Sponsorships Guide

11/14/2014 Blackbaud CRM 4.0 Sponsorships US

Sponsorships-2014

Contents

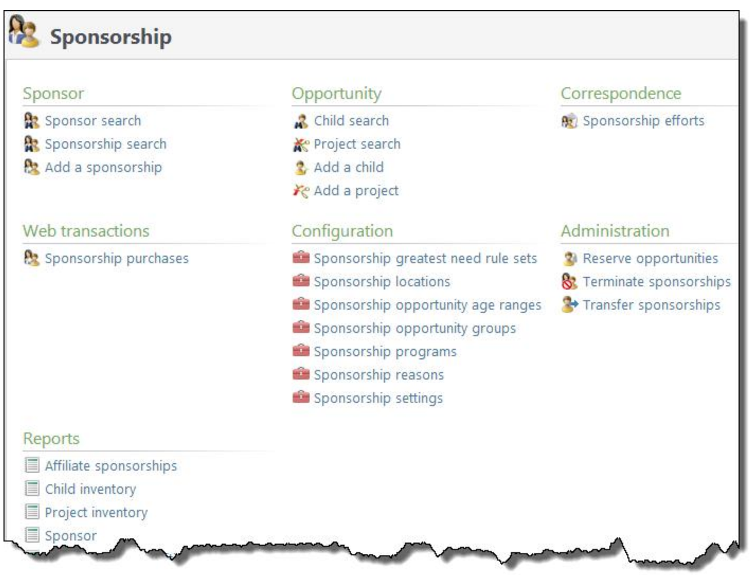
Sponsorships: The Big Picture

A sponsorship is a relationship between a sponsor and a sponsorship opportunity which involves ongoing monetary support. The sponsorship opportunity usually comes in the form of a specific project or an individual.

In this guide, you learn how to configure your organization's sponsorship settings, add and manage sponsorships, and run reports to evaluate the efficacy of your sponsorship programs. You also learn about sponsorship payments and how add, manage, and track changes to them in the system.

Full Circle View

From Sponsorship, you configure sponsorship options and settings, add and manage sponsors, sponsorships, and opportunities, create and run sponsorship processes, and run sponsorship reports.



Sponsorship Configuration

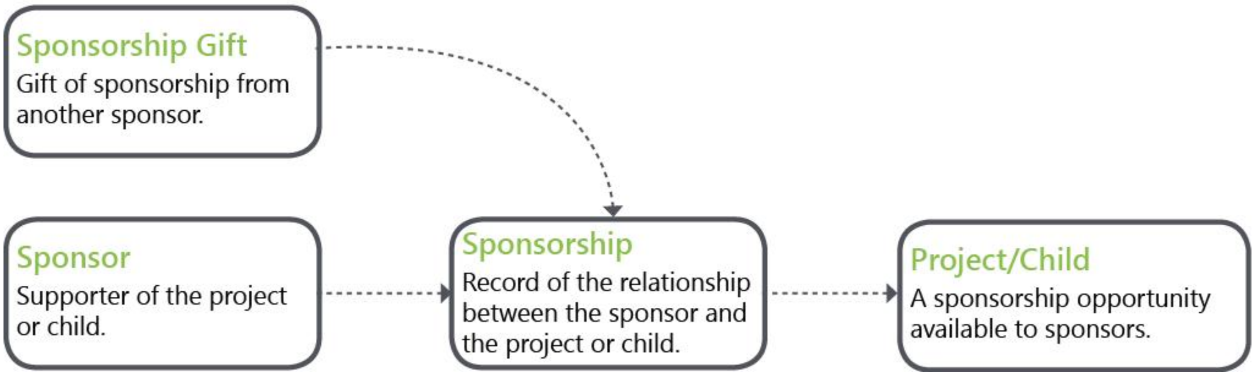
Before you add sponsorships to your database, your organization must first configure default settings, options, and preferences for your sponsorships. Initially, these configuration options must be completed in a specific order as later configuration settings are dependent upon previous ones. For more information, refer to Sponsorship Configuration Checklist on page 15.

Sponsorships

A sponsorship is a relationship between a sponsor and a sponsorship opportunity. Sponsorship opportunities exist in the form of a project or a child. A constituent that maintains a regular sponsorship is assigned a sponsor constituency. The sponsorship relationship between a sponsor and a sponsorship opportunity is captured in the sponsorship record. Sponsorships can also be gifted. A sponsor who gives the gift of a sponsorship is assigned the sponsorship donor constituency, and the sponsor who receives the gifted sponsorship is assigned the sponsorship recipient constituency. A constituent can maintain more than one of these constituencies at any given time.

For more information about sponsorship opportunities, refer to Manage Sponsorship Opportunities on page 39.

For more information about sponsors and sponsorships, refer to Sponsor Management on page 65.



Sponsorship Reports

To monitor the status of your sponsorships, you can run sponsorship reports. You can view various summary reports for sponsorships, get inventories of sponsorship opportunities, or view information about sponsorship revenue. For more information, refer to Sponsorship Reports on page 101.

Sponsorship Administration

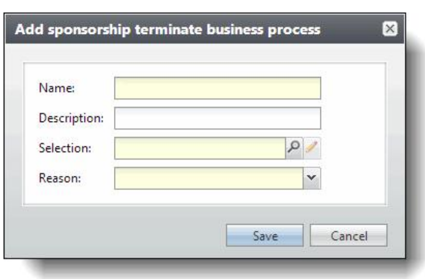
Administration tools in *Sponsorships* help you manage feature-wide tasks, such as a bulk cancel of opportunities or group opportunity reservation.

Terminate Sponsorships

If, as a donor services coordinator, you want to bulk cancel sponsorship to accommodate events that affect multiple sponsors, such as phase outs, you can easily do so with the **Terminate sponsorship** function available on the Sponsorship page. With this function, you can add a process, edit an existing termination process, run the process, view process information, and delete a process.

Add a terminate business process

1. From the Sponsorship page, select **Terminate sponsorships**. The Sponsorship Terminate Process page appears.
2. Click **Add**. The Add sponsorship terminate business process screen appears.



3. In the **Name** field, enter a name to identify the process.
4. In the **Description** field, enter a brief description to help you identify the process.
5. In the **Selection** field, click the magnifying glass at the end of the field to access the Selection Search screen. From here, you can locate a selection of records to include in the termination process.

Note: A selection is a named set of IDs of the same record type. It has a name and description and is often used as input into a process, such as the terminate sponsorship process, as a means to specify which set of records should be acted on by that process. Because selections consist only of IDs (rather than output fields), they are optimized for peak processing speed. You create selections in **Query**, accessed through *Analysis*.

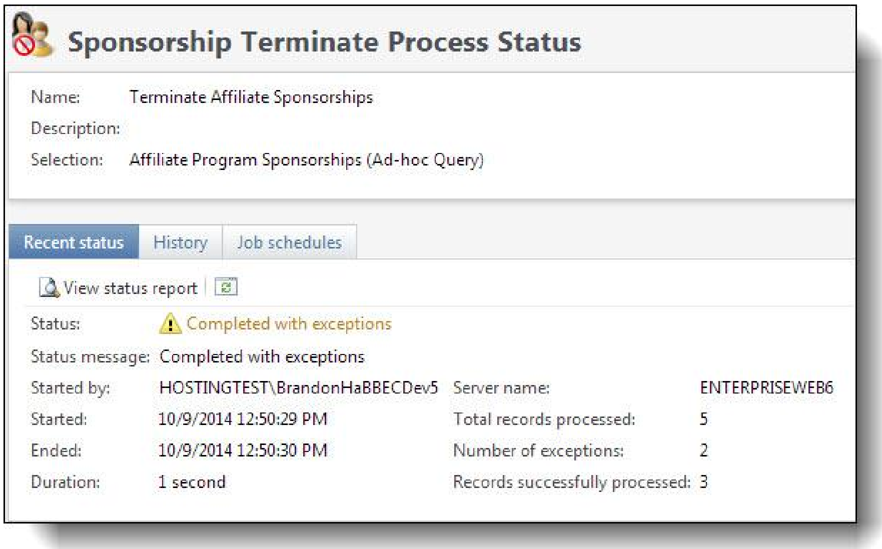
6. In the **Reason** field, select a reason for the termination.

Note: Reasons are created in Sponsorship reasons. For more information, refer to Reasons on page 19.

7. Click **Save** to save and close the process and return to the Sponsorship Terminate Process page. The process you created appears in the **Sponsorship terminate processes** grid.

Run a terminate business process

1. From the Sponsorship page, select **Terminate sponsorship**. The Sponsorship Terminate Process page appears.
2. In the **Sponsorship terminate processes** grid, select the process you want to run.
3. Click **Start process**. The process starts and the processing page appears.



When the process completes, a "Complete" message appears in the **Status** field on the Recent status tab of the process page.

For more information about this page, refer to Tabs of a Process Status Page on page 96.

View the Sponsorship Termination Process Status Page

From the Sponsorship Terminate Process page, click the name of the termination process you want to view. The Sponsorship Terminate Process Status page appears.

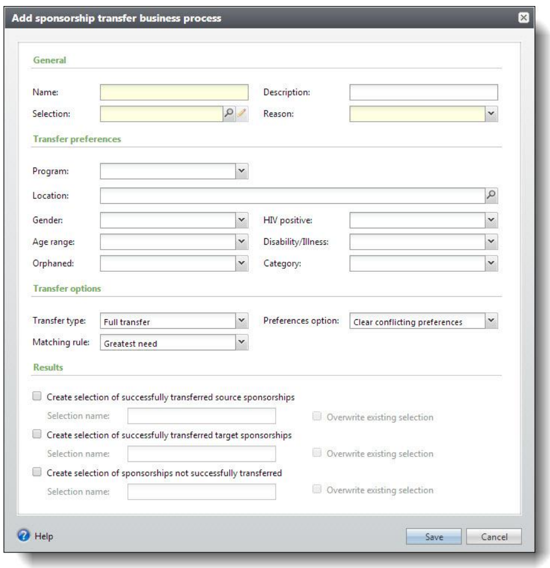
For information about this page, refer to Tabs of a Process Status Page on page 96.

Transfer Sponsorships

If, as a donor services coordinator, you want to bulk transfer sponsorships to close a location or balance sponsorships across locations or for any other reason, you can easily do so with the **Transfer sponsorship** function available on the Sponsorship page. With this function, you can add a process, edit an existing transfer process, run the process, view process information, and delete a process.

Add a transfer business process

1. From the Sponsorship page, under **Administration**, select **Transfer sponsorship**. The Sponsorship Transfer Process page appears.
2. Click **Add**. The Add sponsorship transfer business process screen appears.



3. Enter a **Name** and **Description** to help you identify the process.
4. In the **Selection** field, click the magnifying glass at the end of the field to access the Selection Search screen. From here, you can locate a selection of records to include in the transfer process.

   Note: A selection is a named set of IDs of the same record type. It has a name and description and is often used as input into a process, such as the terminate sponsorship process, as a means to specify which set of records should be acted on by that process. Because selections consist only of IDs (rather than output fields), they are optimized for peak processing speed. You create selections in **Query**, accessed through *Analysis*.

5. In the **Reason** field, select a reason for the termination.

   Note: Reasons are created in Sponsorship reasons. For more information, refer to Reasons on page 19.

6. In the **Transfer preferences** frame, define the criteria you want considered when transferring these sponsorships. For example, if you enter a **Location** option, the transfer process transfers the sponsorships to opportunities in the selected location; if you select a **Program** option, the transfer process transfers the sponsorships to opportunities in the selected program. You can select as many criteria options as necessary.
7. In the **Transfer options** frame select:

- **Transfer type**: "Full transfer" completely transfers all records. No other action is necessary. Select "Pending transfer," if you want each transferred sponsorship designated "Pending" after the transfer. You then must go to each transferred sponsorship and complete the transfer process.
- **Matching rule**: Select how you want transfer options to match with the sponsor. You can select "Greatest need" or "Nearest location, then greatest need."
- **Preferences option**: You can choose:

  Clear conflicting preferences: Retains values from the sponsorship and uses them during the transfer, except where they conflict with transfer settings, in which case it blanks them out. Expected use cases include organization-driven transfers, such as location phase-outs, where the new settings do not necessarily reflect sponsor preference.

  Overwrite specified preferences: Writes all values from the bulk transfer to the new sponsorship, but it does not overwrite non-blanks with blanks or compatible locations. Expected use cases include bulk transfers requested by a sponsor where you wish to change only the specified values.

  Overwrite all preferences: Writes all values from the bulk transfer (including blanks) to the new sponsorship. Expected use cases include bulk transfers requested by a sponsor where you wish to make the preferences exactly match the bulk transfer settings.

8. In the **Results** frame, you can choose to create selections of records that transferred successfully or failed in the transfer process.
9. Click **Save** to save and close the process and return to the Sponsorship Transfer Process page. The process you created appears in the **Sponsorship transfer processes** grid.

Run a transfer business process

1. From the Sponsorship page, select **Transfer sponsorship**. The Sponsorship Transfer Process page appears.
2. In the **Sponsorship transfer processes** grid, select the process you want to run.
3. Click **Start process**. The process starts and the processing page appears.

   When the process completes, a "Complete" message appears in the **Status** field on the Recent status tab of the process page.

   For more information about this page, refer to Tabs of a Process Status Page on page 96.

View the Sponsorship Transfer Process Status Page

From the Sponsorship transfer process page, select the name of the transfer process you want to view. The Sponsorship Transfer Process Status page appears.

For more information about this page, refer to Tabs of a Process Status Page on page 96.

Reserve a Group of Opportunities

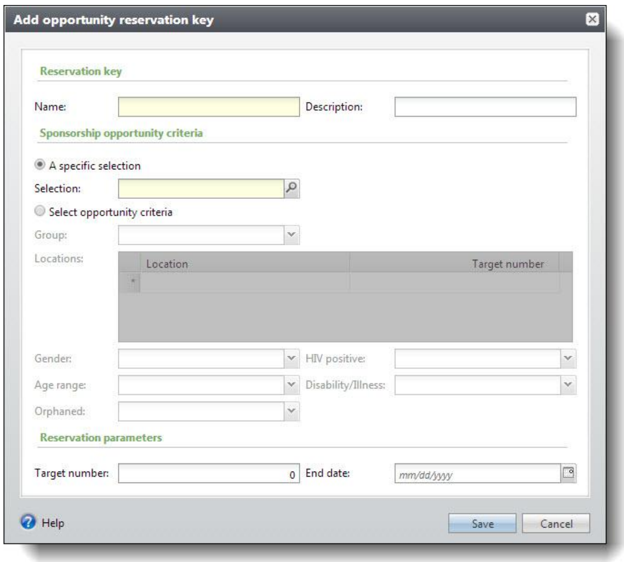
As a donor services coordinator, you may need to reserve a group of opportunities you intend to use for a targeted effort. The **Reserve opportunities** option in **Administration** on the Sponsorship page allows you to create a reserve group for just such purposes. Once you place an opportunity in the reserve group, the opportunity cannot be used in another assignment.

Note: Only child opportunities can be reserved.

Create an opportunity reserve business process

An opportunity reserve business process defines the group of opportunities you want to reserve. You can base your group on a selection of records created in **Query** or selected criteria, such as opportunity group or location.

1. From the Sponsorship page, under **Administration**, click **Reserve opportunities**. The Sponsorship Opportunity Reservation page appears.
2. Click **Add**. The Add opportunity reservation key screen appears.



3. In the application, this business process is referred to as a reservation key.

   In the **Reservation key** frame on the Add opportunity reservation key screen, enter a name and description to help you identify this key. This information displays in the **Sponsorship opportunity reservation keys** grid on the Sponsorship Opportunity Reservation page after you save the key.
4. In the **Sponsorship opportunity criteria** frame, identify the group of records you want to reserve.
   - If you created a selection of records in *Query* that you want to use, select **A specific selection**. In the **Selection** field, enter the name of the selection you want to use. Click the magnifying glass to access a search screen and search for the selection.
   - If you want to identify the records to include based on specific criteria, such as the sponsorship group, location, gender, or age range, select **Select opportunity criteria**. Then enter the criteria you want used to locate qualifying records.

     In the **Location** grid, in the **Location** column, select the location from which you want to reserve a group of opportunities. In the **Target number** column enter the number of opportunities from this location you want to reserve. You can select more than one location in the grid. For example, if you want to reserve 10 opportunities from China and 15 from India, select "China" in the **Location** column and enter "10" in the **Target number** column. In the next row, select "India" in the **Location** column and enter "15" in the **Target number** column.
5. In the **Reserve parameters** frame, in the **Target number** field, enter the maximum number of opportunities you want held by this key.

   For example, if you base the key on a selected location in the **Select opportunity criteria** and this location includes 100 opportunities, you may want to reserve only 10 for the targeted effort. If so, enter

"10" in the **Target number** field and the first 10 opportunities in the selected location are reserved. The other 90 remain unreserved. If you do not enter a number in this field, all opportunities are reserved.

In the **End date** field, you can enter a date on which you want the reservation to end and the selected opportunities released.

6. Click **Save** to save the key and return to the Sponsorship Opportunities Reservation page. The new key displays in the **Sponsorship opportunity reservation keys** grid. The reservation is not complete, however, until you run the business process.

Reserve a group of opportunities

Before you can reserve a group of opportunities, you must create a sponsorship opportunity reservation key. For information about how to create this key, refer to Create an opportunity reserve business process on page 9.

1. From the Sponsorship page, under **Administration**, click **Reserve opportunities**. The Sponsorship Opportunity Reservation page appears.
2. In the **Sponsorship opportunity reservation keys** grid select the reservation key you want to run.
3. Click **Populate key**. The Edit opportunity reservation key screen appears. Make any necessary changes.
4. Click **Start**. The business process runs. When the process completes, a "Complete" message appears in the **Status** field on the Recent status tab of the process page.

Unreserve a group of opportunities

1. From the Sponsorship page, under **Administration**, click **Reserve opportunities**. The Sponsorship Opportunity Reservation page appears.
2. In the **Sponsorship opportunity reservation keys** grid select the reservation key you want to unreserve.
3. Click **Unreserve**. The business process runs. When the process completes, a "Complete" message appears in the **Status** field on the Recent status tab of the process page.

View existing process

After you run a reservation process, you can return to the process page associated with that reservation at any time. From here you can schedule the process to run at a scheduled time and view status information about the process.

1. From the Sponsorship page, under **Administration**, click **Reserve opportunities**. The Sponsorship Opportunity Reservation page appears.
2. In the **Sponsorship opportunity reservation keys** grid select the name of the reservation key for which you want to review process information. The process page appears.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains 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**.

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 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.

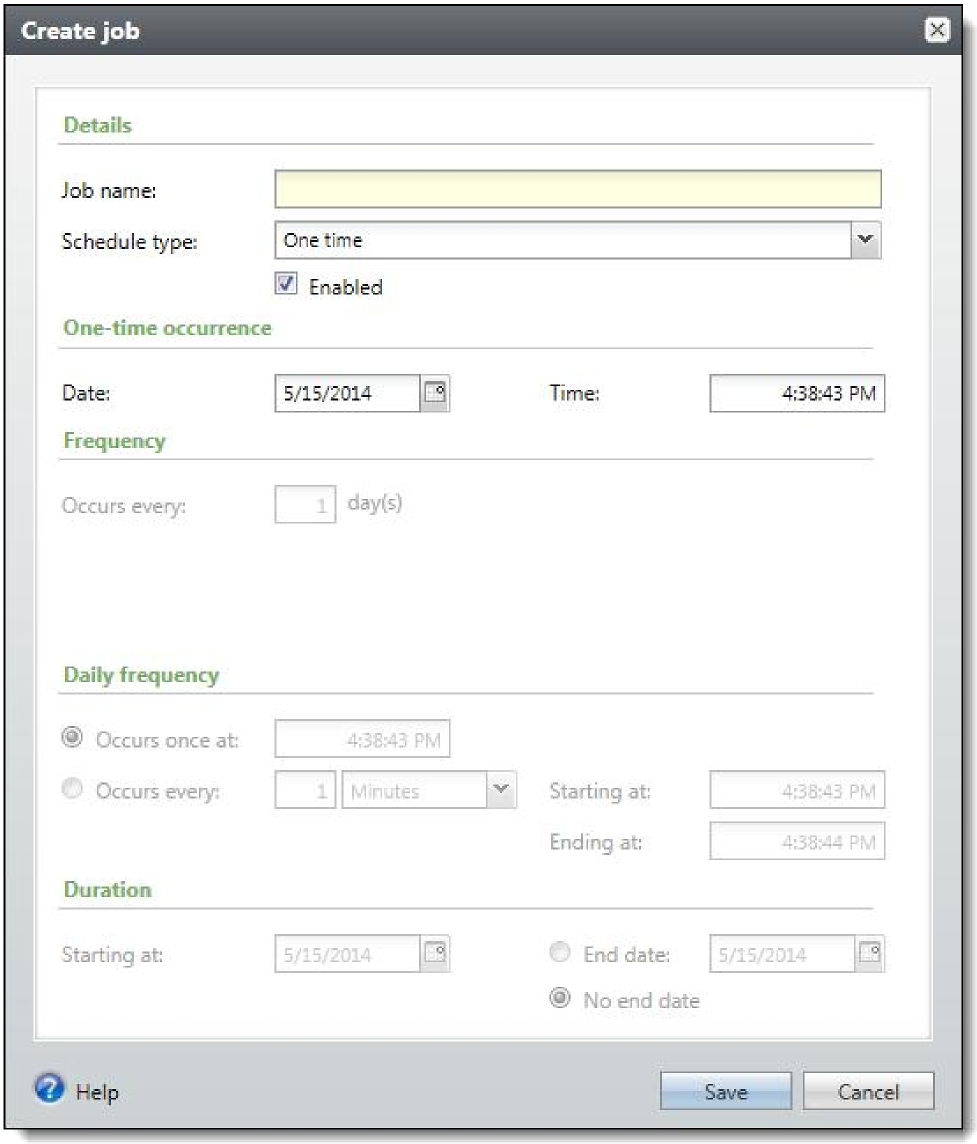
Schedule Process Jobs

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.



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. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package 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 99.
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
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 *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs 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 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.

Start Process

This task allows you to start the selected business process from the process page.

Edit Process

This task allows you to edit the selected business process from the process page.

Create Job Schedule

This task allows you to create a job schedule that tells the application when to automatically run the selected business process.

Delete Process

This task allows you to delete the selected business process from the process page. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the transmission file or prenotification authorization file, once you delete the process, you can no longer use its output file that contains the data extracted from your database.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

Process Status Report

When you execute a process, the process generates a status report which is housed on the Recent status tab of the process page. For example, if you execute a sponsorship transfer process, the Transfer Report appears on the Recent status tab which lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships, and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

Sponsorship Configuration

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

You use configuration options to set up *Sponsorship* for your users. These options can affect multiple areas in the program. For example, you can create sponsorship programs and locations to allow users to establish sponsorship relationships between constituents and opportunities.

Sponsorship Configuration Checklist

The following checklist is a workflow for how to configure *Sponsorship*. Because each configuration task builds on the next, we recommend that you complete each task in the order suggested.

Note: Although some of the configuration tasks you access from *Sponsorship* may only need to be completed once, there are other tasks you may configure initially but return to on a regular basis to adjust as needed. For example, you may need to create new opportunity groups or add additional locations. On the other hand sponsorship settings included in **Manage Sponsorship Settings** will most likely rarely need to be changed.

- [ ] Create necessary **Code Table** entries. For *Sponsorship*, you can establish code table entries for location type, opportunity attachment type, child conditions, opportunity media link type, opportunity note type, and project category.

> ***Note:*** Code tables increase data entry speed and accuracy throughout the program. When entering information into a field with a code table, users can quickly access a list of possible entries for that field, select an entry, and place it directly into the field rather than typing it in manually. For more information, refer to the *Administration Guide*.

- ☐ Create any necessary **Smart Fields**. For *Sponsorship*, you can create smart fields for: child active sponsor count, child available count, child available percent, project active sponsor count, project available count, and project available percent. You can then use these smart field options when you define greatest need rule sets.

> ***Note:*** Smart fields provide users with quick access to specific information that otherwise could take hours or days to compile. For more information, refer to the *Administration Guide*.

- ☐ Create *Sponsorship* reasons. Reasons are used throughout *Sponsorship*. They explain a variety of actions: mark a child ineligible, close a location, close a sponsorship. You should create a reason for every **Type** option your organization uses. These are listed in the drop-down menu on the Add/Edit sponsorship reason screen. For more information, refer to Reasons on page 19.
- ☐ Establish *Sponsorship* settings. These settings dictate protocol for a number of actions: close a location or project, mark a child ineligible for sponsorship, create new opportunities, transfer sponsorships, and more. For more information, refer to Business Rules on page 16.
- ☐ Define *Sponsorship* opportunity age ranges. Age ranges are used in **Sponsorship opportunity groups** and **Sponsorship greatest need rule set**. For more information, refer to Opportunity Age Ranges on page 19.
- ☐ Enter *Sponsorship* locations. Locations may be needed in **Configuration** when you create an opportunity group, greatest need rule set, and program. For more information, refer to Location Hierarchies on page 20.
- ☐ Define *Sponsorship* opportunity groups. Groups help you better manage your opportunities. You can define a group based on location, for example, and every time you enter an opportunity associated with this location you can assign the opportunity to this group. Such groupings help with opportunity placement and opportunity searches. For more information, refer to Sponsorship Opportunity Groups on page 30.
- ☐ Establish *Sponsorship* greatest need rule sets. These rule sets determine which child or project is in the most need and should be placed first. You can base greatest need on a variety of conditions: age, age range, country, gender, smart field definitions. For more information, refer to Greatest Need Rules on page 32.
- ☐ Create *Sponsorship* programs. You associate a program with a specific opportunity group and greatest need rule. Programs are required when you create a sponsorship. For more information, refer to Sponsorship Programs on page 36.

Business Rules

The **Sponsorship settings** tool in **Configuration** on the Sponsorship page establishes business rules to help you ensure that transfers follow your business logic when the application searches for an opportunity based on location, ineligibility, and greatest need. You can also establish a default eligibility for opportunities and more.

▸ Close location rules

1. From the Sponsorship page, click **Sponsorship settings** in **Configuration.** The Manage Sponsorship Settings page appears.

2. In the **Settings for marking a location closed**, click **Edit**. The Edit settings for marking a location closed screen appears.
3. In the **For matching an opportunity use** field, select the option you want used when a location is closed.
4. Click **Save** to save your selection and return to the Manage Sponsorship Settings page.

Create ineligible child rules

1. From the Sponsorship page, click **Sponsorship settings** in **Configuration.** The Manage Sponsorship Settings page appears.
2. In the **Settings for marking a child ineligible**, click **Edit**. The Edit settings for marking a child ineligible screen appears.
3. In the **For matching an opportunity use** field, select the option you want used when a child is ineligible.
4. In the **For transferring a sponsorship use** field, select the option you want used - **Full transfer** or **Pending transfer**.
   - If you select the **Pending transfer** option, when you designate a child "ineligible" and transfer the existing sponsor to a new child, the transfer status in the new sponsorship displays as "pending" until you either go to the new sponsorship record and complete the transfer or run a global change process that completes the process.

   Note: For information about marking a child "ineligible," refer to Mark a Child Ineligible for Sponsorship on page 47.

   - If you select the **Full transfer** option, when you designate a child "ineligible" and transfer the existing sponsor to a new child, the transfer status registers as "complete." No additional action is necessary.
5. Click **Save** to save your selection and return to the Manage Sponsorship Settings page.

Create close project rules

1. From the Sponsorship page, click **Sponsorship settings** in **Configuration.** The Manage Sponsorship Settings page appears.
2. In the **Settings for marking a project closed**, click **Edit**. The Edit settings for marking a project closed screen appears.
3. In the **For matching an opportunity use** field, select the option you want used when a project is closed.
4. In the **For transferring a sponsorship use**, select the option you want used - **Full transfer** or **Pending transfer**.
   - If you select the **Pending transfer** option, when you designate a project "closed" and transfer the existing sponsor to a new project, the transfer status in the new sponsorship displays as "pending" until you either go to the new sponsorship record and complete the transfer or run a global change process that completes the process.

   Note: For information about marking a project "closed," refer to Mark a Project Closed on page 56.

   - If you select the **Full transfer** option, when you designate a project "closed" and transfer the existing sponsor to a new project, the transfer status registers as "complete." No additional action is necessary.
5. Click **Save** to save your selection and return to the Manage Sponsorship Settings page.

Create new child rules

1. From the Sponsorship page, click **Sponsorship settings** in **Configuration.** The Manage Sponsorship Settings page appears.
2. In the **Settings for creating a new child**, click **Edit**. The Edit settings for creating a new child screen appears.
3. In the **For creating a new child use** field, select the option you want used when a new child record is created.
   - If you select the **Pending** option, when you create a new child record the child's eligibility status defaults to "pending." The child cannot be assigned to a sponsor until the status is changed.

   Note: For information about creating a child record, refer to Add a Child on page 39.

   - If you select the **Eligible** option, when you create a child record the child's eligibility status defaults to "eligible." No additional action is necessary.
4. If you select **Pending** in the **For creating a new child use** field, you must select a **Reason** for the pending designation. You create reason options in **Sponsorship Reasons**. For more information, refer to Reasons on page 19.
5. Click **Save** to save your selection and return to the Manage Sponsorship Settings page.

Create new project rules

1. From the Sponsorship page, click **Sponsorship settings** in **Configuration.** The Manage Sponsorship Settings page appears.
2. In the **Settings for creating a new project**, click **Edit**. The Edit settings for creating a new project screen appears.
3. In the **For creating a new project use** field, select the option you want used when a new project record is created.
   - If you select the **Pending** option, when you create a new project the project's eligibility status defaults to "pending." The project cannot be assigned to a sponsor until the status is changed.

   Note: For information about creating a project record, refer to Add a Project on page 42.

   - If you select the **Eligible** option, when you create a project the project's eligibility status defaults to "eligible." No additional action is necessary.
4. If you select **Pending** in the **For creating a new product use** field, you must select a **Reason** for the pending designation. You create reason options in **Sponsorship Reasons**. For more information, refer to Reasons on page 19.
5. Click **Save** to save your selection and return to the Manage Sponsorship Settings page.

Create affiliate relationship rules

1. From the Sponsorship page, click **Sponsorship settings** in **Configuration.** The Manage Sponsorship Settings page appears.
2. In the **Settings for creating an affiliate relationship**, click **Edit**. The Edit affiliate relationship types screen appears.
3. In the **Affiliate relationship type** field, select the relation type you want to set. For example, if you want to set the Attorney/Client relationship, select "Attorney."

4. In the **Sponsor relationship type** field, select reciprocal relationship type you want used in connection with the type selected in the **Affiliate relationship type** field. For example, if you selected "Attorney" in the **Affiliate relationship type** field, you probably want to select "client."
5. Click **Save** to save your selection and return to the Manage Sponsorship Settings page.

Opportunity Age Ranges

When you create a sponsorship program, you can include an **Age range** preference in the program definition. For example, you may want to include only children between the age of 0 and 3 in the program. To include an age range preference, you must first create the age range options.

Add Age Ranges

Add an age range

1. From the Sponsorship page, under **Configuration**, click **Sponsorship opportunity age ranges**. The Sponsorship Opportunity Age Ranges page appears.
2. Click **Add**. The Add an age range screen appears.
3. Define your age range in the **Minimum age** and **Maximum age** fields.
4. Click **Save** to save the age range and return to the Sponsorship Opportunity Age Ranges page.

Reasons

Sponsorship reasons help you track sponsorship histories, identifying why sponsorships are canceled, reactivated, transferred, or reassigned; why children are inactive; why a location is closed; and much more.

In **Sponsorship Reasons**, you create the reasons you want available in your system.

Add a Reason

When you add a sponsorship reason to your system, the reason options are available from the various reason screens accessed throughout the *Sponsorship* feature.

Add a sponsorship reason

1. From *Sponsorship*, under **Configuration**, select **Sponsorship reasons**. The Sponsorship Reasons page appears.
2. Click **Add**. The Add sponsorship reason screen appears.

3. In the **Type** field select the transaction for which you want to enter a reason. All actions in the system that accept "reasons" are options in this field.

   If you select a type that allows transfers - for example, the "Child - Mark ineligible" option - the **Transfer sponsor for** checkbox appears. Select this checkbox if you want the sponsor transferred to another child or project. In this case, if the child currently assigned is deemed ineligible.
4. In the **Reason** field enter the new reason.
5. Click **Save** to save the reason and return to the Sponsorship Reasons page.

Location Hierarchies

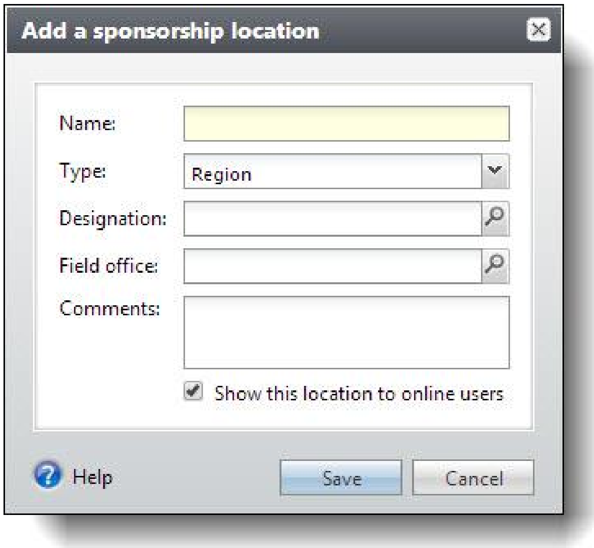
With the **Sponsorship Locations** functionality in *Sponsorship*, you can create a hierarchy of locations. To start, you create your top node in the hierarchy. For example, your top node may be a country, such as the United States. You can then add as many sub-nodes or locations - such as states, cities, counties - as necessary.

Warning: You cannot create the same node level more than once. For example, if you create a United States hierarchy with the sub-node "Southwest," you cannot create another "Southwest" sub-node off the United States hierarchy.

Add Location Hierarchy

▶ **Add a location hierarcy**

1. From the Sponsorships page, click **Sponsorship locations**. The Sponsorship Locations page appears.
2. Click **Add**. The Add a sponsorship location screen appears. From here, you create the top node of your hierarchy.



3. In the **Name** field, enter a name to identify the location. For example, if you need a hierarchy that includes several regions in China, for your top node location, you would enter "China" in the **Name** field.
4. In the **Type** field, identify what type of location your are creating.

   Note: You create **Type** options in **Code Tables** accessed from *Administration*. Navigate to the **Sponsorship** section on the Code Tables page and use the Sponsorship Location Type Code table. The order of this code table is user-defined and designed to aid you in data entry. For example, if you set up the order of your hierarchy to be Country\State\City, the correct **Type** defaults in the field based on the location you are adding - the new hierarchy defaults "Country" the new sub-node under Country defaults State, and so on.

5. In the **Designation** field, you can select the fundraising designation you want to associate with this location.

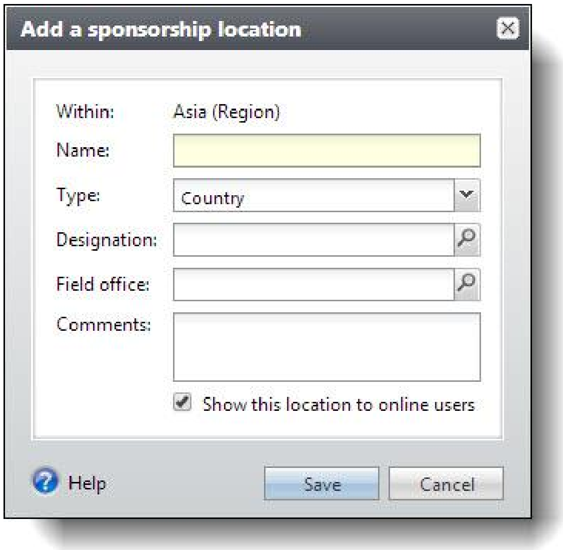
   For any given location associated with an opportunity, either that location or some location above it in the hierarchy must have a designation assigned in order for you to assign a sponsor to the opportunity. For example, if you are creating the City node of the Country\State\City hierarchy, you can associate a designation with each node of the hierarchy or with just the Country node and the State and City nodes use the same designation assigned the Country.

   Note: Designations represent donor intent and tracks how you intend to use the revenue associated with the designation. Designations can also be associated with campaigns to track performance toward a goal. For more information, refer to the *Fundraising Guide*.

6. In the **Field office** field, you can associate this location with a specific field office. The field office must be entered as an organization in your system. Click the magnifying glass to access the Organization search screen.
7. In the **Comments** field, enter any additional information.
8. Select **Show this location to online users** if you want Web users in addition to internal users to see this location when searching for sponsorships.
9. Click **Save** to save the top node location.
10. If you just need this top node location, your work is done. If you need a sub-location - for example you need to include two regions in China:

a. Select a location in the **Sponsorship locations** grid.

b. Click **Add**. The Add a sponsorship location screen appears.



c. The **Within:** field indicates where in the hierarchy the new location will exist. This field appears for all nested locations.

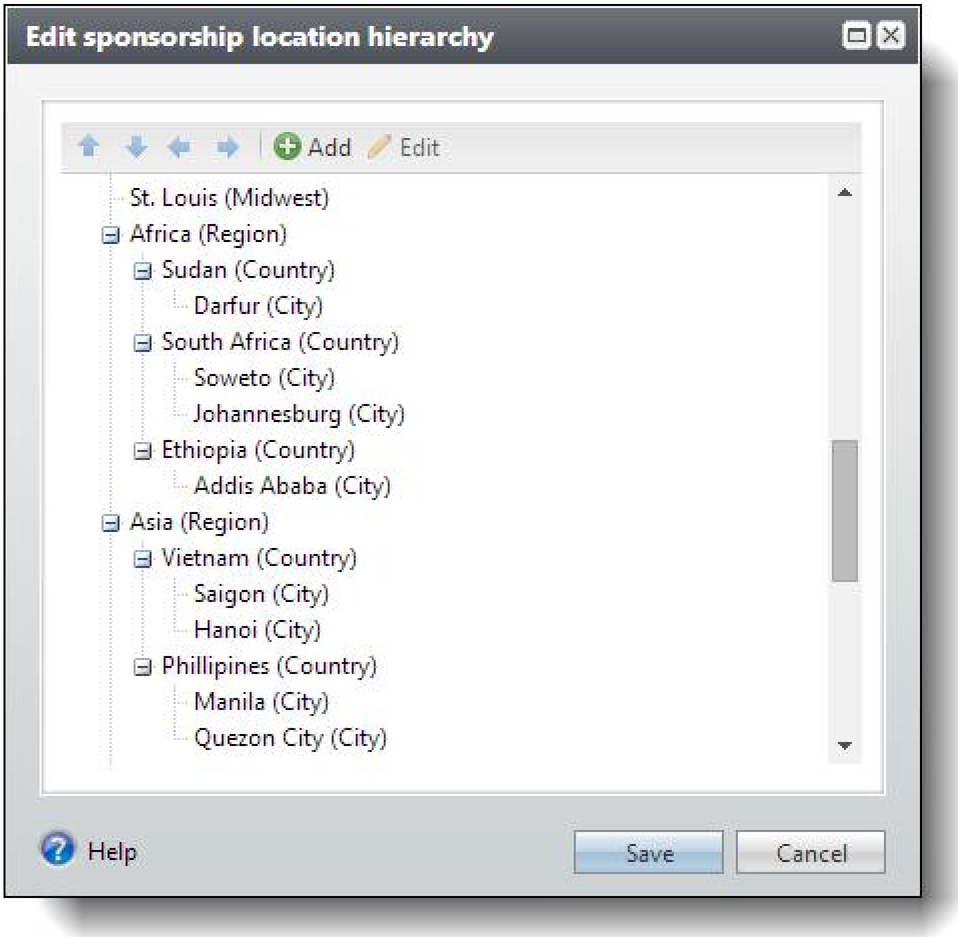
d. Add the information for the sub-location as you did for the top node location and click **Save**.

With the add a location option, you can continue nesting locations until your specific needs are met.

The locations created in **Sponsorship Locations** are used throughout the *Sponsorship* feature.

Edit Sponsorship Location Hierarchy

From the Sponsorship Locations page, you can rearrange the nesting of your existing entries. For example, if you have two China hierarchies and want to move a node from the Southeast China hierarchy to the Northeast China hierarchy you can drag-and-drop the node you want to move.



To move nodes around, select a location and click **Edit hierarchy** from the Sponsorship Locations page. The Edit sponsorship location hierarchy screen appears and displays a tree view of all hierarchies. Select the entries you want to move and drag them to the new locations. You can also select an entry and use one of the **Move** options. If desired, you can **Add** or **Edit** a location. For more information, refer to Add Location Hierarchy on page 20. When you finish rearranging the entry, click **Save** to save the new arrangement and return to the Sponsorship Locations page.

Note: Although you can reorder nodes on this page, by default the system alphabetizes all entries on the Sponsorship Locations page. Any reordering of entries on the Edit sponsorship location hierarchy screen will not translate to the Sponsorship Locations page.

Remove Location from Availability

You may need to remove a location from availability for a number of reasons - it may have been created by mistake, it may have reached its attrition status, or it may no longer be available. How you remove the location from availability depends on which of these reasons you need to satisfy.

Delete Location

You can delete a location from your database if the location and any sub-locations are not referenced in the database, and you want it permanently removed from your system. For example, if you make a mistake while creating new locations, you can delete your mistake before users start to assign sponsorships.

When you delete a location, all sub-locations nested in the deleted location are also removed. If any of the locations are referenced in the database - for example opportunities, programs, sponsorship preferences - the location is not deleted and an error message displays. In this situation, you may want to consider designating the location “Inactive.”

To delete the location, from the Sponsorship Locations page, in the **Sponsorship locations** grid, select the location you want to delete. Click **Delete**. A confirmation screen appears; click **Yes** to remove the location from your system and return to the Sponsorship Locations page.

Mark Location Inactive

If a location is being phased out and not accepting new sponsorships, but it will keep any existing sponsorships through maturity, you can designate the location “Inactive.” This prevents new assignments but keeps existing assignments intact.

To designate the location “Inactive,” from the Sponsorship Locations page, in the **Sponsorship locations** grid, select the location you want to mark “Inactive.” Click **Mark, Mark inactive**. The Mark inactive screen appears. Select a **Reason** why the location is inactive and click **Save** to designate the location “Inactive” and return to the Sponsorship Locations page.

Mark Location Active

If after designating a location “Inactive” or “Closed” you find you have to reactivate the location, you can do so from the Sponsorship Locations page.

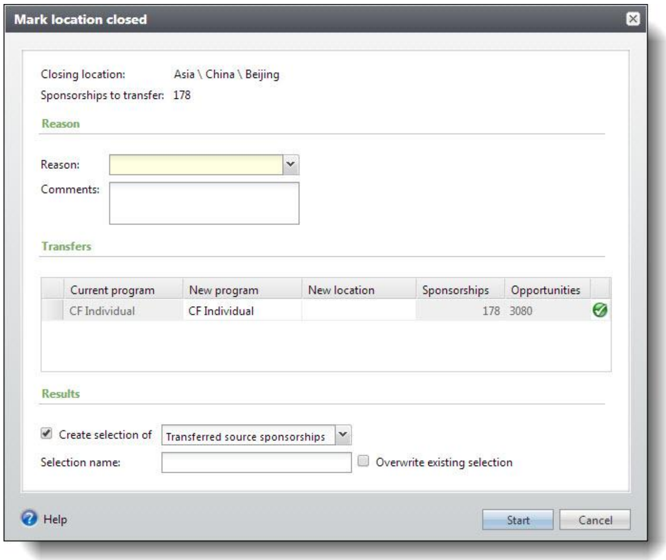
To designate the location “Active,” from the Sponsorship Locations page, in the **Sponsorship locations** grid, select the location you want to mark “Active.” Click **Mark, Mark active**.

Close Location

If a situation requires you to stop using a location option but the location or sub-locations are referenced in your sponsorship records, this option allows you to transfer affected records to a new location or program and close it as an option, preventing users from assigning additional records to the location.

▸ **Mark a location closed and transfer existing sponsorships**

1. From the Sponsorship Locations page, in the **Sponsorship locations** grid, select the location you want to close.
2. Click **Mark, Mark closed**. The Mark location closed screen appears.



3. Select a **Reason** why the location is closed.

   If sponsors are assigned opportunities in these locations and you do not reassign the sponsors using the **Transfers** grid, the program automatically reassigns the sponsors to opportunities best satisfying their sponsorship criteria.

4. Enter any **Comments** about why the location is closed.

5. In the **Transfers** grid:

   - The view-only **Current program** column displays any sponsorship programs currently associated with the selected location.
   - In the **New program** column, you can select the new sponsorship program for any sponsorships currently assigned to the soon-to-be-closed location.
   - In the **New location** field, you can select the new location for any sponsorships currently assigned to the soon-to-be-closed location. Click the magnifying glass at the end of the field to access a search screen to help you locate the new location.
   - The view-only **Sponsorships** column displays the number of sponsorships affected by this close.
   - The view-only **Opportunities** column displays the number of opportunities affected by this close.
   - The last column contains an indicator which states whether or not the new location selected to transfer sponsorships has enough opportunity matches for the sponsorships.

   Note: If the new location selected to transfer sponsorships does not have enough opportunity matches for the sponsorships, an Exception Report generates. You can use the report to track sponsorships still left without a match.

6. To create a selection of the results, check **Create selection of** and select the type of selection to create. For more information about selections, refer to the *Query and Export Guide*.

   - Enter a **Selection name** to identify your selection. You can choose to **Overwrite existing selections** if the **Selection name** you entered already exists.

7. Click **Start** to designate the site “Closed” and execute the transfer. The Mark Sponsorship Location Closed status page appears. This page houses details of the closed location. For more information, refer to Tabs of a Process Status Page on page 13.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains 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**.

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 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.

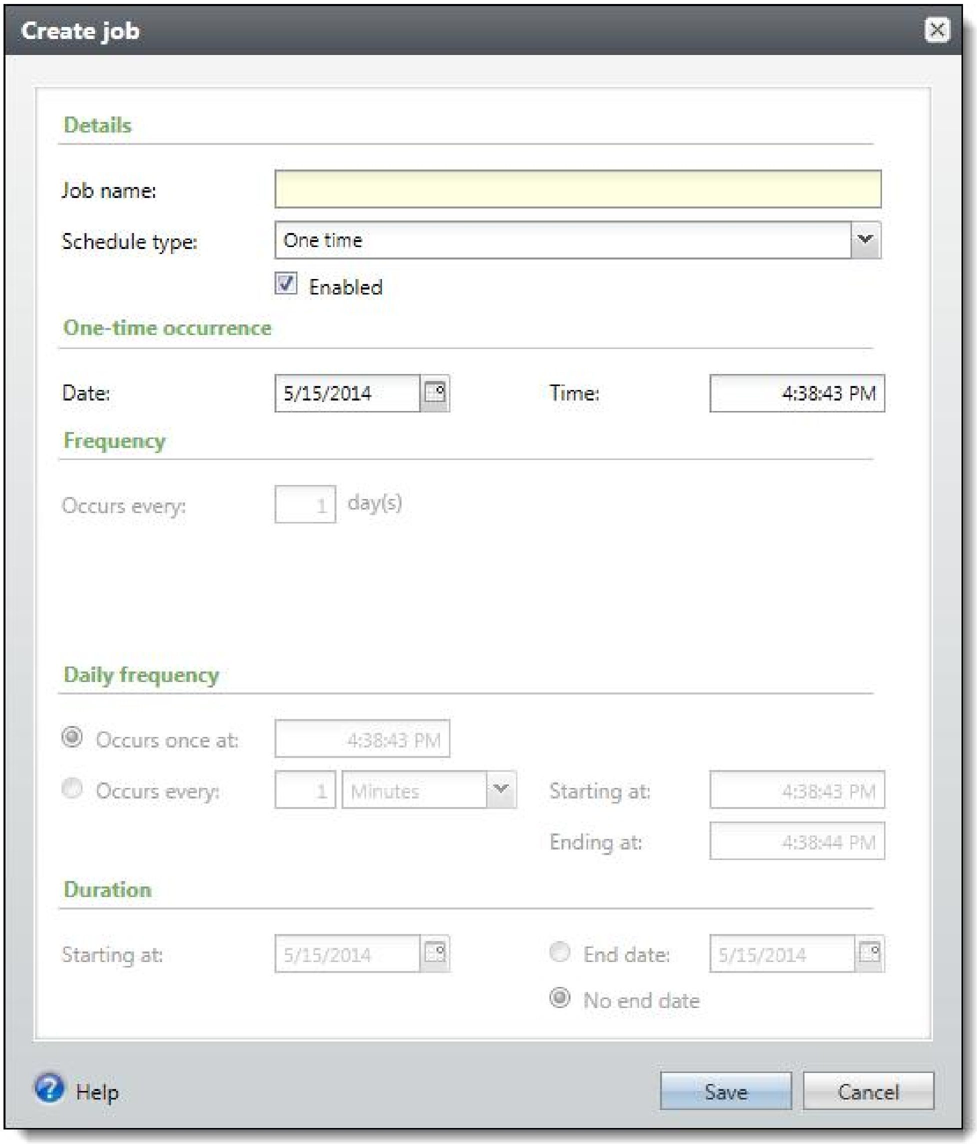
Schedule Process Jobs

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.



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. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package 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 99.
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
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 *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs 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 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.

Start Process

This task allows you to start the selected business process from the process page.

Edit Process

This task allows you to edit the selected business process from the process page.

Create Job Schedule

This task allows you to create a job schedule that tells the application when to automatically run the selected business process.

Delete Process

This task allows you to delete the selected business process from the process page. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the transmission file or prenotification authorization file, once you delete the process, you can no longer use its output file that contains the data extracted from your database.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

Process Status Report

When you execute a process, the process generates a status report which is housed on the Recent status tab of the process page. For example, if you execute a sponsorship transfer process, the Transfer Report appears on the Recent status tab which lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships, and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

Sponsorship Opportunity Groups

A **Sponsorship Opportunity Group** is associated with opportunities. This helps you better track and manage opportunities. For example, you can create groups that included opportunities in the same geographical location or with the same special needs.

Here is a more specific example:

- You create a group for a child or project opportunity that allows for five sponsors per opportunity.
- Next you have to create a program to associate with the opportunity group.

- When you add a child or project you have to associate the new opportunity with an opportunity group.
- When you add a sponsorship, you have to select the program from which you want to select the opportunity. Only opportunities associated with the group you assigned the selected program are available to place with this sponsor.
- Once an opportunity in the group has five sponsors (or a sole sponsor if allowed), the opportunity is no longer available for sponsorship. It does not appear when a sponsorship opportunity search is executed.

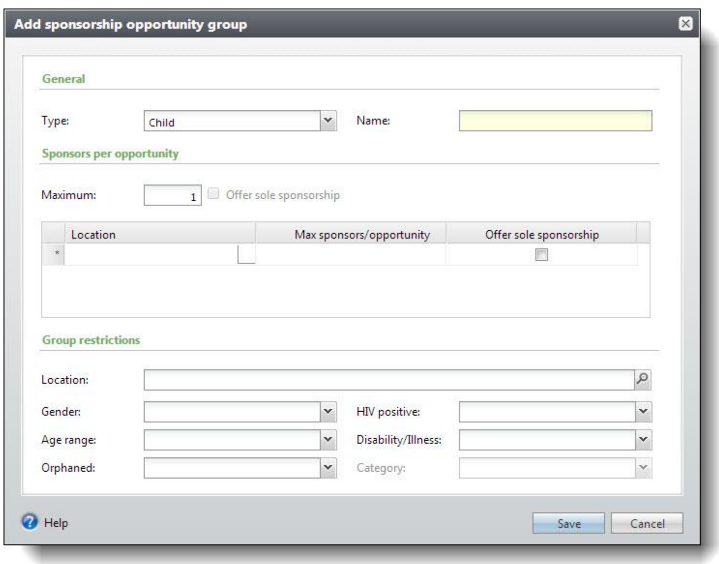
Add Opportunity Groups

Opportunity groups are required when you create **Sponsorship programs** and when you add opportunities to your system.

▸ Create a new opportunity group

1. From the Sponsorship page, under **Configuration**, click **Sponsorship opportunity groups**. The Sponsorship Opportunity Groups page appears.

   All existing groups display in the **Sponsorship opportunity groups** grid.
2. Click **Add**. The Add sponsorship opportunity group screen appears.



3. In the **Type** field, select the type of opportunity you want to include in this group - child or project.
4. In the **Name** field, enter a name to help you identify the new group.
5. In the **Maximum** field, enter the maximum number of sponsors allowed for each opportunity in the group.
6. Mark **Offer sole sponsorship** if you want to offer sponsors the option of being the sole sponsor of an opportunity included in this group. If you select this option, a sole sponsorship option is included in the Add a sponsorship screen.
7. If you want to allow an override of the maximum sponsors per opportunity based on a specific location, in the grid in the **Sponsors per opportunity** frame enter the **Location**, the **Max sponsors/opportunity**, and indicate if you want to **Offer sole sponsorship** for the override.

8. In the **Group restrictions** frame, you can place restrictions on opportunities included in the group based on location, age, gender. Select any restrictions you want applied.
9. Click **Save** to save the opportunity group and return to the Sponsorship Opportunity Groups page. The new group appears in the **Sponsorship opportunity groups** grid.

Mark Opportunity Group Inactive/Active

To deactivate the group, from the Sponsorship Opportunity Groups page, in the **Sponsorship opportunity groups** grid, select the group you want to deactivate and click **Mark inactive**.

To reactivate the group, select the group and click **Mark active**.

Greatest Need Rules

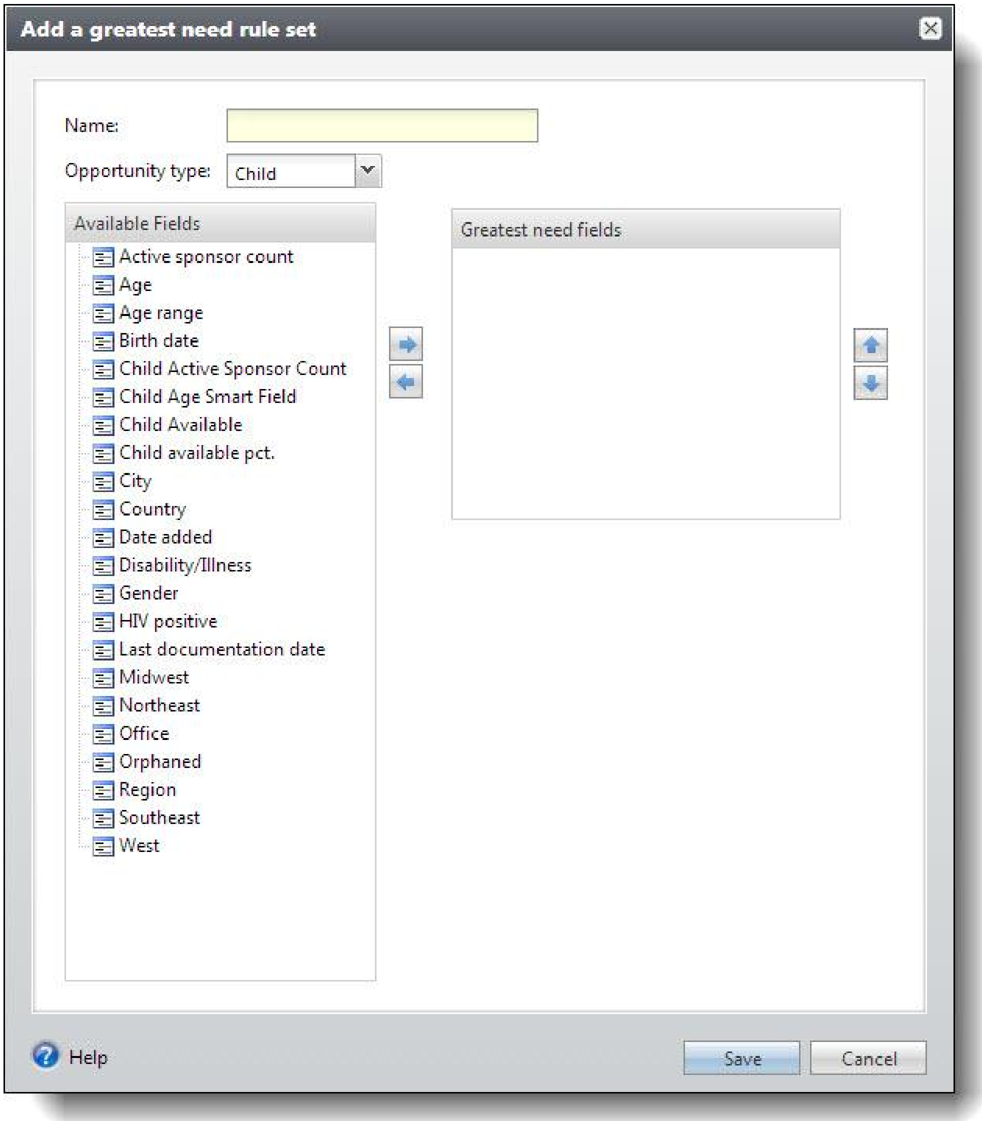
You can create a set of rules to use to determine which child or project is in the most need. When you create a greatest need rule, you determine which attribute of need - age, location, gender - you want considered first when placing an opportunity with a sponsor. For example, for a child opportunity you may want to place all children who tested positive for HIV first. You can set up a rule for this.

Add Greatest Need Rule

Add a greatest need rule

1. From the Sponsorship page, under **Configuration**, click **Sponsorship greatest need rule sets**. The Sponsorship Greatest Need Rule Sets page appears.

   All existing rules display in the **Sponsorship greatest need rule sets** grid.
2. Click **Add**. The Add greatest need rules screen appears.



3. Enter a **Name** to help identify the greatest need rule set.
4. Select an **Opportunity type** for the rule set. This determines which **Available Fields** display.
5. The **Available Fields** contains all of the opportunity fields with which you can create your greatest needs rule. For example, if you select "Child" as your **Opportunity type** you can base greatest need on Age, Birth date, Gender, etc. You can add custom fields through **Smart fields** available in *Administration*. For more information, refer to the *Administration Guide*.

   Note: Location fields included in **Available Fields** depend on the locations defined in **Sponsorship locations**. For example, if you include "City" options in **Sponsorship locations**, "City" is included as a greatest need option. If you do not include "City" in **Sponsorship locations** but you do include "Region," "Region" is included as a greatest need option and "City" is not.

6. The **Greatest need fields** contains all of the selected fields for your greatest needs rule. The order in which the fields are organized determines which gets precedence. For example, if Age appears above

Gender, the child opportunity satisfying the greatest need age rule is placed first. If no opportunity is located, the application then looks at the next field listed, and so on.

7. When a greatest need field is selected, the **Greatest need field values** for that field display. For more information, refer to Greatest Need Field Values for a Child on page 34 and Greatest Need Field Values for a Project on page 35.
8. Click **Save**. You return to the Greatest Need Rules page.

Greatest Need Field Values for a Child

Field	Description
Active sponsor count	Select how you want to determine greatest need based on active sponsor count: **Higher** = children with a greater active sponsor count are selected first; **Lower** = children with a lower active sponsor count are selected first.
Age	Select how you want to determine greatest need based on age: **Higher** = older children are selected first; **Lower** = younger children are selected first.
Age range	In the **Age range** grid, select the age range(s) you want used to identify greatest need. You can select several ranges. The range selected first is the range considered first when the program determines greatest need. **Use threshold of**: If you enter more than one greatest need value - for example ages 0-3 and 4-6 - but you do not want to deplete the children included in the 0-3 category before the application starts selecting children in the 4-6 range, you can select a **Use threshold of** option. The threshold options are created in **Manage Smart Fields** in *Administration* and can be based on a count or a percentage. In the **Is greater than** field, enter the threshold number you want realized before the application starts to select from the next listed greatest need value. For information about smart fields, refer to the *Administration Guide*.
Birth date	Select how you want to determine greatest need based on birthdate: **Earlier** = children with the most recent birthdate are selected first; **Later** = children with the later birth date are selected first.
Sponsorship location options, such as **Country, City, Region**	In the **Country, City, Region, etc.** grid, select the location(s) you want used to identify greatest need. You can select several locations. The location selected first is the location considered first when the program determines greatest need. **Use threshold of**: If you enter more than one greatest need value - for example China and India - but you do not want to deplete the children included in the China category before the application starts selecting children in India, you can select a **Use threshold of** option. The threshold options are created in **Manage Smart Fields**, in *Administration* and can be based on a count or a percentage. In the **Is greater than** field, enter the threshold number you want realized before the application starts to select from the next listed greatest need value. For information about smart fields, refer to the *Administration Guide*.
Date added	Select how you want to determine greatest need based on the date the child was added to your system: **Earlier** = children with the most recent add date are selected first; **Later** = children with the later add date are selected first.
Disability/Illness	In the **Disability/Illness** grid, select the disability and/or illness you want used to identify greatest need. You can select several disabilities and/or illnesses. The options selected first are considered first when the program determines greatest need. **Use threshold of**: If you enter more than one greatest need value - for example TB and limited mobility - but you do not want to deplete the children included in the TB category before the application starts selecting children labeled Limited mobility, you can select a **Use threshold of** option. The threshold options are created in **Manage Smart Fields** in *Administration* and can be based on a count or a percentage. In the **Is greater than** field, enter the threshold number you want realized before the

Field	Description
	application starts to select from the next listed greatest need value. For information about smart fields, refer to the *Administration Guide*.
Gender	In the **Gender** grid, select the gender(s) you want used to identify greatest need. You can select just one gender and this gender is considered when the program determines greatest need. If you select both genders, the gender selected first is the gender considered first when the program determines greatest need. **Use threshold of**: If you enter more than one greatest need value - for example Female and Male - but you do not want to deplete the children included in the Female category before the application starts selecting children listed as Male, you can select a **Use threshold of** option. The threshold options are created in **Manage Smart Fields** in *Administration* and can be based on a count or a percentage. In the **Is greater than** field, enter the threshold number you want realized before the application starts to select from the next listed greatest need value. For information about smart fields, refer to the *Administration Guide*.
HIV positive	Select how you want to determine greatest need based on the child's HIV status: **Unchecked** = children without the HIV option selected on their record are selected first; **Checked** = children with the HIV option selected on their record are selected first.
Last documentation date	Select how you want to determine greatest need based on the child's last documentation date: **Earlier** = children with the most recently updated documentation are selected first; **Later** = children with the oldest updated documentation are selected first.
Orphaned	Select how you want to determine greatest need based on the child's orphaned status: **Unchecked** = children without the orphaned option selected on their record are selected first; **Checked** = children with the orphaned option selected on their record are selected first.
Region	In the **Region** grid, select the region location(s) you want used to identify greatest need. You can select several regions. The region selected first is the region considered first when the program determines greatest need. **Use threshold of**: If you enter more than one greatest need value - for example Southeast and Northwest - but you do not want to deplete the children included in the Southeast category before the application starts selecting children in the Northwest, you can select a **Use threshold of** option. The threshold options are created in **Manage Smart Fields**, in *Administration* and can be based on a count or a percentage. In the **Is greater than** field, enter the threshold number you want realized before the application starts to select from the next listed greatest need value. For information about smart fields, refer to the *Administration Guide*.
Smart field	Any smart field definitions you created in **Smart Fields** display value options based on values you selected when you created the definition. For more information about smart fields, refer to the *Administration Guide*.

Greatest Need Field Values for a Project

Field	Description
Active sponsor count	Select how you want to determine greatest need based on active sponsor count: **Higher** = projects with a greater active sponsor count are selected first; **Lower** = projects with a lower active sponsor count are selected first.
Category	In the **Category** grid, select the category(s) you want used to identify greatest need. You can select several categories. The category selected first is the category considered first when the program determines greatest need.

Field	Description
	Use threshold of: If you enter more than one greatest need value - for example project length 1-3 months and project length 4-6 months - but you do not want to deplete the opportunities included in the 1-3 month category before the application starts selecting projects in the 4-6 month range, you can select a **Use threshold of** option. The threshold options are created in **Manage Smart Fields** in *Administration* and can be based on a count or a percentage. In the **Is greater than** field, enter the threshold number you want realized before the application starts to select from the next listed greatest need value. For information about smart fields, refer to the *Administration Guide*.
Sponsorship location options, such as **Country, City, Region**	In the **Country, City, Region, etc.** grid, select the location(s) you want used to identify greatest need. You can select several locations. The location selected first is the location considered first when the program determines greatest need. **Use threshold of**: If you enter more than one greatest need value - for example China and India - but you do not want to deplete the projects included in the China category before the application starts selecting projects in India, you can select a **Use threshold of** option. The threshold options are created in **Manage Smart Fields** in *Administration* and can be based on a count or a percentage. In the **Is greater than** field, enter the threshold number you want realized before the application starts to select from the next listed greatest need value. For information about smart fields, refer to the *Administration Guide*.
Date added	Select how you want to determine greatest need based on the date the project was added to your system: **Earlier** = projects with the most recent add date are selected first; **Later** = projects with the later add date are selected first.
Last documentation date	Select how you want to determine greatest need based on the project's last documentation date: **Earlier** = projects with the most recently updated documentation are selected first; **Later** = projects with the oldest updated documentation are selected first.
Region	In the **Region** grid, select the region location(s) you want used to identify greatest need. You can select several regions. The region selected first is the region considered first when the program determines greatest need. **Use threshold of**: If you enter more than one greatest need value - for example Southeast and Northwest - but you do not want to deplete the opportunities in the Southeast before the application starts selecting projects in the Northwest, you can select a **Use threshold of** option. The threshold options are created in **Manage Smart Fields**, in *Administration* and can be based on a count or a percentage. In the **Is greater than** field, enter the threshold number you want realized before the application starts to select from the next listed greatest need value. For information about smart fields, refer to the *Administration Guide*.
Smart field	Any smart field definitions you created in **Smart Fields** display value options based on values you selected when you created the definition.

Sponsorship Programs

With *Sponsorships*, you can define and manage the various sponsorship types you want to make available to your sponsors. For example, if you match sponsors to children, you can create specific child programs based on an association with a greatest need rule and specific group.

Note: You must have opportunity groups and greatest need rule sets in place before you create a program. Both are required when you create a program.

For instance, you create a greatest need rule based on age, with the older age given preference, and an opportunity group of children in Asia. You can then create a program that pulls from the selected group and bases its selection of children in this group on the "Age" greatest need rule so the oldest available children in Asia are selected first.

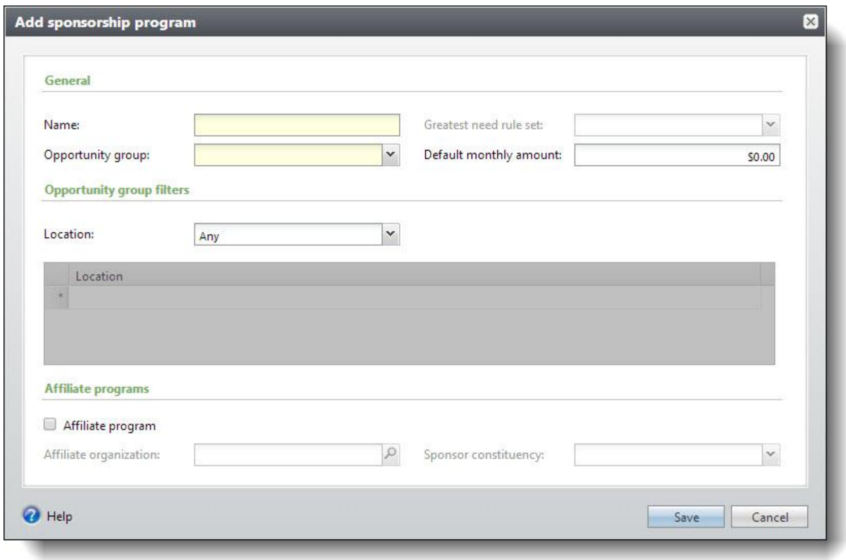
Add Sponsorship Program

Add a new sponsorship program

1. From the Sponsorship page, under **Configuration**, click **Sponsorship programs**. The Sponsorship Programs page appears.

   All existing programs display in the **Sponsorship programs** grid.

2. Click **Add**. The Add sponsorship program screen appears.



3. In the **Name** field, enter a name that identifies the program.
4. In the **Opportunity group** field, select the group you want associated with the program. You create opportunity groups in **Sponsorship opportunity groups**. For more information, refer to Sponsorship Opportunity Groups on page 30.
5. In the **Greatest need rule set** field, select the greatest need rule you want used to govern this program. You create greatest need rules with the **Sponsorship greatest need rule sets** tool in **Configuration**. For more information, refer to Greatest Need Rules on page 32.
6. In the **Default monthly amount** field, enter the dollar amount suggested for a sponsor to participate in this program. This amount defaults in the **Amount** field of any opportunity that uses this program, but it can be edited.
7. In the **Location** field, you can choose to associate a location with this program. Your selection determines which opportunities are available to include in the program:
   - **Any**: Opportunities associated with any location can be included in this program
   - **In**: Only opportunities associated with the location(s) selected in the **Location** grid can be included in this program
   - **Not in**: Only opportunities not associated with the location(s) selected in the **Location** grid can be included in this program

8. Select **Affiliate program** if this program is affiliated with another organization. When you select this option, the **Affiliate organization** and **Sponsor constituency** fields activate.
9. In the **Affiliate organization** field, enter the organization to which this program is affiliated. Click the magnifying glass at the end of the field to access a search screen and locate the organization in your database. You can also add the organization from this screen if the organization does not exist in your database.
10. In the **Sponsor constituency** field, you can assign a constituent code to this organization.
11. Click **Save**. You return to the Sponsorship Programs page.

Mark Inactive

If you want to make sure a program is no longer available to accept sponsors, but you do not want to delete the program from your system - for example a number of sponsors may already be assigned to the program - you can designated it “Inactive.” From the Sponsorship Programs page, select **Mark inactive**. A confirmation screen appears. Click **Yes** to mark the program “Inactive” and remove it from availability.

Manage Sponsorship Opportunities

Sponsorship opportunities are the motivation behind a constituent sponsorship gift. For example, if your organization needs to raise money to dig a well to provide water to a needy community, you can create a "Well" sponsorship opportunity, assign the opportunity to a sponsorship program and location, assign a goal amount, and even enter date information.

You can create sponsorship opportunities for children and projects.

Add a Child

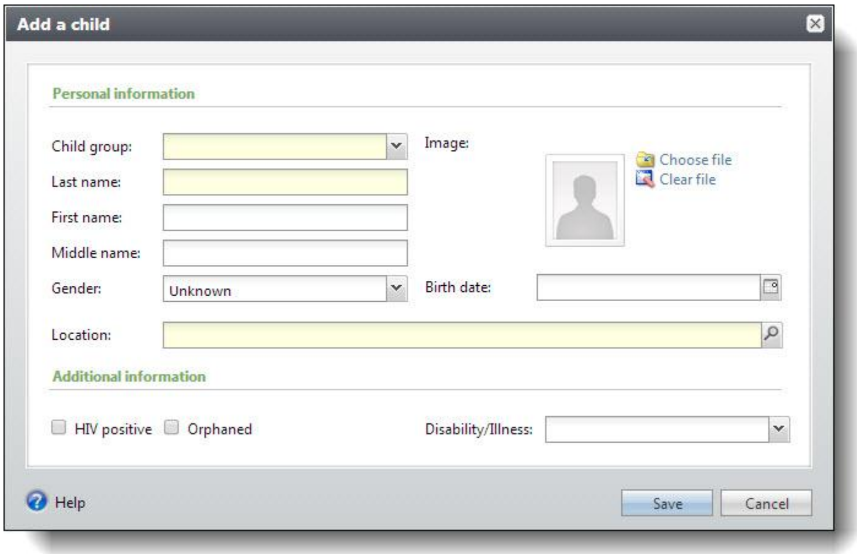
You can create records to track children you want to make available to interested sponsors. For example, you can enter personal information such as name and location for a child. The child is saved in your database and available to be matched with a sponsor.

When creating a child record, you assign the child to a specific Sponsorship program, such as “Children 0-5” and “Children 6-10.” This allows you to better match your sponsors’ needs and track your assignments.

The child group must exist in your system before you can add a child. For information about groups, refer to Sponsorship Opportunity Groups on page 30.

Add a child record

1. From the Sponsorships page, click **Add a child**. The Add a child screen appears.



2. In the **Child group** field, select a sponsorship opportunity group to which you want to assign this child.
3. Enter the child’s name, gender, and birth date. Depending on the **Child group** selected, some of this information may default into the fields. For example if the group is restricted to girls, “Female” defaults into the **Gender** field and cannot be edited. Possible group restrictions include **Location**, **Gender**, **Orphaned**, **Age range**, **HIV positive**, **Disability/Illness**.
4. In the **Location** field, select or enter location information for this child. If the location was defined in the selected group, this field automatically populates with the information included in the group. If the location was not defined in the selected group and you want to include it in the child record, click the magnifying glass at the end of the field to access the search screen. From here, you can search for the location option in the database.
5. Click **Choose file** to locate any picture stored in your system that you want to include on the child’s record. Click **Clear file** if you want to remove an existing image.
6. Select any additional information you need to record regarding the child. Although you can enter **Disability/Illness** information on the fly, you can also define available selections in **Code Tables** accessed through *Administration*. You enter disability and illness information in the Sponsorship Opportunity Child Condition Code table. For more information about code tables, refer to the *Administration Guide*.
7. Click **Save**. The new project record appears.

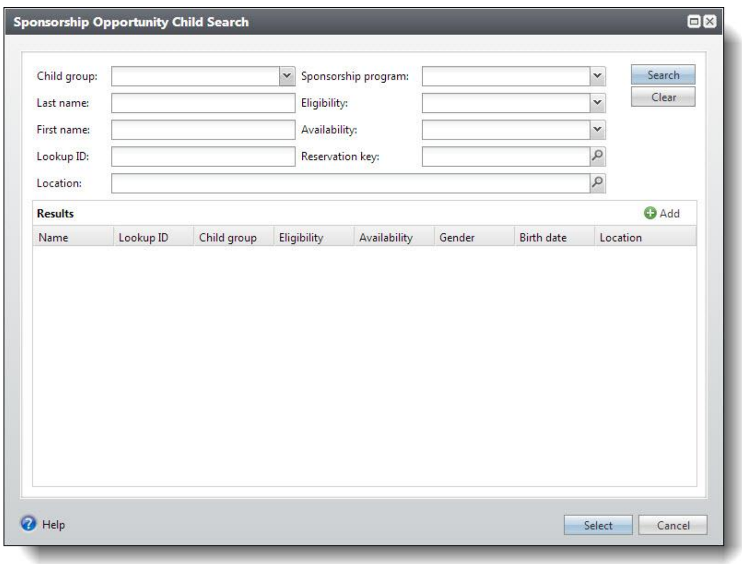
Search for a Child

Before you add a child to your database, to avoid duplicates, you should first search your database to make sure the child is not already entered. Once you add a child record, you can use the search screen at any time to find the child in your database.

When you search for a child record, you can make the search broad or specific, depending on the criteria you select. With a large database, you should be selective and enter detailed information to get the records you need. For example, you can use name and location fields. For searches returning more than 100 records, only the first 100 appear in the results.

Search for an existing child

1. On the Sponsorship page, click **Child search**. The Sponsorship Opportunity Child Search screen appears.



2. In the top frame, decide how to filter records for this search and enter your criteria. The search process is not case-sensitive, so you can enter Smith, smith, or SMITH and get the same results.

   > ***Note:*** In the criteria fields, you can enter “wildcard” characters to take the place of parts of the search phrase. Use the asterisk (*) or percent sign (%) to take the place of a group of characters and the question mark (?) or underscore (_) to take the place of an individual character. For example, to locate all sponsors with a last name ending with the letters “son”, you can enter *son or %son in the name field, or for the last name Smith or Smyth, you can enter Sm?th or Sm_th.

3. Click **Search**. The program searches the database and displays all children who meet your search criteria.
4. Select the child to open. The child’s record page appears.

   > ***Note:*** You can add a child from the search screen. On the action bar, click **Add**. For more information about how to add a child, refer to Add a Child on page 39.

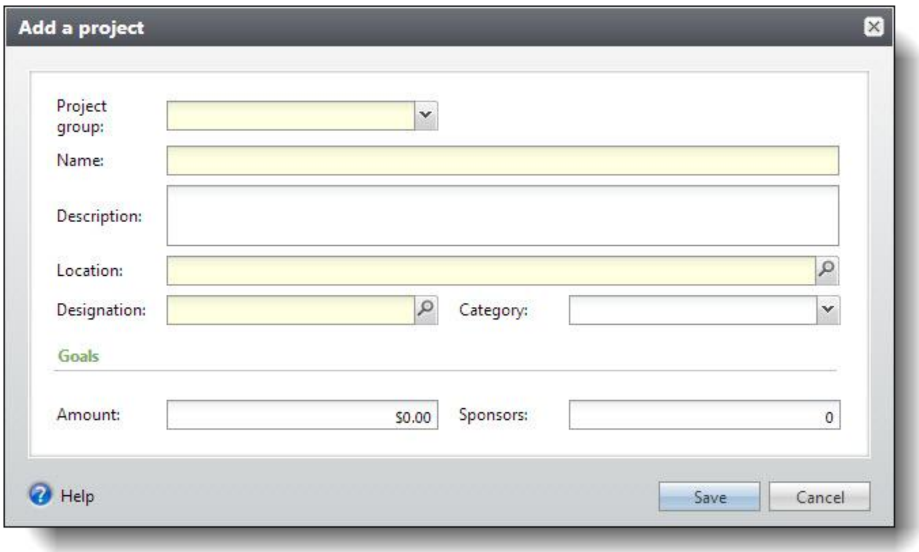
Add a Project

You can create records to track projects you want to make available to interested sponsors. For example, you can enter general information such as the project name, location, and budget. The project is saved in your database and available to be matched with a sponsor.

When creating a project, you assign the project to a specific sponsorship group, such as “Fresh Water Wells,” or “New Schools.” This allows you to better match your sponsors’ needs and track your assignments.

Add a project record

1. From the Sponsorships page, click **Add a project**. The Add a project screen appears.



2. In the **Project group** field, select a sponsorship opportunity group. You create groups in **Sponsorship Opportunity Groups** under **Configuration** on the Sponsorship page. For more information about groups, refer to Sponsorship Opportunity Groups on page 30.
3. Enter a **Name** and **Description** to help you identify this sponsorship opportunity.
4. In the **Location** field, select a location for the project. If a location is associated with the **Project group** selected, this location defaults into the **Location** field and cannot be edited. You create **Location** options in **Sponsorship Locations**. For more information, refer to Location Hierarchies on page 20.
5. In the **Designation** field, you can select the fundraising designation you want to associate with this project.

   Note: Designations represent donor intent and tracks how you intend to use the revenue associated with the designation. Designations can also be associated with campaigns to track performance toward a goal. You manage designations from one central location—the Designation Hierarchies page. From *Fundraising*, select **Designation Hierarchies** to view this page. For more information, refer to the *Fundraising Guide*.

6. In the **Category** field, you can associate a category, created in **Code Tables** in *Administration*, with the project. Categories are user-defined and used to help you better define projects. For example, you may

create categories used to define the length of a project - One month, Two months. For more information about code tables, refer to the *Administration Guide*.

7. In the **Amount** field, enter the amount you need to raise for this project.
8. In the **Sponsors** field, enter the number of sponsors allowed on this project.
9. Click **Save**. The new project record appears.

> ***Note:*** If you configured projects to default to "Pending" when created, a **Start date** is not assigned to the project upon creation. The date is assigned when you activate the new project.

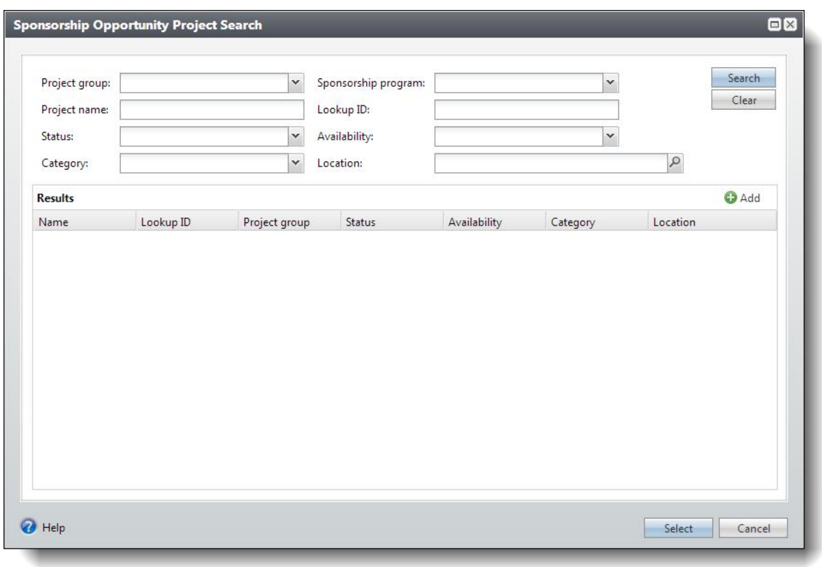
Search for Project

Before you add a project to your database, to avoid duplicates, you should first search your database to make sure the project is not already entered. Once you add a project record, you can use the search screen at any time to find the project in your database.

When you search for a project record, you can make the search broad or specific, depending on the criteria you select. With a large database, you should be selective and enter detailed information to get the records you need. For example, you can use name and location fields. For searches returning more than 100 records, only the first 100 appear in the results.

Search for an existing project

1. On the Sponsorship page, click **Project search**. The Sponsorship Opportunity Project Search screen appears.



2. In the top frame, decide how to filter records for this search and enter your criteria. The search process is not case-sensitive, so you can enter Well, well, or WELL and get the same results.

> ***Note:*** In the criteria fields, you can enter "wildcard" characters to take the place of parts of the search phrase. Use the asterisk (*) or percent sign (%) to take the place of a group of characters and the question mark (?) or underscore (_) to take the place of an individual character. For example, to locate all projects that contain "well", you can enter *well or %well in the **Project name** field. A search of _ell or ?ell in the **Project name** field will return "well" or "sell."

3. Click **Search**.
4. Select the project to open. The project's record page appears.

   Note: You can add a project from the search screen. On the action bar, click **Add**. For more information about how to add a project, refer to Add a Project on page 42.

Opportunity Page

With *Sponsorship*, you can manage a variety of sponsorship opportunities, such as children or projects (dig well, build hospital), to which you want to assign sponsors. Although the opportunity page hosts both children and projects, the tab structure varies based on the opportunity type.

Child Page

After you add a child, the child record page appears. From this page, you can manage your child record - edit the child, delete the child record, add attributes or notes, change the child's status, and more.

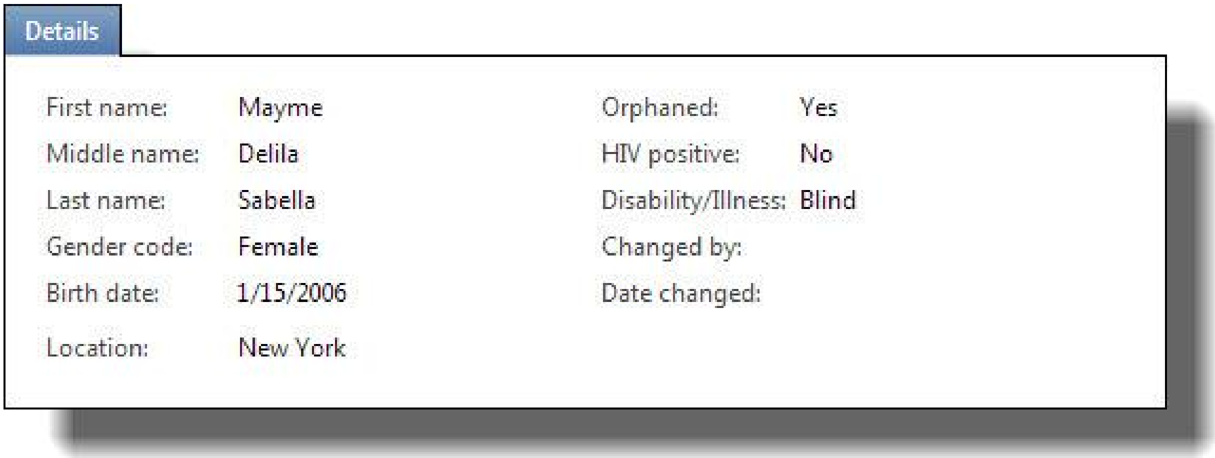
Note: For information about how to create a child opportunity, refer to Add a Child on page 39; for information about how to search for an existing child, refer to Search for a Child on page 41.

Child Summary View

The summary view displays at the top of the child record. It affords you a quick look at pertinent information about the child: Opportunity group, Lookup ID, Eligibility, Availability, the number of Active sponsors, and much more. The Last documentation date recorded in the summary view is the date manually entered using the **Edit last documentation date** under **Tasks**. This date is often changed to record when the child's case history was updated. It is also used when generating a **Child Inventory** report.

Child Details

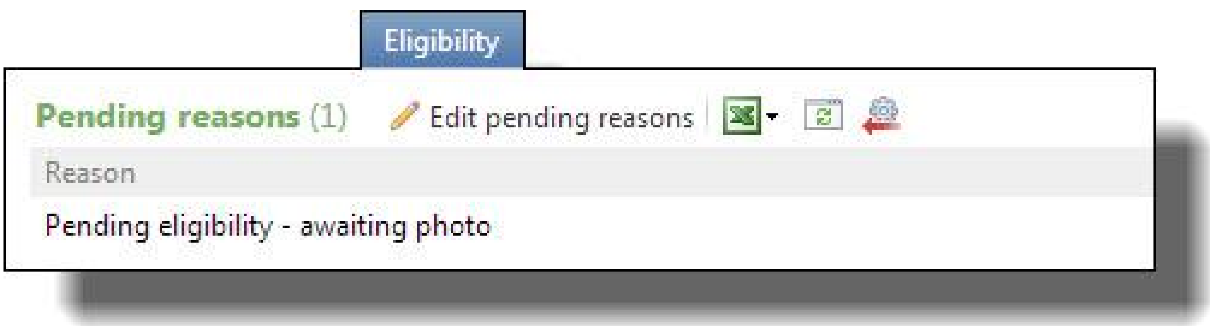
The Details tab of the Child page displays general information about the child, such as name, gender, birth date, and other data. This information is entered when a child is added. When a child's record is modified, the **Changed by** and **Date changed** fields update and indicate who made the change and when.



Reasons an Opportunity is Pending

The Eligibility tab on the child record lists the various reasons the opportunity status is pending.

Note: The Eligibility tab does not appear on the child record if the child is designated "Ineligible."



To change or add a reason, select **Edit pending reasons**. The Edit pending reasons screen appears. In the **Reason** column, select the drop-down arrow to access a list of available reasons. Select the new reason and click **Save**. The change is saved and you return to the opportunity record.

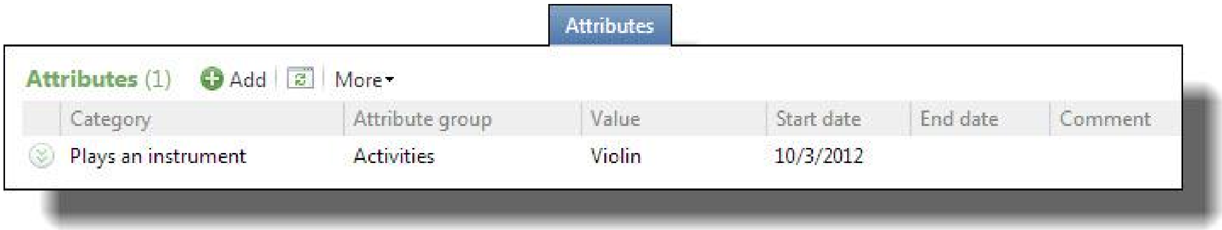
Note: **Reason** options are created in **Sponsorship reasons**, which is accessed under **Configuration** on the Sponsorship page. For more information, refer to Reasons on page 19.

Child Notes, Attachments, and Media Links

Notes, media links such as website hyperlinks, and attachments are all added and managed from the Documentation tab in the child record. For information about working with the Documentation tab, refer to Documentation on page 55.

Child Attributes

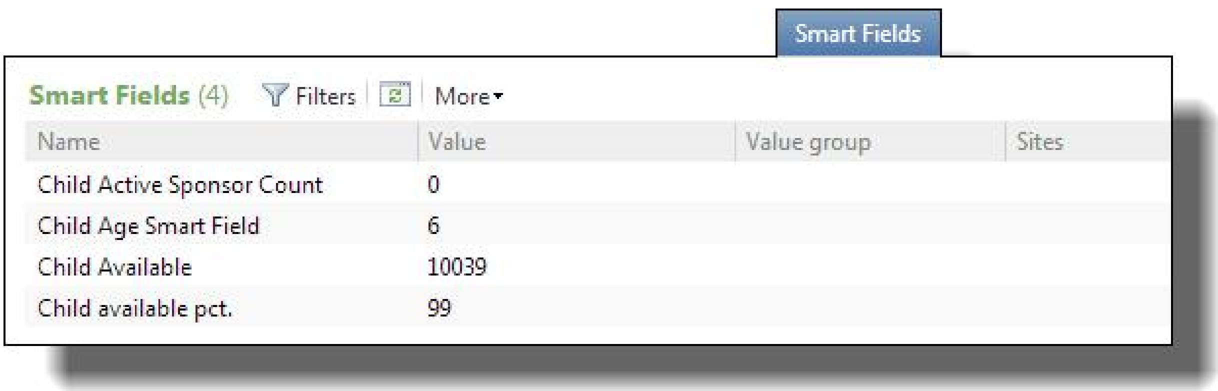
You can use attributes to store specialized information about an opportunity when no field or tab exists for that information. Attributes help track the information that best meet your organization's needs. For example, you may use attributes to record whether a child plays an instrument. This tab appears only if sponsorship opportunity attribute categories exist in *Administration*.



To view the attributes associated with a child, select the Attributes tab on the child's record. For more information about attributes, refer to Opportunity Attributes on page 54.

Child Smart Fields

Smart fields help provide application users quick access to specific information that otherwise would require time and the configuration of queries and reports to view. To display information about a child generated from a smart field created in *Administration*, select the Smart Fields tab.



Under **Smart Fields**, you can view the names of the smart fields and the value and value group of each. To ensure the information in the grid is current, click **Refresh** on the action bar.

For information about how to create and manage smart fields, refer to the *Administration Guide*.

Relationships

If the child is included as a relationship on one or more of your constituent records, the Relationships tab displays on the child's record in *Sponsorships*. This read-only tab displays the constituent's name along with the relationship and date information.

Relationships are familial, social, or professional associations with the child. For more information about constituent relationships, refer to the Constituent Record chapter of the *Constituents Guide*.

Household

If the child is included as a member of a household on one or more of your constituent records, the Household tab displays on the child's record in *Sponsorships*. This read-only tab displays the name of the household(s) to which the child belongs along with the child's relationship to the primary household member.

Households help you track the activities and giving of everyone who lives under one roof. Constituent households also help your organization avoid the creation of duplicate mail for constituents who share an address. For more information about constituent households, refer to the Constituent Groups and Households chapter of the *Constituents Guide*.

Mark a Child Ineligible for Sponsorship

After you enter a child record for *Sponsorship*, if you decide the child is not satisfying eligibility criteria to be placed with a sponsor and you want to remove the child from availability without deleting the child from your database, you can mark the child "Ineligible."

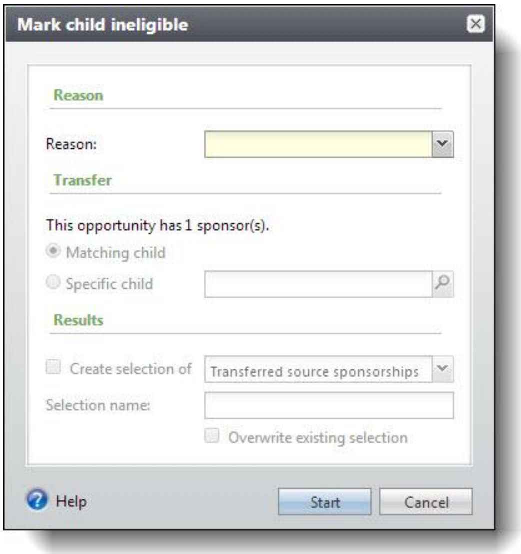
In addition, if the **Reason** selected when you deem a child ineligible allows for transfers, you can transfer any sponsors associated with the child to a new opportunity.

Other important information about designating a child ineligible:

- The child is designated "Ineligible," regardless of what happens with any transfers. For example, if the transfer fails.
- The Eligibility tab disappears from the child's record.
- The ineligible reason appears in parentheses next to the **Eligibility** field in the summary section of the child's record.
- **Edit ineligible reason** appears under **Tasks**. This action allows you to execute the **Mark Child Ineligible** business process again. For example, if any sponsorships remain for the child, you can transfer them.

Mark a child ineligible for sponsorship

1. From the child record, click **Mark ineligible** under **Tasks**. The Mark child ineligible screen appears.



2. In the **Reason** field, select the reason the child is no longer eligible for sponsorship. Reasons are configured in **Sponsorship reasons**. For more information, refer to Reasons on page 19.
3. If the **Reason** selected allows for transfers and the child is associated with active sponsors, the **Transfer** section activates. From here, you have two options:
   - Select **Matching child** and the system matches the sponsor(s) with a child similar to the one now deemed "Ineligible."
   - Select **Specific child** and you can then locate a replacement child for the sponsor.
4. Select **Create Selection of** if you want to create a query selection of either Transferred source sponsorships or Transferred target sponsorships. The selection is available in *Query* after you run the transfer. In the **Selection name** field, enter a name for your selection. Select **Overwrite existing selection** if you want to overwrite any selection with the same name when you run the transfer.
5. Click **Start**. The child is no longer available to match up with sponsors, and the child's old sponsor(s) is assigned a new child. However, the new sponsorship status is "pending" and the old sponsorship remains "active" until the transfer is completed. This allows you time to confirm the transfer with the sponsor.

   You can also change the status using a global change.

   Note: You establish how you want the system to handle transferred sponsorships in **Manage Sponsorship Settings**. Although the system default is to designate a transfer as "pending," you can change the setting to **Full transfer** and eliminate the "Complete pending transfers" step.

   After the transfer process runs, the Mark Child Ineligible process status page appears.

   For information about process status pages, refer to Tabs of a Process Status Page on page 96.

▸ Complete pending transfer manually

When you transfer a child to a new sponsor, the new sponsorship status is pending until you complete the process. This procedure explains the manual completion process.

1. Open either the old sponsorship or new sponsorship record. For more information about how to locate a sponsorship record, refer to Search for an existing sponsorship on page 67.

2. Click **Complete transfer**. A prompt displays to confirm the transfer.
3. Click **Yes**. The transfer completes and returns you to the Sponsorship record.

Complete Pending Transfer through Global Change

When you transfer a child or project to a new sponsor, the new sponsorship status is pending until you complete the process. If you complete the process through **Global Change** you can define a time period you want to pass before the system automatically changes the sponsorships' statuses.

Complete pending transfers in Global Change

1. From *Administration*, click **Global changes**.
2. Click **Add**. The Select a global change definition appears.
3. Under **Sponsorship**, select **Complete pending transfers**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify your global change process.
6. If you want to base the change on just a specific site, in the **Site** field select the site you want changed.
7. In the **Parameters** frame, define the time period you want to wait before "pending" transferred are completed. For example, if you want to wait seven days, in the **Units** field enter "7" and in the **Period** field select "Day(s)."
8. In the **Selection** field, you can select a selection of records, created in *Query*, that you want updated. If you do not choose a selection, all pending transfers satisfying your parameter definitions are included in the change process.
9. Click **Save** to save the global change process and return to the Global Changes page.

Edit Reason for Ineligible Child

After you designate a child "Ineligible," the **Edit ineligible reason** link appears under **Tasks** on the child's record. Click this link to access the Mark child ineligible screen. From here you can change the reason the child was designated "Ineligible" and transfer any remaining sponsorships to new opportunities.

Unreserve a Child

From the record of a reserved child record, you can designate the child "Unreserved." To do so, from **Tasks**, click **Unreserve**. A confirmation screen appears. Click **Yes** to unreserve the child record. For more information about the reservation process, refer to Reserve a Group of Opportunities on page 8.

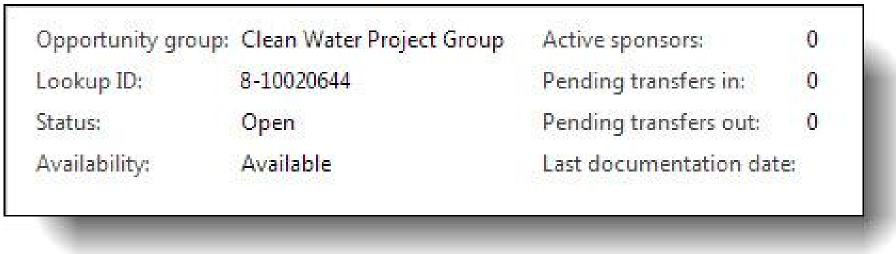
Project Page

After you add a project, the project record page appears. From this page, you can manage your project - edit the project, delete the project, add notes, change the project status, and more.

Note: For information about how to create a project opportunity, refer to Add a Project on page 42; for information about how to search for an existing project, refer to Search for Project on page 43.

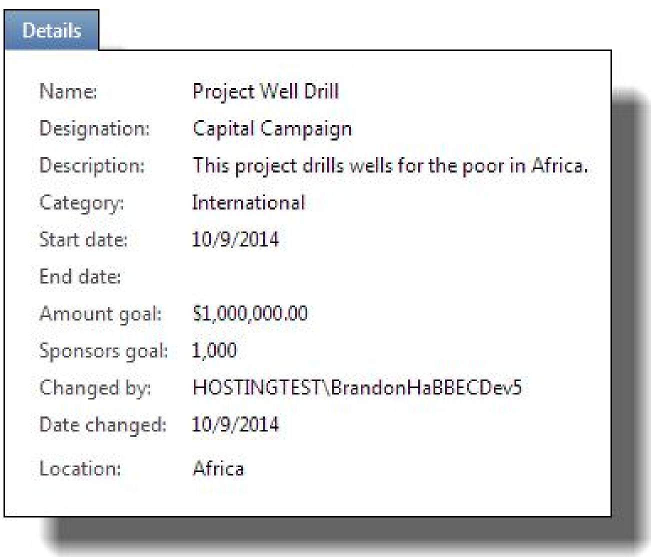
Project Summary View

The summary view displays at the top of the project record. It affords you a quick look at pertinent information about the project: Opportunity group, Lookup ID, Status, Availability, the number of Active sponsors and pending transfers, and the last documentation date.



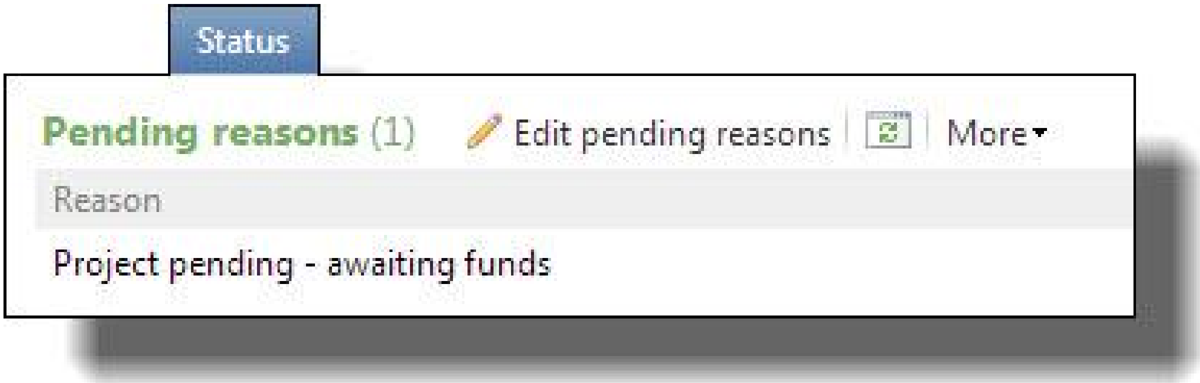
Project Details

The Details tab of the Project page displays general information about the project, such as name, description, designation, start and end dates, goal amount and number of sponsors allowed in the project.



Project Status

The Status tab on the project record lists the various reasons the opportunity status is pending.



In addition, you can change or add reasons if you select **Edit pending reasons**. The Edit reasons screen appears. In the **Reason** column, select the drop-down arrow to access a list of available reasons. Select the new reason and click **Save**. The change is saved and you return to the opportunity record.

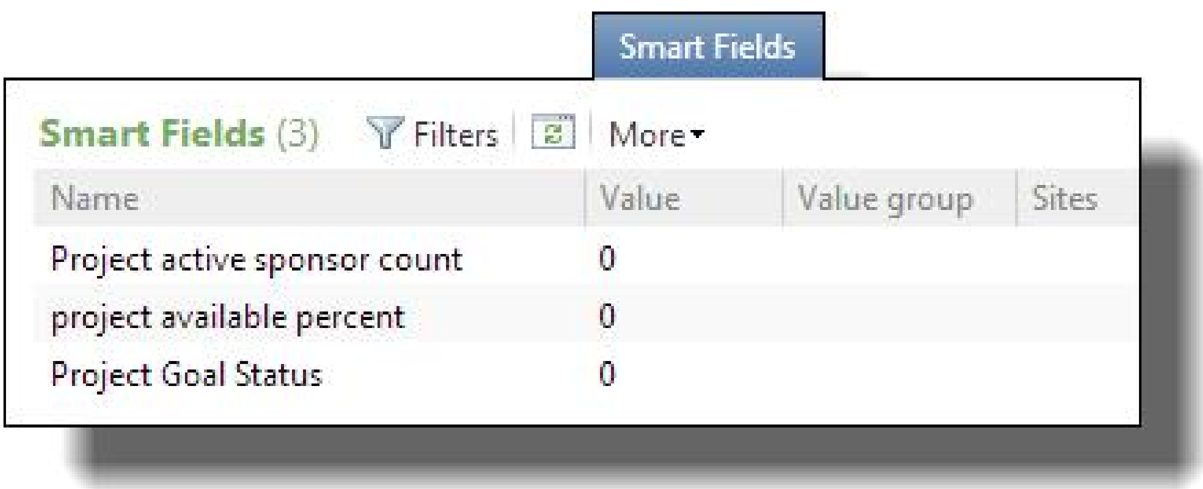
Note: **Reason** options are created in **Sponsorship Reasons**, which is accessed under **Configuration** on the Sponsorship page. For more information, refer to Reasons on page 19.

Project Documentation

Notes, media links such as Web site hyperlinks, and attachments are all added and managed from the Documentation tab in the project record. For information about working with the Documentation tab, refer to Documentation on page 55.

Project Smart Fields

Smart fields help provide application users quick access to specific information that otherwise would require time and the configuration of queries and reports to view. To display information about a project generated from a smart field created in *Administration*, select the Smart Fields tab.



Under **Smart Fields**, you can view the names of the smart fields and the value and value group of each. To ensure the information in the grid is current, click **Refresh List** on the action bar.

For information about how to create and manage smart fields, refer to the *Administration Guide*.

Mark a Project Closed

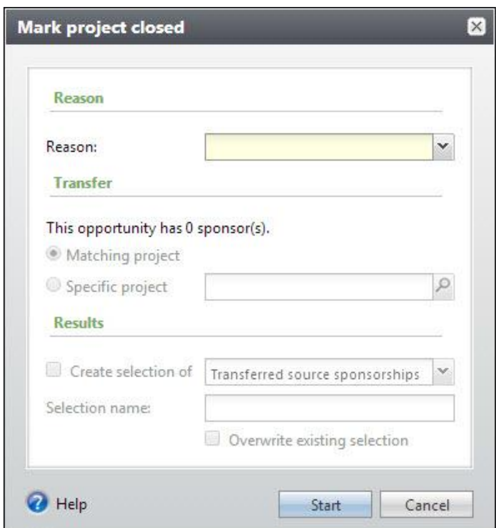
After you enter a project for sponsorships, if you decide the project is not satisfying eligibility criteria and you want to remove the project from availability without deleting it from your database, you can mark the project "closed."

Note: **Reason** options are created in **Sponsorship Reasons**, which is accessed under **Configuration** on the Sponsorship page. For more information, refer to Reasons on page 19.

In addition, if the **Reason** selected when you close the project allows for transfers, you can transfer any sponsors associated with the project to a new opportunity. The status of the selected "reason" depends on how the reason was created and if transfers are allowed.

▸ Mark a project closed

1. From the project record, under **Tasks**, click **Mark closed**. The Mark project closed screen appears.



2. In the **Reason** field, select the reason to close to project.
3. If the **Reason** selected allows for transfers and the project is associated with an active sponsors, the **Transfer** section activates. From here, you have two options:
   - Select **Match project** and the system matches the sponsor(s) with a project similar to the one now closed.
   - Select **Specific project** and you can then locate a replacement project for the sponsor.
4. Select **Create Selection of** if you want to create a query selection of either Transferred source sponsorships or Transferred target sponsorships. The selection is available in *Query* after you run the transfer. In the **Selection name** field, enter a name for your selection. Select **Overwrite existing selection** if you want to overwrite any selection with the same name when you run the transfer.
5. Click **Start**. The project is no longer available to match up with sponsors, and the project's old sponsor(s) is assigned a new project, however the new sponsorship status is "pending" and the old sponsorship remains "active" until the transfer is completed. This allows you time to confirm the transfer with the sponsor.

   You can also change the status using a global change.

Note: You establish how you want the system to handle transferred sponsorships in **Manage Sponsorship Settings**. Although the system default is to designate a transfer as "pending," you can change the setting to **Full transfer** and eliminate the "Complete pending transfers" step.

After the transfer process runs, the Mark Project Closed process status page appears.

For information about process status pages, refer to Tabs of a Process Status Page on page 96.

Complete pending transfer manually

When you transfer a project to a new sponsor, the new sponsorship status is pending until you complete the process. This procedure explains the manual completion process.

1. Open either the old sponsorship or new sponsorship record. For more information about how to locate a sponsorship record, refer to Search for an existing sponsorship on page 67.
2. Click **Complete transfer**. A prompt displays to confirm the transfer.
3. Click **Yes**. The transfer completes and returns you to the Sponsorship record.

Complete Pending Transfer through Global Change

When you transfer a child or project to a new sponsor, the new sponsorship status is pending until you complete the process. If you complete the process through **Global Change** you can define a time period you want to pass before the system automatically changes the sponsorships' statuses.

Complete pending transfers in Global Change

1. From *Administration*, click **Global changes**.
2. Click **Add**. The Select a global change definition appears.
3. Under **Sponsorship**, select **Complete pending transfers**.
4. Click **OK**. The Add global change screen appears.
5. In the **Name** field, enter a name to identify your global change process.
6. If you want to base the change on just a specific site, in the **Site** field select the site you want changed.
7. In the **Parameters** frame, define the time period you want to wait before "pending" transferred are completed. For example, if you want to wait seven days, in the **Units** field enter "7" and in the **Period** field select "Day(s)."
8. In the **Selection** field, you can select a selection of records, created in *Query*, that you want updated. If you do not choose a selection, all pending transfers satisfying your parameter definitions are included in the change process.
9. Click **Save** to save the global change process and return to the Global Changes page.

Mark a Project Open

If after you designate a project for sponsorships "closed" you find you need to reopen it, making the project once again available, you can mark the project "open."

Mark a project open

1. From the project record, under **Tasks**, click **Mark open**. A confirmation screen appears.
2. Click **Yes**. The project is once again open and available for sponsorships.

Opportunity Attributes

You can use attributes to store specialized information about an opportunity when no field or tab exists for that information. Attributes help track the information that best meet your organization's needs. For example, you may use attributes to record hobbies, dietary preferences, special requests, or advocacy activities. To view the attributes associated with an opportunity, select the Attributes tab on the opportunity record.

In the **Attributes** grid, you can view attributes assigned to the opportunity. For each attribute, you can view its value, group, and valid date range. You can also view any comments entered about the attribute. From the grid, you can also manage the attributes assigned to the opportunity.

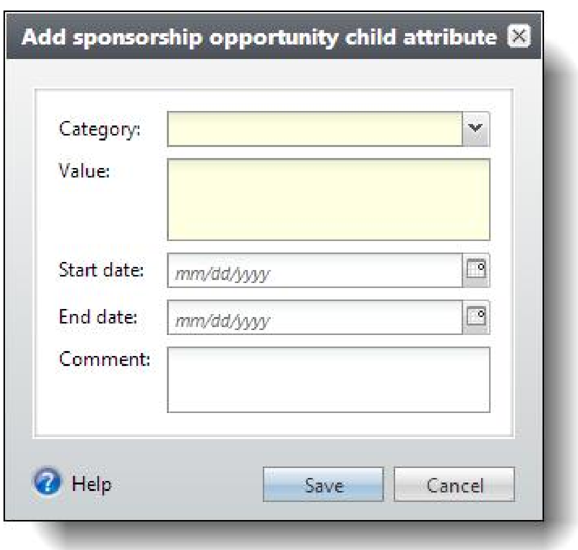
Note: Your organization sets up sponsorship attributes in *Administration*. For information about how to create and manage attribute categories, refer to the *Administration Guide*.

Add Attributes to an Opportunity

From the Attributes tab of an opportunity record, you can assign attributes to record special information about the opportunity. You can add an unlimited number of attributes to the record. If necessary, you can assign the same attribute multiple times to build a comprehensive record.

Add an opportunity attribute

1. Open the record of the opportunity to which you want to add attribute information.
2. Select the Attributes tab.
3. Under **Attributes**, click **Add** on the action bar. A screen appears allowing you to enter attribute information.



4. In the **Category** field, select the type of attribute to assign to the opportunity. Your organization sets up attribute categories in *Administration*.
5. In the **Value** field, enter or select the value of the attribute category to assign to the opportunity.

6. If the attribute applies to the opportunity for a finite duration, select the start and end dates of the attribute.
7. In the **Comments** field, enter any additional information to record about the attribute.
8. Click **Save**. You return to the Attributes 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.

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.

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.
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.
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.

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.
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.
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.
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.

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.
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.
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.
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.

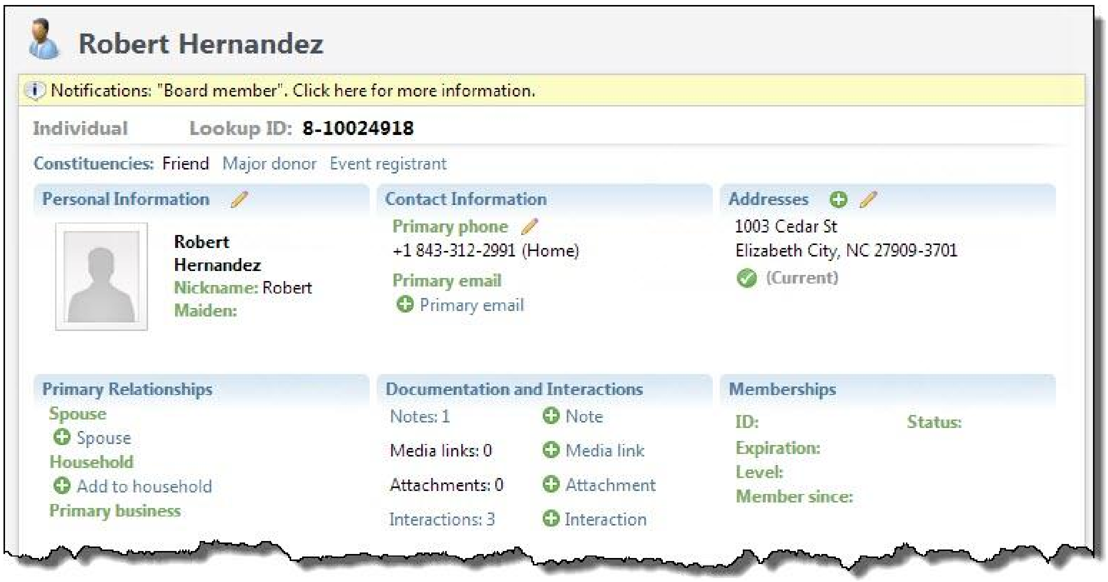
Notifications

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 notify all users to 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.



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 users view a record. The notification screen appears the first time a user views a record 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 record from the Documentation tab of the record.

Add Notifications to Specific Records

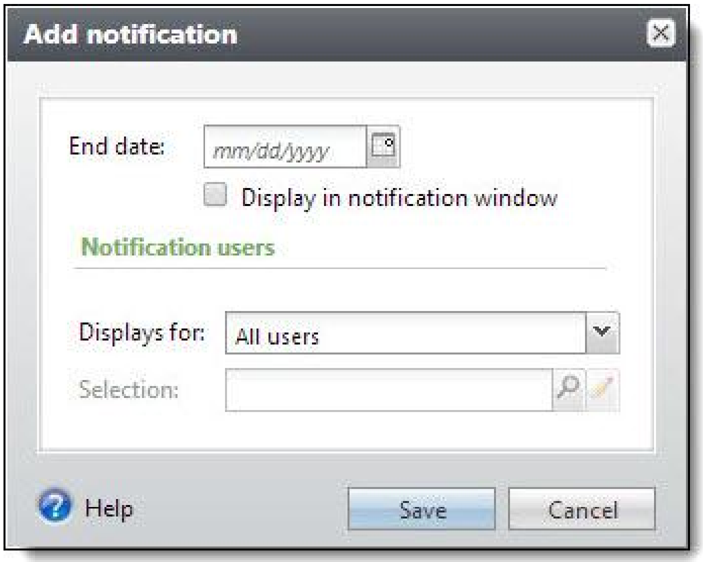
On the Documentation tab, you can add a notification to a note on a record. You can select or create a note with the notification's message and add the notification to the note.

Add a notification

1. Go to the Documentation tab of a record.
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.
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**.

Open Attachment Files

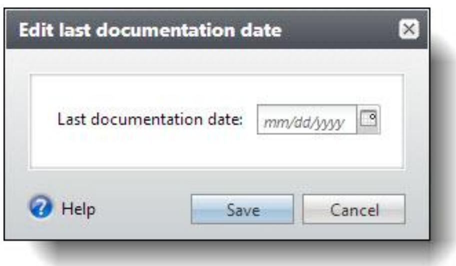
After you add an attachment on the Documentation tab, you can open the attachment. To do this, click the double arrows beside the attachment and click **Open file**.

Edit Last Documentation Date

The **Edit last documentation date** allows you to better track when the opportunity record was last modified. Organizations may want to use this date to determine if an opportunity is still eligible for sponsorship. In addition, you can base your **Child Inventory** and **Project Inventory** reports on this date.

Edit the last documentation date on an opportunity

1. From the opportunity record, under **Tasks**, click **Edit last documentation date**. The Edit last documentation date screen appears.



2. In the **Last documentation date** field, select your new date.
3. Click **Save** to change the date and return to the opportunity page.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains 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**.

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 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.

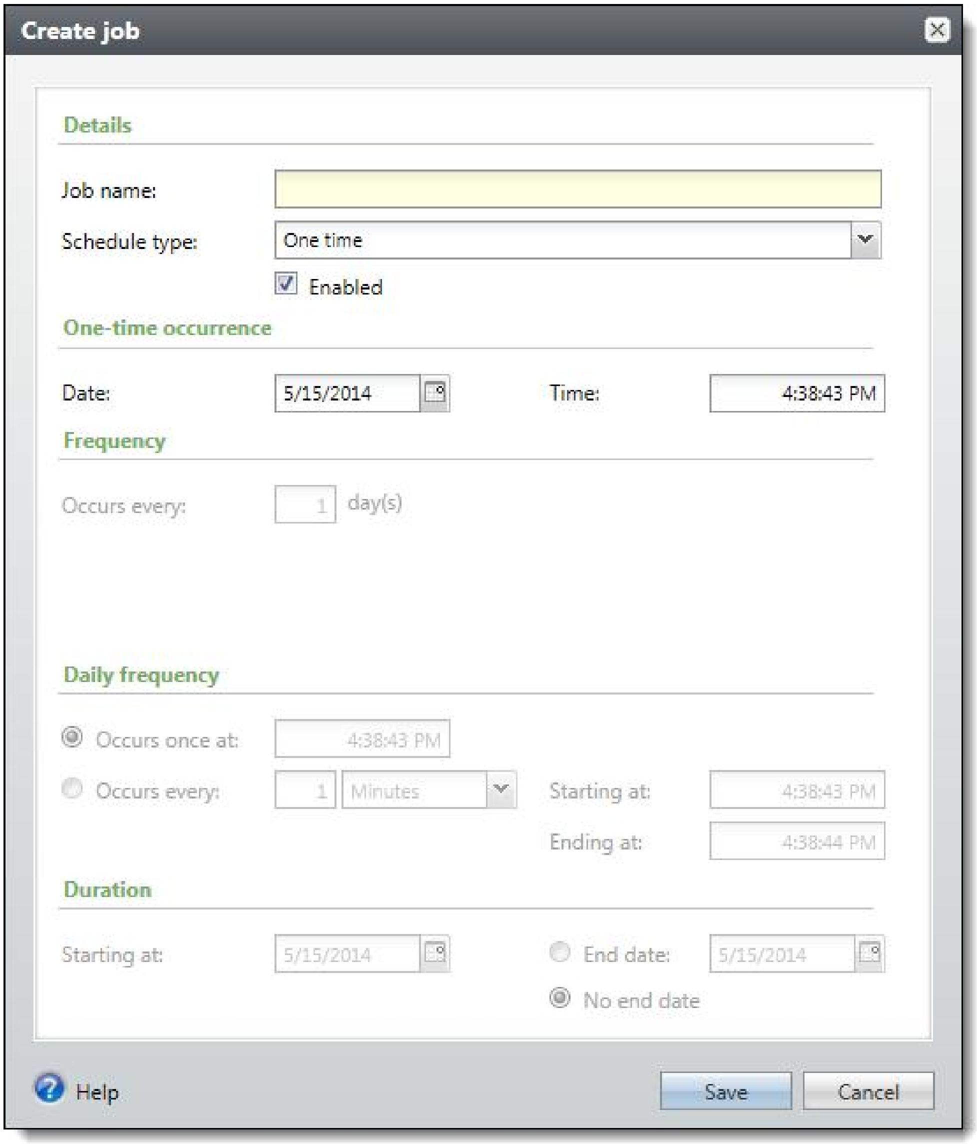
Schedule Process Jobs

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.



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. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package 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 99.
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
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 *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs 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 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.

Mark Ineligible Process

If you mark an opportunity ineligible to accept sponsors, after the business process runs and designates the opportunity ineligible the **Mark ineligible process** link appears under **Tasks** on the opportunity page. Click this link to return to the opportunity's Mark Ineligible process page.

For information about the process page, refer to Tabs of a Process Status Page on page 96 .

Mark Closed Process

If you mark an opportunity closed to new sponsors, after the business process runs and designates the opportunity closed, the **Mark closed process** link appears under **Tasks** on the opportunity page. Click this link to return to the opportunity's Mark Closed process page.

For information about the process page, refer to Tabs of a Process Status Page on page 96.

Edit Lookup ID

When you add an opportunity record to the database, the program automatically assigns it a lookup ID. This primary lookup ID appears in the **Lookup ID** field on the opportunity record. You can edit this lookup ID as necessary.

Edit an opportunity's primary lookup ID

1. Open the record of the opportunity with the primary lookup ID to edit.
2. Under **Tasks**, click **Edit lookup ID**. The Edit lookup ID screen appears.
3. Edit the ID as necessary.
4. Click **Save**. You return to the constituent record.

Locate Opportunities from Blackbaud Internet Solutions

If you use ***Blackbaud Internet Solutions*** and need to locate sponsorship opportunities available from your Website, you can do so through query using the **Sponsorship Opportunity for the Web** source view.

To create this query, open the **Information library** in the *Analysis* feature area, select **Add an ad-hoc query** from the Queries tab, and select **Sponsorship Opportunity for the Web** under Sponsorship Opportunity - CMS on the Select a Source View screen. A new Ad-hoc query screen appears. From here you can define your query filters and output fields and view results.

Note: For more information about working in *Query*, refer to the *Query Guide*.

Sponsor Management

When you add a sponsorship to your system, associating a constituent with a sponsorship opportunity, a "Sponsor" constituency is added to the constituent. This constituency tag remains with the constituent even if the sponsor is no longer actively sponsoring an opportunity. This allows you to track all constituents with a tendency toward sponsorship regardless of whether or not they are currently active.

The common workflow for managing sponsors is:

- Add a sponsorship: Match a constituent with a sponsorship opportunity. For more information, refer to Sponsor Constituency on page 66.
- Track all sponsorships associated with a sponsor using the Sponsor page. You access this page through a **Sponsor search**. From this page, you can also access specific sponsorships associated with the sponsor. For information about sponsor search, refer to Sponsor Search on page 66; for information about the Sponsor page, refer to Sponsor Record on page 73.
- Track sponsorships from the specific sponsorship's Sponsorship page. You access this page from a sponsor record or through a Sponsorship search. The Sponsorship page also appears after you add a sponsorship. For

information about the Sponsorship page, refer to Sponsorship Record on page 77; for information about sponsorship search, refer to Sponsorship Search on page 67.

Sponsor Constituency

Constituencies define the affiliations your constituents have with your organization. A constituent can have multiple constituencies, and these relationships can start and end and overlap. For example, a constituent may first become a sponsor in your database and remain a sponsor for an undetermined length of time. This same constituent may later become a volunteer for your organization, but for only six months. You can use constituencies to define these relationships and group similar constituents in queries, mailings, and reports.

In *Sponsorship*, constituents who give a gift of sponsorship are assigned the “Sponsorship donor” constituency; constituents who receive a gift of sponsorship are assigned the “Sponsorship recipient” constituency; constituents who maintain a regular (non-gift) sponsorship are assigned the “Sponsor” constituency. A constituent can have more than one of these constituency options active on their record at a given time.

To view the constituencies of a constituent, select the Constituencies tab on the constituent record or **Constituencies** under the constituent summary. Each type of sponsorship constituency has its own tab with information relevant to that constituency. For more information, refer to Sponsor Record on page 73.

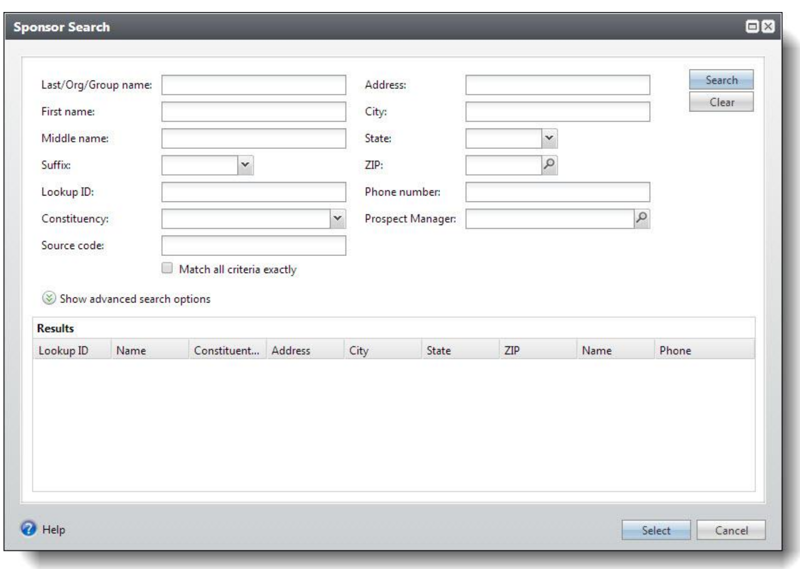
Sponsor Search

Before you add a sponsor record, to avoid duplicates, you should first search your database to make sure the sponsor is not already there. Once you add a record, you can use the search screen at any time to find a sponsor you need to access.

When you search for a sponsor record, you can make the search broad or specific, depending on the criteria you select. With a large database, you should be selective and enter detailed information to get the records you need. For example, you can use name and address fields. For searches returning more than 100 records, only the first 100 appear in the results.

▸ Search for an existing sponsor

1. On the Sponsorship page, click **Sponsor search**. The Sponsor Search screen appears.



2. In the top frame, decide how to filter records for this search and select/enter your criteria. You can search by the name, address, constituency, prospect manager, and source code associated with the sponsor.
3. To show all search options, click the down arrow beside **Show advanced search options**.
4. Under **Advanced search options**, you can select the constituent criteria of the transactions to include. For example, select the constituent types to return in the results and select whether to include constituent nicknames or aliases, include deceased or inactive constituents, or check alternate lookup IDs.

   You can enter data in all fields or none, depending on how broad or narrow you want your search. Depending on your criteria, the program may find one sponsor or many.

   Note: In the criteria fields, you can enter "wildcard" characters to take the place of parts of the search phrase. Use the asterisk (*) or percent sign (%) to take the place of a group of characters and the question mark (?) or underscore (_) to take the place of an individual character. For example, to locate all sponsors with a last name ending with the letters "son", you can enter *son or %son in the name field, or for the last name Smith or Smyth, you can enter Sm?th or Sm_th.
5. Click **Search**.
6. Select the sponsor record to open. The sponsor page for that record appears.

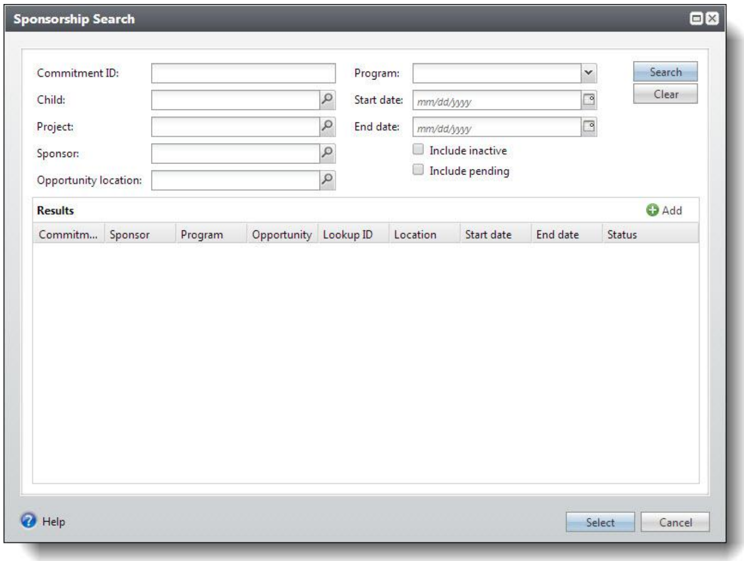
Sponsorship Search

Before you add a sponsorship record, to avoid duplicates, you should first search your database to make sure the sponsorship does not already exist. Once you add a record, you can use the search screen at any time to find a sponsorship you need to access.

When you search for a sponsorship record, you can make the search broad or specific, depending on the criteria you select. With a large database, you should be selective and enter detailed information to get the records you need. For example, you can use child and sponsor fields. For searches returning more than 100 records, only the first 100 appear in the results.

Search for an existing sponsorship

1. On the Sponsorship page, click **Sponsorship search**. The Sponsorship Search screen appears.



2. In the top frame, decide how to filter records for this search and select/enter your criteria. You can also choose to include inactive and pending sponsorships. The search process is not case-sensitive, so you can enter Smith, smith, or SMITH and get the same results.

   Note: In the criteria fields, you can enter "wildcard" characters to take the place of parts of the search phrase. Use the asterisk (*) or percent sign (%) to take the place of a group of characters and the question mark (?) or underscore (_) to take the place of an individual character. For example, to locate all sponsors with a last name ending with the letters "son", you can enter *son or %son in the name field, or for the last name Smith or Smyth, you can enter Sm?th or Sm_th.

3. Click **Search**.
4. Select the sponsorship record to open. The sponsorship page for that record appears.

Add Sponsorship

When you add a sponsorship you match a constituent to a sponsorship program. The sponsorship program must exist before you create the new sponsorship record; however, you can add a new constituent while working on the Add a sponsorship screen.

Note: For information about sponsorship programs, refer to Sponsorship Programs on page 36.

You can select a specific child or project to include in the sponsorship record, or you can define criteria specified by the sponsor and locate a child or project that best matches the sponsor's request. You also record and track payment information.

Opportunity Lock Model

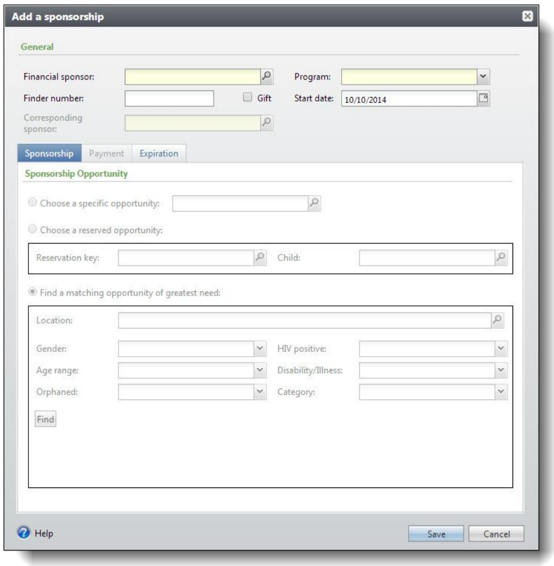
When assigning an opportunity to a sponsorship, the selected opportunity's availability in the system is governed by the following rules:

- The systems allows as many users to access an opportunity as sponsorships remaining for the opportunity. For example, if the opportunity allows for six sponsors and two sponsors have already been assigned the opportunity, only four users can concurrently access the opportunity for assignment.

- The system locking model guarantees that once an opportunity is brought into a form for sponsorship, that opportunity is still available when the assignment process completes and the form is saved.

Add a sponsorship record to your database

1. From the Sponsorships page, click **Add a sponsorship**. The Add a sponsorship screen appears.



2. At the top of the screen in the **General** frame, enter or search for the sponsor's name in the **Financial Sponsor** field. The financial sponsor is the sponsor responsible for payment.

   If the sponsorship is a gift, select the **Gift** checkbox. This activates the **Corresponding sponsor** field. In the **Corresponding sponsor** field, enter or search for the sponsor who receives the sponsorship gift.

   Other **General** information you must enter includes the sponsorship **Program** from which this sponsor wants to select an opportunity and the **Start date**. You can also enter a **Finder number** for the sponsorship, to match the payment to a particular marketing mailing, such as to track and report on the mailing's performance.

3. On the Sponsorship tab, in the **Sponsorship opportunity** frame, select the opportunity you want to assign this sponsor.

   a. If you want to associate the sponsor with a specific opportunity, select **Choose a specific opportunity**. Click the magnifying glass to open the Sponsorship Opportunity search screen and search for the desired opportunity. The search parameters and results are limited by the selected program.

   b. If your organization ha reserved a set of opportunities through the **Reserve opportunities** function, select **Choose a reserved opportunity** to select one of those opportunities. In the **Reservation key** field, enter or search for the reservation key associated with the reserved opportunities. Next, select or search for the desired child you wish to assign to this sponsor. The search is limited to opportunities included in the reservation key.

> ***Note:*** The **Choose a reserved opportunity** option is not available if a program associated with a project sponsorship opportunity group is selected. For more information about sponsorship opportunity groups, refer to Sponsorship Opportunity Groups on page 30.

c. If you want to assign an opportunity based on the greatest need criteria, select **Find a matching opportunity of greatest need**. The program locates the greatest need opportunity based on the parameters defined in the greatest need rule associated with the program. For more information about greatest need rules, refer to Greatest Need Rules on page 32. To change the greatest need criteria for this sponsorship, click **Clear** and select your desired criteria. Once you have made your selections, press **Find** to locate a new opportunity.

Note: You can only modify the greatest need rule criteria for child opportunities.

d. If the selected sponsorship program allows for sole sponsorship, the **Sole sponsorship** field appears. To make the sponsor the sole sponsor for this sponsorship, select **Sole sponsorship**.

4. On the Payment tab, enter payment and mailing information such as credit data and a payment schedule.
   a. In the **Amount** field, enter the payment amount for the sponsorship.
   b. If the sponsorship is associated with a marketing effort, enter the source code, appeal, inbound channel, or effort information for the sponsorship.
   c. Add any notes or pertinent information about the payment in the **Reference** field.
   d. Select a **Revenue category** for the payment.
   e. Set the payment schedule in the **Schedule** frame. Select the frequency and starting date for the payments. The payment schedule grid is updated based on the information entered in the **Installment Frequency** and **Installment schedule begins** fields.
   f. Select a **Payment method** for the sponsorship:

      To set up a recurring gift with automatic payments, select the "Credit card - pay installments automatically" or "Direct debit - pay installments automatically." Enter the relevant payment information for the credit card or direct debit.

      To save a credit card for future reference, select "Credit card - store last 4 digits for reference." Enter the credit card data in the payment information fields.

      To pay with some other method, select "Other." Other type payment methods are configured in *Administration*.

      If the payment method is unknown, select "None."
   g. To send payment reminders for the sponsorship recurring gift, select **Send reminders**.
   h. If you do not wish to acknowledge the sponsor for this sponsorship, select **Do not acknowledge**.
5. On the Expiration tab, determine if this is a fixed-term sponsorship.
   a. To set an end date for the sponsorship, select **This is a fixed-term sponsorship**.
   b. Enter the expiration date and reason for the sponsorship. For more information about reasons, refer to Reasons on page 19.
6. Click **Save** to save the new sponsorship and return to the Sponsorships page. The new sponsorship is added to your database and the constituency “Sponsor” is added to the sponsoring constituent.

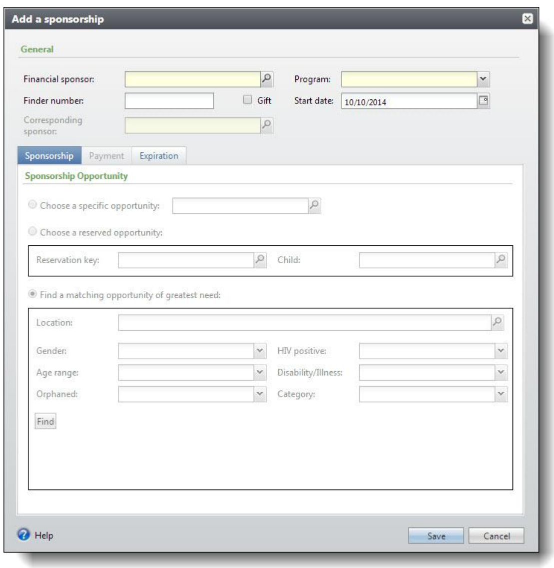
Add a Gift of Sponsorship

When you add a gift of sponsorship you match two constituents to a sponsorship program - the constituent giving the gift (the financial sponsor) and the constituent receiving the gift (Corresponding sponsor). The sponsorship program must exist before you create the new gift of sponsorship record; however, you can add a new constituent while working on the Add a sponsorship screen.

You can select a specific child or project to include in the gift of sponsorship record, or you can define criteria specified by the sponsor and locate a child or project that best matches the sponsor's request. You also record and track payment information.

▸ Add a gift of sponsorship record to your database

1. From the Sponsorships page, click **Add a sponsorship**. The Add a sponsorship screen appears.



2. At the top of the screen in the **General** frame, enter or search for the sponsor's name in the **Financial Sponsor** field. The financial sponsor is the sponsor responsible for payment.
3. Select the **Gift** checkbox. This activates the **Corresponding sponsor** field.
4. In the **Corresponding sponsor** field, enter or search for the sponsor who receives the sponsorship gift.
5. Other **General** information you must enter includes the sponsorship **Program** from which this sponsor wants to select an opportunity and the **Start date**. You can also enter a **Finder number** for the sponsorship, to match the payment to a particular marketing mailing, such as to track and report on the mailing's performance.
6. On the Sponsorship tab, in the **Sponsorship opportunity** frame, select the opportunity you want to assign this sponsor.

   Note: For more information about the items included on this screen, refer to Add a sponsorship record to your database on page 69.

7. Select the Payment tab and enter payment and mailing information such as credit card data and a payment schedule.

8. Select the Expiration tab if this is a fixed-term sponsorship. From here you can enter an expiration date and assign a reason for the fixed-term designation.
9. Click **Save** to save the new gift of sponsorship and return to the Sponsorship page. In the summary view at the top of the page, in the **Gift sponsorship paid for by** field, the name of the constituent responsible for paying the sponsorship commitment displays.

Cancel Expired Sponsorships

If when you created the sponsorship record, you entered an **Expiration date** to identify when you expect the sponsorship relationship to end, you can run a **Global Change** process and bulk cancel any expired fixed-term sponsorships.

Cancel expired sponsorships in bulk

1. From *Administration*, click **Global changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Sponsorship, select **Cancel expired sponsorships**.
4. Click **OK.** The Add global change screen appears.
5. In the **Name** field, enter a name for this global change process.
6. Click **Save**.
7. When your are ready to cancel the sponsorships, click **Process global change**.

   For more information about the **Global Change** process, refer to the Global Change chapter in the *Administration Guide*.

Merge Sponsorships

With a constituent merge process available in *Constituents*, you can merge multiple duplicate constituents automatically, based on criteria you specify. Before you create a constituent merge process, you must configure which information on the target and source constituent records to merge. On the Constituent Merge page, you can view and manage the constituent merge processes and configurations your organization uses. To access the Constituent Merge page, from *Constituents*, click **Duplicates**, **Constituent merge**.

If the constituents you plan to merge are sponsors:

- The target constituent gets all the sponsorships (commitments) of the source constituent when two constituents are merged.
- If the target constituent is not a sponsor they get converted to a sponsor first and then get assigned the source's sponsorships.
- In addition, if the source and target constituents sponsor the same opportunity:
    - The target sponsor gets the sponsorship.
    - The payment amount on the sponsorship is aggregated to include the source constituent's payment amount along with the target constituent's payment amount.
    - If the opportunity is a child and the target constituent is the only sponsor for the child, the sponsorship becomes a sole sponsorship.

For more information about how to run a constituent merge, refer to the *Duplicate Constituents and Merge Tasks Guide*.

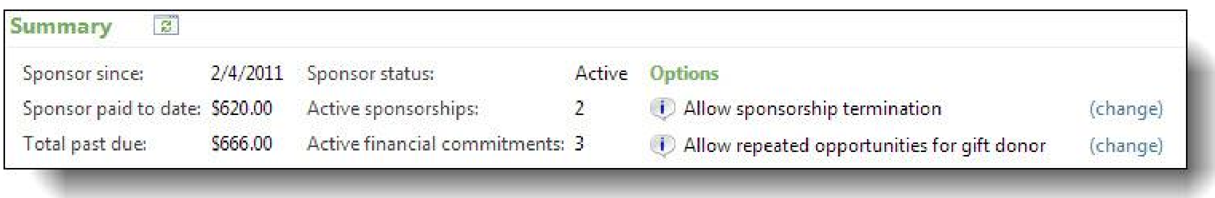
Sponsor Record

You can access the sponsor record one of several ways:.

- From the constituent record, select the Sponsor tab
- From the sponsorship record, click the sponsor's name
- Execute a sponsor search. For more information, refer to Sponsor Search on page 66

From the sponsor page, you perform multiple management tasks, depending upon your system roles and security rights. You can add, cancel, and delete sponsorships from the sponsor record, view sponsorship transactions, and access selected sponsorships.

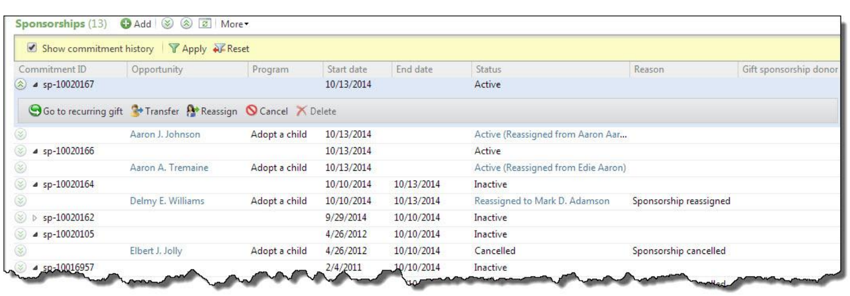
Sponsor Summary View



The summary displays under **Summary** on the Sponsorships tab of a constituent record. It affords you a quick look at pertinent information about the sponsor: sponsor since date, number of active sponsorships and financial commitments, amount the sponsor paid to date, sponsor status, sponsor options, and the total past due amount.

Track Sponsorships from Sponsor

The Sponsorships tab includes the **Sponsorships** grid, which displays information about all sponsorships assigned to this sponsor. It includes sponsorships paid for by the sponsor and any gift of sponsorships that may exist. You can complete a number of tasks from this section.

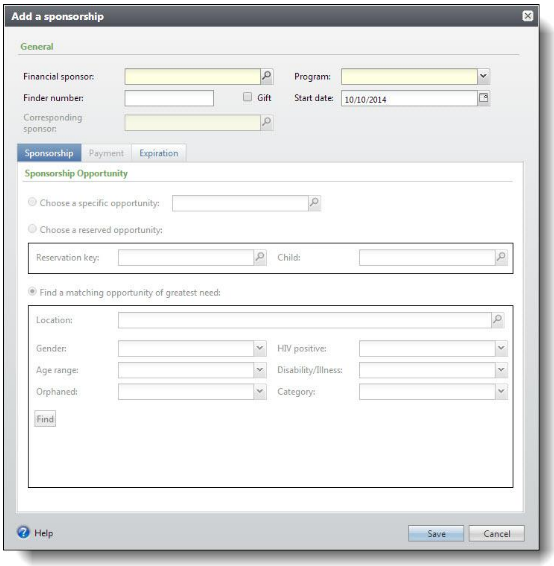


Add a Sponsorship to an Existing Sponsor

Once you create a sponsor record, if the sponsor wants to sponsor another child or project, you can add a new sponsorship to their existing record.

▸ Add a sponsorship to an existing sponsor record

1. From the sponsor record, click **Add**. The Add a sponsorship screen appear.



2. Enter the necessary information. For a detailed explanation of all items and tabs included on this screen, refer to Add a sponsorship record to your database on page 69.
3. Click **Save** to save the new sponsorship and return to the sponsor record. The new sponsorship is added to your database and displays in the **Sponsorships** grid. To view the sponsorship record, select the **Opportunity** in the grid.

Cancel a Sponsorship from an Existing Sponsor

You can cancel a sponsorship, which severs the relationship between the sponsor and the opportunity but maintains the sponsorship record in your database.

To cancel the sponsorship relationship, from the sponsor record, in the **Sponsorships** grid, select the sponsorship you want to cancel and click **Cancel**. The Cancellation reason screen appears. In the **Reason** field, select the reason the relationship is canceled and click **Save**. The **Status** is updated to “Canceled” and the reason displays in the **Reason** column.

Reactivate a Sponsorship from an Existing Sponsor

If after canceling a sponsorship you find you want to reestablish the relationship, you can reactivate a canceled sponsorship so long as the opportunity is still eligible and available.

From the Sponsorships tab, select **Show commitment history** under **Sponsorships** to view all commitments associated with the sponsor. In the **Sponsorships** grid, select the commitment you want to reactivate and click **Reactivate**. The Reactivation reason screen appears. In the **Reason** field, select the reason the relationship is reactivated and click **Save**. The **Status** is updated to “Active.”

Delete a Sponsorship from an Existing Sponsor

Once you have canceled a sponsorship, you can delete the sponsorship record, permanently removing it from your system.

Note: Sponsorships that have been transferred or reassigned, even if they have been canceled, cannot be deleted from the system.

Delete a sponsorship from an existing sponsor record

1. In the **Sponsorships** grid, select the sponsorship you want to remove.
2. Click **Delete**. A confirmation message appears.
3. Click **Yes** to remove the sponsorship and return to the sponsor record. The sponsorship no longer displays in the **Sponsorships** grid.

Reassign a Sponsorship from a Sponsor

From the sponsor record, you can reassign an existing child or project to the different sponsor. The reassignment process ends the original sponsor's commitment and starts a commitment for the new sponsor.

Reassign a sponsorship

1. From the sponsor record in the **Sponsorships** grid, select the sponsorship you want to reassign and select **Reassign**. The Reassign a sponsorship screen appears.
2. For more information about how to reassign sponsorships, refer to Reassign a sponsorship on page 83.
3. Click **Save** to reassign the sponsorship and return to the Sponsor page. The commitment displays in the **Sponsorships** grid and "Inactive" displays in the **Status** column.

Transfer a Sponsorship from a Sponsor

From a sponsor record you can replace an existing child or project opportunity with a new opportunity. When you execute a transfer, the process tags the old opportunity as "Inactive" and adds the new opportunity to the sponsor record under the existing commitment.

Transfer an existing sponsorship opportunity out and a new opportunity in

1. From the sponsor record in the **Sponsorships** grid select the sponsorship you want to transfer and select **Transfer**. The Transfer a sponsorship screen appears.
2. For more information about how to transfer a sponsorship, refer to Transfer an existing sponsorship opportunity out and a new opportunity in on page 84.
3. Click **Save** to execute the transfer and return to the Sponsor page. The commitment displays in the **Sponsorships** grid and "Transferred" displays in the **Status** column.

View Sponsorship Record

In the **Sponsorships** grid on the sponsor record, all sponsorships associated with the sponsor display. To view a sponsorship record, in the **Sponsorships** grid select the name of the opportunity you want to view. The selected sponsorship record appears. For information about the sponsorship record, refer to Sponsorship Record on page 77.

View Sponsorship Recurring Gift Record

In the **Sponsorships** grid on the sponsor record, all sponsorships associated with the sponsor display. To view recurring gift information associated with a sponsorship record, in the **Sponsorships** grid select the record for which you want to view recurring gift information. Click **Go to recurring gift**. The selected sponsorship recurring gift record appears.

Gift Financial Sponsorship Commitments Grid

If the sponsor gives a gift of sponsorship and is responsible for payment of the gift commitments, information about the gift displays in the **Gift financial commitments** grid on the sponsor page. From this grid, you can access the gift sponsorship record. To do so, select the name of the program in the **Gift financial commitments** grid. You can also access the record or the sponsor who received the gift: select the name of the sponsor in the **Gift financial commitments** grid.

Gift financial commitments (1) Filters More

Commitment ID	Sponsor	Program	Opportunity	Location	Start date	End date
sp-10020163	Grazyna Aaron	Water Project	Project - Test Project_0004fb58-d9...	New York	10/10/2014	

Track Commitment Transaction from Sponsor

From the Transactions tab of the Sponsor record, you can review all commitment transactions associated with the sponsor. For example, if the sponsor upgrades his sponsorship or when the sponsorship was added.

Transactions (13) More

Commitment	Action	From	To	Reason	Date
sp-10016957 (2/4/2011)					
sp-10016957 (2/4/2011)	Add		William W. Tristan		2/4/2011
sp-10016957 (2/4/2011)	Cancel			Sponsorship cancelled	10/10/2014
sp-10020105 (4/26/2012)					
sp-10020105 (4/26/2012)	Add		Elbert J. Jolly		4/26/2012
sp-10020105 (4/26/2012)	Upgrade	$30.00	$35.35		4/26/2012
sp-10020105 (4/26/2012)	Downgrade	$35.35	$30.00		4/26/2012
sp-10020105 (4/26/2012)	Cancel			Sponsorship cancelled	10/10/2014
sp-10020162 (9/29/2014)					
sp-10020162 (9/29/2014)	Add		Jason Todd		9/29/2014
sp-10020162 (9/29/2014)	Transfer	Jason Todd	Universal A. Child	Location closed	9/29/2014
sp-10020162 (9/29/2014)	Cancel			Sponsorship cancelled	10/10/2014

Prevent or Allow Sponsorship Termination

When you create a sponsorship, you can assign an expiration date. This creates a fixed-term sponsorship, and through **Global Change** you can create a process that automatically cancels expired fixed-term sponsorships. If there are sponsors in your system you want to remove from this automated process - even if they have expired, fixed-term sponsorships - you can add a tag to their records that protects them from the cancellation process.

To protect a sponsor, from the Sponsorships tab, under **Options** click **Change** next to **Allow sponsorship termination**. A confirmation screen appears. Click **Yes** to protect the sponsor. “Prevent sponsorship termination" displays under the **Options** in the sponsorship summary. Select **Change** again to allow for the termination of sponsorships.

Prevent or Allow Repeat Opportunity with Gift of Sponsorship

From the Sponsorships tab, under **Options** click **Change** next to **Allow repeated opportunities for gift donor**. A confirmation screen appears. Click **Yes** to ensure that all sponsorships given as a gift from this sponsor are unique and no repeated opportunities allowed. Click **Change** again to allow for repeated opportunities for the gift donor.

Note: This applies to only sponsorships created from the time this task is activated. It is not retroactive.

Sponsorship Record

Sponsorship records house details such as information about the child or project sponsored, the criteria used to match the sponsor with the opportunity, payment information, and more.

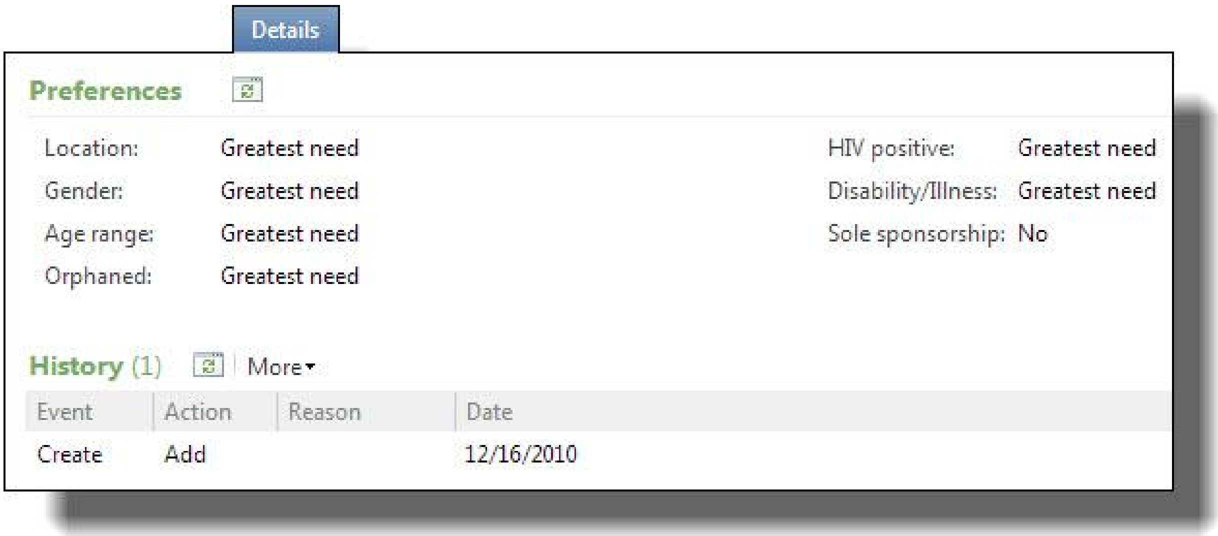
View Child or Project Sponsored

From the Sponsorship record, select the Child or Project tab to view information such as the program name, location information, and details about the child or project. The tab that appears depends on the sponsorship type - a child sponsorship displays the Child tab and a project sponsorship displays the Project tab.

From this page, click **Go to child** or **Go to project** to open the child or project record.

View Criteria and History Information

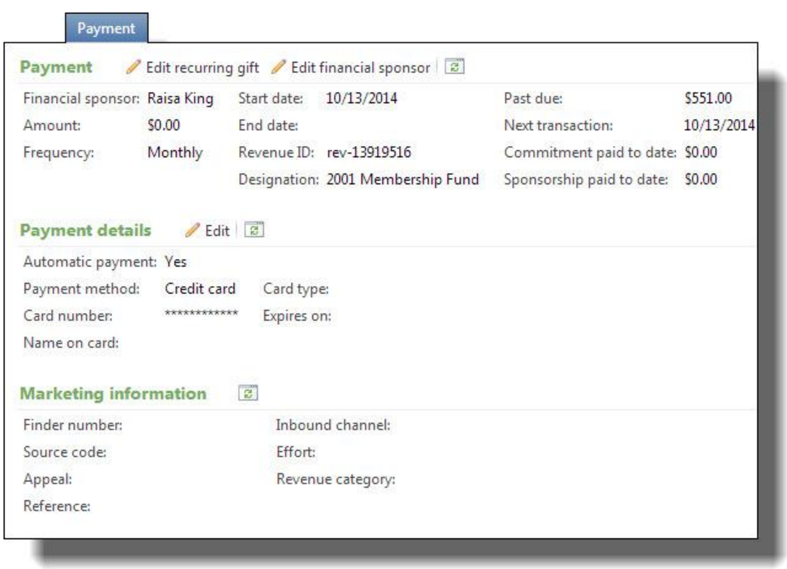
From the Sponsorship record, select the Details tab to view information about the criteria used to match the sponsor with this child or project. This tab also tracks the sponsor's history with the sponsorship, such as when the sponsorship was added.



Manage Sponsorship Payments

From the Sponsorship record, select the Payment tab to view and edit payment information associated with the sponsorship.

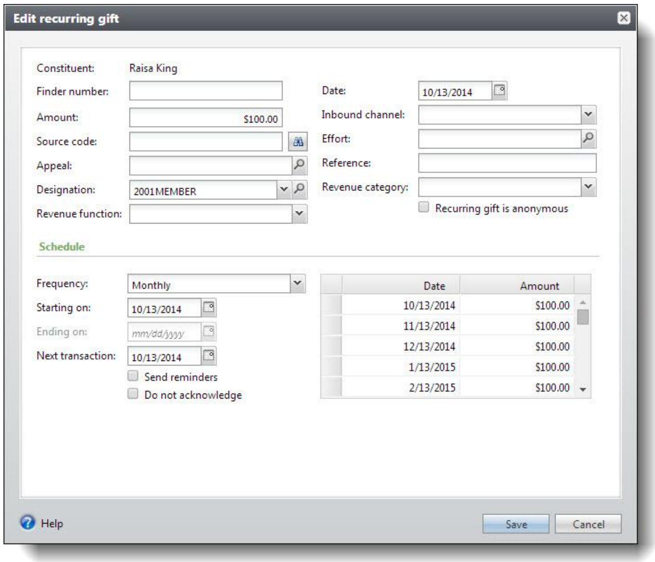
To view the recurring gift payment record, under **More information**, select **Go to recurring gift**.



▸ Edit sponsorship payment information

This option allows you to change amount, frequency, and transaction dates. To change payment method, refer to Edit payment method on page 80.

1. From the sponsorship record, select the Payment tab.
2. In the Payment grid, select **Edit recurring gift**. The Edit recurring gift screen appears.

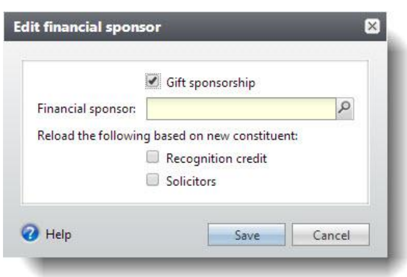


3. Make the necessary changes. For a detailed explanation about the items included on this screen, refer to Add a sponsorship record to your database on page 69.
4. Click **Save** to save the changes and return to the Payment tab.

Edit gift sponsorship information

This option allows you to change the “gift sponsorship” designation and donor. To change amount, frequency, and transaction dates refer to Edit sponsorship payment information on page 78. To change payment method, refer to Edit payment method on page 80.

1. From the sponsorship record, select the Payment tab.
2. In the Payment grid, select **Edit financial sponsor**. The Edit financial sponsor screen appears.



3. If you no longer want the gift designated a gift sponsorship, unmark the **Gift sponsorship** checkbox. If you want to designate a sponsorship currently not a gift as a gift sponsorship, select the **Gift sponsorship** checkbox.
4. In the **Financial sponsor** field, you can enter a new constituent to recognize as the donor of this gift. Click the magnifying glass at the end of the field to access the Constituent Search screen. This constituent is financially responsible for paying for the sponsorship.
5. If you want the system to update the constituent recognized for the gift as the constituent entered in the **Financial sponsor** field, select **Recognition credit**.
6. If you want the system to update the constituent recognized as the solicitor of the gift as the constituent entered in the **Financial sponsor** field, select **Solicitors**.

7. Click **Save** to save the changes and return to the Payment tab.

Edit payment method

1. From the sponsorship record, select the Payment tab.
2. In the **Payment details** grid, select **Edit**. The Edit payment method screen appears.
3. Make any necessary changes. For a detailed explanation of the items included on this screen, refer to Add a sponsorship record to your database on page 69.
4. Click **Save** to save the changes and return to the Payment tab.

Add Recurring Additional Gift to Sponsorship

If a sponsor wants to include a recurring gift to your organization in addition to sponsoring an opportunity, you can record this additional gift from the Sponsorship record. Under **Tasks**, click **Add recurring additional gift** and the Add a recurring additional gift screen appears.

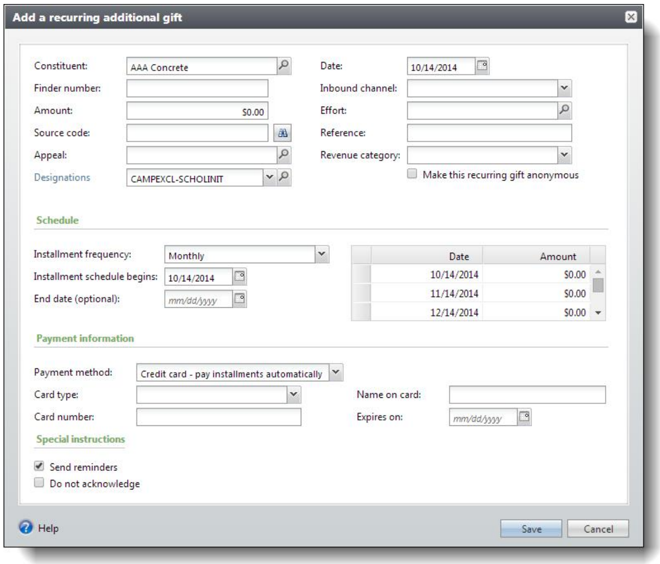
Note: For more information about recurring gifts, refer to the Recurring Gifts chapter in the *Revenue Guide*.

Also, note the following:

- If the sponsorship associated with the additional recurring gift is transferred the additional recurring gift links to the new sponsorship
- If the sponsorship associated with the additional recurring gift is reassigned, the additional recurring gift links to the new commitment/sponsorship
- If the additional recurring gift is deleted, the link to the sponsorship record is removed
- If the sponsorship is deleted and no payments exist against the additional recurring gift, the gift is also deleted. If payments do exist against the additional recurring gift, an error message appears, explaining the payments must be deleted before you can delete the sponsorship
- If the sponsorship is canceled or terminated, the additional recurring gift associated with the sponsorship is marked "Terminated"

Add a recurring additional gift to a sponsorship

1. From the Sponsorship record, under **Tasks**, click **Add recurring additional gift**. The Add a recurring additional gift screen appears.



2. The **Constituent** field defaults to the name of the sponsor associated with the sponsorship. To change the name, click the magnifying glass and search for the constituent for the recurring gift. If the donor is not already a constituent in your database, you can add a new constituent from the Search screen.
3. In the **Finder Number** field, enter the finder number to match the recurring gift to a particular marketing mailing, such as to track and report on the mailing's performance. Typically, the finder number consists of 15 characters or less.
4. In the **Amount** field, enter the monetary value of one transaction of the recurring gift.
5. In the **Date** field, select a date to associate with the recurring gift. For example, select the date your organization receives the recurring gift. To select the date on a calendar, click the arrow.
6. In the **Source code**, **Appeal**, **Effort**, and **Inbound channel** fields, enter information about how you receive the recurring gift. You can search for a specific appeal or marketing effort.
7. In the **Designations** field, information about default designations to which the recurring gift is applied appears, as specified by the appeal entered. Search for and select the designation to which to apply the recurring gift as necessary.
8. To apply the recurring gift to multiple designations, click **Designations**. The Split designations screen appears.
9. In the **Reference** field, enter any special information about the recurring gift, such as to appear in communications about the revenue.
10. In the **Revenue category** field, select the category for the revenue, such as Deposit or Merchandise Sales. Your system administration configures the selections available in the **Revenue category** field.
11. If the constituent requests to make the recurring gift anonymously, select **Make this recurring gift anonymous**.
12. Under **Schedule**, set up the transaction schedule for the recurring gift.
13. Under **Payment information**, select whether the constituent sets up automatic payments for the recurring gift transactions. After you select a payment method in the **Payment method** field, enter information about the credit card, direct debit account, or other payment method the constituent uses to pay the recurring gift transactions.

14. Click **Save** to save the recurring gift and return to the Sponsorship page.

Edit Sponsorship Expiration Date

To change the planned end date associated with a sponsorship, open the sponsorship record and under **Tasks** click **Edit sponsorship expiration**. The Edit sponsorship expiration screen appears.

From this screen:

- If you want to designate the sponsorship a fixed-term sponsorship with and expiration date, select **This is a fixed-term sponsorship**.
- In the **Expiration date** field, enter the date on which this sponsorship expires.
- In the **Reason** field, select the reason for the fixed-term sponsorship.
- Click **Save** to save the change and close the screen.

Warning: The new start date cannot be later than the revenue schedule start date.

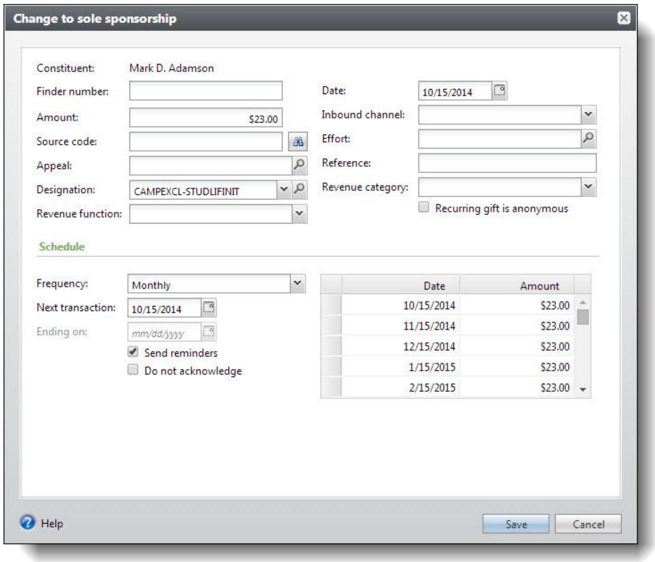
Change Sponsorship to Sole Sponsorship

If:

- the program selected for the sponsorship allows for a sole sponsorship
- the current sponsorship is not already designated a sole sponsorship
- and no other sponsors are associated with the opportunity

the **Change to sole sponsorship** option appears under **Tasks** on the sponsorship record.

To designate the current sponsorship the sole sponsor of the opportunity, click the **Change to sole sponsorship** option. The Change to sole sponsorship screen appears.



Enter the new payment information associated with the sole sponsorship and click **Save**. The sponsor is now designated the sole sponsor of the opportunity and no other sponsorships are accepted.

For information about the items included on the Change to sole sponsorship screen, refer to Add a sponsorship record to your database on page 69.

Remove Sole Sponsorship

If a sponsor is currently designated the sole sponsor of an opportunity, the **Remove sole sponsorship** option appears under **Tasks** on the sponsorship record. To remove the sole sponsorship designation, click the **Remove sole sponsorship** option. The Remove sole sponsorship screen appears. Enter the new payment information associated with the sponsorship and click **Save**. The sponsor is no longer designated the sole sponsor of the opportunity and other sponsorships are now accepted.

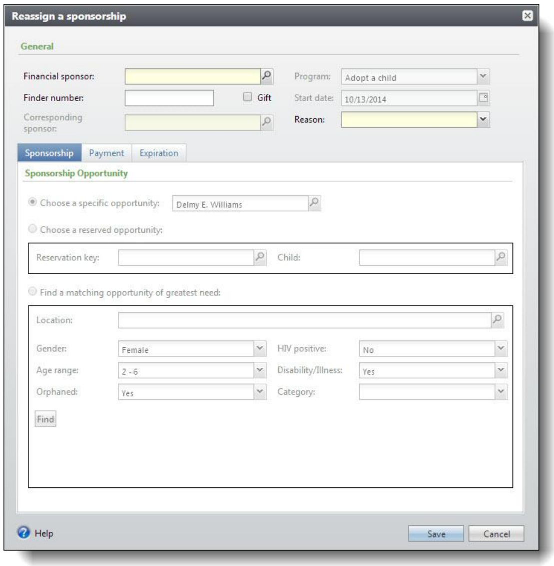
For information about the items included on this screen, refer to Add a sponsorship record to your database on page 69.

Reassign a Sponsorship

From the sponsorship record, you can reassign the child or project to the different sponsor. The reassignment process ends the original sponsor’s commitment and starts a commitment for the new sponsor.

Reassign a sponsorship

1. From the sponsorship record under **Transactions** select **Reassign sponsorship**. The Reassign a sponsorship screen appears.



2. In the **Financial sponsor** field, click the magnifying glass to access the Record Search screen. From here you can search for or add a new constituent to which to assign the child or project.
3. In the **Reason** field, select a reason for the reassignment.

   Note: For a detailed explanation about all items included on this page, refer to Add a sponsorship record to your database on page 69.

4. On the Payment tab, enter the new payment information.
   a. If a past due balance exists for the sponsorship to be reassigned, you can select to carry the balance forward to the new sponsor. Check **Carry forward** and enter the value to carry forward. The amount entered in this field is added to the next installment due for the new sponsorship.

   Note: This field is only enabled if a past due balance exists for the sponsorship.

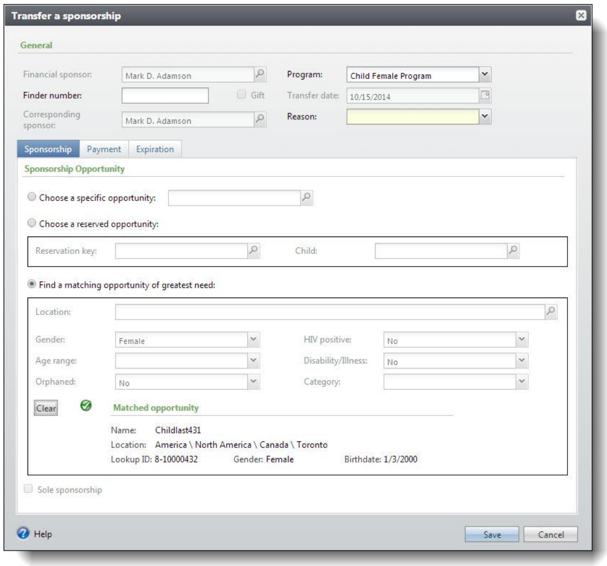
5. On the Expiration tab, enter any new information about when or if the sponsorship expires.
6. Click **Save** to reassign the sponsorship and return to the Sponsorship page. The reassignment is recorded in the **History** section of the Details tab of the sponsorship record.

Transfer a Sponsorship

From a sponsorship record you can replace an existing child or project opportunity with a new opportunity. When you execute a transfer, the process tags the old opportunity as “Inactive” and adds the new opportunity to the sponsor record under the existing commitment.

Transfer an existing sponsorship opportunity out and a new opportunity in

1. From the sponsorship record, under **Transactions**, select **Transfer sponsorship**. The Transfer a sponsorship screen appears.



2. In the **Reason** field, select a reason for the reassignment.
3. Select the new opportunity.

   Note: For a detailed explanation about all items included on this page, refer to Add a sponsorship record to your database on page 69.

4. On the Payment tab, enter the new payment information.
5. On the Expiration tab, enter any new information about when or if the sponsorship expires.
6. Click **Save** to execute the transfer.

Cancel a Sponsorship

From the sponsorship record under **Tasks**, click **Cancel sponsorship** to cancel the sponsorship but retain the inactive sponsorship record.

To cancel the sponsorship relationship, from the sponsorship record under **Tasks**, select **Cancel sponsorship**. The Cancellation reason screen appears. In the **Reason** field, select the reason the relationship is canceled and click **Save**. The **Status** is updated to “Inactive (Canceled)” and a **Reactivate sponsorship** link appears under **Tasks**.

Reactivate a Sponsorship

If after canceling a sponsorship you find you want to reestablish the relationship, you can reactivate a canceled sponsorship. From the sponsorship record, click **Reactivate sponsorship** in **Tasks**. The Reactivation reason screen appears. In the **Reason** field, select the reason the relationship is reactivated and click **Save**. The **Status** is updated to “Active” and a **Cancel sponsorship** link appears under **Tasks**.

Warning: You can reactivate only the same opportunity that was canceled. The sponsorship payment history also stays the same. If the canceled opportunity is no longer available, reactivation is not an option.

View the Sponsorship Sponsor

From the sponsorship record under **More information**, click **Go to sponsor** to move out of the sponsorship record and into the sponsor record.

Complete Transfer

If the opportunity associated with the sponsorship is designated ineligible and as a result the sponsor is assigned to a new opportunity, and if the **Mange Sponsorship Settings** is set to **Pending transfer** in the **For transferring a sponsorship use** field, the **Complete Transfer** option appears under **Transactions** on page of the sponsorship associated with the transfer. This option allows you to manually change the transfer status from “Pending” to “Complete.”

To accept the transfer and change the sponsorship status, click **Complete transfer**. A confirmation screen appears. Click **Yes** to complete the transfer.

Override Transfer

If the opportunity associated with the sponsorship is designated ineligible and as a result the sponsor is assigned to a new opportunity, and if the **Mange Sponsorship Settings** is set to **Pending transfer** in the **For transferring a sponsorship use** field, the **Override Transfer** option appears under **Transactions** on the sponsorship page associated with the transfer. This option allows you to manually reject the transfer and locate a new opportunity.

To reject the transfer and locate a new opportunity, click **Override transfer**. The Transfer a sponsorship screen appears. From here, you assign a **Reason** for the override and locate a new opportunity to assign the sponsor.

Bulk Add New Sponsorships

To enter new sponsorship information in the database, you can manually enter this data one record at a time, or if you have a large number of records you want to enter at once, you can do a bulk add. This process involves **Batch Entry**, which is housed in the *Administration* functional area. If the data you want to add is stored in an external CVS-formatted spreadsheet, you can also use the **Import** feature, also housed in the *Administration* functional area.

In **Batch**, you enter and update information on records quickly because you do not open each individual record. Instead, you create a batch design to specify the fields to include. Or, you can use **Batch Entry** to commit data to your database that you import from a spreadsheet created in another application. For example, you enter information about new sponsorships into a spreadsheet application such as Microsoft *Excel*. You can create a business process to easily import the information from the spreadsheet into a batch design and then commit the data.

Note: For information about working in **Batch** and **Import**, refer to the *Batch and Import Guide*.

Edit Sponsorship Start Date

To change the **Start date** associated with a sponsorship, from the sponsorship record, under **Tasks**, click **Edit Sponsorship start date**. The Edit sponsorship start date screen appears. In the **Start date** field, enter the new date, and click **Save** to save the new date and return to the Sponsorship page. The sponsorship record is updated to reflect the new date.

Sponsorship Purchases

Sponsorship purchases tracks failed online sponsorship transactions. The Unresolved online sponsorship purchases pages displays all unresolved transactions. From this page, you can complete or delete the transactions.

If you select **Complete**, the transaction is completed and any errors encountered during the process display. You can then address the errors and complete the transaction. Note that the entire transaction must be error free before you can complete it.

If you select **Delete**, the transaction is canceled. If there were other items in the shopping cart, these items remain in the batch file so long as the batch files was downloaded before you deleted the failed transaction.

For more information about online transactions, refer to the ***Blackbaud Internet Solutions*** user documentation.

Sponsorship Efforts

Sponsorship efforts are marketing efforts for sponsorships and they are managed on the Sponsorship Efforts page. Select **Sponsorship efforts** under **Correspondence** from *Sponsorship* to access the Sponsorship Efforts page.

For more information about sponsorship efforts, refer to the *Marketing Efforts Guide*.

Unlock Sponsorship Opportunities

This global change definition is designed for you to run on a daily basis. It releases opportunities inadvertently locked by an operation or process that may not have cleanly closed. For example, if during the unreserve process your system times out leaving a number of opportunities that you intended to unlock locked, this global change completes the process.

Unlock sponsorship opportunities

1. From *Administration*, click **Global changes**.
2. Click **Add**. The Select global change definition screen appears.
3. Under **Sponsorship**, select **Unlock sponsorship opportunities**.
4. Click **OK**. The Add global change screen appears
5. In the **Name field**, enter a name to identify your global change process.

6. If you want to base the change on just a specific site, in the **Site** field select the site you want changed.
7. In the **Timeout (in minutes)** field, select how old the lock should be before it is released by the global change. For example, if you select 15 minutes, only locks the occurred in the past 15 minutes are released. If the lock occurred 13 minutes ago, it is not included in the process.
8. Click **Save** to save the global change process and return to the Global Changes page.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains 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**.

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 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.

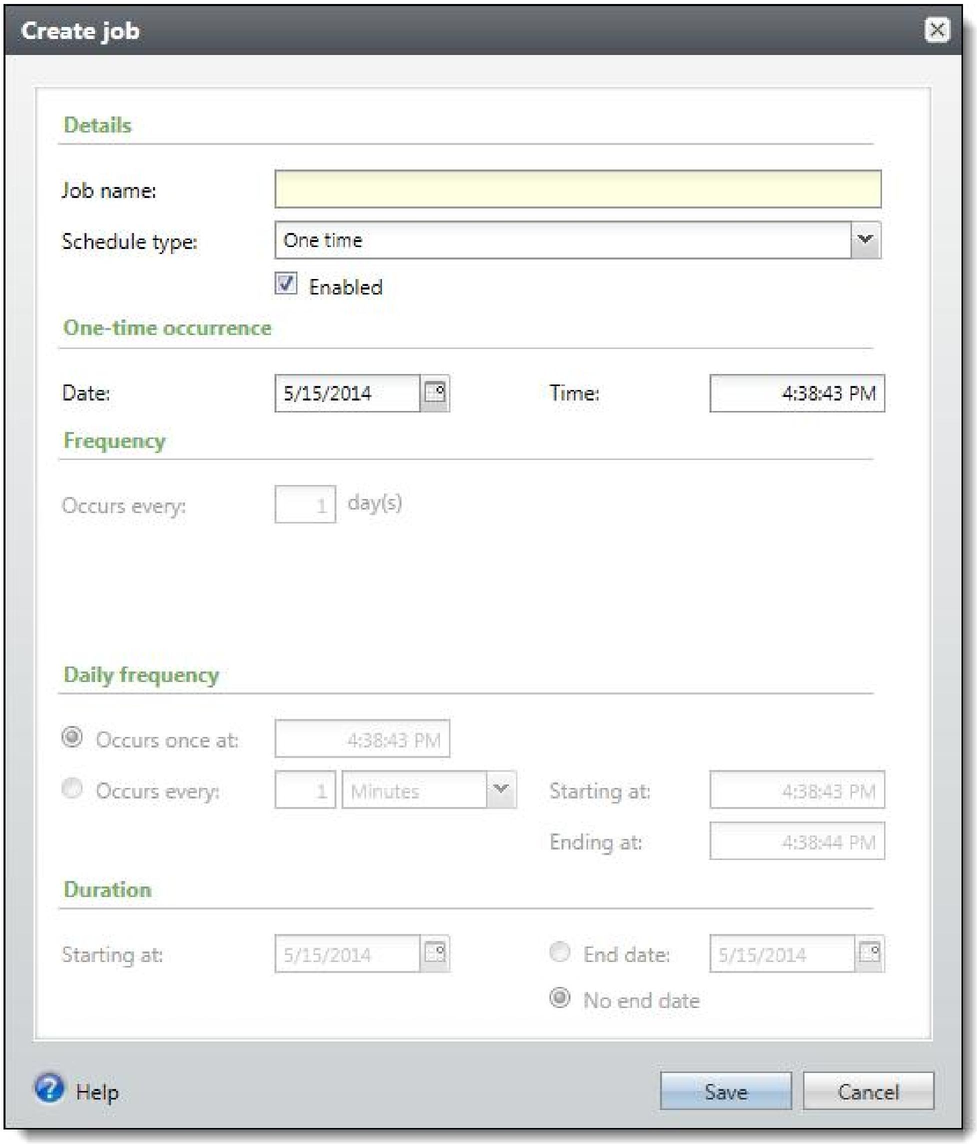
Schedule Process Jobs

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.



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. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package 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 99.
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
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 *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs 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 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.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

Process Status Report

When you execute a process, the process generates a status report which is housed on the Recent status tab of the process page. For example, if you execute a sponsorship transfer process, the Transfer Report appears on the Recent status tab which lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships, and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

Sponsorship Payments

A sponsorship payment is a recurring gift payment in the application. Recurring gifts are similar to pledges paid in installments because a constituent agrees to pay a specific amount to your organization over time. In the case of sponsorships, they agree to pay a fee to sponsor a specific opportunity.

Workflow for Sponsorship Payments

Payment information is entered in *Revenue* through the **Add a payment** option. From the Add a payment screen, you can enter payments for any payment application.

This section details the suggested workflow for recording a recurring gift payment associated with a sponsorship. Although the *Revenue* function is flexible and allows for several workflow options, this workflow was designed specifically for sponsorship payments.

Warning: This workflow is not a comprehensive "Add a payment" procedure. It offers only an overview of the steps specific to adding a sponsorship recurring gift payment. For example, it does not cover the Payment information, Mailing, or Transaction details tabs. For information about all fields and options included on the Add a payment screen, refer to the Add a Payment section of the *Revenue Guide*.

1. Create the payment record when you add the sponsorship. Payment information is recorded on the Payment tab of the Add a sponsorship screen. For information about how to add a sponsorship, refer to Add Sponsorship on page 68.
    - If you need to edit payment information after you create the sponsorship, use the edit options included on the Payment tab of the Sponsorship record. For more information, refer to Manage Sponsorship Payments on page 78.
    - To view the recurring gift record associated with the sponsorship, click **Go to recurring gift** from the sponsorship record. This link is under **More information**.
2. Add payments through the Add a payment screen in *Revenue*.
    a. From *Revenue*, select **Add a payment**.
    b. In the **Constituent** field, locate the sponsor for whom you want to add a payment.
    c. In the **Amount** field, enter the amount of the payment.
    d. The **Date** field defaults to today. You can change it if necessary.

e. In the **Application** field, select Recurring gift. All outstanding recurring gifts appear in the box. Sponsorship gifts are clearly identified as a “Sponsorship recurring gift.” The **Amount due**, **Opportunity**, **Designation**, **Frequency**, and **Total paid** information also appear.

f. Click **Add** next to the gift for which you want to record a payment. The Amount to apply screen appears.

- If the amount paid matches the amount due for the sponsor’s next recurring gift payment, select **Next transaction amount of**. The amount due also displays in this option. For example, if the amount due is $50 and the sponsor is paying $50, select this option.
- If the amount paid is different than the amount due, select **Other amount** and enter the amount paid.
- If the sponsor has overpaid, say they send in $150 for a $100 gift and they want the overpayment applied as a donation to the organization, select **Next transaction amount of** and select **Additional donation**. Whatever the amount paid over the next transaction amount - in this example $50 - defaults in the **Additional donation** field.
- If the sponsor overpaid, does not want the overpayment applied as donation, and the **Manage recurring gift settings** = “Maintain installment amounts,” the overpayment is applied to any remaining balances and any remainder amount pays into a later installment.

Note: For information about the **Manage recurring gift settings** options, refer to Revenue Configuration in the *Revenue Guide*.

- If the sponsor overpaid, does not want the overpayment applied as donation, and the **Manage recurring gift settings** = “Update installment amounts to match payments” the installment amount is increased to match the total payment. No underpaid installment balance or future installment is affected by the overpayment.
- If the sponsor underpaid, when you open the Amount to apply screen, the **Other amount** option is selected and the **Amount** defaults in the **Other amount** field. When you save the payment, a balance is recognized and carried on the sponsor’s payment record.

a. Click **OK** to save the information added to the Amount to apply screen and return to the Add a payment screen.

3. Click **Save** to save the payment.

View Overdue, Past Due and Under Payments

All payment activity is record on the Activity tab of the sponsor’s recurring gift record. There are a number of ways to access this tab. From *Sponsorship* the easiest way is to click **Go to recurring gift** from the Sponsorship record. From the recurring gift record, select the Activity tab.

Track Sponsorship Upgrades and Downgrades

If a sponsor wants to make development changes to an existing sponsorship, for example they want to increase the amount they pay each month, you enter this information on the sponsorship’s recurring gift record. Once this information is entered on the recurring gift, you can track the records changed through reports and in queries. You can also view the information in the History report on the recurring gift record and the Transactions tab on the sponsor record.

Note: Designations used to track development changes to a sponsorship are user-defined in **Code Tables**. Adding code table options to your system is the responsibility of the database administrator. You access **Code Tables** through *Administration*.

Track upgrades and downgrades to existing sponsorships

1. From the Payment tab of the sponsorship record, click **Edit recurring gift**. The Edit recurring gift screen appears.
2. In the **Revenue function** field, select the function you want to include on the record. For example, if the client is upgrading their sponsorship, select “Upgrade.”
3. Make any other changes to the record. For example, if this is an upgrade, you may need to change the **Amount**. For a detailed explanation of all items included on this screen, refer to Add a sponsorship record to your database on page 69.
4. Click **Save** to save the change and return to the recurring gift record.

Adjust Sponsorship Rates

The billing coordinator for your organization may need to implement a global rate change in order to meet changes in the cost of maintaining the sponsorship. The **Adjust sponsorship rates** definition in **Global Change** allows you to globally increase or decrease the rate of sponsorships based on a % or fixed amount.

Adjust the sponsorship rates globally

1. From *Administration*, click **Global Changes**. The Global Changes page appears.
2. Click **Add**. The Select a global change definition screen appears.
3. Under Sponsorship, select **Adjust sponsorship rates**.
4. Click **OK**.
5. In the **Name** field, enter a name to identify this global change process.
6. In the Site field, select the specific site you want changed. For example, if your organization maintains several offices - office A, office B, and office C - and you just want office B changed, select office B. Select All sites to change the amount in all locations.
7. If you want to globally change the rate set on a specific program, select **Program** and then in the drop-down menu select the specific program to use.
8. If you want to globally change the rate set on a specific group of records included in a selection created in Query, select Selection. Click the magnifying glass at the end of the field to access a search screen and locate the specific selection you want to use.
9. In the **Adjust method** field, you can choose to “Set rate to” a specific amount or to “Increase rate by” a specified amount.
10. In the **Amount** field, enter the new rate or the amount by which you want the existing rate increased. This depends on the option you selected in the **Adjust method** field.
11. In the **Revenue function** field, select the function you want to include on the record when recognizing the rate change. For example, if the new rate is for upgrades, select "Upgrade."
12. In the **Marketing fields**, modify the marketing information as desired.
13. Click **Save**.

14. When your are ready to execute the rate change, click **Process global change**.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains 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**.

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 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.

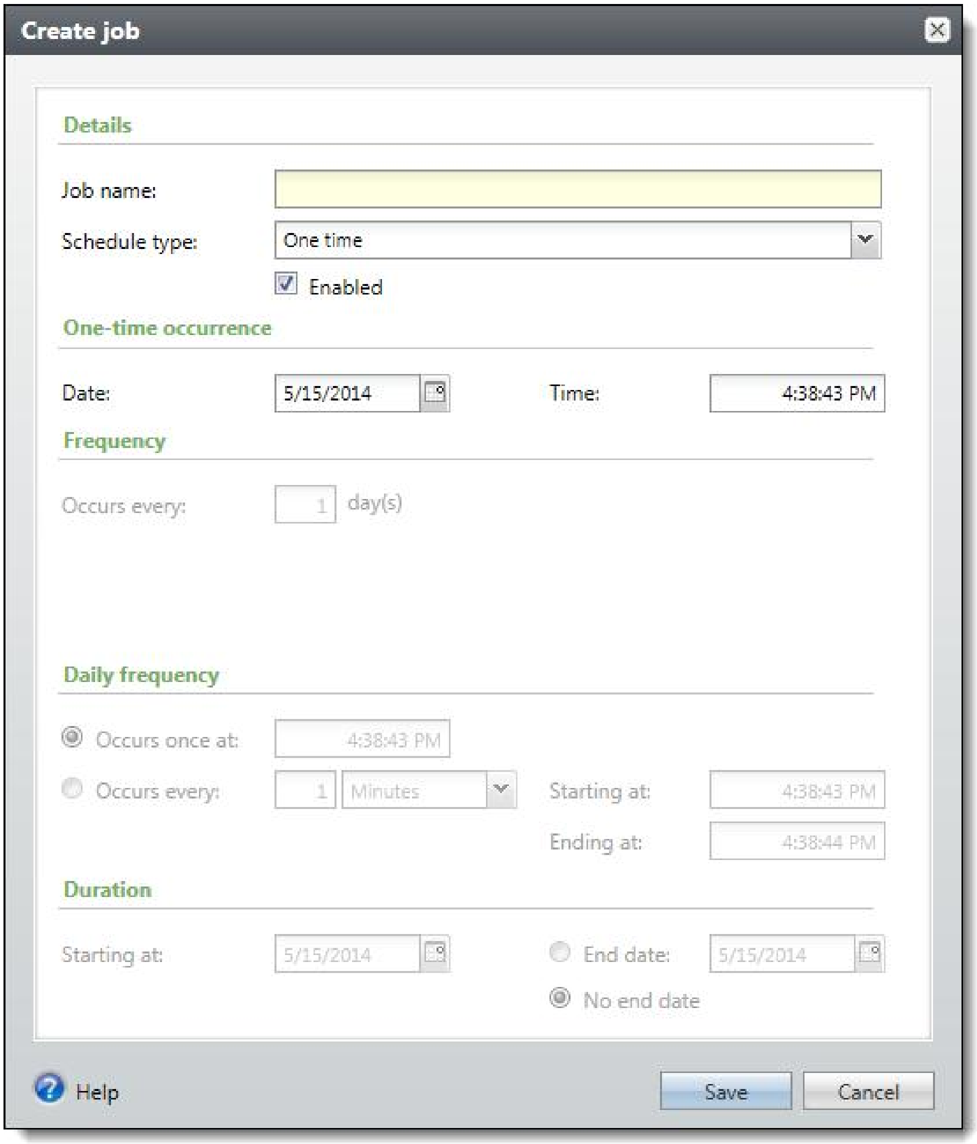
Schedule Process Jobs

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.



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. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package 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 99.
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
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 *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs 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 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.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

Process Status Report

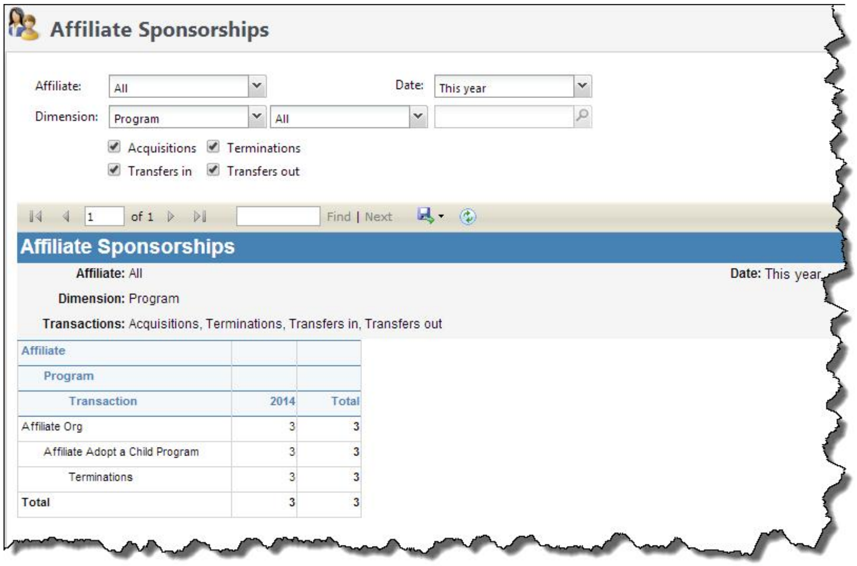
When you execute a process, the process generates a status report which is housed on the Recent status tab of the process page. For example, if you execute a sponsorship transfer process, the Transfer Report appears on the Recent status tab which lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships, and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

Sponsorship Reports

Sponsorship includes several report options, which allow you to quickly and easily generate basic reports that track a variety of sponsorship-related activities. For example, you can generate a **Sponsorship past due** report to review details about past due sponsorship payments or a **Sponsorship acquisition** report to review details about opportunities acquired by sponsors.

Affiliate Sponsorships

The **Affiliate Sponsorships** report provides details about sponsorships associated with affiliates in your database. You can view information for all affiliate sponsorships in your database, or you can select a specific affiliate organization for which to view data. You can filter your report further by selecting a dimension, such as “Program” or “Location type,” or selecting one or more transactions such as **Acquisitions**, **Terminations**, **Transfers in**, and **Transfers out**.



Note: If your organization works with other organizations to locate sponsors for opportunities and one of these affiliates plan to participate in finding sponsors for a program, you can select to associate the program with the affiliate organization when you create the program.

Generate an Affiliate sponsorship report

1. From the Sponsorship page, under **Reports**, select **Affiliate sponsorships**. The Affiliate Sponsorships page appears.
2. In the **Affiliate** field, select the affiliate organization for which you want to view information. All affiliates assigned in your system display in the drop-down menu. You can also choose to view data for "All" affiliates.
3. In the **Dimension** field, select the nesting dimension you want included in your report. For example, if you selected "All" in the **Affiliate** field and you want to see all affiliated sponsorship in each program, in **Dimension** select "Program" and then select "All" in the corresponding field.
4. In the **Date** field, select the date range on which you want to base your report. For example, if you select "This year," any affiliate sponsorship information that displays is restricted to information entered this year.
5. In the **Transaction** section, select the transaction operations for which you want to view information. You can select as many options as necessary for your report.
6. Click **View Report** to generate your report.

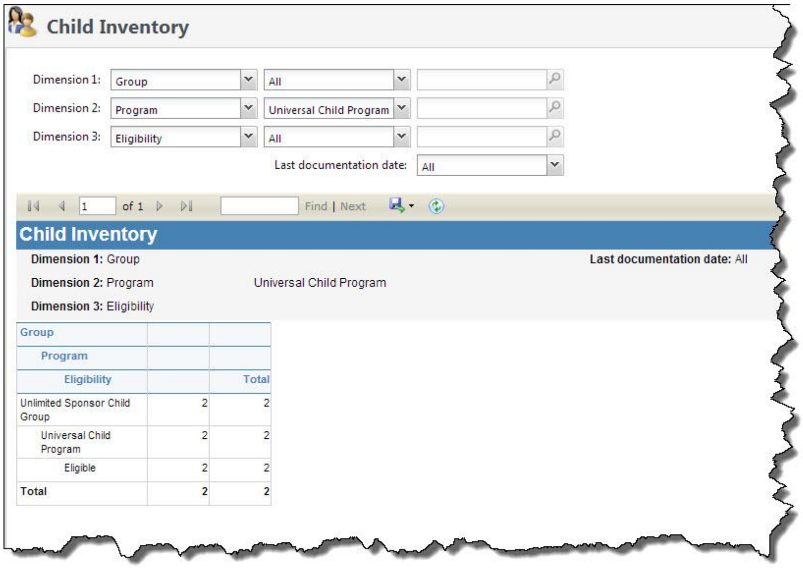
Child Inventory

The **Child Inventory** report option provides details about children in your database. You can view inventory information based on a selected group, program, location type, eligibility, age, gender, and availability or a combination of any three of these options, identified as "Dimensions" in the report parameters.

In the report, your dimension selections are hierarchical. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select

"Availability" and "Reserved" in **Dimension 2**, only reserved children included in the program you selected in **Dimension 1** are included in the report.

You also further define information included in your report based on **Last documentation date**. This is a manually entered date that is often used to track when the child's case history was last updated.



Generate a Child Inventory report

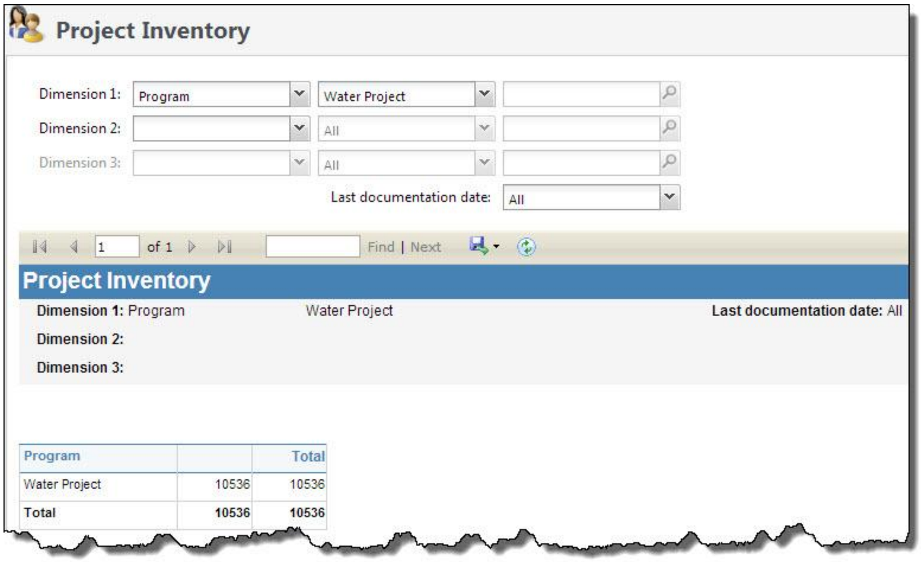
1. From the Sponsorship page, under **Reports**, select **Child inventory**. The Child Inventory page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select "Program." In the corresponding field, enter the program you want used. You can select "All" to see information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected "Program" and "All" for your **Dimension 1**, and you want to see all available children in each program, in **Dimension 2** select "Availability" and then select "Available" in the corresponding fields.
4. In the **Last documentation date** field, select the date range on which you want to base your report.
5. Click **View Report** to generate your report.

Project Inventory

The **Project Inventory** report option provides details about projects in your database. You can view inventory information based on a selected group, program, location type, status, availability, or category, or a combination of any three of these options, identified as "Dimensions" in the report parameters.

In the report, your dimension selections are hierarchical. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select "Status" and "Open" in **Dimension 2**, only open projects included in the program you selected in **Dimension 1** are included in the report.

You also further define information included in your report based on **Last documentation date**. This is a manually entered date that is often used to track when the project's case history was last updated.



Generate a Project Inventory report

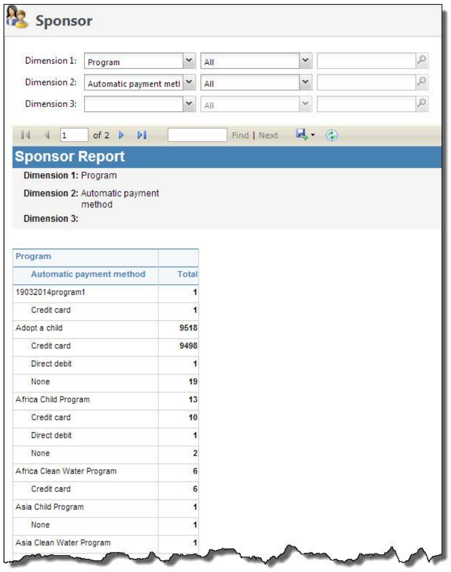
1. From the Sponsorship page, under **Reports**, select **Project inventory**. The Project Inventory page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select "Program." In the corresponding field, enter the program you want used. You can select "All" to see information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected "Program" and "All" for your **Dimension 1**, and you want to see all open projects in each program, in **Dimension 2** select "Status" and then select "Open" in the corresponding fields.
4. In the **Last documentation date** field, select the date range on which you want to base your report.
5. Click **View Report** to generate your report.

Sponsor Report

The **Sponsor** report counts all sponsors at a given time with active sponsorships. The report offers a snapshot of the general health of your sponsor numbers.

Note: This report includes the same dimensions as the **Sponsorship acquisition** report with an additional dimension for Number of sponsorships. The Number of sponsorship dimension has values of 1, 2, 3 and 4+.

You can base the report on three different dimensions, which filter and group data in your report. Your dimension selections are hierarchical. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program option you select in **Dimension 1**. So if you select "Location type" in **Dimension 2**, only location types included in the program you selected in **Dimension 1** are included in the report.



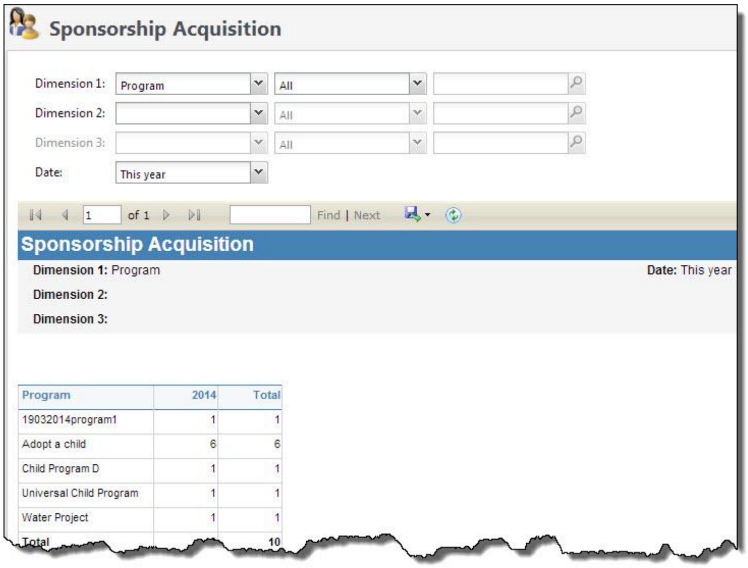
Generate a Sponsors report

1. From the Sponsorship page, under **Reports**, select **Sponsors**. The Sponsors Report page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select “Program.” In the corresponding field, enter the program you want used. You can select “All” to see information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and you want to see all program information for a specific location type, in **Dimension 2** select “Location types” and then select the type of location in the corresponding fields.
4. Click **View Report** to generate your report.

Sponsorship Acquisition

The **Sponsorship acquisition** report provides details about new sponsorships satisfying your selected date parameters. The report looks at only the add and start dates of the sponsorship.

You can base the report on three different dimensions, which filter and group data in your report. Your dimension selections are hierarchical. For example, if you select “Program” as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select “Location types” in **Dimension 2**, only location types for the program you selected in **Dimension 1** are included in the report. You can also further restrict information included in your report based on **Date**.



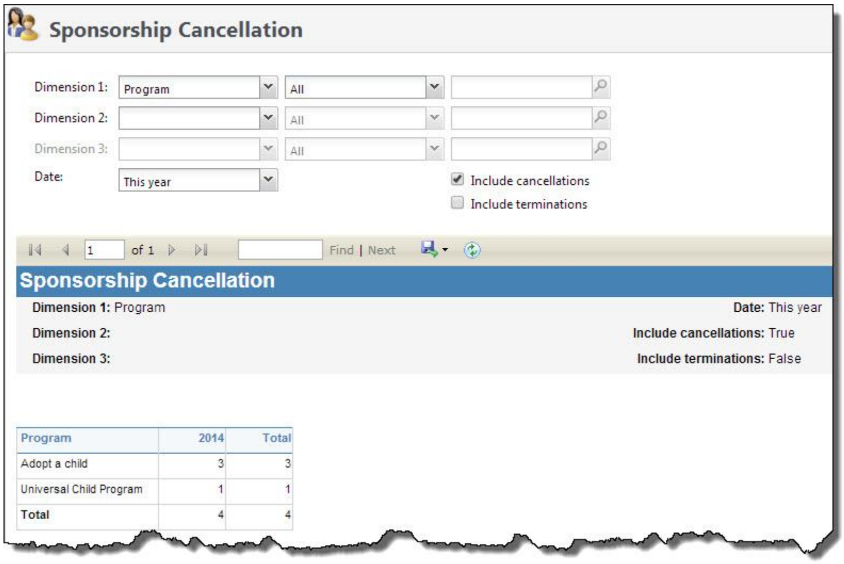
Generate a Sponsorship acquisition report

1. From the Sponsorship page, under **Reports**, select **Sponsorship acquisition**. The Sponsorship Acquisition page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select “Program.” In the corresponding field, enter the program you want used. You can select “All” to see information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and you want to see all program information for a specific location type, in **Dimension 2** select “Location types” and then select the type of location in the corresponding fields.
4. In the **Date** field, select the date range on which you want to base your report.
5. Click **View Report** to generate your report.

Sponsorship Cancellation

The **Sponsorship cancellation** report provides details about canceled sponsorships in your system based on the sponsorship information you select.

You can base the report on three different dimensions. Your dimension selections are hierarchical. For example, if you select “Reason” as your **Dimension 1** any remaining dimension selections are restricted to the reason you select in **Dimension 1**. So if you select “Location types” in **Dimension 2**, only location types associated with the reason you selected in **Dimension 1** are included in the report. You can also further restrict information included in your report based on **Date**.



Generate a Sponsorship cancellation report

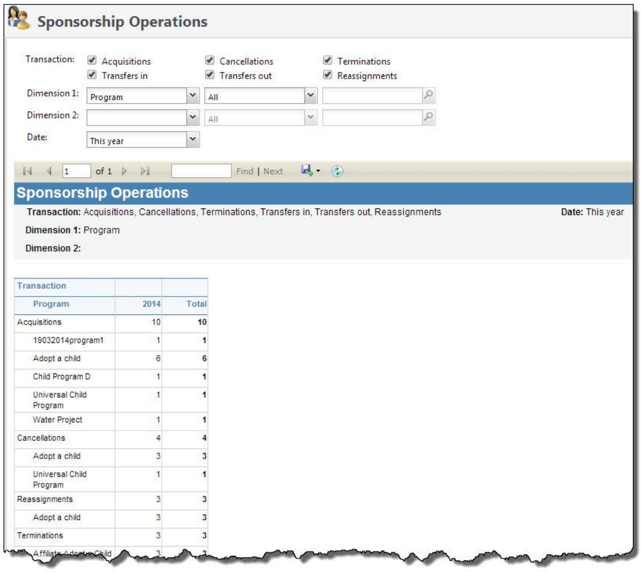
1. From the Sponsorship page, under **Reports**, select **Sponsorship cancellation**. The Sponsorship Cancellation page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on cancellation reasons, select "Reason." In the corresponding field, enter the specific reason you want used. You can select "All" to see information for all cancellation reasons in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected "Reason" and "All" for your **Dimension 1**, and you want to see all cancellation reason information for a specific location type, in **Dimension 2** select "Location type" and then select the type of location in the corresponding fields.
4. In the **Date** field, select the date range on which you want to base your report.
5. Select to **Include terminations** and/or **Include cancellations**. You must select at least one.
6. Click **View Report** to generate your report.

Sponsorship Operations

The **Sponsorship Operations** report provides details about sponsorship transactions, such as new assignments, transfers, cancellations, and terminations.

Additionally, you can base the report on two different dimensions, which are used to filter and group the report data. Your dimension selections are hierarchical and place restrictions on your selected transactions. For example, if you select "Program" as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select "Location types" in **Dimension 2**, only location types for the program you selected in **Dimension 1** are included in the report and if you selected the "Transfer in" **Transaction**, only transfer in operations included in the selected program and location types are included in the report.

You can also further restrict information included in your report based on **Date**.



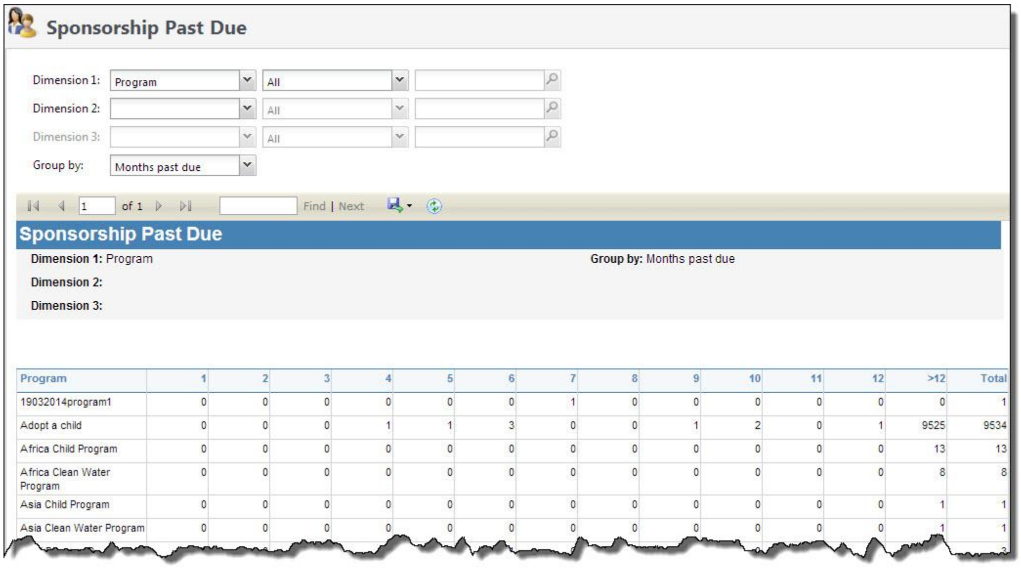
▸ Generate a Sponsorship operations report

1. From the Sponsorship page, under **Reports**, select **Sponsorship operations**. The Sponsorship Operations page appears.
2. In the **Transactions** section, select the transaction operations for which you want to view information. You must select at least one **Transaction** option.
3. In the **Dimension 1** field, select the top level dimension you want used to define your report. Transaction information included in the report is restricted to your dimension selections. For example, if you select a specific program in **Dimension 1** and a specific location in **Dimension 2**, transaction information is provided for the selected program in the selected location only. To view all selected transaction information, leave the **Dimension** fields blank.
4. In the **Dimension 2** field, select the nesting dimension you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and you want to see all transaction information for programs for a specific location type, in **Dimension 2** select “Location types” and then select the type of location in the corresponding fields.
5. In the **Date** field, select the date range on which you want to base your report.
6. Click **View Report** to generate your report.

Sponsorship Past Due

The **Sponsorship past due** report provides details about past due sponsorship accounts in your system.

You can base the report on three different dimensions. Your dimension selections are hierarchical. For example, if you select “Program” as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select “Location types” in **Dimension 2**, only location types for the program you selected in **Dimension 1** are included in the report. You can also further restrict information included in your report based on **Date**.



Program	1	2	3	4	5	6	7	8	9	10	11	12	>12	Total
19032014program1	0	0	0	0	0	0	1	0	0	0	0	0	0	1
Adopt a child	0	0	0	1	1	3	0	0	1	2	0	1	9525	9534
Africa Child Program	0	0	0	0	0	0	0	0	0	0	0	0	13	13
Africa Clean Water Program	0	0	0	0	0	0	0	0	0	0	0	0	8	8
Asia Child Program	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Asia Clean Water Program	0	0	0	0	0	0	0	0	0	0	0	0	1	1

Generate a Sponsorship past due report

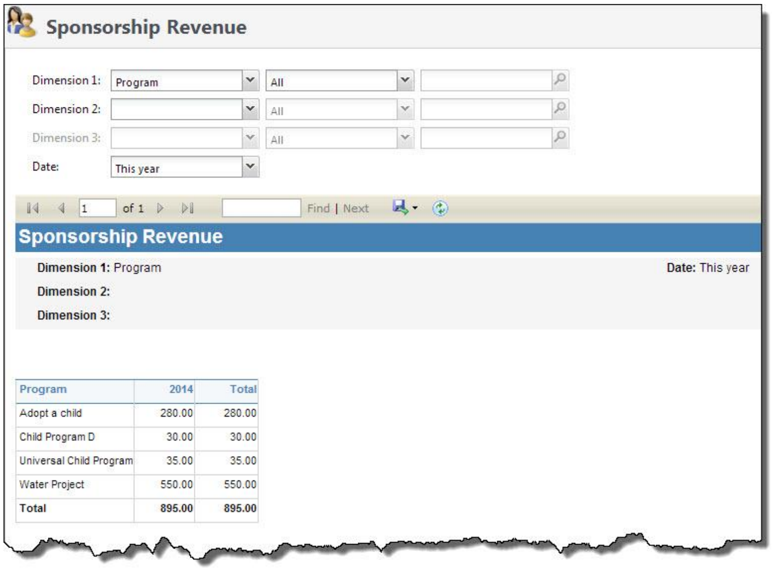
1. From the Sponsorship page, under **Reports**, select **Sponsorship past due**. The Sponsorship Past Due page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select “Program.” In the corresponding field, enter the program you want used. You can select “All” to see information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and you want to see all past due information for programs for a specific location type, in **Dimension 2** select “Location types” and then select the type of location in the corresponding fields.
4. In the **Date** field, select the date range on which you want to base your report.
5. Click **View Report** to generate your report.

Sponsorship Revenue

The **Sponsorship Revenue** report option provides detailed information about the revenue generated by your sponsorship activity. The report is based on payments not the auto payment method used.

You can base the report on three different dimensions. Your dimension selections are hierarchical. For example, if you select “Program” as your **Dimension 1** any remaining dimension selections are restricted to the program you select in **Dimension 1**. So if you select “Payment method” in **Dimension 2**, only sponsorships assigned the selected payment method and included in the program you selected in **Dimension 1** are included in the report.

You can also further restrict information included in your report based on **Date**. The report is based on when a payment was made.



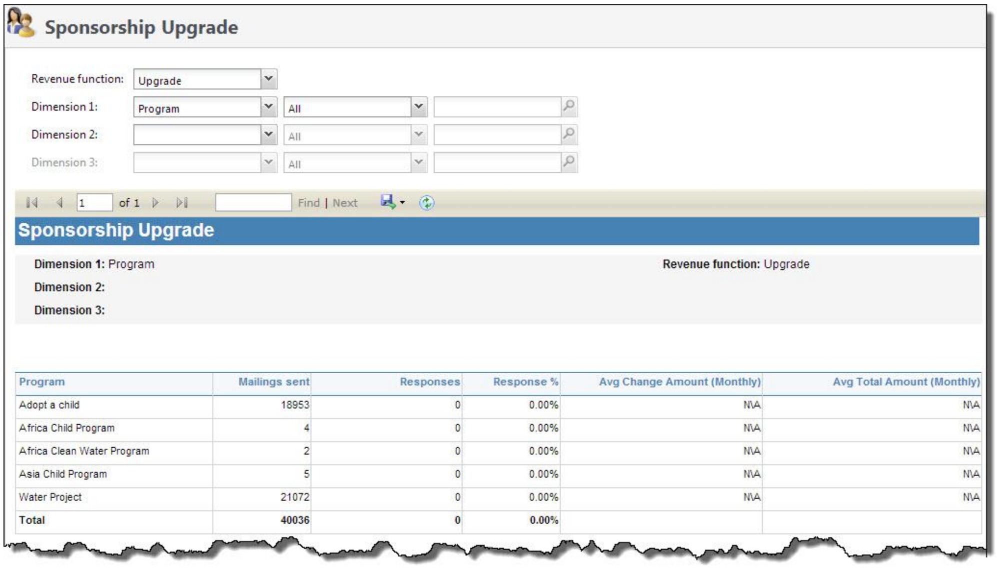
Generate a Sponsorship revenue report

1. From the Sponsorship page, under **Reports**, select **Sponsorship revenue**. The Sponsorship Revenue page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select “Program.” In the corresponding field, enter the program you want used. You can select “All” to see revenue information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and you want to see all revenue information for a specific location type within each program, in **Dimension 2** select “Location type” and then select the type of location in the corresponding fields.
4. In the **Date** field, select the date range on which you want to base your report.
5. Click **View Report** to generate your report.

Sponsorship Upgrade Report

The **Sponsorship upgrade** report tracks how many sponsors upgraded their sponsorship based on a specific revenue function. The report can help you determine the success of a specific campaign which was targeted for upgraded giving levels or to evaluate a response center team members success in upgrading sponsorships.

In addition to selecting a specific revenue function on which to base your report, you can base the report on three different dimensions, which filter and group data in your report. Your dimension selections are hierarchical. For example, if you select “Program” as your **Dimension 1** any remaining dimension selections are restricted to the program option you select in **Dimension 1**. So if you select “Appeal” in **Dimension 2**, only appeals included in the program you selected in **Dimension 1** are included in the report.



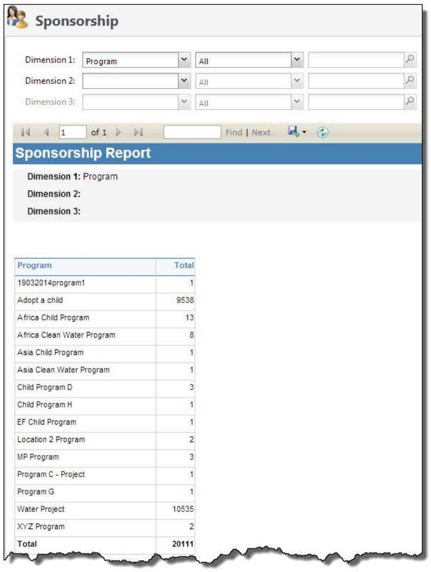
▶ Generate an Upgrade report

1. From the Sponsorship page, under **Reports**, select **Sponsorship upgrade**. The Sponsorship Upgrade Report page appears.
2. Select the **Revenue function** for which you want to track sponsorship information. For example, you may have a revenue function of “upgrade” on which you want to base your report.
3. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select “Program.” In the corresponding field, enter the program you want used. You can select “All” to see information for all programs in your system.
4. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and you want to see all program information for a specific location type, in **Dimension 2** select “Location types” and then select the type of location in the corresponding fields.
5. Click **View Report** to generate your report.

Sponsorship Report

The **Sponsorship** report counts all sponsorships in your system at the time you run the report.

You can base the report on three different dimensions, which filter and group data in your report. Your dimension selections are hierarchical. For example, if you select “Program” as your **Dimension 1** any remaining dimension selections are restricted to the program option you select in **Dimension 1**. So if you select “Location Type” in **Dimension 2**, only location types included in the program you selected in **Dimension 1** are included in the report.



Generate a Sponsorship report

1. From the Sponsorship page, under **Reports**, select **Sponsorship**. The Sponsorship Report page appears.
2. In the **Dimension 1** field, select the top level dimension you want used to define your report. For example, if you are interested in breaking your report down based on sponsorship programs, select “Program.” In the corresponding field, enter the program you want used. You can select “All” to see information for all programs in your system.
3. In the **Dimension 2** and **Dimension 3** fields, select the nesting dimensions you want included in your report. For example, if you selected “Program” and “All” for your **Dimension 1**, and you want to see all program information for a specific location type, in **Dimension 2** select “Location types” and then select the type of location in the corresponding fields.
4. Click **View Report** to generate your report.