made a pledge for \$5,000 and wanted all of it to go toward the athletics fund, the pledge on the Donor Information tab would show as one split in the details section, because it is going toward one designation. If John Smith made a pledge for \$5,000 and wanted \$2,500 to go to the athletics fund and \$2,500 to go to the research fund, this would show as two splits in the details section of a pledge on the Donor Information tab. However, if John Smith made a payment of \$5,000 and wanted \$2,500 to go toward his pledge to the athletics fund and \$2,500 to go toward a donation to the track and field building fund, which is under the same purpose as the athletics fund, the pledge would show a payment of \$2,500 and display a split of one, and would not have any information about the donation.

The split gifts icon will appear for payments when the payment is applied to commitments which are split across more than one designation, or if the payment is applied to multiple commitments which have differing designations. The split gifts icon will appear for commitments when the commitment is split across multiple designations. If the split gift icon appears on a payment and there is only one split indicated in the details section, it indicates that the original payment has been applied to more than one designation, but the portion of the payment being displayed is only being applied to one designation under the current Fundraising Purpose.

Benefactors

You can identify which donors established a fundraising purpose. These donors, or benefactors, can then be recognized by your organization. To indicate that a donor is a benefactor, from the Donor Information tab of a fundraising purpose, click the double arrows next to a donor's entry in the grid. From the action bar that appears, click **Mark as benefactor**. A checkmark appears in the **Benefactor** column.

Remove Benefactor Status

You can remove benefactor status from a fundraising purpose donor. From the Donor Information tab of a fundraising purpose, click the double arrows next to a donor's entry in the grid. From the action bar that appears, click **Unmark as benefactor**. A checkmark no longer appears in the **Benefactor** column.

Original Funding

You can identify the original donations to a fundraising purpose. These donations are the corpus or principal of the purpose. Your organization invests these funds to generate long-term revenue for the purpose. From the Donor Information tab of a fundraising purpose, click the double arrows next to a donor's contribution in the grid. From the action bar that appears, click **Mark as original funding**. A checkmark appears in the **Corpus** column.

Note: Click the plus sign to the left of a donor entry to view the donor's contributions to the fundraising purpose.

Remove Original Funding Status

You can remove principal funding or corpus status from a donation. From the Donor Information tab, click the double arrows next to a contribution in the grid. From the action bar that appears, click **Unmark as original funding**. A checkmark no longer appears in the **Corpus** column.

Note: Click the plus sign to the left of a donor entry to view the donor's contributions to the fundraising purpose.

Hierarchies

When you create designation hierarchies to manage and track your fundraising purposes, you can view designations associated with the fundraising purpose from the Hierarchies tab.

To reduce the number of hierarchies that appear in a grid, you can filter the grid to view only hierarchies assigned specific report codes. On the action bar, click **Filter**, select the report codes of the hierarchies to view, and click **Apply**. To remove the filter and view all hierarchies in a grid, click **Reset**.

Under **Hierarchies (Non-revenue)**, the hierarchies that do not accept revenue toward the fundraising purpose appear. To view additional information about a hierarchy, click the hierarchy name. The record of the hierarchy appears. For information about the items on this record, see [Designation Record on page 33](#).

Under **Revenue designations**, the hierarchies that accept revenue toward the purpose appear. To view additional information about a hierarchy, click the hierarchy name. The record of the hierarchy appears. For information about the items on this record, see [Designation Record on page 33](#).

From either grid, you can add new designations to a hierarchy or activate inactive designations in a hierarchy.

When the fundraising purpose is a top-level designation in a hierarchy, the Hierarchy tab appears. Under **Fundraising hierarchy**, you can view the hierarchy that supports the designation.

To view only active designations in the hierarchy, click **Filter**, select **Only show active designations**, and click **Apply**. To remove the filter, click **Reset**. To view additional information about a designation in the hierarchy, click the designation name. The designation record appears. For information about the items on this record, see [Designation Record on page 33](#).

From this tab, you can add and manage designations on the hierarchy as necessary.

Financial Information

When you select **Has financial information** for a fundraising purpose type, the Financial Information tab appears on the records of fundraising purposes based on this type.

On this tab, under **Financial information**, you can enter financial activity details about the purpose such as start and end dates, book and market values, and total gift and disbursement revenue. The program does not automatically update this information. From this grid, you can add and manage financial information as necessary.

Tip: From the Batch Entry page in *Administration*, you can create a Fundraising Purpose Financial Info Batch to import financial information.

Under **Disbursements**, you can view and manage the revenue paid out from the fundraising purpose, such as payments toward a research or development effort. The program does not automatically update this information. From this grid, you can add and manage disbursement information as necessary.

When the market value of a fundraising purpose falls below the book value, you can decapitalize an amount of the fundraising purpose. Under **Decapitalization**, you can view and manage the decapitalized amounts of the purpose. The program does not automatically update this information. From this grid, you can add and manage decapitalization information as necessary. For information about how to manage the decapitalization, see [Manage the Decapitalization of a Fundraising Purpose on page 45](#).

Import Financial Information

To import updated financial information, use the Fundraising Purpose Financial Info Batch process. The information appears in the **Financial information** grid on the Financial Information tab of a fundraising purpose.

Add Financial Information

When you receive updated financial information, you can enter this information on the Financial Information tab of a fundraising purpose.

> Add financial information

1. On the fundraising purpose record, select the Financial Information tab.
2. Under **Financial information**, click **Add** on the action bar. The Add financial information screen appears.
3. In the **Start date** and **End date** fields, enter the date range associated with the financial information.
4. In the **Book value start** and **Book value end** fields, enter the funding book value of the purpose at the start date and end date.

5. In the **Market value start** and **Market value end** fields, enter the funding market value of the purpose at the start date and end date.
6. In the **Total gift revenue** field, enter the total amount donated toward the purpose during the date range.
7. In the **Total disbursements** field, enter the total amount disbursed from the purpose during the date range.
8. In the **Pledge balance** field, enter the total remaining on any pledges applied toward the purpose at the end date.
9. Click **Save**. You return to the Financial Information tab.

Add Disbursement Information

From the **Disbursements** grid on the Financial Information tab, you track how your organization spends a purpose's funding.

> Add a disbursement

1. From the **Disbursements** grid, click **Add**. The Add disbursement screen appears.
2. In the **Constituent** field, enter the constituent who received the funds.
3. In the **Amount** field, enter the amount disbursed.
4. In the **Date** field, enter the date your organization disbursed the funds.
5. Click **Save**. You return to the Financial Information tab.
6. In the **Financial information** grid, you must manually update the total disbursements amount to reflect the amount you entered in the **Disbursements** grid. For information about how to edit this amount, see Edit Financial Information on page 1.

Manage the Decapitalization of a Fundraising Purpose

When the market value of an endowment fundraising purpose falls below the book value, you can decapitalize the purpose. Your organization determines how much below the book value that the market value must fall before you decapitalize. After your organization approves the decapitalization of a fundraising purpose, you can decapitalize all or some of the purpose value to indicate that your organization should not disburse revenue from the purpose.

When you decapitalize a purpose, you enter information about the approval of the decapitalization, the amount to decapitalize, the designation into which to transfer the amount, and the rationale for the decapitalization.

Note: To view information about the decapitalized amounts of a fundraising purpose, you can generate the Decapitalization Fund report. On the purpose record, click **Fund decapitalization** under **Reports**. For information about this report, see [Fund Decapitalization Report on page 117](#).

After you decapitalize a purpose, you can edit or delete the decapitalization as necessary.

➤ Add the decapitalization of a purpose

1. From a fundraising purpose record, select the Financial Information tab.
2. Under **Decapitalization**, click **Add**. The Add a decapitalization screen appears.
3. In the **Approval date** field, select the date on which your organization approved the decapitalization of the purpose.
4. In the **Approved by** field, search for and select the person who approved the decapitalization.
5. In the **Amount** field, enter the amount of purpose value to decapitalize. You can decapitalize all or a portion of the purpose value.
6. In the **Account transferred to** field, search for and select the designation into which to transfer the decapitalized amount.
7. In the **Rationale** field, enter an explanation or reason for the decapitalization.
8. Click **Save**. You return to the Financial Information tab.

GL Mapping Tab

To successfully post transactions, you must set up GL Ledger information, such as accounts, transaction mappings, and segment mappings in *Administration*.

When you create segment mappings for items, such as appeals or events, the GL Mapping tab appears on the item's record. For example, once you select appeal as a segment in an account structure, when you view the appeal record, the GL Mapping tab appears. From the GL Mapping tab, you can view the segment value and edit the mapping if necessary.

Note: You create segment mappings in *Administration*. To access the Map Segment page, select an account system from the GL Ledger Setup page. From an account system page, click **Define Segment Mappings**.

To view and manage the GL Ledger mapping of an item, select the GL Mapping tab on the item's record. Additional examples of items with potential segment mappings are: fundraising purposes, events, and membership levels.

Note: The GL Mapping tab does not appear on records that are used as segments in more than one account structure within the database.

When you apply a revenue transaction toward an item, such as a designation, the GL mapping information automatically appears as a default on the revenue record. From the revenue record's GL Mapping tab, you can edit the segment mapping as necessary.

➤ Edit mapping

1. On the record of an item such as a designation or appeal, select the GL Mapping tab.
2. Under GL **mapping**, click **Edit**. The Edit mapping screen appears.
3. Select a different segment value to associate with this item.

When you edit a segment value from the Edit mapping screen, the value is automatically updated on the Map Segment page in *Administration*. To access the Map Segment page, click **Define Segment Mappings** on the GL Ledger Setup page of *Administration*.

4. Click **Save**. You return to the GL Mapping tab.

Recipients

Recipients are constituents who receive funds from your fundraising purposes, such as students who receive tuition from a scholarship fund. You can provide scholarship sponsors with information about scholarship donors and recipients. You can manage recipients from the Recipients tab of a fundraising purpose.

Note: In order to track recipient information, the fundraising purpose type must be set up to include recipients. For more information, see [Fundraising Purpose Types on page 13](#).

Add Recipients

From the Recipients tab of a fundraising purpose, you can add constituents who receive funding from the purpose, enter information about each recipient, and enter the type and amount of the award.

> Add a recipient

1. From the Recipients tab, Click **Add**. The Add recipient screen appears.

Note: When the Recipients tab is not available, the fundraising purpose type on which this purpose was based may not include recipient information. For more information, see [Fundraising Purpose Types on page 13](#).

2. In the **Constituent** field, search for and enter a recipient.
3. In the **Education** field, select the educational institution associated with the award.
4. In the **Status** field, select the recipient's current status such as "Active."
5. In the **Type** field, select the type of award.

Tip: **Status** and **Type** are text fields. You can add entries directly to these fields.

6. Enter the award amount and date.
7. In the **Published name** field, enter the full name of the fundraising purpose.
For example, the name you want to appear on published materials for the Simms Scholarship Fund is The William Simms Scholarship for the Advancement of Education in the Field of Sports Medicine.
8. In the **Scholarship term** field, select the scholarship term. You define scholarship terms on the Educational Catalog page in *Administration*.
9. In the **Comments** field, enter information about the recipient or award.
10. Click **Save**. You return to the Recipients tab.

Naming Opportunities

On the Naming Opportunities tab, you can view the naming opportunities associated with the fundraising purpose. A naming opportunity is a recognition, such as an engraved brick or the ability to determine the name of a building, constituents may receive when they contribute a specific amount to your organization. To view details about the selected opportunity, click the name of the opportunity to go to the opportunity record.

For more information about naming opportunities, see [Naming Opportunities on page 75](#).

Designation Campaigns

You can associate a designation with one or more campaigns. On the Campaigns tab of a designation record, you can view the campaigns associated with the designation.

For each campaign, you can view its subpriority and start and end dates. When you apply a revenue transaction toward a designation, you can select which campaigns receive credit. The campaigns associated with the designation are the default campaigns for the transaction; however, you can select any campaign or campaigns to receive credit.

> Edit campaigns

1. From a designation record, select the Campaigns tab.
2. Click **Edit campaigns**. The Edit designation campaigns screen appears.
3. In the **Campaign** column, search for and select the campaigns to associate with this designation.
4. In the **Subpriority** column, select a subpriority or goal for each campaign.
5. In the **Date from** and **Date to** columns, select a date range for each campaign. When you apply revenue to the designation between the dates specified, the campaign automatically receives credit.

Note: When you apply a revenue transaction to the designation, you can select a different campaign or subpriority to receive credit for the transaction.

6. Click **Save**. You return to the Campaigns tab.

Designation Attributes

You can use attributes to store details about a designation when no field or tab exists for the information. Attributes help track the information that best meets your organization's needs. For example, you may use attributes to record additional reporting codes. To view the attributes associated with a designation, select the Attributes tab.

Note: The Attributes tab appears only if your system administrator configured designation attributes in *Administration*.

For each designation attribute, you can view and manage the value, group, valid date range information, and comments entered about the attribute.

Add Designation Attributes

You can add attributes to store details about a designation when no field or tab exists for that information. For example, you may add an attribute to record additional reporting codes.

> Add a designation attribute

1. From a designation record, select the Attributes tab.
2. Click **Add**. The Add designation attribute screen appears.
3. In the **Category** field, select the type of attribute to assign to the designation. Your organization sets up attribute categories in *Administration*.
4. In the **Value** field, enter or select the value of the attribute to assign to the fundraising purpose.
5. If the attribute applies to the designation for a specific duration, select start and end dates for the attribute.
6. In the **Comments** field, enter any additional information about the attribute.
7. Click **Save**. You return to the Attributes tab.

Fundraising Purpose Attributes

You can use attributes to store details about a fundraising purpose when no field or tab exists for that information. Attributes help track the information that best meets your organization's needs. For example, you may use attributes to record the earnings amount or the number of shares of an endowment. To view the attributes associated with a fundraising purpose, select the Attributes tab.

Note: The Attributes tab appears only if your system administrator configured fundraising purpose attributes in *Administration*.

For each fundraising purpose attribute, you can view and manage the value, group, valid date range information, and comments entered about the attribute.

> Add attributes for a fundraising purpose

1. From a fundraising purpose, select the Attributes tab.
2. Click **Add**. The Add fundraising purpose attribute screen appears.
3. In the **Category** field, select the type of attribute to assign to the fundraising purpose. Your organization sets up attribute categories in *Administration*.
4. In the **Value** field, enter or select the value of the attribute to assign to the fundraising purpose.

5. If the attribute applies to the fundraising purpose for a specific duration, select start and end dates for the attribute.
6. In the **Comments** field, enter any additional information about the attribute.
7. Click **Save**. You return to the Attributes tab.

Designation Tags

You can use tags to assign keywords or terms to designations so they can be found in a search. For example, you may assign tags such as "Scholarships," "Poverty," or "Environment" to identify a designation's purpose. When potential donors search online for causes to support, tags help them find designations on your website that match their interests.

Note: The Tags tab appears only if your system administrator configured code table entries for tags in *Administration*.

To view the tags associated with a designation, select the Tags tab.

Add Designation Tags

You can use tags to assign keywords or terms to designations so they can be found in a search.

> Add a designation tag

1. From a designation record, select the Tags tab.
2. Click **Add**. The Add designation tag screen appears.
3. In the **Value** field, enter or select the value of the tag to assign to the designation.
4. Click **Save**. You return to the Tags tab.

Designation Web Settings

When potential donors search your website for causes to support, the search results provide a short description of each designation that meets their criteria. On the Web tab, you can assign a URL to the designation so the search results include a link to detailed information about the designation. You can also assign a thumbnail image that appears with the designation's description in the search results.

Add Designation URLs and Images

You can assign a details page URL and thumbnail image to a designation that appears in the search results on your website.

> Add a details page URL to a designation

1. From a designation record, select the Web tab.

2. Click **Add, Details Page URL**. The Add details link URL screen appears.
3. In the **Details Page URL** field, enter the URL for the page that contains more information about the designation. You can enter any web address but typically you will enter the address for a Designation Details part page on your website.
4. Click **Save**. You return to the Web tab.

➤ Add an image to a designation

1. From a designation record, select the Web tab.
2. Click **Add, Thumbnail image**. The Add thumbnail image screen appears.
3. Click **Choose file** to browse to the image.
4. Click **Save**. You return to the Web tab.

Financials

When you integrate with Financial Edge NXT and a designation that is integrated has an alternate lookup ID, the Financials tab appears. This tab shows the latest financial information for that designation as it appears in Financial Edge NXT.

Fund Stewardship

As part of your donor cultivation strategy, you can steward constituents with an interest in a fundraising purpose. When you configure a fundraising purpose type to include donor and financial information, you can associate a stewardship package with each fundraising purpose based on this type. A stewardship package contains a cover letter and stewardship report you can distribute at regular periods. The stewardship report provides a current snapshot of the purpose including the amount earned on investment, amounts distributed, contributions made, and other expenses related to purpose management. Stewardship packages communicate that your organization has used contributions as the donor intended to meet a specific need. When you provide this information to donors and other constituents who have an interest in the fundraising effort, you demonstrate that your organization manages contributions carefully and responsibly.

You can add a stewardship package to a purpose from the Stewardship tab of the purpose record. A **Stewardship Package** section appears on the Stewardship tab above the **Stewardship Recipients** section. From here, you can add and edit stewardship packages, review summary information, and send the stewardship package. The stewardship summary information displays only when you add the package to the purpose.

Fund: 1999 Annual Fund
Fund:

General Information

Lookup ID: **99ANNUAL** Accepting funds: **Yes**

Category: **Annual** Disbursing money: **Yes**

Administrator: **Benton Site 1** Description: **1999 Annual Fund**

Site: **Benton Site 1** Public name:

Report code 1:

Report code 2:

Stewardship package and financial information

Stewardship package: **New Stewardship**

Fully funded: **No**

Endowed: **No**

Minimum amount for endowment: **\$0.00**

Target date for endowment:

Date minimum amount met:

Goals
Donor Information
Hierarchies
Financial Information
Recipients
Naming Opportunities
Stewardship
Documentation
Opportunity Pyramid

Stewardship Package Send stewardship package Go to stewardship package Edit Remove

Stewardship package: **New Stewardship**

Fully funded: **No**

Endowed: **No**

Minimum amount for endowment: **\$0.00**

Target date for endowment:

Date minimum amount met:

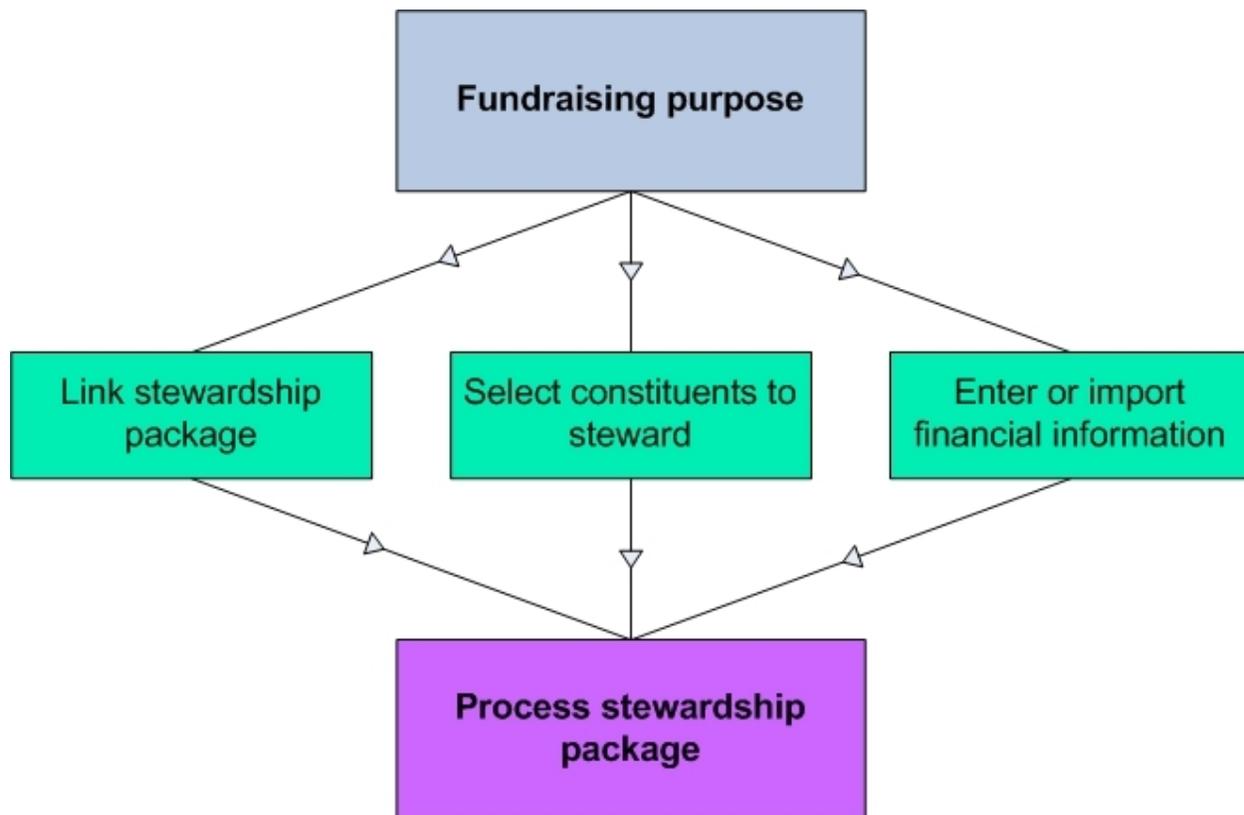
Stewardship Recipients (0) Add

Constituent	Type	Start date	End date

Fund Stewardship Workflow

The first step in establishing a fund stewardship workflow is to link a stewardship package process to a fundraising purpose. When you add a stewardship package to a purpose, you select a cover letter, define the output format and exclusions for the process, and enter information to appear in the stewardship report. From the fundraising purpose, you identify which donors and constituents should receive the package and enter or import financial information for the purpose. The final step is to process your stewardship packages and assemble the cover letters and stewardship report.

From *Communications*, you can configure and manage stewardship packages.



Fundraising purpose

A fundraising purpose based on a purpose type that includes donor and financial information contains Donor Information and Financial Information tabs. The information on these tabs appears in the stewardship report.

Link stewardship package

When you link a package to a fundraising purpose, you select how the program processes donor and constituent information for the stewardship package cover letter and you enter information included in the stewardship report.

Select constituents to steward

From the Stewardship tab on a fundraising purpose, you select which donors and constituents receive the stewardship package. When you run the stewardship package process, the program merges information for these constituents with the cover letter you selected.

Enter or import financial information

The information you enter or import on the Financial Information tab appears in the stewardship report included in the stewardship package process. You update financial activity data on a periodic basis, for example quarterly or annually.

Process stewardship package

You run the stewardship package process at regular periods to communicate details concerning the fundraising purpose's status to donors and selected constituents. The process generates a cover letter

for each recipient you selected on the fundraising purpose's Stewardship tab and a stewardship report. The mail merge fields you add to the cover letter and the address processing options you select determine the letter's appearance. The stewardship report contains financial activity details for the purpose.

Stewardship Recipients

For fundraising purposes based on a type that includes donor and financial information, when you select a stewardship package in the **Package** field of the Add a purpose screen, the Stewardship tab appears on the fundraising purpose.

From the Stewardship tab, you determine who receives stewardship packages. In addition to donors, you can also steward constituents who did not contribute to the purpose. For example, a business creates an endowment fund in honor of a former board member. You add the board member as a stewardship recipient because this individual has an interest in the purpose's status whether or not she contributes.

Add Stewardship Recipients

When you run the stewardship package process, the program creates a cover letter for each constituent you select to steward.

> Add a stewardship recipient

1. From a fundraising purpose record, select the Stewardship tab.
2. Click **Add**. The Add a stewardship recipient screen appears.
3. In the **Constituent** field, enter a constituent to steward.

When a constituent pledges or makes a payment to the purpose, the constituent's name appears in the **Constituent** drop-down list.

4. In the **Type** field, select the level of stewardship for the constituent.
For example, you may define stewardship levels based on the amount a donor contributes to the fundraising purpose.
5. In the **Start** and **End date** fields, enter the start and end dates for stewarding the constituent.
6. Click **Save**. You return to the Stewardship tab.

Process Stewardship Packages

You run the stewardship package process at specific intervals or on demand if a donor or constituent requests the information. When you start the process, the program merges the constituent information you selected from the header file to the cover letter merge fields and generates a stewardship report.

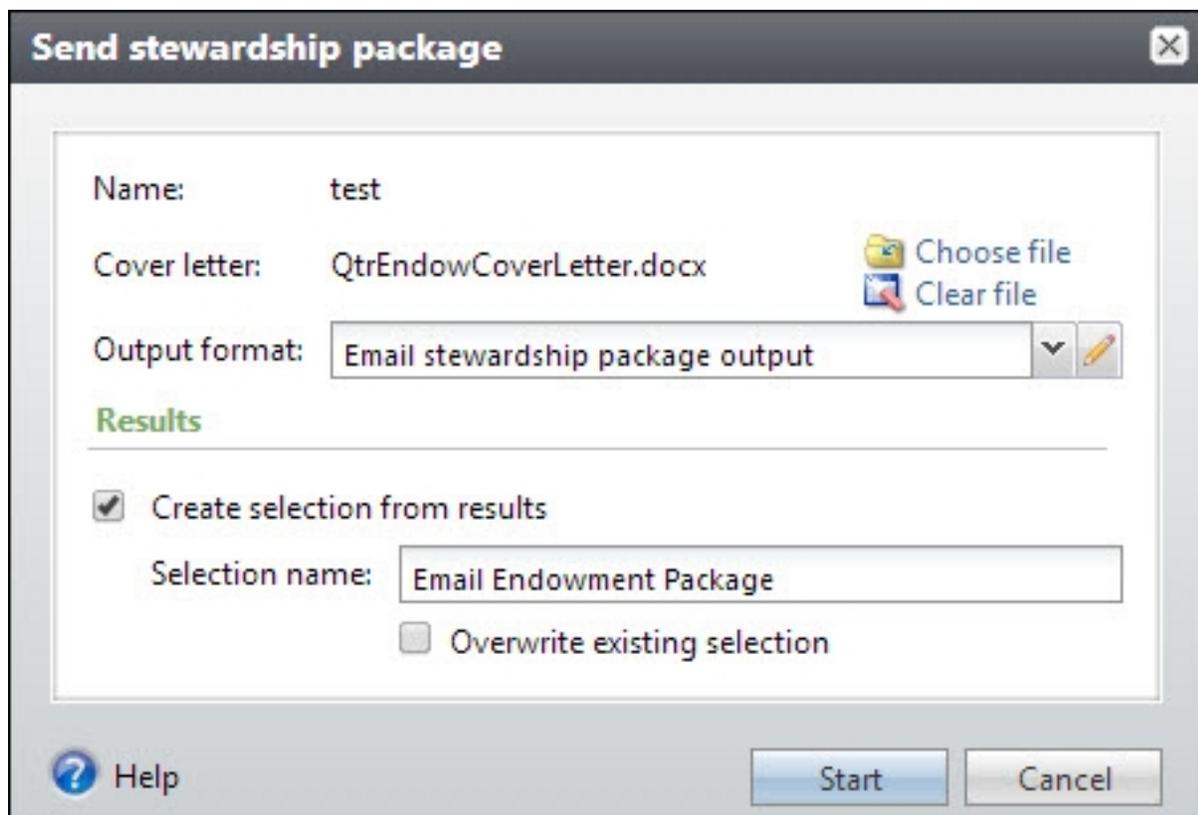
Run Stewardship Package Processes

For fundraising purposes linked to a stewardship package, you can run the stewardship package process to generate cover letters and a stewardship report. To successfully process a stewardship package from a fundraising purpose, the package must have an associated header file and a *Microsoft Word* cover letter that contains merge fields.

From *Communications*, you can configure and manage stewardship packages.

➤ Send a stewardship package

1. From a fundraising purpose, click **Send stewardship package** under **Tasks**. The Send stewardship package screen appears.



The screenshot shows a dialog box titled "Send stewardship package" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Name:** test
- Cover letter:** QtrEndowCoverLetter.docx. To the right are two buttons: "Choose file" (with a folder icon) and "Clear file" (with a trash icon).
- Output format:** A dropdown menu showing "Email stewardship package output" with a downward arrow and an edit icon (pencil).
- Results** section, separated by a horizontal line:
 - Create selection from results
 - Selection name:** Email Endowment Package (text input field)
 - Overwrite existing selection
- At the bottom left is a "Help" button with a question mark icon.
- At the bottom right are "Start" and "Cancel" buttons.

2. Click **Start** to run the package process. The stewardship package process status page appears. For more information about the process status page, see [Stewardship Package Process Status on page 56](#).

Stewardship Package Process Status

The stewardship package process page contains the parameters and properties for the stewardship package merge process. To change this information, click **Edit process**. The process page contains the Recent status, History, and Job schedule tabs.

Recent Status

On the Recent Status tab, you view the details of the most recent instance of the stewardship package process. These details include the status of the run; the start time, end time, and duration of the run; the person who last started the process; the name of the server used to process the run; the total number of packages processed; and how many packages processed successfully and how many were exceptions.

After a process runs, you can use the following links to manage the information generated by the process.

Download output file

To save a copy of the output file, click **Download output file**. A Save as screen appears for you to name your file and browse to a location to save the output file.

Merge cover letter

To merge the constituent information with the cover letter, click **Merge cover letter**. The selected constituent fields merge automatically in *Microsoft Word*. Save the merged cover letter document on your hard drive or network.

Warning: If **Merge cover letter** is disabled, click **Edit process** under **Tasks** and verify you selected a *Microsoft Word* merge file in the **Cover letter** field.

Show report

To view the Stewardship Report, click **Show report**. For information about this report, see [Stewardship Report on page 58](#).

Delete

To delete the most recent instance of the process, click **Delete**.

History

On the History tab, you view the history for each run of the stewardship package process. The details in the grid include the status of the process; the start time, end time, and duration of the process; the person who last started the process; and the name of the server most recently used to process the acknowledgements. An separate entry appears each time you run a stewardship package process.

Each time you run the package process, an entry appears on the History tab. You can select an entry and use the links to manage the information generated by the process.

Download output file

To save a copy of the output file to your hard drive or network, click **Download output** file. A Save as screen appears for you to name your file and browse to a location on your hard drive or network to save the output file.

Merge cover letter

To merge the constituent information with the cover letter, click **Merge cover letter**. The selected constituent fields merge automatically in *Microsoft Word*. Save the merged cover letter document on your hard drive or network.

Warning: If **Merge cover letter** is disabled, click **Edit process** under **Tasks** and verify you selected a *Microsoft Word* merge file in the **Cover letter** field.

Show report

To view the Stewardship Report, click **Show report**.

Delete

To delete the most recent instance of the process, click **Delete**.

Job Schedules

On the Job Schedules tab, you can use the links to manage scheduled run times for each stewardship package process. When you create a job schedule, you specify a frequency and time for the process to run. On the Job Schedules tab, click **Add**.

Create Job Screen

Screen Item Description

Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.

Screen Item Description

Daily frequency	<p>For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.</p> <p>To run a process once, select Occurs once at and enter the start time.</p> <p>To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.</p>
Start date	<p>For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date.</p>

Generate WSF

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate JScript (*.js) or VBScript (*.vbs) routines and include XML elements. On the stewardship package process page, you can select a process and use either JScript or VBScript language to generate a *.wsf file of the process to use with another application. You can use Windows Task Scheduler to schedule tasks to run the exported Windows Scripting File with the selected application.

Note: This is typically completed by the IT Administrator at your organization.

Stewardship Report

The Stewardship Report generated by the stewardship package process includes a giving summary, financial details for the period entered on the Financial Information tab, disbursement information, and fund recipient details. The information you enter in the **Statement** field on the Add a purpose screen appears at the top of the report.

After you run the stewardship package process, click **Show report** on the Recent Status tab. Select the sections to include in the report from **Show sections** on the Stewardship Report page. Then, click **View Report** to generate the report.

Giving Summary

The Giving Summary includes the total amount contributed, the average contribution, the number of contributions, and the number of donors for the period selected. For information about how to view donor details, see [Donor Information on page 39](#).

Financial Information

The information you import or enter on the Financial Information tab of the fundraising purpose appears in the Financial Information section. For information about how to add financial details, see [Financial Information on page 44](#).

Disbursements

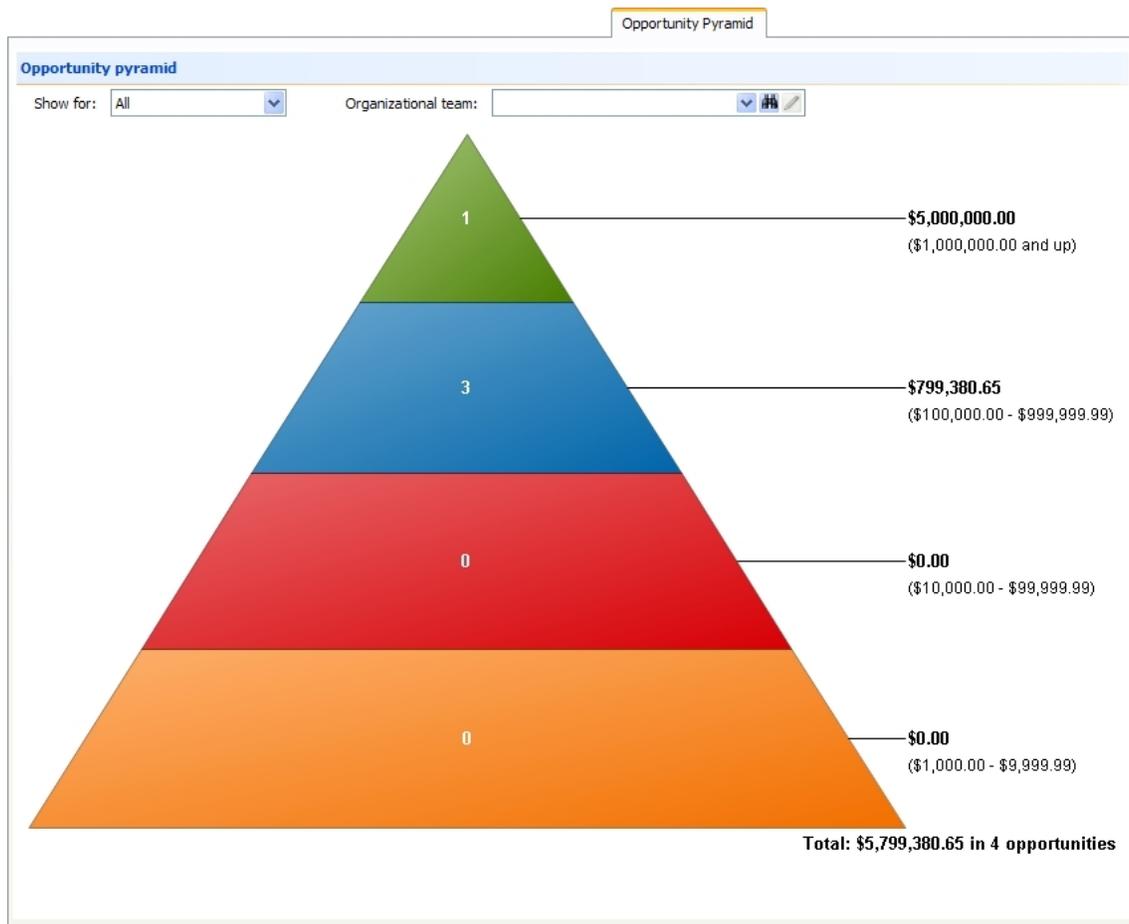
The information you enter in the **Disbursements** grid on the Financial Information tab of the fundraising purpose appears in the Disbursements section. For information about disbursements, see [Financial Information on page 44](#).

Recipients

The fund recipients you select on the Recipients tab of the fundraising purpose appear in the Recipients section. For information about how to add recipients, see [Recipients on page 47](#).

Opportunity Pyramid

The opportunity pyramid is a way to see how many major giving opportunities you have for a particular fundraising purpose or designation. You can view the opportunities by status (qualified, response pending, accepted, or all) or by organizational team. The levels of the pyramid are configured on the Major Giving Setup page in *Prospects*.



To view selected opportunities, select "All," "Qualified," "Response pending," or "Accepted" in the **Show for** field. Use the **Organizational team** field to select a team of fundraisers to view opportunities for.

Gift Fees

Your organization may use a percentage of payment amounts received as a gift fee, for example, to cover operating costs. When your organization enables gift fees, the Gift Fees tab appears on the record of a fundraising purpose. To view and manage the gift fees applied to payments made toward the fundraising purpose, select this tab.

Note: In *Revenue*, you can enable default gift fees and determine the types of revenue to which these fees apply. You can manage default gift fees in *Revenue*.

Some fundraising purposes may require different fees than your organization's default gift fees. Under **Gift fee option**, you can view whether the program applies gift fees to payments made toward the fundraising purpose and the type of payment applications to which the fees apply. You can select whether or not to apply gift fees to this purpose's revenue and edit the applications to which the fees apply.

When gift fees are enabled, you can configure multiple gift fees based on the payment application amount. For example, you may charge a higher fee for larger payment transactions. Under **Gift fees**, you can view and manage the gift fees your organization applies to payments made toward the fundraising purpose.

Edit Gift Fee Options for a Fundraising Purpose

From a fundraising purpose record, you can edit the gift fee options for payments made toward the purpose. You can select to not apply gift fees to these payments or apply the gift fees to only specific payment application types.

Note: You must enable default gift fees in *Revenue* for the Gift Fees tab to appear on a fundraising purpose.

> Edit gift fee options

1. From a fundraising purpose, select the Gift Fees tab.
2. On the **Gift fee options** action bar, click **Edit**. The Edit gift fee options screen appears.
3. Select whether to apply gift fees to payments made toward the fundraising purpose.
When you select **Yes**, select the types of payment applications to which fees apply.
4. Click **Save**. You return to the fundraising purpose record.

Note: To return gift fees to the default settings you defined in *Revenue*, click **Restore defaults** on the Gift Fees tab.

Restore Default Settings for Gift Fee Options

After you edit the gift fee options for a fundraising purpose, you can return the gift fees to the default settings you defined in *Revenue*.

Note: In *Revenue*, you can enable default gift fees and determine the types of revenue to which these fees apply. You can manage default gift fees in *Revenue*.

➤ Restore the default gift fee options

1. From a fundraising purpose, select the Gift Fees tab.
2. On the **Gift fee option** action bar, click **Restore defaults**. A confirmation message appears.
3. Click **Yes**. You return to the fundraising purpose record.

Edit Gift Fees for a Fundraising Purpose

From a fundraising purpose record, you can edit the gift fees applied to payments made toward the selected purpose. You can determine the minimum amount to which the fee applies and the fee amount as a percent.

➤ Edit gift fees

1. From a fundraising purpose, select the Gift Fees tab.
2. On the **Gift fees** action bar, click **Edit**. The Edit gift fees screen appears.
3. For each gift fee, enter the minimum amount of the payment for which to charge the fee and the percentage of the payment amount to apply to the fee. For example, if your organization applies 5% as a gift fee for each donation between \$5 and \$100, enter "\$5.00" in the **Minimum payment amount** column and "5" in the **Gift fee (%)** column.
4. Click **Save**. You return to the fundraising purpose record.

Related Staff

Related staff are constituents who do work associated with and subsidized by a fundraising purpose, or constituents who should be contacted for information about the purpose. You can link these constituents to a purpose from the Related Staff tab.

When you add related staff to a purpose, you assign the staff member to a role and specify the start and end dates for the staff member's assignment. You can also include any additional information about the staff member.

You can edit or delete staff members as necessary. To view more information about a staff member, click the staff name to open the individual or organization's constituent record.

> Add related staff

1. From a fundraising purpose, select the Related Staff tab.
2. Click **Add**. The Add related staff screen appears.
3. In the **Staff** field, enter the constituent to assign as a staff member.
4. In the **Role** field, select a role for the staff member.
5. In the **Start date** and **End date** fields, select a date range for the staff member's assignment.
6. In the **Comments** field, enter any additional information about the related staff member.
7. Click **Save**. You return to the Related Staff tab.

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A campaign represents your organization's planned efforts to raise money for specific programs or causes. You can set goals for each campaign and track the progress your organization makes toward each of these goals over time.

Campaigns

You can associate multiple designations with a campaign. For example, you may have a capital campaign to raise money for both a building fund and a scholarship fund. Campaigns can have goals, as well as priorities and subpriorities. You can associate campaigns with other campaigns to show a hierarchy. Campaigns in a hierarchy offer a consolidated view of progress toward goals. Fundraisers can be associated with campaigns to measure individual or team performance toward goals.

Search for Campaigns

After you add campaigns, you can search for them based on criteria such as **Name** or **Type**, or any combination of the available filters. From the Fundraising page, click **Campaign search**. On the Campaign Search screen, enter criteria to limit the results to a specific campaign and click **Search**. Campaigns that satisfy your criteria appear in the search grid. Choose the campaign you want to open and click **Select**. When necessary, you can add a new campaign from this screen.

Add Campaigns

You can add campaigns to manage your organization's efforts to raise money for specific programs or causes.

When you add a new campaign, it is a top-level campaign in its hierarchy by default. You can add the campaign to the hierarchy of another campaign when necessary. For more information about campaign hierarchies, see [Campaign Hierarchy on page 66](#).

> Add a campaign

1. From *Fundraising*, click **Add a campaign**. The Add a campaign screen appears.
2. Enter a name and description for this campaign.
The description is not required, but if your organization has many campaigns, this information can help you easily identify the campaign you want to select.
3. In the **Lookup ID** field, you can enter a lookup ID that you can type into search screens to find this campaign quickly.
For example if you have a capital campaign that started in 2014, you may want to assign a lookup ID of "14CC. The ID must be unique.
4. In the **Type** field, select the type of campaign to create.

When the campaign is associated with specific sites in your organization, you can select these in the **Sites** field. Administrators can set up security access to campaigns based on site. Any security settings your administrators have established for the sites selected will take effect as soon as you save the campaign.

5. Enter the start and end dates for the campaign.
6. Click **Save**. The campaign page appears.

Campaign Goals

With campaign goals, you can track the overall goal or goals for the campaign and progress towards these goals. A capital campaign, for example, may have two top-level goals: one for the quiet or private phase and one for the public phase. Goals for campaigns in a campaign hierarchy roll up under the goals created for the top-level campaign. For more information about hierarchies, see [Campaign Hierarchy on page 66](#).

When a committee is a fundraiser for a campaign, the goals of the campaign also appear on the committee's Goals tab. However, the campaign goal can be edited only from the campaign, not from the committee.

Note: When the campaign is at the top level of the campaign hierarchy, you can add a goal for the campaign and all campaigns under it in the hierarchy. When the campaign is in the hierarchy of another campaign, you can select which of the primary goals of the top-level campaign to set for the campaign.

To track additional sub-goals, you can use priorities. For more information about priorities and subpriorities, see [Campaign Priorities on page 67](#).

Add Campaign Goals

Goals you add for campaigns in a campaign hierarchy roll up under the goals created for the top-level campaign. Start and end dates for goals can overlap.

➤ Add a top-level campaign goal

1. On the Goals tab of a top-level campaign in the hierarchy, click **Add**. The Add campaign hierarchy goal screen appears.
2. In the **Name** field, enter a name for this campaign hierarchy goal.
3. In the **Amount** field, enter a fundraising goal amount.
4. Enter start and end dates for goals for the top-level campaign.

Tip: When you have multiple goals, start and end dates can overlap. For campaigns underneath another campaign in the hierarchy, the start and end dates default from the top-level campaign.

5. Click **Save**. You return to the Goals tab. Campaigns underneath a top-level campaign in the hierarchy can set goals to count toward this top-level goal.

➤ Add a campaign goal for a sub-campaign

1. On the Goals tab of a campaign that is in the hierarchy of another campaign, click **Add**. The Add campaign goal screen appears.
2. Select which of the primary goals of the top-level campaign to set for the campaign and enter an amount. The start and end dates default from the top-level campaign.
3. Click **Save**. You return to the Goals tab.

Edit Campaign Goals

You can edit top-level campaign goals and as well as goals for a sub-campaign as necessary.

Note: When the campaign is at the top level of the campaign hierarchy, you can edit a goal for the campaign and all campaigns under it in the hierarchy. When the campaign is in the hierarchy of another campaign, you can edit which of the primary goals of the top-level campaign to set for the campaign.

To edit a campaign goal, from the Goals tab of a campaign record, click the double arrows next to a goal to expand its row. From the action bar that appears, click **Edit**. Make any necessary changes and click **Save**. You return to the Goals tab.

Campaign Goal KPIs

With Key Performance Indicators (KPIs), you can quickly view the progress of a campaign toward its goals.

Add Campaign Goal KPIs

You can add Key Performance Indicators (KPIs) to each campaign to track the amount raised towards a campaign goal and determine how to display the results. To add a KPI for a campaign goal, from the Goals tab of a campaign record, click the double arrows next to a goal to expand its row. From the action bar that appears, click **Add KPI**.

Update Campaign Goal KPIs

To update the information in a KPI instance for a campaign goal, from the Goals tab, click the double arrows next to a goal to expand its row. From the action bar that appears, click **Update KPI value**.

Campaign Hierarchy

Campaigns in a hierarchy can offer a consolidated view of progress toward goals. When you add a new campaign, it is a top-level campaign in its hierarchy by default. You can add the campaign to the

hierarchy of another campaign when necessary. The Hierarchy tab only appears on top-level campaign records.

Search for Campaign Hierarchies

After you add campaigns and create hierarchies, you can search for the top-level campaigns in the hierarchies. On the Campaign Hierarchy Search screen, click **Search** to locate the top-level campaigns in the hierarchies that meet your specified criteria. Choose the campaign you want and click **Select**. The Hierarchy tab of the campaign appears.

Add Campaigns to Hierarchy

When you add a new campaign, it is a top-level campaign in its hierarchy by default. You can add the campaign to the hierarchy of another campaign when necessary.

➤ Add a campaign to the hierarchy

1. On the Hierarchy tab of a top-level campaign, click **Edit campaign hierarchy**. The Edit campaign hierarchy screen appears.
2. Select a campaign in the hierarchy and click **Add**. The Campaign Search screen appears.
3. Search for the campaign to nest under the campaign in the hierarchy and click **Select**. The campaign you selected appears on the Edit campaign hierarchy screen.
4. Use the arrows to change the order and the nesting level of the campaigns in the hierarchy.
5. Click **Save**. You return to the Hierarchy tab.

Campaign Priorities

With campaign goals, you can track the overall goal or goals for the campaign and the progress toward these goals. If you want to track additional goals as a subset of the overall goals, you can use priorities. With priorities and subpriorities, you can track additional monetary goals for the campaign. For example, fundraising activity that occurs outside of a campaign may have its own goals.

Note that revenue for a campaign can be associated with a priority.

Add Campaign Priorities

With priorities and subpriorities, you can track additional monetary goals for the campaign. Revenue for the campaign can be associated with a priority.

➤ Add a campaign priority

1. On the Priorities tab of a campaign, click **Add**. The Add campaign priority screen appears.
2. Select the priority type to help identify the priority, or sub-goal, for the campaign.

3. Enter a monetary goal, along with any subpriorities.
You can select subpriorities and enter a goal which will roll up and be counted for the priority.
4. Click **Save**. You return to the Priorities tab.

➤ Add a campaign subpriority

1. On the Priorities tab of a campaign, click the double arrows next to a priority to expand its row. From the action bar that appears, click **Add**. The Add campaign subpriority screen appears.
2. Select a name and a monetary goal for the subpriority.
Subpriorities roll up to count toward the priority.
3. Click **Save**. You return to the Priorities tab.

Campaign KPIs for Priorities and Subpriorities

With Key Performance Indicators (KPIs), you can quickly view the progress of a campaign toward its goals.

Add Campaign Priority KPIs

You can add Key Performance Indicators (KPIs) to each campaign to track the amount raised towards a campaign priority or subpriority and determine how to display the results. To add a KPI, click the double arrows next to a campaign priority or subpriority to expand its row. On the action bar that appears, click **Add KPI**.

Update Campaign Priority KPIs

To update the information in a KPI instance, click the double arrows next to a campaign priority or subpriority to expand its row. From the action bar that appears, click **Update KPI value**.

Campaign Designations

Designations describe how to apply revenue received by your organization. You can associate a campaign with one or more designations. When you enter revenue and select a designation, you can choose which campaigns receive credit. The designations associated with a campaign are default campaigns for the revenue; however, you can select any campaign or campaigns to receive credit. For more information, see [Hierarchies on page 43](#).

On the Designations tab of a campaign, you can add and edit designations.

Add or Edit Campaign Designations

You can associate a campaign with one or more designations.

On the Designations tab of a campaign, click **Edit designations**. The Edit campaign designations screen appears. In the **Designation** column, search for the designation to associate with this campaign. You can then select information about the subpriority and dates to use for the campaign designation. Click **Save**. You return to the Designations tab.

Add Multiple Designations to a Campaign

You can easily assign a group of designations to a campaign.

For example, before your current annual campaign ends, you set up the annual campaign for the upcoming year. Rather than manually add each designation associated with last year's annual campaign to this year's campaign, you can add all the designations at one time. First, you create a query that includes the current annual campaign designations, then save a selection based on the query results. You can then add the designations in the selection to the campaign record for next year's annual campaign.

➤ Add multiple designations to a campaign

Before you can add multiple designations to a campaign, you must create a selection of the designations you want to assign in *Query*.

1. On the Designations tab of a campaign, click **Add multiple designations**. The Add multiple designations screen appears.

Add multiple designations

Selected designations:

Default values

Subpriority: ▼

Date from:

Date to:

Preview

Designation	Subpriority	Date from	Date to

2. In the **Selected designations** field, enter the selection that contains the designations you want to associate with this campaign.

Note: You may add only one instance of a designation to a campaign. When you enter a selection that contains a designation you previously assigned to the campaign, this designation does not appear in the **Preview** section of the Add multiple designations screen.

3. In the **Subpriority** field, select the campaign subpriority to assign to these designations.

When the campaign has subpriorities defined, you can select a specific subpriority or goal to assign to designations added from the selection. When you enter revenue for a designation during the selected date range, this subpriority appears by default.

4. In the **Date from** and **Date to** fields, enter the date to start and stop crediting the designations.

The date range indicates the period in which the campaign can receive credit for revenue associated with the designation. When you enter designation revenue between the dates entered in the **Date from** and **Date to** fields, the campaign and subpriority information appear by default on the Add a payment screen.

5. Click **Save**. You return to the Designations tab.

For information about how to edit the designations associated with a campaign, see [Add or edit designations for a campaign on page 1](#).

Fundraisers and Teams

Fundraisers are members of your organization who help raise money. Fundraisers can be assigned to positions and teams within an organizational hierarchy. You can assign fundraisers and teams to campaigns in order to track their progress toward the campaign goals.

A team goal may be different than the sum of the goals for all members on a team. To be able to track goals for teams and individuals within a team, you can use both the Fundraisers and Teams tabs.

Add All Fundraisers from an Organization Hierarchy Team

You can assign individual fundraisers to a campaign in order to track the fundraiser's progress toward the campaign goals. You can add fundraisers one at a time or by team. For more information on how to add individual fundraisers, see [Add Individual Fundraisers on page 71](#).

Note: When you want to track a fundraising team's performance for the campaign, you can add the team. For more information, see [Add Organization Hierarchy Team of Fundraisers on page 73](#).

➤ Add all fundraisers from a team

1. On the Fundraisers tab of a campaign, click **Add, Fundraisers from team**. The Add campaign fundraiser from team screen appears.
2. Select a team. Teams are defined through the Organization Hierarchy in *Administration*.

3. When necessary, enter a **Start date** and **End date** for the team's association with this campaign.
4. Click **Save**. You return to the Fundraisers tab.

The fundraisers for the team you selected are now associated with the campaign.

Add Individual Fundraisers

You can assign individual fundraisers to a campaign in order to track the fundraiser's progress toward the campaign goals. You can add individual fundraisers one at a time or by team. For more information on how to add all the fundraisers from a team, see [Add All Fundraisers from an Organization Hierarchy Team on page 70](#).

Note: To track a fundraising team's performance for the campaign, you can add the team, not just the individual team members. For more information, see [Add Organization Hierarchy Team of Fundraisers on page 73](#).

➤ Add an individual fundraiser

1. On the Fundraisers tab of a campaign, click **Add, Fundraiser**. The Add a campaign fundraiser screen appears.
2. Select a fundraiser. You can also select a position and task for the fundraiser.
3. When necessary, enter a start and end date for the fundraiser's association with this campaign.
4. Click **Save**. You return to the Fundraisers tab.

The fundraiser you selected is now associated with the campaign.

Add Fundraiser Committees

You can assign committees as fundraisers to a campaign. When a committee is a fundraiser, the campaign goals also appear on the Goals tab of the committee record. However, the campaign goal can be edited only from the campaign, not from the committee.

You can add and manage committees in *Constituents*.

➤ Add a fundraiser committee

1. On the Fundraisers tab of a campaign, click **Add, Committee**. The Add committee as campaign fundraiser screen appears.
2. Select a committee. You can also specify a position and task for the committee.
3. When necessary, enter a start and end date for the committee's association with this campaign.
4. Click **Save**. You return to the Fundraisers tab.

The committee you selected is now associated with the campaign.

Add KPI

Key Performance Indicators track your organization's strategic performance. You can create KPIs to help you track your fundraisers' performances based on the campaigns associated with a fundraiser.

➤ Add KPI to a fundraiser record

1. From the Fundraisers tab of the Campaign record, click the double arrows next to a fundraiser to expand its row. From the action bar that appears, click **Add KPI**. The Add a KPI screen appears.
2. Enter the information to include in the results.

For information about how to create a KPI instance, see the *Reports and KPIs Guide*.

Update KPI Value

After you create an instance, you can generate the KPI values associated with the instance settings whenever necessary.

➤ Update KPI value from Fundraiser record

1. From the Fundraisers tab of the campaign record, click the double arrows next to a fundraiser to expand its row. From the action bar that appears, click **Update KPI value**. The Update KPI screen appears.
2. To view data based on the current date, select **Process once using current date**. This creates one history record relative to the current date.

To enter specific date information, complete the following steps:

- a. Select **Back-date**. This creates several history records relative to the date determined by the interval provided, such as "every 3 months" or "every 7 days." For example, back-dating a KPI between 1/1/2013 and 1/1/2014 with an interval of every 3 months creates four history records. One for each quarter.

Note: Back dating is typically used for new KPI instances when trend information does not exist. After you create a KPI instance, you will most likely update it by scheduling a business process. Each time the process runs, a new KPI instance history record is created as of the date the process ran. For more information, see [Add KPI on page 72](#).

- b. In the **From** field, enter the start date from which you want to view data.
- c. In the **To** field, enter the end date to which you want to view data.
- d. In the **Calculate value every** field, select how you want the data calculated. For example, if in the **From** and **To** fields you select to view data for one year, in the **Calculate value every** fields, you can select to view information for every three months.

Warning: Back-dating a KPI erases any values that fall within the specified date range previously stored for the selected KPI instance.

3. Click **Start**. The KPI page appears.

Add Organization Hierarchy Team of Fundraisers

You can assign teams of fundraisers to campaigns in order to track their progress toward the campaign goals.

Note: When you want to track individual campaign fundraisers and their performance, you can add them on the Fundraisers tab. For more information, see [Add Individual Fundraisers on page 71](#).

> Add a team

1. On the Teams tab of a campaign, click **Add**. The Add organizational team screen appears.
2. Select a team.

Note: An organizational team is a selected group of positions in the organization hierarchy for which development managers usually want to analyze fundraising or performance data. You configure these teams in *Administration*. From the Administration page, click **Organization hierarchy** to view and manage the hierarchy and organizational teams. For more information about organizational teams, see the *Administration Guide*.

3. Click **Save**. You return to the Teams tab.

The team you selected is now associated with the campaign.

Manage Team KPIs

With Key Performance Indicators (KPIs), you can quickly view the progress of teams of fundraisers toward campaign goals. From the Teams tab, click the double arrows next to a team to expand its row. From the action bar that appears, click **Manage KPIs** to access KPI instances for the team.

Major Giving

Plan opportunities are ask opportunities associated with a specific prospect plan. Opportunities associated with the campaign are displayed on the Major Giving tab of the campaign. Planned or legacy gifts associated with the campaign are also displayed. Plans and opportunities are created and managed in *Prospects*.

Campaign Naming Opportunities

Naming opportunities are a means to recognize donors for their gifts by adding the individual's name, or a name of their choice, to a physical location such as a building, bench, or walkway. Or, your organization may include the donor's name, or a name of an individual or organization the donor chooses, in the name of a fundraising purpose, such as the Jonathan D. Silas Building Fund. Naming opportunities you associate with a campaign appear on the Naming Opportunities tab of the campaign record. For more information about this type of donor recognition, see [Naming Opportunities on page 75](#).

Snapshots

When you run a campaign report, you can save the report's parameter settings and create a snapshot of the information from the Report Explorer.

The snapshot provides a read-only view of the report's results. It does not include information added or changed after you take the snapshot. You can use snapshots to get a quick view of a campaign's performance over time. For example, when you create a snapshot each year of the primary goals for your top-level campaigns, you can compare these results to the same information for the current year. From the campaign record, you can view any report snapshots available for the campaign from the Snapshots tab.

For more information about snapshots and report explorer, see the *Reports and KPIs Guide*.

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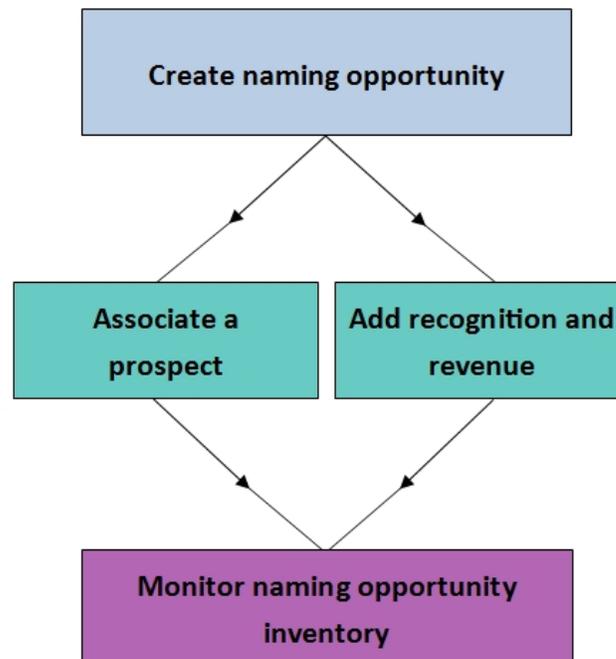
Naming opportunities enable you to raise funds and provide constituents the chance to have their names placed in a physical location or on a fundraising purpose. Smaller-value, higher-volume opportunities may include bricks in a courtyard or seats in an auditorium. Higher-value, lower-volume opportunities may include buildings or exhibits. With naming opportunities, you can track information about opportunities and the donors who receive recognition.

Naming Opportunities Workflow

The naming opportunity workflow begins when an organization creates a naming opportunity as a means to raise funds, and ends when a gift has been collected and the donor has been recognized by having their name or the name of their choice associated with a physical location or a fundraising purpose.

Naming Opportunities for Major Gifts

You create naming opportunities in *Fundraising*. After you create a naming opportunity, you associate it with a fundraising purpose. As an option, you can also add a facility, such as a library on a college campus, to the naming opportunity.



Create Naming Opportunity

To help raise funds, your organization may provide constituents the opportunity to be recognized for donations. When an organization creates the naming opportunity, you must decide on information such as the location of the opportunity, minimum donation amount, and how many recognitions to offer.

Associate a Prospect with a Naming Opportunity

You can create an inventory of naming opportunities and add appropriate opportunities to the prospect plans of likely donors.

Add Recognition and Revenue to the Naming Opportunity

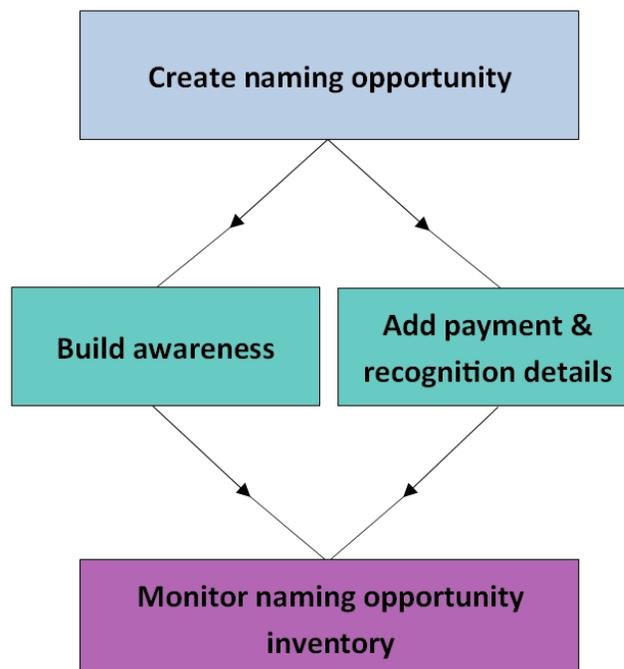
After the donor accepts a major giving opportunity with an associated naming opportunity, you determine how to recognize the donor, for example, "In honor and gratitude of Dianne A. Ziegler."

Monitor Naming Opportunity Inventory

You can generate reports to monitor how many recognitions have been made and how many are still available.

Naming Opportunities for Smaller Gifts

You create naming opportunities in *Fundraising*. After you create a naming opportunity, you associate it with a fundraising purpose. As an option, you can also add a facility, such as a library on a college campus, to the naming opportunity.



Create Naming Opportunity

To help raise funds, your organization may provide constituents the opportunity to be recognized for their donations in a physical location, such as bricks in a courtyard. When you create the naming opportunity, you must decide on information such as the location of the opportunity, minimum donation amount, and how many recognitions to offer.

Build Awareness of the Naming Opportunity

To target donors for a naming opportunity with a smaller gift amount, consider who might be interested and build awareness to inform constituents.

Add Payment and Recognition Information

Donors whose gifts qualify them for the naming opportunity can specify the inscription or name used for recognition.

Monitor Naming Opportunity Inventory

You can generate reports to monitor how many recognitions have been made and how many are still available.

Naming Opportunities Management

Once you create a naming opportunity and associate it with a fundraising purpose, you can edit the opportunity, delete it, or mark the opportunity as inactive.

Search for Naming Opportunities

To search for naming opportunities, click **Naming opportunity search** in *Fundraising*.

From the Naming Opportunity Search screen, to locate a specific naming opportunity, you can base your search on criteria such as name, facility, or fundraising purpose. To locate the naming opportunity that meets your criteria, click **Search**.

All naming opportunities that satisfy your criteria appear in the **Results** grid. Choose the naming opportunity to view and click **Select**. When necessary, you can add a new naming opportunity from this screen.

Add Naming Opportunities

When you add a naming opportunity, you associate it with a fundraising purpose. The naming opportunity can be tracked from a fundraising purpose record.

> Add a naming opportunity

1. From the Fundraising page, click **Add a naming opportunity**. The Add a naming opportunity screen appears.

Add a naming opportunity

General

Name: 2015 Courtyard Bricks

Description:

Type: [dropdown]

Quantity: 1

Minimum gift amount: \$500.00

Location

Facility: [lookup]

Contact: [lookup]

Site: [dropdown]

Fundraising

Fundraising purpose: Botanical Garden Fund [lookup]

Campaign: ANNUAL [lookup]

Comments:

Special handling:

Help Save Cancel

2. Enter a name and short description for the naming opportunity. The name you enter appears on associated records and reports.
3. In the **Type** field, select the type of opportunity.
4. In the **Quantity** field, enter the total number of opportunities available.
5. In the **Minimum gift amount** field, enter the minimum gift amount a constituent must donate to qualify for the naming opportunity.

Tip: The Recognition History tab on the naming opportunity record displays constituents who qualified for and received the opportunity.

6. Select a facility where the naming opportunity is located as well as the fundraiser who will manage this naming opportunity.
7. When the naming opportunity is associated with a specific site, you can select it in the **Site** field.

Administrators can set up security access to naming opportunities based on site. Any security settings established for the site you select take effect for this naming opportunity as soon as you save it.

8. Specify which campaign and fundraising purpose to associate with the naming opportunity.
9. Enter any comments or special handling instructions about the naming opportunity.
10. Click **Save**. The naming opportunity record appears.

Naming Opportunity Recognition

The Recognition History tab on the naming opportunity record displays information about constituents who qualified for and received the opportunity, as well as information such as the recognition date and donation amount.

You can also add recognition from the Recognition History tab. When revenue already exists, you can link to it and add the naming opportunity recognition. When revenue does not exist, you can link the naming opportunity recognition to a constituent. For example, you may want to honor a long-time volunteer.

Naming Opportunity Recognition Search

After you create naming opportunities, and constituents contribute to the opportunities, you can use the Naming Opportunity Recognition Search to locate these constituents.

You can search for constituents by name or by naming opportunity. To access the naming opportunity search, click the binoculars in the **Naming opportunity** field.

After you have entered your search criteria, click **Search**. The naming opportunity recognitions that meet the criteria appear in the **Results** grid.

Add Recognition

You can add a naming opportunity recognition from the Recognition History tab. When revenue already exists, you can link to it and add the naming opportunity recognition. When revenue does not exist, you can link the naming opportunity recognition to a constituent. For example, you may want to honor a long-time volunteer.

Tip: You can add naming opportunity recognitions to new revenue records from *Revenue*.

➤ Add a naming opportunity recognition

1. From the Recognition History tab of a naming opportunity, click **Add**. The Add a naming opportunity recognition screen appears.
2. When the revenue already exists, select **Revenue** and search for the revenue application to link to the naming opportunity recognition. When you want to give the naming opportunity recognition to a constituent without linking it to a revenue application, select **Constituent** and search for the constituent.

Note: You can link new revenue to the naming opportunity and create recognition when you add the revenue.

3. When you select **Link opportunity to Revenue**, the constituent defaults from the revenue application you selected. You can change it, when necessary.
4. When you select **Link opportunity to Constituent**, the constituent defaults from the constituent you selected and cannot be changed.

5. Under **Recognition name**, you can select **Name format** and choose the name format to use for the recognition, such as "Mr. Mark D. Adamson III." Or you can select **Specific name** to enter the name as it is to appear on the naming opportunity, such as "In honor of Mark."
6. Enter the start and end dates for the recognition.
7. In the **Recognition amount** field, enter the amount of the revenue transaction.
8. **Quantity available** displays the number of how many of these naming opportunities are available.
9. In the **Quantity** field, enter the number of opportunities associated with this recognition.
10. In the **Inscription** field, enter the message to appear on the naming opportunity, if any.
11. In the **Special request** field, enter any special requests associated with the naming opportunity.
12. **Click Save**. You return to the Recognition History tab.

Recognition Page

On the General tab of the Recognition page, you can edit comments about the naming opportunity recognition and also view revenue associated with the recognition. When revenue is associated with the naming opportunity recognition, the revenue displays.

To access this page, from the Recognition History tab of a naming opportunity, click the recognition name.

Installed Locations

From the Installed Locations tab on the Recognition page, you can add information related to the physical placement of a naming opportunity.

Edit Installed Locations

You can edit installed locations at any time. From the Installed Locations tab, click **Edit**. The Edit installed locations screen appears.

You can edit the specific location where the constituent's name is placed for recognition. You can also add the type of item that the constituent name appears on, such as "Building." Select the current status of the creation and placement of the named item, such as "Installed" or "Ordered," and enter the date.

Click Save. You return to the Installed locations tab.

Naming Opportunity Prospects

The Prospects tab on a naming opportunity record displays prospects you targeted for this naming opportunity. Once you associate a naming opportunity with a prospect plan, the prospect appears on this tab.

Documentation

On the Documentation tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track notes about your records.

> Add a note

1. Go to the Documentation tab of a record.
For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

Add a Note Screen

Screen Item	Description
Type	Select the type of note. The system administrator configures note types.
Date	Enter the date of the note.
Title	Enter the title, or purpose, of the note.
Author	To search for an author, click the magnifying glass. A search screen appears.
Notes	Enter the content of the note.

Edit Notes

On the Documentation tab, you can edit notes as necessary.

> Edit a note

1. Go to the Documentation tab of a record.
For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click the double arrows beside a note and click **Edit**. The Edit note screen appears.
3. Make changes as necessary to the note type, date, title, author, or note content.
4. Click **Save**. You return to the Documentation tab.

Delete Notes

After you add notes to the Documentation tab, you can delete notes when necessary.

> Delete a note

1. Go to the Documentation tab of a record.
For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click the double arrows beside a note and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

Notifications

Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you may want all users to receive a notification when they open the record of a board member.

Notifications are not available for every record type. They are available only for:

- Bank Account Adjustment records
- Bank Account Deposit records
- Bank Account Deposit Correction records
- Constituent records
- Event records
- Membership records
- Planned Gift records
- Research Group records
- Revenue records

Notifications appear on the information bar of a record.

Robert Hernandez

Notifications: "Board member". Click here for more information.

Individual **Lookup ID: 8-10024918**

Constituencies: Friend Major donor Event registrant

Personal Information	Contact Information	Addresses
 Robert Hernandez Nickname: Robert Maiden:	Primary phone +1 843-312-2991 (Home) Primary email + Primary email	1003 Cedar St Elizabeth City, NC 27909-3701 (Current)

Primary Relationships	Documentation and Interactions	Memberships
Spouse + Spouse Household + Add to household Primary business	Notes: 1 + Note Media links: 0 + Media link Attachments: 0 + Attachment Interactions: 3 + Interaction	ID: Status: Expiration: Level: Member since:

Note: Notifications for constituents also appear in the Constituent Window of a revenue batch.

You can also set notifications to appear on a separate screen when a record is accessed. The notification screen appears the first time a record is accessed during a session. If you leave the record and return within 60 minutes, the notification screen does not appear again. However, if you return after more than 60 minutes, the notification screen appears again.



You can create notifications for groups of records in *Administration*. You can also create notifications for a specific record from the Documentation tab of the record.

Add Notifications to Specific Records

On the Documentation tab, you can add a notification to a note on a record. First, you select or create a note with the notification's message. Then you add the notification to the note.

> Add a notification

1. Go to the Documentation tab of a record.

For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

2. Select a note to use for the notification. The note's title and text appear as the notification.

Note: You must add a note to the record before you can add a notification.

3. Click **Add notification**. The Add notification screen appears.

4. Select how long to display the notification, whether to display it in a notification window, and the users who view the notification.
5. Click **Save**. You return to the Documentation tab.

Edit Notifications for Specific Records

After you add a notification to a record, you can edit its properties on the Documentation tab. You can change how long to display the notification and who views it. To edit the notification's content, you edit the note associated with the notification.

> Edit a notification

1. Go to the Documentation tab of a record.
For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click the double arrows beside the note with the notification and click **Edit notification**. The Edit notification screen appears.
3. Make changes as necessary to the notification, such as how long to display it and who views it.

Note: To edit the notification title or content, edit the note itself.

4. Click **Save**. You return to the Documentation tab.

Delete Notifications from Specific Records

On the Documentation tab, you can delete a notification when you no longer need it.

Note: For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

To remove a notification from a record, click the double arrows beside the note with the notification to remove and click **Delete notification**.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

> Add a media link

1. Go to the Documentation tab of a record.
For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Add a Media Link Screen

Screen Item	Description
Type	Select the type of media link. The system administrator configures media link types.
Date	Enter the date of the media link.
Title	Enter the title, or purpose, of the link.
Author	To search for an author, click the binoculars. A search screen appears.
Media URL	Enter the URL for a website.

Edit Media Links

You can edit the URL for a website.

> Edit a media link

1. Go to the Documentation tab of a record.
For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

2. Click the double arrows beside a media link and click **Edit**. The Edit media link screen appears.
3. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

> Delete a media link

1. Go to the Documentation tab of a record.
For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click the double arrows beside a media link and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

> Add an attachment

1. Go to the Documentation tab of a record.
For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click **Add attachment**. The Add an attachment screen appears.
3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Add an Attachment Screen

Screen Item Description

Screen Item	Description
Type	Select the type of attachment. The system administrator configures attachment types.
Date	Enter the date of the attachment.
Title	Enter the title, or purpose, of the attachment.
Author	To search for the author, click the binoculars. A search screen appears.
File	To locate the attachment, click Choose file . To view an attachment, click Open file . To remove an attachment, click Clear file .

Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

➤ Edit an attachment

1. Go to the Documentation tab of a record.
For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click the double arrows beside an attachment and click **Edit**. The Edit attachment screen appears.
3. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. To select a different file, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

➤ Delete an attachment

1. Go to the Documentation tab of a record.
For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.
2. Click the double arrows beside an attachment and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment.

Note: For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

Click the double arrows beside the attachment and click **Open file**.

Donor Challenges

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A donor challenge is a fundraising tool to help increase support for a specific cause. A major donor or corporate sponsor can pledge a large sum to challenge the organization to raise a specific amount from other donors. A donor challenge can have an internal sponsor rather than an external one. For example, the president's office can challenge the organization to raise an amount that the department

will match. The program includes two types of donor challenges: "Match per gift" and "Lump sum match."

With "Match per gift" challenges, the sponsor matches gifts multiple times during the course of the challenge. Donors receive recognition credit for the matching challenge funds, and you select the type of recognition credit to use. The matching funds go to the same designation as the gifts unless you specify otherwise in the designation mapping on the Designations tab of the donor challenge record. For individual donors to receive recognition credit for matching challenge funds, the challenge type must be "Match per gift."

With "Lump sum match" challenges, the sponsor pays a lump sum after the challenged amount is raised. Individual donors do receive recognition credit for the matching challenge funds. The matching funds go to the designations you select when you add the challenge.

Add Donor Challenges

Before you add a donor challenge, you must have basic information, such as the funding source and sponsor, start and end dates, and challenge type. The program includes two types of donor challenges: "Match per gift" and "Lump sum match."

> Add a donor challenge

1. From *Fundraising*, click **Add a donor challenge**. The Add a donor challenge screen appears.

2. Enter a name for the challenge.
3. In **Funding source**, select "Internal" or "External." For example, a challenge issued by a major donor would be external, whereas a challenge issued by an endowment at your organization would be internal.
4. In **Funding sponsor** for external funding sources, search for the sponsor.

In **Funding sponsor** for internal funding sources, select or enter the name of the sponsor. For internal funding sources, can add entries directly to this field.

5. Enter start and end dates for the challenge.

Warning: Donor challenges cannot be open-ended; you must specify start and end dates. After the challenge's end date has passed, the challenge is considered inactive.

6. When this donor challenge applies to a specific site in your organization, you can select it. Other sites in your organization will not be able to view the challenge.

7. In **Pay pledges within**, specify when pledges payments must be paid to qualify for the challenge.

Pledge payments for pledges associated with schedules outside the time frame are not eligible for the challenge.

8. Enter a description for the challenge.

9. In the **Type** field, select the type of donor challenge: "Match per gift" or "Lump sum match."

With "Match per gift" challenges, the sponsor matches gifts multiple times during the course of the challenge. Donors receive recognition credit for the matching challenge funds, and you select the type of recognition credit to use. The matching funds go to the same designation as the gifts unless you specify otherwise in the designation mapping on the Designations tab of the donor challenge record. For individual donors to receive recognition credit for matching challenge funds, the challenge type must be "Match per gift."

With "Lump sum match" challenges, the sponsor pays a lump sum after the challenged amount is raised. Individual donors do receive recognition credit for the matching challenge funds. The matching funds go to the designations you select when you add the challenge.

10. In the **Total funds** field, enter the total amount of the matching challenge funds.

11. In the **Matching portion** field, select whether to match the full gift amount or the tax-deductible portion only.

12. In the **Min gift amount** field, enter the minimum gift amount that receives a match. When the donor challenge matches any gift, no matter how small, leave this as zero.

13. In the **Max match per gift** field, enter the maximum gift that receives a match.

For example, some challenges may limit how much to match for individual gifts, so gifts above the limit are matched at the maximum match amount.

The program interprets "0" as blank. When there is no maximum, leave the field set as zero.

14. In the **Recognition credit** field, for "Match per gift" donor challenges, select the type of recognition credit to use when the donor gets credit for the matching challenge funds. For the individual donor to receive recognition credit for the challenge funds, the challenge type must be "Match per gift."

15. In the **Matching designation** field, for "Lump sum match" donor challenges, select the designations for the lump sum payment of the matching challenge funds.

16. You can include all payment types as eligible for the donor challenge, or you can exclude specific payment types, such as memberships.

17. Click **Save**. The Donor Challenge page appears.

Search for Donor Challenges

After you add donor challenges, you can search for them based on criteria such as name or type. From *Fundraising*, click **Donor challenge search**. On the Donor Challenge Search screen, enter criteria for the donor challenge and click **Search**. The donor challenges that meet your criteria appear. Choose the challenge and click **Select**. When necessary, you can add a donor challenge from this screen. Inactive challenges are ones with end dates in the past.

Donor Challenge Record

After you add a donor challenge, you can manage details, such as the criteria for eligible revenue. The summary view displays information about the funds that are encumbered. Funds are encumbered when they are eligible for the challenge. The summary view also displays the revenue approved as matches for the challenge, in addition to the available challenge funds remaining.

Edit Donor Challenge Details

When necessary, you can edit basic information about a donor challenge.

From a donor challenge record, select the Challenge Details tab and click **Edit**. The Edit donor challenge screen appears. Make any necessary changes and click **Save**. You return to the donor challenge record.

Note: After you add a challenge, you cannot change the challenge type.

Update Donor Challenge

On a donor challenge record, when you click **Update donor challenge** under **Tasks**, the program searches for any revenue that matches the challenge criteria encumber (or set aside) the funds. After the task runs, any qualified revenue appears on the Encumbered Funds tab. You can then approve the match for the encumbered funds. After you approve the match, the revenue moves to the Matched Funds tab.

Note: Qualified pledges are also encumbered. When the corresponding pledge payments are added, they are encumbered and can be approved and moved to the Matched Funds tab.

Typically, your organization sets up the Update donor challenge process to run automatically at regular intervals. Only when the challenge is close to being met would you need to run the process manually to check for revenue. For more information, see [Update Donor Challenge Business Process on page 99](#).

Encumbered Funds

Revenue is considered encumbered when it meets the donor challenge criteria. The Encumbered Funds tab displays all revenue that is eligible for the donor challenge. Your organization should set up

the Update donor challenge business process to search for eligible revenue; however, you can add revenue to the list manually as well. For more information, see [Update Donor Challenge Business Process on page 99](#).

Note: Qualified pledges can also be encumbered. When the corresponding pledge payments are added, they can be encumbered and can then be approved and moved to the Matched Funds tab.

You can manually encumber any revenue for the challenge. After you review the encumbered funds and approve the matches, the funds move to the Matched Funds tab.

From the Encumbered Funds tab, you can edit the match details for encumbered funds. You can also manually remove funds that you do not want to include in the challenge.

Add Eligible Revenue to the Challenge

The Update donor challenge business process searches for eligible revenue, but you can also manually add any revenue to the Encumbered Funds tab. When you encumber revenue manually, you can override the donor challenge criteria.

Qualified pledges can also be encumbered. When the corresponding pledge payments are added, they can be encumbered and can then be approved and moved to the Matched Funds tab.

Note: For more information on the Update donor challenge business process, see [Update Donor Challenge Business Process on page 99](#).

> Encumber funds manually

1. On the Encumbered Funds tab of a donor challenge record, click **Add, Gift**. The Add gift screen appears.
2. In the **Gift** field, search for the revenue to add.
3. Click **Save**. The revenue appears on the Encumbered Funds tab.

The revenue is encumbered and included in the **Encumbered funds** field in the summary view.

Add Reserved Funds

A constituent may ask to participate in a challenge, but without making a payment or signing a formal pledge agreement. In this case, you can add reserved funds as a placeholder for the constituent. The encumbered amount you enter for the constituent is counted in the **Encumbered funds** field in the summary view.

To add reserved funds, click **Add, Reserved funds** on the Encumbered Funds tab. Select the constituent and enter the amount to encumber.

Note: After you enter a pledge or the revenue you reserved for the challenge, you must manually delete the reserved funds. Challenge funds held in reserve are not available for other gifts until you remove the reserved funds.

Edit Eligible Encumbered Revenue

You can edit match details for eligible gifts on the Encumbered Funds tab of a donor challenge record. From the tab, click the double arrows next to a gift to expand its row. From the action bar that appears, click **Edit**. The Edit donor challenge match screen appears.

You can edit the encumbered amount, as well as the encumbered designation (Lump sum match) or Recognition credit (Match per gift). Edit the information as necessary and click **Save**. Changes to the encumbered amount are reflected in the Encumbered funds total in the summary view.

Approve Eligible Revenue

After funds are encumbered for a donor challenge, you must approve the matches for the funds to be officially counted, and for donor challenge claims to be entered. After you approve the eligible funds, the revenue moves to the Matched Funds tab.

Remove Eligible Encumbered Revenue

If you decide an encumbered gift should not be eligible for the challenge, you can manually remove it. For example, you may cultivate a major gift for several years, prior to a donor challenge. When you receive that major gift revenue, it might meet the criteria for the challenge, but you may want to manually remove it so it is not counted toward the challenge and doesn't use the matched funds.

To remove encumbered funds, from the Encumbered Funds tab, click the double arrows next to a gift to expand its row. From the action bar, click **Remove gift**. The gift is removed and is no longer counted in the **Encumbered funds** field in the summary view. To view the gifts that you removed, change the filter on the Encumbered Funds tab to include "Removed" and click **Apply**. You can re-encumber the gift when necessary. For more information, see [Re-encumber Revenue on page 95](#).

Re-encumber Revenue

When you remove revenue on the Encumbered Funds tab, you can re-encumber it. Change the filter on the Encumbered Funds tab to include "Removed" and click **Apply**. Click the double arrows next to the revenue to re-encumber to expand its row. From the action bar that appears, click **Encumber gift**. The revenue is re-added and is now counted in the **Encumbered funds** field in the summary view.

Matched Funds

The Matched Funds tab displays all revenue approved as matches for the donor challenge. For "Match per gift" challenges, when you approve a match, you can enter revenue from the external challenge sponsor as a donor challenge claim payment.

Remove Matched Funds

You can remove an approved match from the challenge unless you added a donor challenge claim payment for the match. On the Matched Funds tab, click the double arrows next to the revenue to expand its row. From the action bar that appears, click **Remove match**.

Designations for Donor Challenges

On the Designations tab for a donor challenge record, you select the designations that qualify for the donor challenge. Only revenue for those designations is considered eligible by the Update donor challenge process. However, you can manually add revenue to the challenge when it doesn't meet the criteria.

For a "Match per gift" challenge, you also define the designation mappings for the matching funds on the Designations tab. You may want matching revenue to go to the same designation as the original revenue. However, you can map eligible revenue to different designations. For example, when the challenge's sponsor wants the matching revenue to go to the "Memorial garden" designation, you can map the matching revenue to the "Memorial garden" designation. The donor might make a gift to the "Building fund" designation, but the challenge's matching revenue goes to the "Memorial garden" designation.

For a "Lump sum match" challenge, you select the designation that receives the challenge's matching revenue when you add the challenge. On the Designations tab, you select which designations are eligible for the challenge.

Associate Designations with Challenges

For donor challenges, you select which designations qualify or are eligible for the challenge. For "Match per gift" challenges, you must also select the designations to use for the challenge's matching revenue. You can add designations to a challenge one at a time or use selections of designations.

➤ Add a designation for a "Match per gift" challenge

1. From a donor challenge record, select the Designations tab.
2. Click **Add, Designation**. The Add designation mapping screen appears.
3. In the **Original gift designation** field, enter the designation which qualifies for the challenge. Revenue with this designation is eligible for the challenge.
4. In the **Matching funds designation** field, enter the designation that receives the challenge's matching revenue. When revenue from the challenge sponsor is entered through a donor challenge claim, it uses this designation.
5. Click **Save**. You return to the Designations tab.

➤ Edit a designation for a "Match per gift" challenge

1. From a donor challenge record, select the Designations tab.

2. Click the double arrows next to a designation to expand its row. From the action bar that appears, click **Edit**. The Edit designation mapping screen appears.

Note: You cannot edit designations for "Lump sum match" challenges. When a designation no longer applies, you must delete it from the challenge.

3. In **Original gift designation**, the designation which qualifies for the challenge is displayed. Revenue with this designation is eligible for the challenge.
4. In **Matching funds designation**, enter the designation that receives the challenge's matching revenue. When revenue from the challenge sponsor is entered through a donor challenge claim, it uses this designation.
5. Click **Save**. You return to the Designations tab.

➤ Add a designation for a "Lump sum match" challenge

1. From a donor challenge record, select the Designations tab.
2. Click **Add, Designation**. The Add an eligible designation screen appears.
3. In **Original gift designation**, enter the designation which qualifies for the challenge. Revenue with this designation is eligible for the challenge.

Note: When you create "Lump sum match" challenges, you select the designation that receives the challenge's matching revenue when you add the challenge. On the Designations tab, you simply specify the designations that qualify for the challenge.

4. Click **Save**. You return to the Designations tab.

Add Selections of Designations

For donor challenges, you select which designations qualify or are eligible for the challenge. For "Match per gift" challenges, you must also select the designations to use for the challenge's matching revenue. To handle large numbers of designations, you can add them by using selections of designations.

➤ Add a selection of designations for a "Match per gift" challenge

1. From a donor challenge, select the Designations tab.
2. Click **Add, Selection**. The Add designations screen appears.
3. Search for the selection of designations that qualify for the challenge.
4. In the **Default matching designation** field, enter the designation that receives the challenge's matching revenue. When you enter revenue from the challenge sponsor through a donor challenge claim, it uses this designation.
5. Click **Save**. You return to the Designations tab.

➤ Add a selection of designations for a "Lump sum match" challenge

1. From a donor challenge record, select the Designations tab.

2. Click **Add, Selection**. The Add eligible designations screen appears.
3. Search for the selection of designations that qualify for the challenge. Revenue with any of these designations is eligible for the challenge.

Note: When you create "Lump sum match" challenges, you select the designation that receives the challenge's matching revenue when you add the challenge. On the Designations tab, you simply specify the designations that qualify for the challenge.

4. Click **Save**. You return to the Designations tab.

Memberships for Donor Challenges

The Memberships tab displays memberships, if any, which qualify for the donor challenge. Revenue associated with memberships are eligible and appear on the Encumbered Funds tab with the Update donor challenge process.

Associate Memberships with Challenges

For donor challenges, you can specify which memberships qualify or are eligible for the challenge.

> Associate a membership with a challenge

1. From a donor challenge record, select the Memberships tab.
2. Click **Add**. The Add membership mapping screen appears.
3. In the **Program** field, select the membership program.
Revenue associated with the membership program is eligible for the challenge.
4. In the **Level** field, select a specific level of the membership program. In this case, revenue associated with the specific level of the membership program is eligible for the challenge.
5. In the **Matching funds designation** field, for a "match per gift" challenge, search for and select the designation that receives the challenge's matching revenue. When revenue from the challenge sponsor is entered through a donor challenge claim, it uses this designation.
6. Click **Save**. You return to the Memberships tab.

> Edit a membership for a "Match per gift" challenge

1. From a donor challenge record, select the Memberships tab.
2. Click the double arrows next to a membership to expand its row. From the action bar that appears, click **Edit**. The Edit membership mapping screen appears.
The membership program and level which qualifies for the challenge are displayed. Revenue with for these programs and levels is eligible for the challenge.

Note: You cannot edit memberships for "Lump sum match" challenges. When a membership no longer applies, you must delete it from the challenge.

3. In the **Matching funds designation** field, search for and select the designation that receives the challenge's matching revenue. When revenue from the challenge sponsor is entered through a donor challenge claim, it uses this designation.
4. Click **Save**. You return to the Designations tab.

Remove Memberships from Challenges

You can remove memberships from a donor challenge when revenue from the associated membership programs is no longer eligible for the challenge. From the Memberships tab, click the double arrows next to the membership program to expand its row. From the action bar that appears, click **Delete**.

This removes the membership from the challenge, but does not delete it from the database. You can add a membership back when necessary.

Update Donor Challenge Business Process

You can manually encumber revenue one transaction at a time for a donor challenge. You can also run a business process to automatically encumber revenue. When you run the Update donor challenge process, the program searches for revenue that meets the challenge criteria. The revenue appears on the Encumbered Funds tab of the challenge.

Note: Qualified pledges are also encumbered by the process. When the corresponding pledge payments are added, they are encumbered and can be approved and moved to the Matched Funds tab.

From the Update donor challenge processes page, you can access a process, add or edit a process, start a process, or delete a process.

Add Update Donor Challenge Processes

When you add an Update donor challenge process, you select the donor challenges to include. The process automatically encumbers revenue that meets the criteria of the donor challenges.

Note: Qualified pledges are also encumbered by the process. When the corresponding pledge payments are added, they are encumbered and can be approved and moved to the Matched Funds tab.

➤ Add an Update donor challenge process

1. From *Fundraising*, click **Update donor challenges**. The Update donor challenges page appears.
2. Click **Add**. The Add a donor challenge update process screen appears.
3. Enter a name for the process.
4. Select the group of donor challenges to include in the process. When the selection or query does not exist, you can add one from the Selection Search screen.

5. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
6. Click **Save**.

You can now run the Update donor challenge process to encumber revenue that meets the criteria of the donor challenges.

Start Update Donor Challenge Processes

When you add an Update donor challenge process, you select the donor challenges to include. The process automatically encumbers revenue that meets the criteria of the donor challenges. After you add a process, you can run the process to encumber revenue for the donor challenges.

Note: Qualified pledges are also encumbered by the process. When the corresponding pledge payments are added, they are encumbered and can be approved and moved to the Matched Funds tab.

From *Fundraising*, click **Update donor challenges**. The Update donor challenges page appears. Click the double arrows next to a process to expand its row. From the action bar that appears, click **Start process**. The process runs and the Update donor challenge process page appears.

Note: You can view a process and its history without running the process. From the Update donor challenges page, click the name of a process.

Update Donor Challenge Process Status

On the Recent Status tab, you view the details of the most recent instance of the Update donor challenge process. These details include the status; the start time, end time, and duration; the person who started the process; the name of the server; the total number of records processed; and how many records processed successfully and how many were exceptions.

Update Donor Challenge Process History

On the History tab, you view the history for each run of the Update donor challenge process. The details in the **History** grid include the status; the start time, end time, and duration; the person who started the process; and the name of the server. This information generates each time you run the process. Therefore, it is likely you have multiple rows of information in this grid. You can delete items from the history as needed.

Update Donor Challenge Process Job Schedules

Use job schedules to run a process automatically. When you create a job schedule, you specify the frequency and scheduled time of the occurrence. Using the job schedule and *SQL Server*, the program runs the process at the scheduled time and interval.

Note: This is typically completed by a system administrator at your organization.

Add Job Schedules

You can create a job schedule so the update donor challenge process can run at a specified interval, usually at night or during a time when the server is not as busy.

Create Job Screen

Screen Item Description

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date .

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements. To create a scripting file, click **Generate WSF** under **Tasks**. Your browser prompts you to open or save the file.

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To measure and compare your organization’s fundraising gain and loss ratios year to year and against similar organizations, you can participate in the Association of Fundraising Professionals (AFP) annual Fundraising Effectiveness Project (FEP) survey. The survey collects consecutive annual data from many organizations throughout the United States. As a participant, your organization receives the annual report of compiled data from AFP, which you can use to help identify areas to improve and to help increase revenue.

From *Administration*, you can create and run a submission process to compile the information required for the survey and submit it electronically to AFP. The process submits only statistics of your organization’s overall fundraising efforts, such as the number of new, repeat, and lapsed donors. The process does not submit personal or specific information about your constituents, and AFP retains your results in an anonymous format. For additional analysis, the process also submits your statistics to Blackbaud so you can examine your effectiveness at any time. After you create an FEP submit process, you can view and manage it from its status page.

Fundraising Effectiveness Project Process

To submit information to the Fundraising Effectiveness Project (FEP) survey, you create an FEP process. When you first add an FEP process, you enter information about your organization. The Association of

Fundraising Professionals (AFP) uses this information to determine similar organizations to use for comparison purposes. For accuracy, you can update information such as expenses and staff head count each year before you submit your fundraising data to AFP. To view and manage your organization's FEP process, from *Administration*, click **Fundraising Effectiveness Project**. The Fundraising Effectiveness Project page appears.

On this page, the processes your organization uses to submit information to the FEP survey appears. To view information about a process, such as the date it was last run or the contact person associated with the process, click the double arrows next to a process to expand its row. Below the action bar, details of the process appear. To view additional information about a process, such as previous instances or job schedules, click the name of the process. The status page for the process appears.

Tip: For more information about the AFP as it relates to the FEP, refer to the [AFP web site](#).

➤ Add an FEP process

1. From *Administration*, click **Fundraising Effectiveness Project**. The Fundraising Effectiveness Project page appears.
2. On the action bar, click **Add**. The Add a fundraising effectiveness project process screen appears.

Add a fundraising effectiveness project process

Name:

Description:

Identification and contact information

Organization name:

Identification number:

Country:

ZIP Code:

Contact person:

Phone:

Email address:

Organizational and professional staff affiliations (select all that apply)

AFP (Association of Fundraising Professionals)

CASE (Council for Advancement and Support of Education)

AHP (Association for Healthcare Philanthropy)

ALDE (Association of Lutheran Development Executives)

NCPG (National Committee on Planned Giving)

CRD (Council for Resource Development)

Other (please specify)

Other information

Year development program initiated (YYYY):

Subsector or type of organization:

Fundraising Expenses:

Full-time Professional staff (Period 2):

Full-time Support staff (Period 2):

Consultant full-time equivalent (Period 2):

Full-time Volunteer fundraisers (Period 2):

Comments

[Help](#)

3. Enter a unique name and description to help identify the process.
4. To restrict use of the process to a specific site at your organization, in the **Site** field, select the site to use the process.
5. Under **Identification and contact information**, enter your organization's name. By default, the organization name configured for your database appears.
6. Enter the identification number for your organization, such as the IRS Employer Identification Number (EIN), Canadian CRA Registration Number, or Blackbaud site identification number.
7. Select the country and enter the Zip code for your organization.
8. Enter the name, phone number, and email address of the individual at your organization the AFP can contact with questions about your FEP data.

9. Under **Organizational and professional staff affiliations**, select the groups of which your organization is a member. To select an affiliation not listed, select **Other** and enter the name of the group.
10. Under **Other information**, enter the year your organization started its fundraising development program.
11. In the **Subsector or type of organization** field, select the category that best describes your organization.
12. Enter your organization's financial expenses and the number of full-time professional staff, support staff, consultants, and volunteer fundraisers at your organization for the second, later time period in the comparison.

Note: When you run the submit process, you define two time periods to compare, such as two consecutive years. The AFP uses this information to compare the period's expenses against your organization's expenses during previous periods and against similar organization during the same period.

Tip: Financial expenses may be pulled from your development office budget, audited financial information, IRS Form 990, or CRA Form T3010A.

13. Under **Comments**, enter any additional information to send to AFP.
14. Click **Save**. You return to the Fundraising Effectiveness Project page.

Edit a Fundraising Effectiveness Project Submit Process

Before you run a process to send information to the AFP for the FEP survey, you must edit the submit process to define the two time periods to include in the comparison, such as year-to-year. When you select the two periods, you can preview the results to submit to the survey, which includes information such as the number of new, recaptured, and lapsed donors.

Warning: For the most meaningful data, we recommend you update the fundraising expenses and staff head count numbers for the later period before you submit data to AFP.

> Edit an FEP submit process

1. Access the status page of the FEP process to edit.
2. Under **Tasks**, click **Edit process**. The Edit a fundraising effectiveness project submit process screen appears.

Edit a fundraising effectiveness project submit process

Previous period

Start date: 1/1/2013

End date: 12/12/2013

Current period

Start date: 1/1/2014

End date: 12/12/2014

Preview

Type: All constituents

Category	Previous Period No. of Donors	Previous Period Amount	Current Period No. of Donors	Current Period Amount
New	12	\$2,404.00	41	\$2,404.00
Recaptured	0	\$0.00	19	\$0.00
Upgraded	1	\$1.00	1	\$1.00
Lapsed new	12	\$2,404.00	0	\$0.00
Lapsed repeat	11	\$1,706.00	0	\$0.00

Number of gift transactions in previous period: 24 Number of gift transactions in current period: 81

3. Under **Previous period**, select the start and end dates of the earlier of the consecutive years. The duration cannot exceed one year.
4. Under **Current period**, select the start and end dates of the later of the consecutive years. The duration of cannot exceed one year, and the end date cannot exceed one year from the end date of the previous period.
5. To view the results and statistics to send to AFP, select the type of constituents to include in the results and click **Preview**. You can include all constituents or only individual or organization constituents.
6. Click **Save**. You return to the process status page.

Start a Fundraising Effectiveness Project Submit Process

To send information to AFP for the FEP survey, you must run an FEP process. When you run a process, you can define the two time periods to include in the comparison, such as year-to-year, and select the type of constituents to include in the survey.

Warning: For the most meaningful data, we recommend you update the fundraising expenses and staff account numbers for the later period before you submit data to AFP.

➤ Run a FEP submit process

1. From *Administration*, click **Fundraising Effectiveness Project**. The Fundraising Effectiveness Project page appears.
2. In the grid, click the double arrows next to a process to expand its row. From the action bar that appears, click **Start process**. The Run the fundraising effectiveness project submit process screen appears.
3. To view the results and statistics to send to AFP, define two time periods to compare, such as two consecutive years.

The AFP uses the financial expense information you specified (when adding a process) to compare the period's expenses against your organization's expenses during previous periods and against similar organization during the same period.

4. Select the type of constituents to include in the results, and click **Preview**. You can include all constituents or only individual or organization constituents.

Warning: When you click **Send**, you agree for Blackbaud to send data, on behalf of your organization, to AFP for the FEP survey. AFP retains this data in an anonymous format for trending and analysis purposes for the life of the FEP.

5. Click **Send**. The program electronically sends your information to AFP. You return to the Fundraising Effectiveness Project Submit Process List page.

Fundraising Effectiveness Project Process Status Page

When you add an FEP process, the program automatically creates a status page for the process. From the status page, you can view and manage the process. To access the status page, on the Fundraising Effectiveness Project Submit Process List page, click the name of the process you want to view.

From the status page, you can define the time periods to compare and submit information to the Association of Fundraising Professionals (AFP). Depending on your system role, you can also delete an FEP process from its status page.

You can also view information about the most recent instance of the process, its previous instances, and any job schedules created for the process. To help you navigate through the information, the status page includes multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of "Did not finish." To filter the records that appear in the grid, click **Filters**. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh**.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history. To delete a status record, select it and click **Delete**.

➤ Delete a status record from the History tab

1. On the History tab of the process status page, click the double arrows beside a status record and click **Delete**. A confirmation message appears.

Note: You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh**.

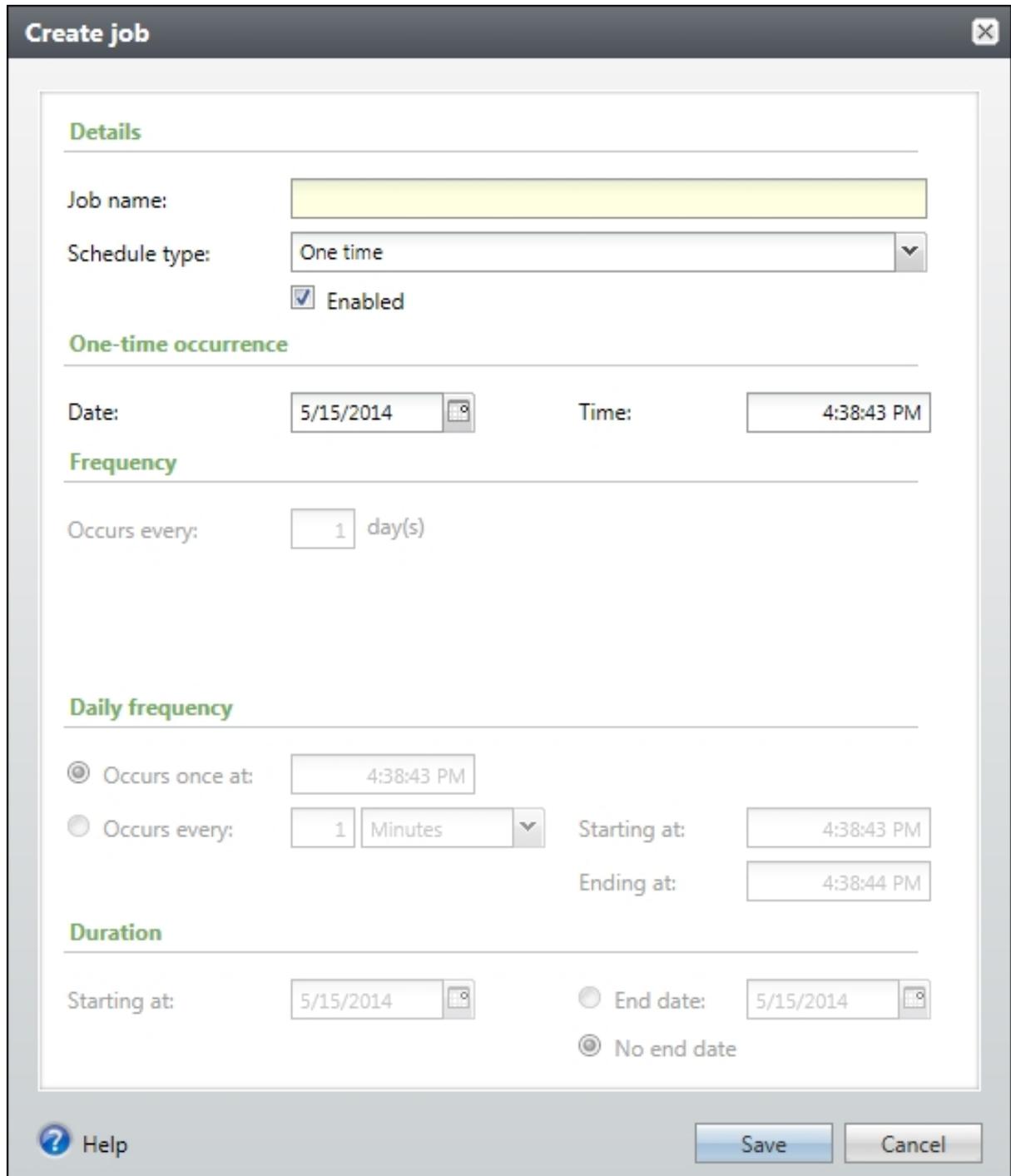
Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight.

Note: To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

> Create a job schedule

1. On the Job schedules tab of the process, click **Add**. The Create job screen appears.



The screenshot shows a 'Create job' dialog box with the following sections and fields:

- Details**
 - Job name: [Empty text field]
 - Schedule type: [One time] (dropdown menu)
 - Enabled
- One-time occurrence**
 - Date: [5/15/2014] (calendar icon)
 - Time: [4:38:43 PM]
- Frequency**
 - Occurs every: [1] day(s)
- Daily frequency**
 - Occurs once at: [4:38:43 PM]
 - Occurs every: [1] Minutes (dropdown menu)
 - Starting at: [4:38:43 PM]
 - Ending at: [4:38:44 PM]
- Duration**
 - Starting at: [5/15/2014] (calendar icon)
 - End date: [5/15/2014] (calendar icon)
 - No end date

At the bottom of the dialog box, there is a 'Help' button (with a question mark icon), a 'Save' button, and a 'Cancel' button.

2. In the **Job name** field, enter a name for the scheduled process.

3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.
 - a. For a process that runs once, select the date and time to run it.
 - b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.
 - c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.
5. Click **Save**. You return to the Job schedules tab.

Edit Job Schedules

After you create a job schedule for a process, you can update it as necessary. For example, you can adjust its frequency. You cannot edit the package selected to create the job schedule. To edit a job, select it and click **Edit**.

> Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, refer to [Create Job Screen on page 111](#).
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Create Job Screen

Screen Item Description

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.

Screen Item Description

One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date .

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as any changes made to it outside the program. To delete a job schedule, select it and click **Delete**.

➤ Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements. To create a scripting file, click **Generate WSF** under **Tasks**. Your browser prompts you to open or save the file.

➤ Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**.
2. Your browser prompts you to open or save the file. To save the file, choose the file location.

Note: The download process varies according to the browser you use.

Fundraising Effectiveness Project Statistics

To measure and compare your organization's fundraising gain and loss ratios year to year and against similar organizations, you can participate in the Association of Fundraising Professionals (AFP) annual Fundraising Effectiveness Project (FEP) survey. The survey collects consecutive annual data from many organizations. When you run the FEP submit process, the program compares the payment activity during the selected time periods, including donations and payments toward commitments such as pledges and recurring gifts, and breaks down the activity into gains and losses based on the giving behavior of the constituents associated with the revenue.

Category Description

Category	Description
New	Constituents with a payment transaction during the later period but not prior to the later period.
Recapture	Constituents with a payment transaction during the later period and prior to, but not during, the earlier period.
Same	Constituents with payment transactions during both periods, with an equal payment amount during each period.
Upgrade	Constituents with payment transactions during both periods, but with a larger payment amount during the later period than the earlier period.
Downgrade	Constituents with payment transactions during both periods, but with a larger payment amount during the earlier period than the later period.
Lapsed new	Constituents with a payment transaction during the earlier period, but not prior to the earlier period nor during the later period.
Lapsed repeat	Constituents with a payment transaction during and prior to the earlier period, but not during the later period.

Tip: From *Revenue* or *Analysis*, you can generate the Giving Dynamics report to view your constituents' revenue activity, including payments and pledges, with the statistics similar to those used for the FEP. From *Fundraising* or *Analysis*, you can generate the FEP Benchmarking Comparison report to compare your annual performance against the averages of the FEP survey participants for the same year. For information about the Giving Dynamics report or FEP Benchmarking Comparison report, see the *Reports and KPIs Guide*.

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From *Fundraising*, you can track the effectiveness of your fundraising activities, as well as the performance of individual fundraisers. A variety of reports are available to help you measure your organization's progress toward meeting specific goals.

Campaign Recognition Credit Report

The Campaign Recognition Credit Report shows progress toward a specific goal, including total recognition credit, and percent of goal for the campaign selected.

To run the report, open a campaign and click **Campaign recognition credit report** under **Reports**. On the report, you must specify a goal against which you want to measure progress before you can run the report. After you select a goal, click **View Report**. You can select different breakdowns, such as by quarter or year, to use for this report. You can also filter the report based on the type of recognition credit you want to include.

Campaign Recognition Credit

Campaign: Annual Campaign Group by: []
 Goal: Overall Recognition credit type: [] View report

1 of 1 Find | Next

Campaign Recognition Credit Report

Campaign: Annual Campaign Group by: []
 Goal: Overall (3/28/2014 to 3/28/2015) Recognition credit type: All

Campaign	Recognition - Total Raised	Goal	% of Goal
Annual Campaign	\$3,000,000.00	\$800,000,000.00	0.38 %

Campaign Priority Report

The Campaign Priority Report shows progress toward specific priority goals, including total raised, total received, new commitments, the total amount of planned gifts, and percent of goal for the campaign selected. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, minus any write-off amounts.

To run the report, open a campaign and click **Campaign priority report** under **Reports**. Select a date range and click **View Report**. You can select different breakdowns, such as by quarter or year, to use for this report. You can also filter the report based on the priorities for the campaign.

Campaign Priority Report

Campaign: Annual Campaign Group by: [] View report
 Priority: Primary
 Date: Last Year from 1/1/2013 to 12/31/2013

1 of 1 Find | Next

Campaign Priority Report

Campaign: Annual Campaign Group by: None Currency: Base
 Date range: Last Year Priority: Primary

Priority	Total Raised	Received	New Commitments	Planned Gifts	Goal	% of Goal
Primary	\$1,332	\$555	\$777	\$710	\$1,000	133.20 %

Campaign Summary Report

The Campaign Summary Report shows progress toward a specific goal, including total raised, how much has been received, new commitments, the total amount of planned gifts, and percent of goal for

the campaign selected. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges.

To run the report, open a campaign and click **Campaign summary report** under **Reports**. On the report, you must specify a goal against which you want to measure progress before you can run the report. After you select a goal, click **View Report**. You can select different breakdowns, such as by quarter or year, to use for this report.

Campaign Summary Report

Campaign: Annual Campaign Group by: None View report

Goal: Overall

1 of 1 Find | Next

Campaign Summary Report

Campaign: Annual Campaign Group by: None

Goal: Overall (3/28/2014 to 3/28/2015)

Campaign	Total Raised	Received	New Commitments	Planned Gifts	Goal	% of Goal
Annual Campaign	\$220	\$145	\$75	\$80	\$1,500	14.67 %

Page 1 of 1

Hierarchical Campaign Summary Report

While the Campaign Summary Report shows progress toward a specific goal for top-level campaigns in the hierarchy, the Hierarchical Campaign Summary Report displays details for all or selected campaigns and goals in the campaign hierarchy.

You can view information for the entire campaign, the root campaign, or selected campaigns in the hierarchy. To view specific campaigns, select the checkbox for each parent and child campaign to include in the report. Select the parent campaign's checkbox to automatically select all campaigns under the parent. You can then choose which of these child campaigns to include. To select only the parent campaign, press **CTRL** and click the parent campaign's checkbox.

Before you run this report, a system administrator must install and configure a standard data mart. The data mart places records from your source database in a data warehouse so you can conduct complex reporting and analysis. For information about data marts, see the *Data Mart and OLAP Guide*.

To run the report, open a campaign and click **Hierarchical campaign summary report** under **Reports**.

Designation Progress Report

The Designation Progress report shows progress toward a specific goal by total raised, percent of goal, how much has been received, new commitments, the total amount of planned gifts, and number of gifts. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges. The totals are broken down by designation under the parent purpose.

To run the report, open a fundraising designation and click **Designation progress** under **Reports**. On the report, you must specify a **Goal** against which you want to measure progress before you can run the report. When a selection exists that already includes the filters you want to use in the report, you can specify it in the **Selection** field. After you select a goal and any other filters, click **View Report**.

Hierarchy: Annual Campaign

Designation Progress

Selection:

Hierarchy: Annual Campaign Goal: Overall goal

Category: Annual Report code 1: View report

Type: Report code 2:

Group by:

1 of 1 Find | Next

Designation Progress	
Hierarchy:	Annual Campaign
Goal:	Overall goal (3/8/2014 - 3/8/2015)
Category:	Annual
Type:	All Types
Report code 1:	Include All
Report code 2:	Include All
Group by:	None

Designation	Goal	Total Raised	% of Goal	Received	New Commitments	Planned Gifts	Number of Gifts
Annual Campaign	\$500,000.00	\$1,949.99	0 %	\$1,700.00	\$249.99	\$0.00	7

You can print the report or export it in several different formats.

Fund Decapitalization Report

When the market value of a fundraising purpose falls below the book value, you can decapitalize an amount of the fundraising purpose. After your organization approves the decapitalization of a fundraising purpose, you can decapitalize all or some of the purpose value to indicate that your organization should not disburse revenue from the purpose. The Fund Decapitalization report provides information about the decapitalized amounts of a purpose, including its approval and the designation into which to transfer the decapitalized amount.

To run the report for a fundraising purpose, open the record of a purpose and click **Fund decapitalization** under **Reports**. By default, the report includes the purpose from which you access the report. On the Fund Decapitalization report page, select the fundraising purpose to include and click **View Report**.

Approval date	Approved by	Amount	Account transferred to
08/08/2010		\$10000.00	Annual Fund

Rationale: Fund is now considered a loss.

You can print the report or export it in several different formats.

Fundraising Effectiveness Project (FEP) Benchmarking Comparison Report

To measure and compare your organization's fundraising gain and loss ratios year to year and against similar organizations, you can participate in the Association of Fundraising Professionals (AFP) annual Fundraising Effectiveness Project (FEP) survey. The survey collects consecutive annual data from many organizations throughout the United States. From *Administration*, your organization can create and run a process to compile and submit information to the AFP for the FEP survey. When you run the FEP submit process, the program compares the payment activity during two consecutive time periods, including donations and payments toward commitments such as pledges and recurring gifts, and breaks down the activity into gains and losses based on the giving behavior of the constituents associated with the revenue.

The FEP Benchmarking Comparison report shows your annual performance in comparison to the averages compiled by AFP from FEP survey participants for the same year. You can use this comparison to help identify areas to improve and to help increase revenue.

		Blackbaud Demo		FEP Averages		Variance	
		Constituents	Gain/Loss	Constituents	Gain/Loss	Constituents	Gain
Gains	New	6	\$15,120.00	460	\$235,538.67	-454	
	Recaptured	8	\$4,170.00	151	\$129,295.32	-143	
	Upgraded	32	\$171,745.00	176	\$229,015.04	-144	
	Same	5	\$6,650.00	149	\$85,606.25	-144	
Losses	Downgraded	36	-\$149,205.00	138	-\$211,101.99	-102	
	Lapsed new	4	-\$12,500.00	316	-\$128,448.19	-312	
	Lapsed repeat	38	-\$91,730.00	214	-\$163,407.72	-176	

To run the FEP Benchmarking Comparison report, from *Fundraising*, click **FEP benchmarking comparison** under **Reports**. Select the year of the data to compare. In the **Subsector** field, select whether to view the averages of all verticals of FEP survey participants or only those related to a specific vertical. To include only information submitted to AFP for a specific site at your organization, in the **Site** field, select the site associated with the data to compare. After you select the criteria of the information to include, click **View Report**.

The report displays the constituent and revenue information your organization submitted to AFP for the selected year. For comparison, the report also displays the selected year's FEP averages and the variance between the two for the various FEP statistics.

On the second page of the report, you can view bar graphs of the statistics to quickly compare your organization's performance to the FEP averages.

You can print the report or export it in several different formats.

Fundraising Hierarchy Progress Report

The Fundraising Hierarchy Progress report shows progress of the purposes and designations in a hierarchy toward a specific goal. The report shows total raised, how much has been received, new commitments, the total amount of planned or legacy gifts, percent of goal, and number of gifts. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges. The totals are broken down by designation.

Note: To prevent double-counting of pledges made and installments paid during the same time period, totals in the **Received** column do not include payments applied toward pledge installments.

Hierarchy: Annual Campaign
Fundraising Hierarchy Progress

Hierarchy: Annual Campaign
 Goal: Overall goal View report

1 of 1 Find | Next

Fundraising Hierarchy Progress

Hierarchy: Annual Campaign
 Goal: Overall goal (3/8/2014 - 3/8/2015)

Name	Goal	Total Raised	Received	New Commitments	Planned Gifts	% of Goal	Number of Gifts
Annual Campaign	\$500,000.00	\$1,949.99	\$1,700.00	\$249.99	\$0.00	0 %	7
1999 Annual Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	N/A	0
2000 Annual Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	N/A	0
2001 Annual Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	N/A	0

To run the report, open a fundraising purpose and click **Fundraising hierarchy progress** under **Reports**. On the report, you must specify a goal against which you want to measure progress before you can run the report. After you select a goal, click **View Report**.

You can print the report or export it in several different formats.

Fundraising Hierarchy Summary Report

The Fundraising Hierarchy Summary report shows progress toward a specific goal, including total raised, how much has been received, new commitments, the total amount of planned or legacy gifts, variance between a goal amount and actual amount raised, and percent of goal. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges.

Fundraising Hierarchy Summary

Hierarchy: Campaign for Excellence Group by: Quarter [View report](#)

Goal: Overall goal

1 of 6 100% Find | Next

Fundraising Hierarchy Summary

Hierarchy: Campaign for Excellence Group by: Quarter

Goal: Overall goal (6/1/2001 - 5/31/2011)

Name	Quarter	Total Raised	Received	New Commitments	Goal	Variance
Campaign for Excellence		\$0.00	\$0.00	\$0.00	\$100,000,000.00	(\$100,000,000.00)
	Q2, 2001	\$0.00	\$0.00	\$0.00		
	Q3, 2001	\$0.00	\$0.00	\$0.00		
	Q4, 2001	\$0.00	\$0.00	\$0.00		
	Q1, 2002	\$0.00	\$0.00	\$0.00		
	Q2, 2002	\$0.00	\$0.00	\$0.00		

To run the report, open a fundraising purpose and click **Fundraising hierarchy summary** under **Reports**. On the report, you must specify a goal against which you want to measure progress before you can run the report. After you select a goal, click **View Report**. You can select different breakdowns, such as by quarter or year, to use for this report.

You can print the report or export it in several different formats.

Fundraising Purpose Profile Report

With the Fundraising Purpose Profile report, you can show every designation, appeal, recipient, and note associated with a purpose. You can also select to include a giving summary that shows the total raised, average gift amount, total number of gifts, and total number of donors.

To run the report, open a fundraising purpose and click **Purpose profile** under **Reports**.

You can print the report or export it in several different formats.

Profile Report

Include: Designations Appeals Summary
 Recipients Notes View report

1 of 1 Find | Next

Purpose Profile

Name: Annual Campaign
Description: Annual Campaign
Category: Annual
Type: Campaign
Is accepting funds: True
Is disbursing money: True

Designations

Name	Report code 1
Annual Campaign	
Annual Campaign \ 2000 Annual Fund	
Annual Campaign \ 1999 Annual Fund	
Annual Campaign \ President's Development Fund	
Annual Campaign \ 2001 Annual Fund	
Annual Campaign \ 2002 Annual Fund	
Annual Campaign \ 2003 Annual Fund	
Annual Campaign \ 2004 Annual Fund	
Annual Campaign \ 2005 Annual Fund	

Fundraising Purpose Revenue Report

The Fundraising Purpose Revenue report shows revenue for a purpose by total raised, how much has been received, new commitments, the total amount of planned gifts, and number of gifts. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges. To run the report, open a fundraising purpose and click **Fundraising purpose revenue** under **Reports**. To run the report for a specific fundraising purpose or for a group of purposes, use a selection.

The other report fields enable you to filter the results according to your preferences. If a selection exists that already includes the filters you want to use in the report, you can specify it in the **Selection** field. The **Start date** defaults to the first day of the current calendar year and the **End date** defaults to the current date. You can change these dates and additionally filter the report by a specific category or fundraising purpose type.

Fundraising Purpose Revenue

Selection:

Start date: 1/1/2013 End date: 4/1/2014 [View report](#)

Category: Annual Group by: Purpose only

Type: Campaign Campaign:

1 of 1 Find | Next

Fundraising Purpose Revenue

Dates: 1/1/2013 to 4/1/2014 Category: Annual

Type: Campaign Group by: Purpose only

Campaign:

Name	Total Raised	Received	New Commitments	Planned Gifts	Number of Gifts
Annual Campaign	\$2,189.97	\$1,914.98	\$274.99	\$26.00	10

You can print the report or export it in several different formats.

Giving Level Program Report

With the Giving Level Program report, you can view which constituents are members of each level of a giving level program. The report shows summary revenue information about the levels within a program and information about each constituent who reaches a level in a giving program. The report shows the total given, percent of total, number of donors, and number of donations for each level, and the total given and number of donations for each constituent within a level.

To access the report, from *Constituents*, click **Giving Level Programs** under **Configuration**. On the Giving Level Program page, click the double arrows beside the program to expand its row. From the action bar that appears, click **View Report**. The Giving Level Program report page appears.

In the **Selection** field, search for and select a constituent selection to include in the report. In the **Giving level program** field, select a program. To include all constituents in the report, leave this field blank. To run the report, click **View Report**.

Giving Level Programs
Giving Level Program

Selection:

Giving level program:

View report

1 of 1 Find | Next

Giving Level Report

Program: Olympic Program

Level	Total Given	% Total	No. Donors
<input checked="" type="checkbox"/> Gold (\$50,000,000.00+)		50.00%	500
TOTAL			0

You can print the report or export it in several different formats. To view a detailed giving summary of a constituent, click the name of the constituent in the report.

Naming Opportunity Availability Report

The Naming Opportunity Availability report enables you to see which naming opportunities have been purchased and which are still available. You can view the report based on criteria such as fundraising purpose, campaign, facility, or any combination of these filters. To run the report, from the *Fundraising* page, click **Naming opportunity availability** under **Reports**.

You can print the report or export it in several different formats.

Naming Opportunity Availability

Include... All records

Purpose: Area:

Site: Unit:

Type: Facility:

Campaign: Contact:

View report

1 of 1 Find | Next

Naming Opportunity Availability Report

Purpose: Area:

Site: Unit:

Type: Facility:

Campaign: Contact:

Naming opportunities: All records

Naming Opportunity	Amount	Recognized	Available	Contact
Cougar Arena	\$5,000,000.00	1	0	Emilio Cortez
Auditorium	\$1,000.00	2	8	Emilio Cortez
Student Center Courtyard	\$50.00	1	74	Ellen Ingles
JKM NO	\$10.50	1	54	Emilio Cortez

Naming Opportunity Recognition Report

The Naming Opportunity Recognition report generates a list of constituents recognized on naming opportunity items. To run the report, from the *Fundraising* page, click **Naming opportunity recognition** under **Reports**.

You can print the report or export it in several different formats.

Naming Opportunity Recognition

Include... All records

Purpose:

Site:

Type:

Campaign:

Area:

Unit:

Facility:

Contact:

Date range: All Dates Start date: End date:

1 of 1 Find | Next

Naming Opportunity Recognition Report

Purpose: _____ Area: _____

Type: _____ Unit: _____

Site: _____ Facility: _____

Campaign: _____ Contact: _____

Date range: All Dates

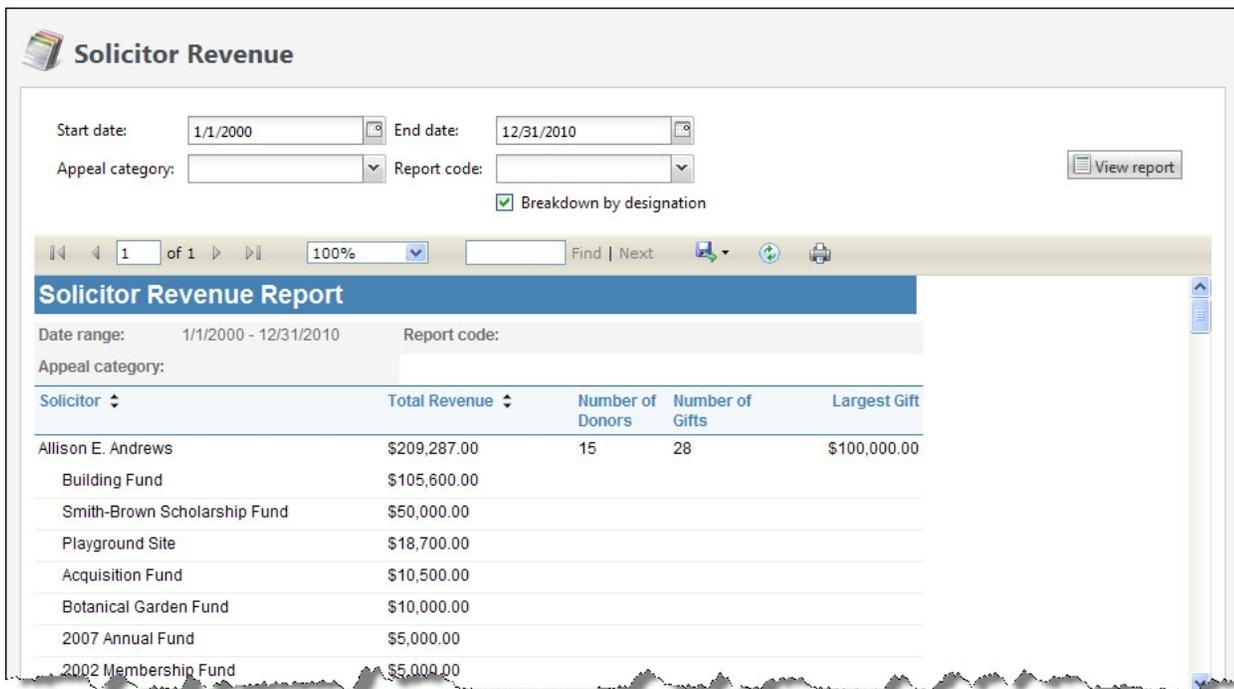
Naming opportunities: All records

Naming Opportunity	Amount	Recognized	Available	Contact
<input type="checkbox"/> Cougar Arena	\$5,000,000.00	1	0	Emilio Cortez
<u>Constituent</u>			<u>Amount</u>	<u>Date</u>
Gretta Andrews			\$5,000,000.00	11/7/2008
<input type="checkbox"/> Auditorium	\$1,000.00	2	8	Emilio Cortez
<u>Constituent</u>			<u>Amount</u>	<u>Date</u>
Geoffrey Abrahms			\$100.00	11/10/2008
<input type="checkbox"/> Student Center Courtyard	\$50.00	1	74	Ellen Ingles
<u>Constituent</u>			<u>Amount</u>	<u>Date</u>
Jeff Ashton			\$50.00	10/20/2008

Solicitor Revenue Report

The Solicitor Revenue report enables you to see the performance of a solicitor or a group of solicitors over a specified period of time. The report includes information such as the total amount raised, the number of donors, and the largest gift. You can also see the designations for the money raised.

To run the report, from the *Fundraising* page, click **Solicitor** under **Reports**.



Solicitor Revenue

Start date: 1/1/2000 End date: 12/31/2010

Appeal category: Report code: [View report](#)

Breakdown by designation

1 of 1 100% Find | Next

Solicitor Revenue Report

Date range: 1/1/2000 - 12/31/2010 Report code:

Appeal category:

Solicitor	Total Revenue	Number of Donors	Number of Gifts	Largest Gift
Allison E. Andrews	\$209,287.00	15	28	\$100,000.00
Building Fund	\$105,600.00			
Smith-Brown Scholarship Fund	\$50,000.00			
Playground Site	\$18,700.00			
Acquisition Fund	\$10,500.00			
Botanical Garden Fund	\$10,000.00			
2007 Annual Fund	\$5,000.00			
2002 Membership Fund	\$5,000.00			

You can print the report or export it in several different formats.

Stewardship Report

The Stewardship report is a component of the stewardship package. You can link a stewardship package to any fundraising purpose that includes donor and financial information. At regular intervals, you can run the stewardship package process to create a custom cover letter for each stewardship recipient, along with a Stewardship report. This report provides a current snapshot of a fund including the amount earned on investment, amounts distributed, contributions made to the fund, and other expenses related to fund management. You can use this report to demonstrate to fund donors and other constituents with an interest in the fundraising purpose that your organization manages contributions carefully and responsibly.

VSE Survey Report

Colleges, universities, and private elementary and secondary schools can use the Voluntary Support of Education (VSE) Survey report to compile data, such as private gifts and grants received, to send to the Council for Aid on Education (CAE). The VSE Survey report shows information about the giving associated with the categories of the VSE Survey and is formatted to correspond directly with the survey. The report shows the quantity and total amount of outstanding pledges associated with current and capital operations, the outright giving associated with the VSE categories, and the total given to each category by constituency. The CAE uses this information to help your institution compare its data against other related organizations. Participation in the VSE Survey is voluntary.

VSE Survey

This VSE Survey process will provide the information necessary to fill in the appropriate parts of the Voluntary Support of Education Survey as dictated by the Council for Aid to Education.

Calculate totals using: Transaction Date Post Date

Include: Inactive Deceased [View report](#)

This Fiscal Year

1 of 5 Find | Next

VSE Survey Report

Start Date: 1/1/2014 End Date: 12/31/2014

Section 1a. Outstanding Pledges

	No. of Pledges	Amount
1. For current operations	0	\$0.00
2. For capital purposes	0	\$0.00

Section 3a. Outright Giving: Current Operations

	A. Alumni	B. Parents	C. Other Individuals	D. Foundations
1. Unrestricted	\$0.00	\$0.00	\$0.00	\$0.00
Restricted 2. Academic Divisions	\$0.00	\$0.00	\$0.00	\$0.00
3. Faculty & Staff Compensation	\$0.00	\$0.00	\$0.00	\$0.00
4. Research	\$0.00	\$0.00	\$0.00	\$0.00
5. Public Service & Extension	\$0.00	\$0.00	\$0.00	\$0.00
6. Library	\$0.00	\$0.00	\$0.00	\$0.00
7. Operation & Maint. of Plant	\$0.00	\$0.00	\$0.00	\$0.00
8. Student Financial Aid	\$0.00	\$0.00	\$0.00	\$0.00
9. Athletics	\$0.00	\$0.00	\$0.00	\$0.00
10. Other Restricted	\$0.00	\$0.00	\$0.00	\$0.00
11. Total Restricted (2-10)	\$0.00	\$0.00	\$0.00	\$0.00
12. Total Outright for Curr. Ops. (1&11)	\$0.00	\$0.00	\$0.00	\$0.00

Section 3b. Outright Giving: Capital Purpose

	A. Alumni	B. Parents	C. Other Individuals	D. Foundations
1. Prop., Build. & Equipment	\$0.00	\$0.00	\$0.00	\$0.00
2. Endowment - Unrestricted	\$0.00	\$0.00	\$0.00	\$0.00

Note: The constituencies and fundraising purposes associated with revenue determine to which VSE categories gifts are applied. When a fundraising purpose is added to the database, your organization can assign it to a specific VSE category. Similarly, your system administrator can map individual and organization constituencies to the constituencies of the VSE Survey in *Constituents*. For information about how to map your constituencies to the constituencies of the VSE Survey, see the *Constituents Guide*.

To access the report, on the Fundraising page, click **VSE survey** under **Reports**. The VSE Survey report screen appears. From this screen, you can select the parameters to use to generate and view the report. Once you run the report, you can print it or export its data in several different formats.

➤ **View the Voluntary Support of Education (VSE) Survey report**

The VSE Survey report does not provide all the information necessary to complete the VSE Survey. The VSE Survey report shows only information about the giving associated with the categories of the VSE Survey. For ease of use, the report is formatted to correspond directly with the survey. The reports in the VSE Survey report are consistent with the guidelines set forth in *CASE Management*

Reporting Standards: Standards for Annual Giving and Campaigns in Educational Fund Raising, available from the Council for Advancement and Support of Education (CASE). For more information about CASE, visit their website at www.case.org or call them at (202) 328-2273.

1. From *Fundraising*, click **VSE survey** under **Reports**. The VSE Survey report screen appears.

Note: To access this report from Report explorer, select **Reports, Fundraising Efforts, VSE Survey Report**.

2. For **Calculate totals using**, select the date to use to calculate the revenue totals for the report. You can select **Transaction** or **Post Date**.

In the adjacent field, select the date range of the revenue to include in the report. When you select "Specific Date," enter the start and end dates of the date range.

3. For **Include**, select whether to include revenue from inactive or deceased constituents in the report.
4. Click **View report**. The report appears.