

The Raiser's Edge™

Workplace Giving Guide

042612

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How Do I Use These Guides?



The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser's Edge* documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser's Edge* by accessing the help file in the program. Select **Help, The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

Workplace Giving



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United Way's annual community campaign in the workplace effectively organizes charitable contributions made directly to the United Way and to designated United Way agencies. When your United Way receives pledge envelopes from various accounts, *The Raiser's Edge* enables your data entry personnel to easily and rapidly enter this data.

When you commit an envelope to the database, all associated account and employee pledges and payments are entered automatically as gifts on the appropriate constituent records. Further, you can enter and commit pledge envelopes and pledge cards independently, allowing you to perform immediate campaign reporting without having to first enter all pledge cards.

Workplace Giving: The Big Picture

Using *Workplace Giving* involves the following major steps.

- 1. Add campaigns, funds, and appeals.** A campaign is an overall objective your organization has for raising money. For United Ways, campaigns are generally run on an annual basis.

The Raiser's Edge enables you to have campaigns, funds, and appeals in the database that are not tied to one another. For the United Way, however, each pledge envelope notes not only the campaign, but the fund as well.

Campaign Types and Subtypes in *Campaign Management System (CMS)* are both represented as funds in *The Raiser's Edge*. For example, a United Way Workplace Campaign Type with Subtypes of Employee Giving, Corporate Giving, and Individual Giving, results in three funds in *The Raiser's Edge*: United Way Workplace - Employee Giving, United Way Workplace - Corporate Giving, and United Way Workplace - Individual Giving.

In most cases, you should set up campaigns and funds before you begin entering envelopes. Additionally, each United Way can decide whether or not to use appeals to further note or categorize the types of donors. For more information, see the *Campaigns, Funds, & Appeals Data Entry Guide*.

After you create a campaign, you can create a hierarchy of combined structure codes, and set goals at each level of that hierarchy. You can then include the hierarchy in a Structure Summary Report to show how pledges compare to your goals. For more information, see "Structure Code Goals" on page 20.

- 2. Designate organization constituents as agencies and/or accounts.** Organization constituent records include a UW Account and a UW Agency tab. On these tabs, you specify whether an organization is an account, agency, or both. On the UW Agency tab, enter information such as payout details and eligibility data. On the UW Accounts tab, specify Structures, payout processing rules, and other details.

You can also specify Structures on individual constituent records. By adding Structure Codes to individual constituent records, in reports you can include a breakdown of pledges and payments made by individuals outside of pledge envelopes.

For more information about specifying organizations as agencies and accounts, see "Agencies and Accounts" on page 13.

- 3. Add pledge envelopes and/or individual gifts.** *Workplace Giving* handles United Way's methods of receiving and processing pledge envelopes. Three main elements are involved in processing pledge envelopes: creating envelopes, entering pledge cards, and committing envelopes.

The first step is always creating a new envelope. For more information, see "Creating Pledge Envelopes" on page 26. From that point, you can either commit the envelope summary information before you enter pledge cards, or enter pledge cards, then commit the envelope. For more information about committing envelopes, see "Committing Pledge Envelopes" on page 38. For more information about entering pledge card data, see "Entering Pledge Cards" on page 28.

To speed data entry, you can enter pledge card gifts in batches. For more information, see "Workplace Giving Batches" on page 59.

In addition to pledge envelopes, gifts assigned to your campaigns that are not associated with envelopes are also included in your *Workplace Giving* reports to gauge the success of the campaigns. For more information about these reports, see "Workplace Giving Reports" on page 53.

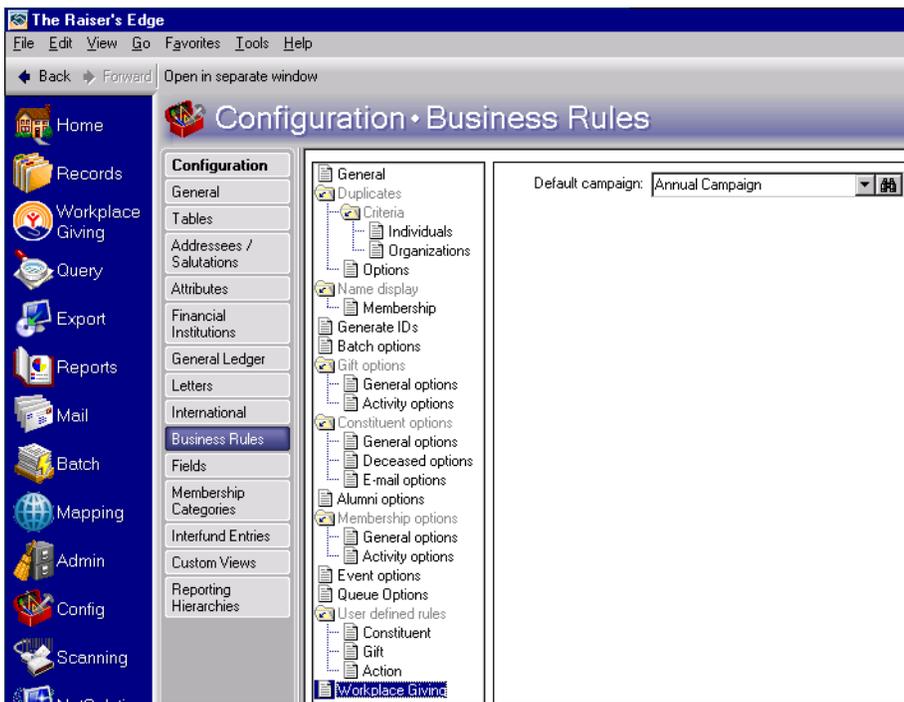
4. **Generate payouts.** When gifts are designated to go to particular United Way agencies, you should run periodic payouts to create payout records in *The Raiser's Edge*. All payouts that were accepted and generated database records display on the Payouts page. For more information, see "Payouts" on page 50.
5. **Run reports to gauge your progress.** Certain reports are available to meet United Way's specific reporting needs. At any point during your fundraising, you can run these reports to measure different aspects of your progress. For example, you can create a Campaign Ranking Report to display a comparison of Employee Giving vs. Corporate Giving, or a Designation Detail by Agency Report to provide information about designations made by individuals at the time of employee gifts. For more information about these and the other United Way specific reports, see "Workplace Giving Reports" on page 53.

Configuration and Administration

Before you start entering *Workplace Giving* data, you should specify several settings to help increase your efficiency and to ensure that only those users who you want to have access can view or edit *Workplace Giving* information.

Business Rules

On the Raiser's Edge bar, click **Config**. The Configuration page appears. Click **Business Rules**. Select **Workplace Giving** from the list on the left.

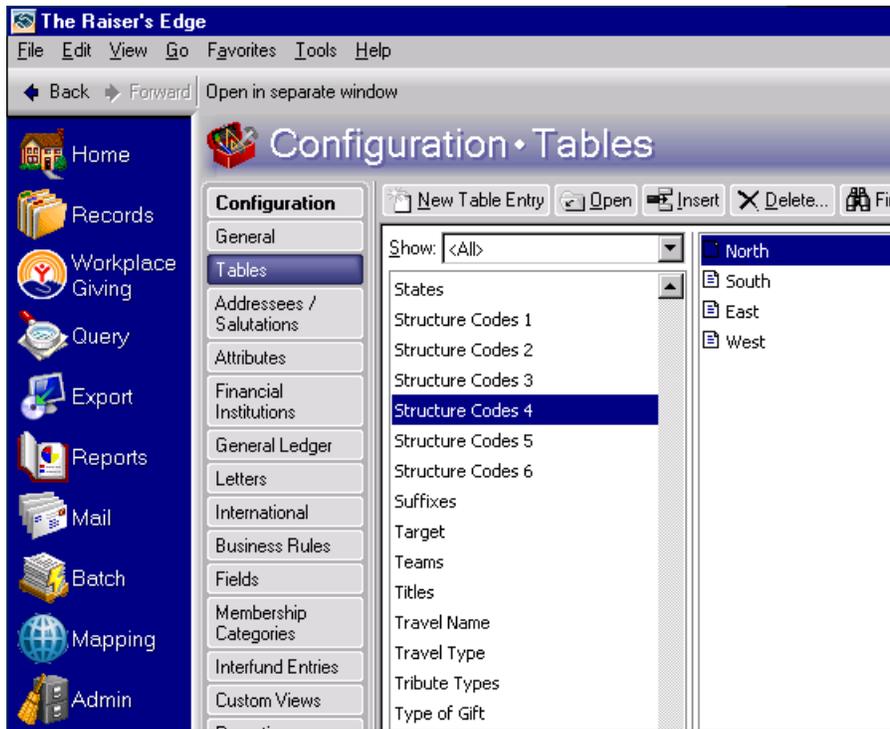


Select a **Default campaign** for pledge envelopes. When you create pledge envelopes, to save data entry time, the selected campaign defaults into the **Campaign** field on the Envelope Summary tab. This setting is only a default and can be changed on individual pledge envelopes.

For information about all the settings in *Configuration*, see the *Configuration & Security Guide*.

Tables

You can establish entries for tables in *Configuration*. Several tables are specific to *Workplace Giving*. On the Raiser's Edge bar, click **Config**. The Configuration page appears. Click **Tables**. The Tables page appears.

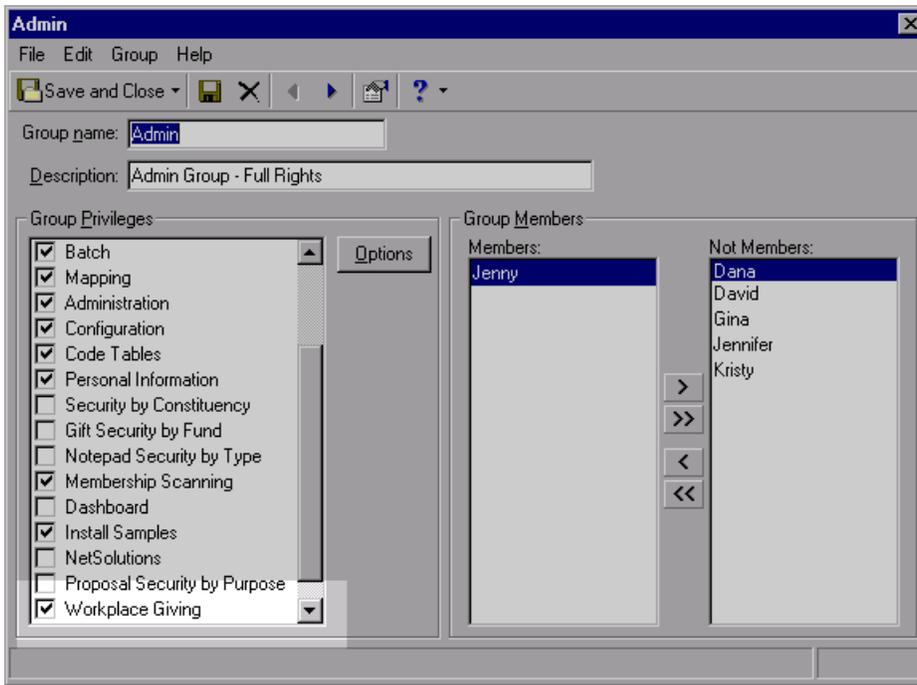


Here, you establish entries for all tables in the program. For example, you need to create entries for the **Structure Code** tables used in *Workplace Giving* reports. To create entries, select a table on the left, and click **New Table Entry** on the action bar. For more information about structure codes, see “Structure Codes” on page 18. For information about creating table entries, see the *Configuration & Security Guide*.

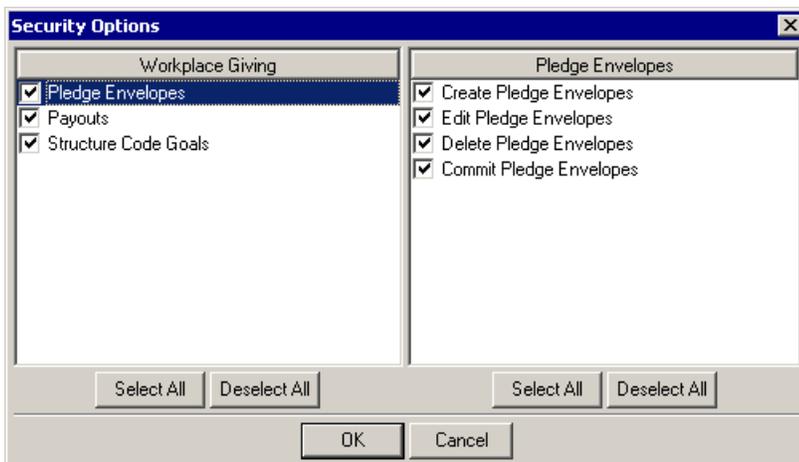
Security Settings

On the Raiser's Edge bar, click **Admin**. The Administration page appears. Click **Security**.

Security is set up in *The Raiser's Edge* by group. To specify *Workplace Giving* security for a group, select and open it from the Security page. The Group screen appears.

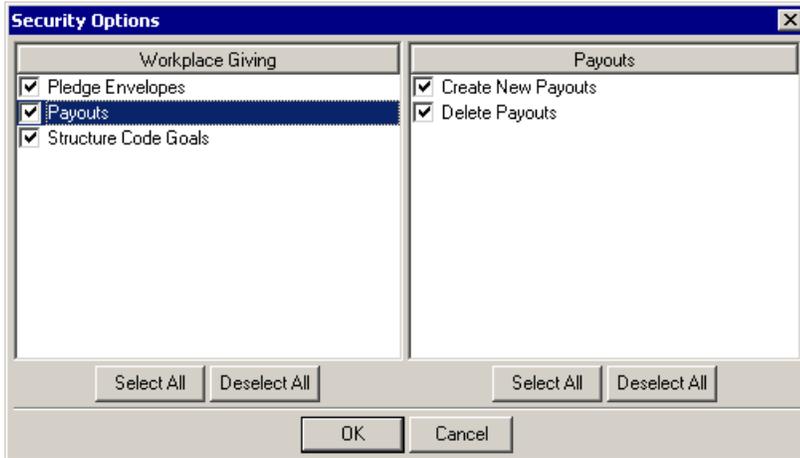


In the **Group Privileges** box, mark the **Workplace Giving** checkbox (scroll to the bottom of the list), and click **Options**. The Security Options screen appears.



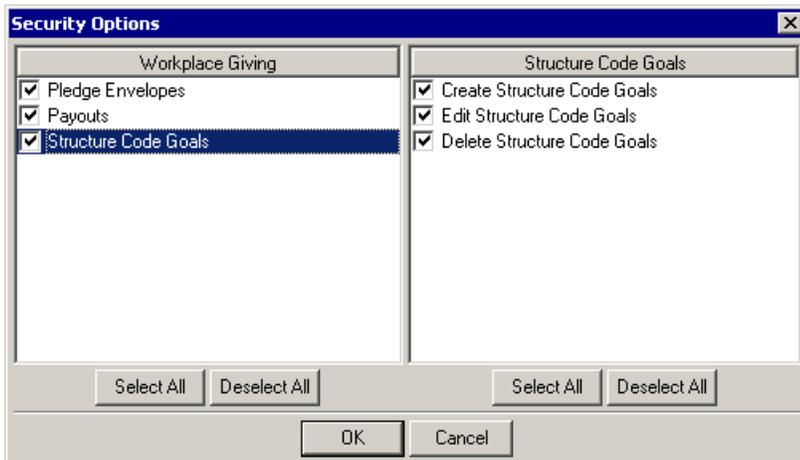
In the **Workplace Giving** box if you unmark the **Pledge Envelopes** checkbox, all checkboxes in the **Pledge Envelopes** box are locked as unmarked so the users in this group have no access to any pledge envelope functions. If you mark the **Pledge Envelopes** checkbox, you can specify the functions users should have access to by marking or unmarking the checkboxes in the **Pledge Envelopes** box.

When you mark the **Payouts** checkbox in the **Workplace Giving** box, the box on the right becomes **Payouts**.



In the **Workplace Giving** box, if you unmark the **Payouts** checkbox, the checkboxes in the **Payouts** box are locked as unmarked so the users in this group have no access to any payout functions. If you mark the **Payouts** checkbox, you can specify the functions users should have access to by marking or unmarking the checkboxes in the **Payouts** box.

When you mark the **Structure Code Goals** checkbox in the **Workplace Giving** box, the box on the right becomes **Structure Code Goals**.



In the **Workplace Giving** box, if you unmark the **Structure Code Goals** checkbox, the checkboxes in the **Structure Code Goals** box are locked as unmarked so the users in this group have no access to any structure code goal functions. If you mark the **Structure Code Goals** checkbox, you can specify the functions users should have access to by marking or unmarking the checkboxes in the **Structure Code Goals** box.

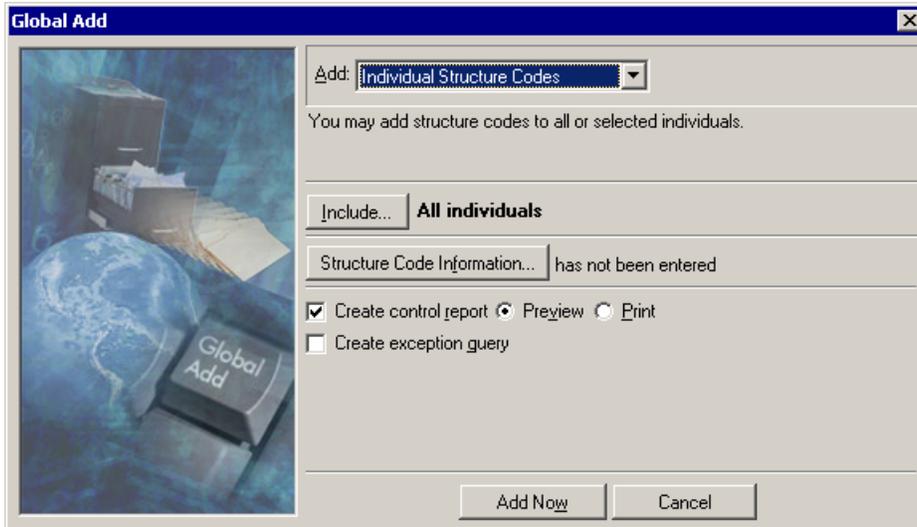
For information about all the settings in *Security*, see the *Configuration & Security Guide*.

Global Functions

In *Administration*, you can globally add or change a number of *Workplace Giving* specific fields on your records.

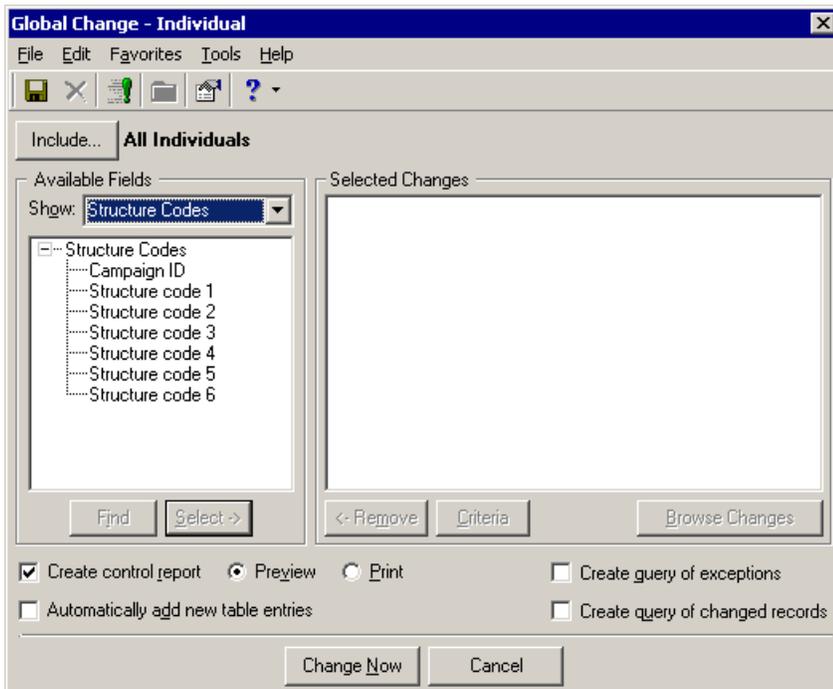
Globally Add Records

When you click **Globally Add Records**, you can add **Individual Structure Codes** to your individual constituent records, or add **UW Agency** and **UW Account** information to organization constituent records.



Globally Change Records

When you click **Globally Change Records**, several *Workplace Giving* fields can be changed on individual, organization, and gift records. For example, when you select to change Constituent, Individual records, you can change Campaign ID and structure code fields.



On Constituent, Organization records, you can change Structure Codes, UW Agency and UW Account fields. On Gift records, you can change **Designations** fields.

Import

You can import many *Workplace Giving* specific fields into your **Raiser's Edge** database. For a complete list of these fields, see "Appendix A: Workplace Giving Import Fields" on page 89.

Navigating in Workplace Giving

The main features of *Workplace Giving* are located on the Workplace Giving page. Additional components are also located on organization constituent records, *Batch*, *Reports*, *Export*, and *Query*.

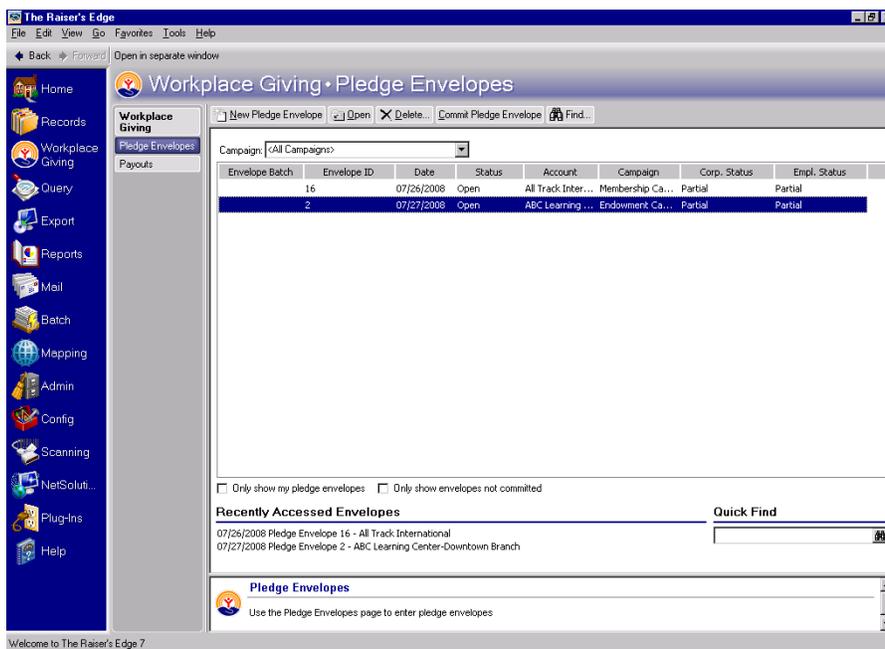
Workplace Giving Page

To access the Workplace Giving page, click **Workplace Giving** on the Raiser's Edge bar.

From the Workplace Giving page, you can access **Pledge Envelopes**, **Payouts**, and **Structure Code Goals**.

For more information about Pledge Envelopes, see "Pledge Envelopes" on page 24. For more information about Payouts, see "Payouts" on page 50. For more information about Structure Code Goals, "Structure Code Goals" on page 20.

Pledge Envelopes Page



The Pledge Envelopes page is the central location for transactions involving new and existing envelopes. For more information about creating new pledge envelopes, "Creating Pledge Envelopes" on page 26.

When you select an envelope and click **Commit Pledge Envelope**, individual and account gift records are created. For more information about committing an envelope, see "Committing Pledge Envelopes" on page 38.

In the **Campaigns** field, you can select to display envelopes for all campaigns or for only one campaign. You can mark checkboxes to display only envelopes you created and only those envelopes you created that have not yet been committed.

In the **Quick Find** field, you can quickly search for an envelope by entering a full or partial envelope ID.

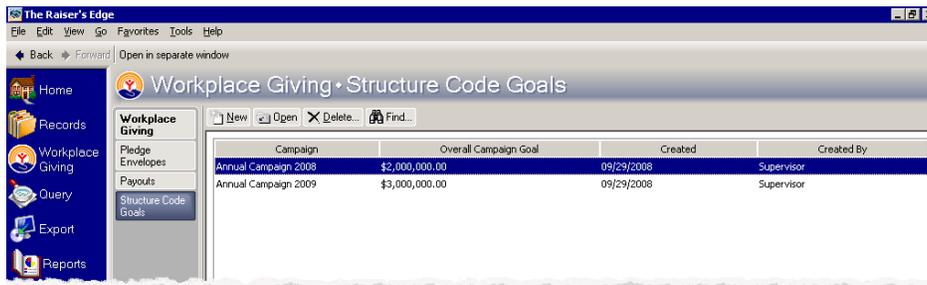
Payouts Page



When gifts are designated to go to particular United Way agencies, you must run periodic payouts to create payout records in *The Raiser's Edge*. All payouts that were accepted and generated database records display on the Payouts page.

For more information about creating payouts, see “Creating Payouts” on page 50.

Structure Code Goals Page



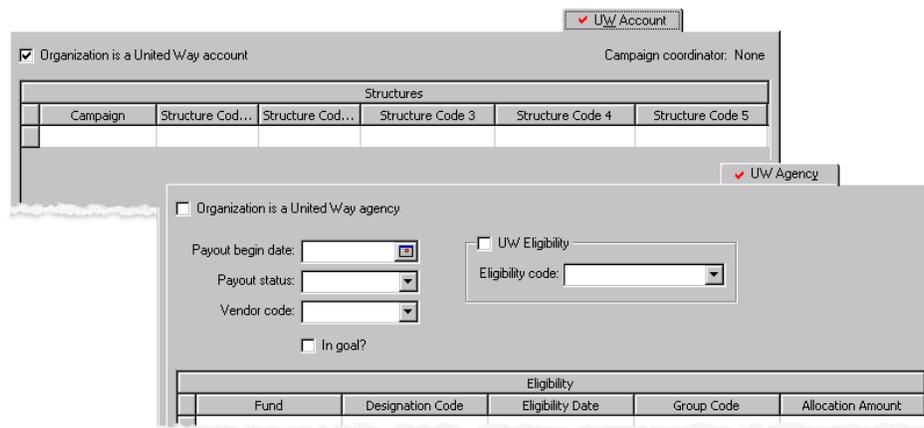
From the Structure Code Goals page, you can define hierarchies of your structure codes and set goals at each level of that hierarchy.

For more information about setting up structure code goals, see “Structure Codes” on page 18.

Constituent Records

Several items specific to *Workplace Giving* are available on constituent records.

To facilitate *Workplace Giving*, two tabs appear on organization constituent records: UW Agency and UW Account.



On these tabs, you can specify whether an organization is an account, agency, or both. On the UW Agency tab, enter information such as payout details and eligibility data. On the UW Accounts tab, specify structures, designation information, and other details.

For more information, see “Agencies and Accounts” on page 13.

On individual constituent records, you can add structure code goals from the Bio 2 tab.

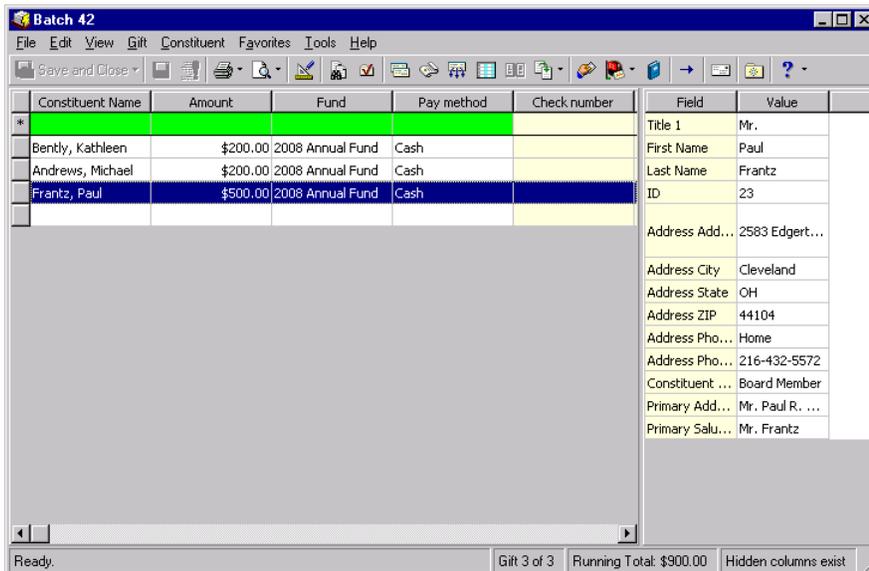


Click **Structures** to access a screen on which you can add structure codes to individual constituents. This enables you to include a breakdown of pledges and payments that are made by individuals outside of Pledge Envelopes in reports.

For more information, see “Structure Codes” on page 18.

Batch

The Raiser’s Edge Batch enables you to save data entry time by entering groups of gifts at the same time. With *Batch*, you can enter gift records quickly because you do not need to open each individual gift record to add information. Instead, you select the fields to add or update and the program lists these fields in a spreadsheet, called a batch, so you can efficiently enter information in the database.



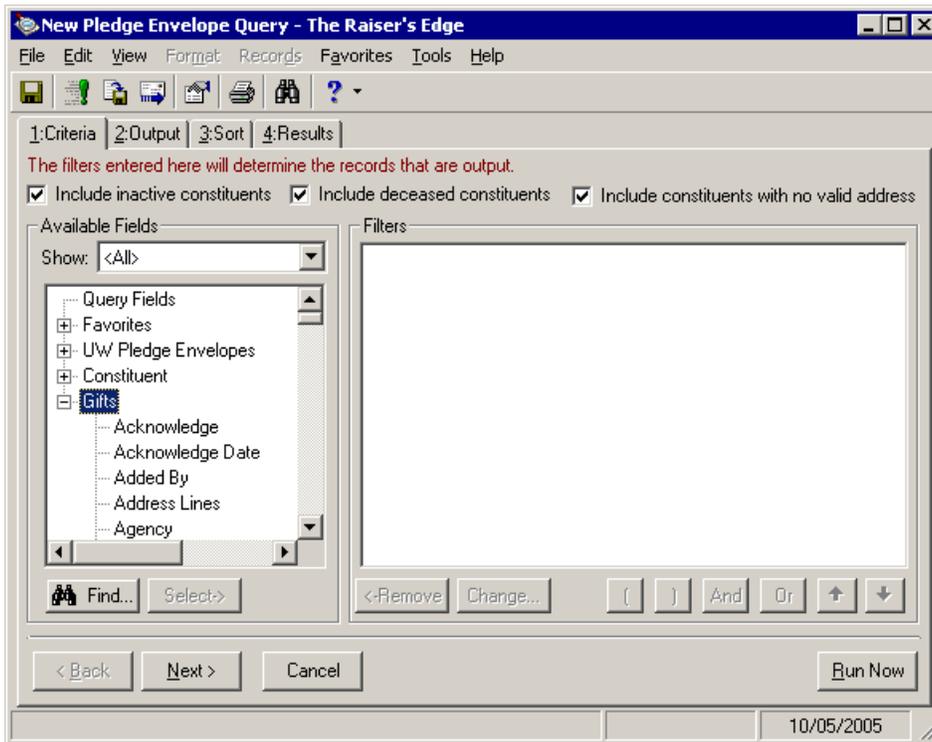
The Raiser’s Edge has a type of batch designed especially for United Way. A *Workplace Giving* batch enables you to add pledge card gifts in groups.

For information about *Workplace Giving* batches, see “Workplace Giving Batches” on page 59. For specific information about setting up and using batches in **The Raiser’s Edge**, see the *Batch Guide*.

Query

Many types of queries include *Workplace Giving* specific criteria and output fields. These include Individual, Organization, Constituent, Gift, and Campaign queries.

Also, an additional query type, Pledge Envelope, is available in *Workplace Giving*.



Reports

Additional reports have been developed to meet United Way's specific reporting needs. The Reports page is the central location for standard reports in *The Raiser's Edge*. To access the page, click **Reports** on the Raiser's Edge bar.

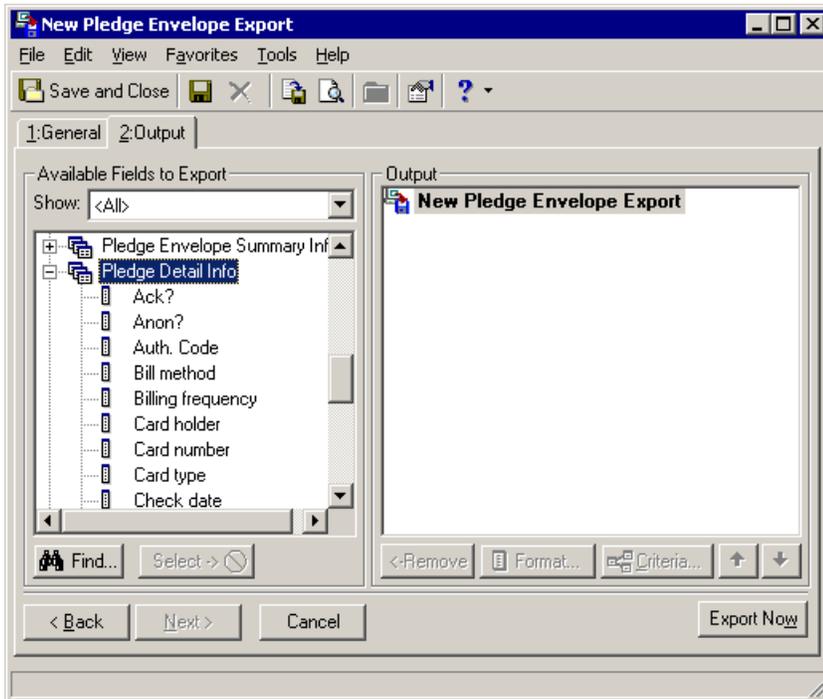
The Reports page contains links to all *Raiser's Edge* reports including those designed specifically for the United Way. To access these reports, click **Workplace Giving Reports**. The Workplace Giving Reports page appears.



For more information about these reports, see “Workplace Giving Reports” on page 53.

Export

You can include fields specific to *Workplace Giving* in Constituent, Gift, and Campaign exports. Also, an additional export type, Pledge Envelope, is available.



Agencies and Accounts

Agencies in *The Raiser's Edge* first exist as organizations and therefore have a constituent record. Accounts are organizations for which you create your pledge envelopes. Because a particular organization can be an account, an agency, or both, the constituent record has two United Way tabs: UW Account and UW Agency.

Constituent Record UW Agency Tab

Agency records are organization constituent records that are marked as United Way agencies.

The screenshot shows the 'All Track International' software window. The 'UW Agency' tab is active. The form contains the following elements:

- Organization is a United Way agency
- Payout begin date: 10/22/2008
- Payout status: [dropdown menu]
- Vendor code: [dropdown menu]
- In goal?
- UW Eligibility
- Eligibility code: [dropdown menu]

Eligibility				
Fund	Designation Code	Eligibility Date	Group Code	Allocation Amount

07/28/2004

To indicate this constituent is an agency, mark the **Organization is a United Way agency** checkbox.

In the **Payout begin date** field, enter the date to start considering this agency for payouts. The date here does not actually affect payout processing at this time. In the **Payout status** field, select the current payout status of the account. Each United Way can define its own status values. For example, you may use values such as Initial campaign payout made, End of campaign year payout made, and Final payment made.

In the **Vendor code** field, enter the type of agency for the organization. Each United Way can set its own vendor code values. These values are used to identify the agency as a vendor in your accounts payable software.

To indicate that designations to this agency should be considered in the overall United Way campaign goal, mark the **In goal?** checkbox.

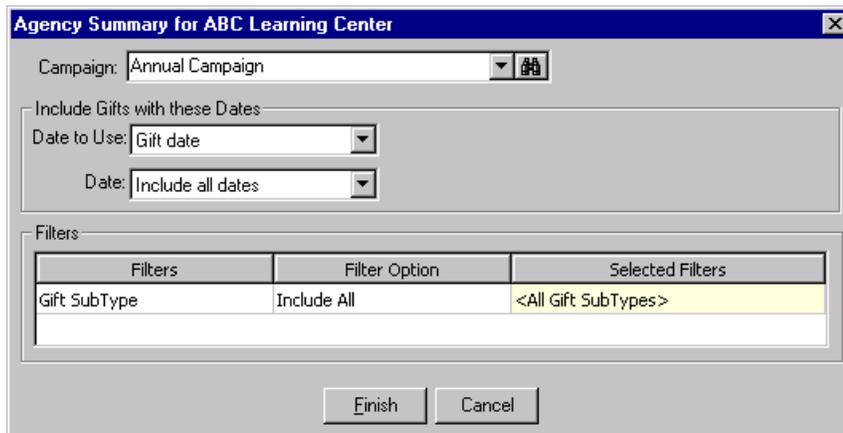
Mark the **UW Eligibility** checkbox to indicate that this agency is eligible for designations under the United Way campaign. The associated **Eligibility code** field enables clarification of eligibility and is definable by each United Way.

In the **Eligibility** grid, enter additional funds, such as the Combined Federal Campaign (CFC), from which this agency can receive designations. You can also enter the date the agency became eligible, its designation code, amount it can receive, and a group code that enables you to define the agency within the campaign type. At this time, the fields in this grid are for reference only and do not affect payout processing.

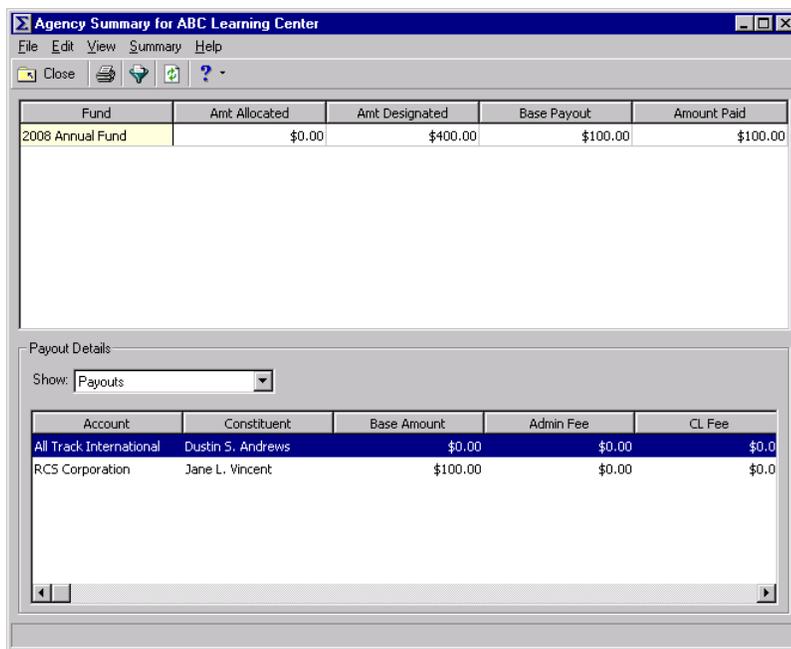
Viewing an Agency Summary

One of the primary goals of entering agency information in *The Raiser's Edge* is to be able to quickly retrieve designation and payment totals based on gift data. To enable this, the Agency View screen provides a single location for viewing a summary of agency transactions.

To create an Agency Summary, select **Summaries, UW Agency Summary** from the **View** menu of the agency organization constituent record. The Agency Summary screen appears.



Select the **Campaign** on which to base the summary and any date or gift subtypes on which to filter the summary information. To create the summary, click **Finish**.



The top of the screen displays summary information by fund. In the **Payout Details** grid, you can select to **Show** details by individual payouts or by an account summary. You can scroll to the right to view additional columns in the grid.

Constituent Record UW Account Tab

Note: When creating a pledge envelope, if you select an organization that is not an account, a message appears asking if you want to make it an account at this time. When you click **Yes**, the ID from the constituent record defaults into the **ID** field on the pledge envelope record.

On the UW Account tab of an organization constituent record, you can enter information about the organization account, including structures, SIC and NCC codes, and fees.

The screenshot shows the 'UW Account' tab for 'RCS Corporation'. The 'Organization is a United Way account' checkbox is checked. The 'Structures' grid contains the following data:

Campaign	Structure Code 1	Structure Code 2	Structure Code 3	Structure Code 4	Structure Code 5
Annual Campaign	Industry	Manufacturing	Heavy Equipment	North	

Below the grid, the 'Corporate status' is set to 'Partial' and 'Employee status' is also 'Partial'. The 'Budget decision date' is 08/06/2008. The 'Designations' section has 'Pledges paid' selected. The 'Fees' table is as follows:

	Waived?	%	Max
Admin	<input type="checkbox"/>		
Loss	<input type="checkbox"/>		

At the bottom right, the date 08/06/2004 is displayed.

To indicate the constituent is an account, mark the **Organization is a United Way account** checkbox.

In the **Structures** grid, specify structure codes for the account. Structures are used to classify accounts in different ways. For more information, see “Structure Codes” on page 18.

Specify the **Corporate** and **Employee status** for the account. A “Partial” status indicates that additional pledges are expected from employees or from the organization itself. A “Final” status means no more pledges are expected.

Note: When you move your mouse over the names of the **SIC code** and **NCC subsid** fields, the names become a link. Click the link to access a screen where you can add entries to the tables.

In the **SIC code** field, select a Standard Industry Code (SIC) for the account. SICs are set up by the Federal Government as a classification scheme for the major industry groups. SIC codes are used as a convenient way to compare like accounts (such as financial institutions with other financial institutions). The United Way of America provides updated SIC code information every two years.

In the **NCC subsid code** fields, select the National Corporate Codes (NCC codes) connected with your organization accounts for United Way of America’s annual DataBase I Report.

The **Budget decision date** is the date the company makes its decision regarding its philanthropic budget. Use this date to determine when solicitors should contact this company.

If you know the organization’s Employee Identification Number, you can enter it in the **Government EIN** field.

You determine the type of information you want to track in the **UW characteristic** field. You can use this field to track information not maintained elsewhere in the program to sort or select in reports and queries. Similarly, the **Other characteristic** field is also available to store information not tracked elsewhere in the program.

If this account is a National Corporate Leadership account, mark the **NCL account?** checkbox.

If the total payroll amount is a calculated rather than actual figure, mark the **Payroll calculation?** checkbox.

If the organization has its own campaign marketing materials, mark the **Own campaign material?** checkbox.

In the **Designations** frame, select an option to determine whether fees are based on **Pledges paid** or **Pledges designated** amounts.

The **Pledges designated** option processes payouts based on the total amount designated for all pledges rather than just those paid. The total amount of all pledges is used in the calculation of payout amounts.

The **Pledges paid** option processes only payments made against pledges to designated agencies. The payout amount is calculated based on a prorated portion of the total amount of designated pledges.

Specifically, the amount of the pledge that has been paid is compared to the total amount pledged and the resulting ratio determines the payout amount. For example: if a \$100 pledge has been designated to go equally to two agencies, they are each due \$50. However, if the actual amount paid at the time payouts are processed is \$50, then each agency receives \$25.

Note: You can also specify fee information on a payout run itself. If the settings you establish on the UW Account tab differ from settings specified in an actual payout run, the UW Account tab settings are used in the payout.

If you have special fee arrangements with the account, enter them in the **Fees** grid. The administrative and collection loss values determine the percentage of the pledge that is charged as a fee for service or uncollected donations. The maximum fields ensure that fee percentages do not exceed a set amount. You can indicate the account is exempt from fees by marking the **Waive?** checkbox. For information about specifying fees on a payout run, see “Creating a payout” on page 50.

Viewing an Account Summary

You can create a summary to view detailed information about an account, including totals by campaign broken down in a variety of ways, and pledge envelope details.

Select **Summaries, UW Account Summary** from the **View** menu of the account organization constituent record. The Account Summary screen appears.

Account Summary for All Track International

Include Gifts with these Dates

Date to Use:

Date:

Include Gifts with these Campaigns

Campaign
Annual Campaign

Select date information and specify the campaign or campaigns associated with the gifts to include in the summary. To create the summary, click **Finish**.

Annual Campaign	
Employees	25
Givers	85
% Participation	340.000
Employee Gifts	\$3,450.00
Average Employee Gift	\$40.59
Employee Per Capita	\$138.00
Corporate Gifts	\$5,000.00
Corporate Per Capita	\$200.00
Total Pledge	\$8,450.00

Pledge Envelopes						
Envelope Batch	Envelope ID	Date	Status	Campaign	Corp. Status	Empl. Status
7	08/06/2...	Closed	Annual Campa...	Partial	Partial	

The summary shows detail information for the selected campaign or campaigns at the top of the screen and pledge envelope details at the bottom of the screen.

Structure Codes

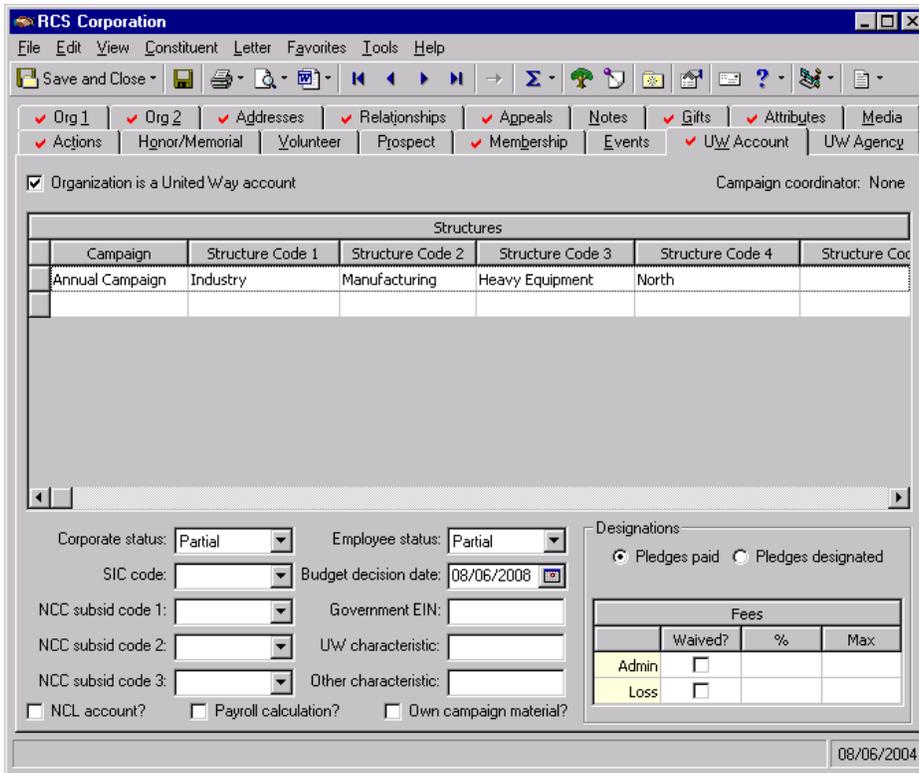
Note: When setting up structure entries for the first time, you may want to stick as closely as possible to the structure with which you are familiar and comfortable. However, if your campaign structure is outdated or does not work, now may be a good time to change it.

Structure code fields can be used to sort and select records in *Workplace Giving* reports, queries, and other functions. In the **Tables** link of *Configuration*, you can define up to six structure codes. Once you add the codes in *Configuration*, you can apply them to individual and organization constituent records.

Additionally, you can define hierarchical goals for your structure codes.

Organization Records

On the UW Account tab of organization constituent records, you can add structure codes.



For example, you can include the following codes on your records:

- **Structure Code 1** can contain an entry of Industries.
- **Structure Code 2** can differentiate among types of industries, such as Manufacturing and Finance for example.
- **Structure Code 3** can contain subentries for each type of industry; for example, Textiles, Heavy Equipment, Corporate, Individual, etc.
- **Structure Code 4** can break down by region, containing entries for North, South, East, and West.

Using these codes, you can filter *Workplace Giving* reports to include only corporate financial industry accounts in the south for example.

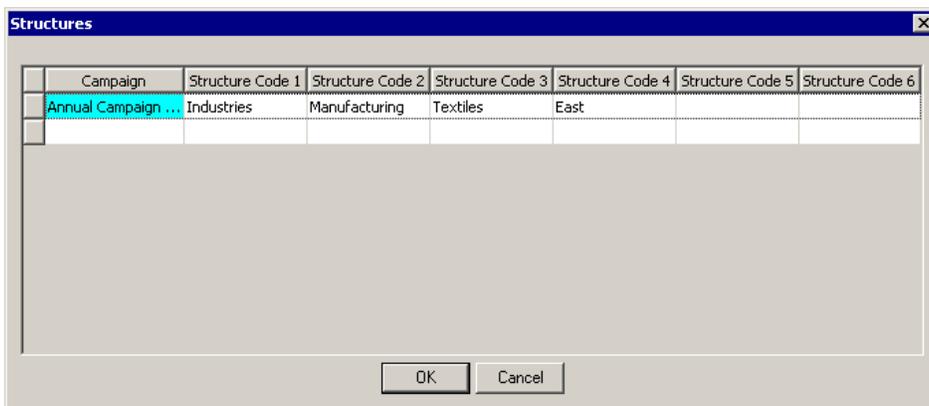
Individual Records

On individual constituent records, adding structure codes enables you to include a breakdown of pledges and payments that are made by individuals outside of pledge envelopes in reports.

To add structure codes to an individual constituent record, from the Bio 2 tab, click **Structures**.



A screen appears on which you can add structure codes.



When you enter a pledge or payment through a gift record from an individual constituent, and a corresponding pledge has not already been established through a pledge envelope, the structure codes established through this screen apply to that gift.

Reports that show the breakdown of gifts by structure code apply these individual structure codes to that gift, rather than applying the structure codes from the organization constituent record of the account. (Any gift associated with the pledge envelope is still classified under the account's structure codes.)

Structure Code Goals

Note: In *Security*, you can specify user rights to create, edit, and delete structure code goals.

You can define hierarchical goals for your structure codes. You define one goal for each campaign year. This enables you to use the Structure Summary Report to show how pledges compare to your goals, broken out by campaign and structure codes.

You either enter specific goals at each structure code level in the hierarchy or enter goals only for the lowest level, and let the program roll the goals up into the higher level goals.

Adding Structure Code Goals

You can define one set of hierarchical goals for each campaign year. The Structure Code Goals page lists any saved goals for previous years' campaigns.

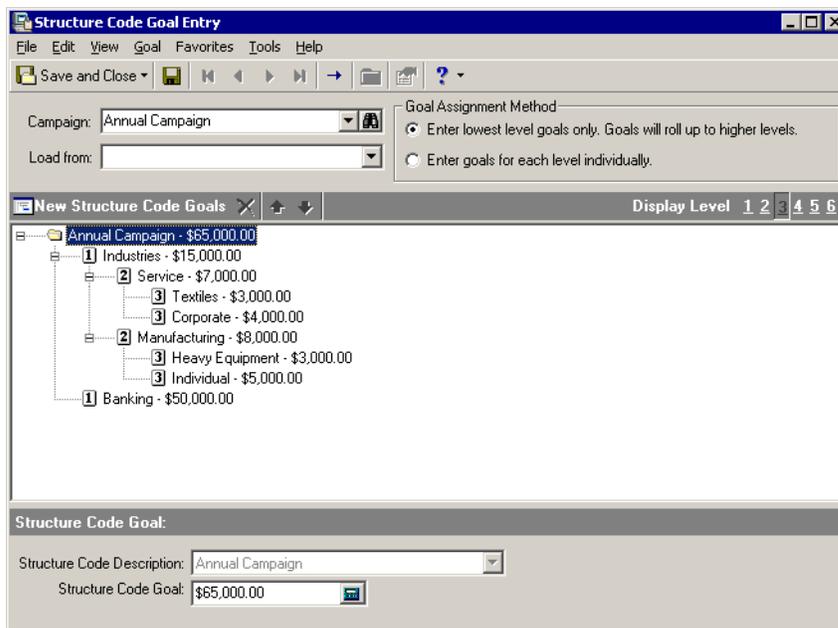
A key concept to understand when creating goal hierarchies is the parent-child relationship between items in the hierarchy. When you create a goal hierarchy, you specify how items nest; an item that ranks higher in the hierarchy than another item is parent to that item. When you create a new hierarchy of structure code goals, you can either enter goal amounts for every level in the hierarchy, or enter goal amounts only at the lowest levels and have **The Raiser's Edge** roll them up so that higher parent levels always display the sum of their hierarchical child levels.

When you enter goals separately at each level, the higher level goals are not required to match the total of the goals for their hierarchical children. When you let **The Raiser's Edge** roll the lower level goals into the higher goals, the goal amounts reconcile from the top to the bottom of the hierarchical structure so that the total of each goal includes the goal totals of all its children in the hierarchy.

No matter which method you use to enter goal amounts, the total amount of the hierarchy should match the **Overall goal** specified on the campaign record. Although you can save the hierarchy even if the goals do not match (in case you are planning to work on it more later for example), any reports run on a hierarchy with a goal that does not match that of the campaign may generate data that is inconsistent.

▶ **Adding a Structure Code Goal hierarchy**

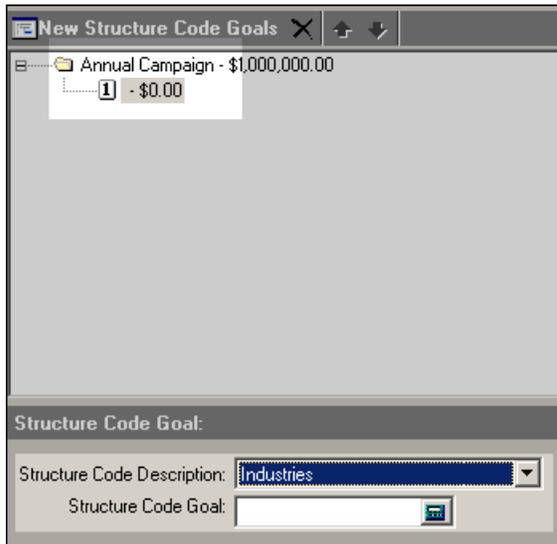
1. On the Raiser's Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Structure Code Goals**. The Structure Code Goals page appears.
3. Click **New**. The Structure Code Goal Entry screen appears.



4. Select the **Campaign** for which you want to establish a structure code goal.
5. To save data entry time, if the goals and hierarchy for the campaign you selected in the previous step will be similar to those for a previous year's campaign, you can select it in the **Load From** field. That goal hierarchy is then copied into the goals for the currently selected campaign. You can make necessary changes to the current campaign's goals after the old goals have been copied.
6. In the **Goal Assignment Method** frame, select how to establish goals in each level of the hierarchy.
 - **Enter lowest level goals only. Goals will roll up to higher levels** - With this option, you enter goal amounts in the **Structure Code Goal** field only for the lowest level in the hierarchy for which you want to define a goal. This level can be different for different nodes in the hierarchy. After you enter a goal amount, the program adds that amount to the hierarchical levels above it so the higher parent levels always display the sum of their hierarchical child levels.
 - **Enter goals for each level individually** - With this option, you must enter an amount in the **Structure Code Goal** field for every structure code included in the hierarchy and each amount stands on its own.

With this option, the goal amounts do not have to reconcile hierarchically (a level 2 goal can be less than the sum of its level 3 children for example). Because the numbers do not have to reconcile between levels, you can enter any amount for every structure code level.

- The campaign you specified earlier appears at the top of the hierarchy along with the goal entered on that campaign's record. When you select the campaign and click **New Structure Code Goals**, a new level appears in the hierarchy.

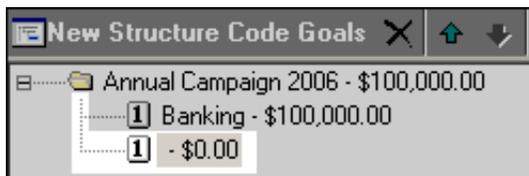


Note: The **Structure Code Description** drop-down includes values from the table corresponding to the structure code level of any node. (Level 1 corresponds to Structure Code 1, Level 2 to Structure Code 2, etc.)

All table entries defined for the **Structure Code Goals 1** table in *Configuration* are available in the **Structure Code Description** field drop-down.

- Enter the amount of the **Structure Code Goal** for the selected description in the hierarchy. You can continue to add new levels by selecting the parent level for the structure code to be added in the hierarchy display, and clicking **New Structure Code Goal**. A new child node is added hierarchically below that node, and you can provide a description and goal amount for that child.

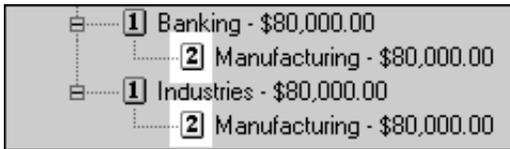
For example, if you select the campaign and click **New Structure Code Goals**, a new Level 1 node appears.



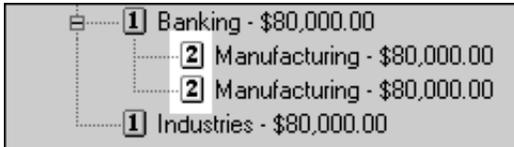
If you select an existing Level 1 node and click **New Structure Code Goals**, a new Level 2 node appears.



- Structure code values must be unique for each level within each hierarchical tree. For example, the same Level 2 values can be added to the hierarchy from two different Level 1 nodes.



However, you cannot add the same Level 2 values to multiple Level 2 child subnodes of same Level 1 node.

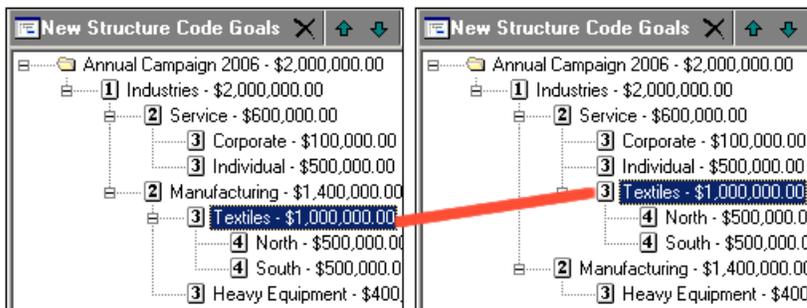


If you duplicate existing child node values under the same parent, a message appears when you try to save the goal hierarchy stating that it must be changed before you can save it.

Note: An arrow button is disabled when there is no other valid location for the selected node in the direction of the arrow.

- Use the **Up** and **Down** arrows to move a selected structure code description and goal node to another line in the hierarchy. This may make the selected node the child of a different node, but it remains at the same level in the hierarchy.

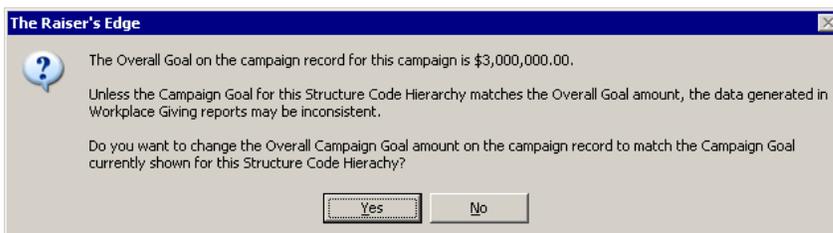
For example, selecting the “Textiles” Level 3 node in the screen below and clicking the **Up** arrow moves it from under the “Manufacturing” Level 2 node to under the “Service” Level 2 node



Note: Using the **Display Level** buttons, you can specify how many levels of structure codes display in the hierarchy. Displaying fewer levels than actually exist in the hierarchy does not remove those levels, it only hides them in the display.

- Once you have your structure code goal hierarchy in place, click **Save and Close** on the toolbar to save the goal hierarchy and return to the Structure Code Goals page.

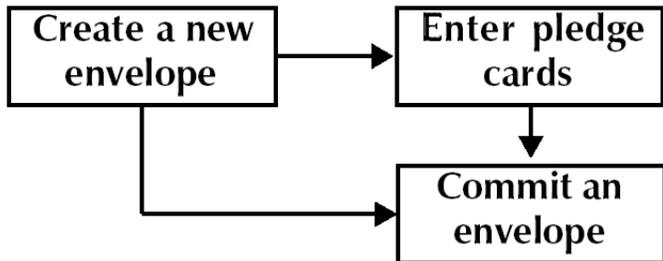
If the total of your hierarchy does not match the overall goal specified on the campaign record, a message appears.



12. To change the goal amount on the campaign record to match this hierarchy, click **Yes**.
13. To save the hierarchy without the goals matching at this time, click **No**. However, before running any reports on a hierarchy, you should either change it or the campaign record so the goals match. Otherwise, your reports may yield inconsistent results.

Pledge Envelopes

Workplace Giving handles United Way's methods of receiving and processing pledge envelopes. Three main elements make up processing pledge envelopes.



The first step is always creating a new envelope. From that point, you can either commit the envelope summary information before you enter pledge cards, or enter pledge cards, then commit the envelope.

Committing the envelope creates gifts for the account that apply toward the campaign. Gift records are also created for any initial payments received with the envelope. You can add pledge cards immediately on the envelope record, or wait until later to add them. You also can commit pledge cards at different times as they arrive. Each commit process credits employees with gifts based on only unprocessed pledges.

Pledge Envelope Record Tabs

The pledge envelope record consists of two main tabs: Envelope Summary and Pledge Detail. You enter overall information from the envelope on the Envelope Summary tab, including account and envelope information as well as totals for each pledge type in the envelope. You enter pledge card information on the Pledge Detail tab.

Envelope Summary Tab

On the Envelope Summary tab, enter information to identify the envelope and gift amounts to be credited to the campaign and account.

Pledge Type	Gifts	Total Pledge	Payment	Balance
Payroll Deduction	50	\$5,000.00	\$0.00	\$5,000.00
Cash	25	\$2,500.00	\$2,500.00	\$0.00
Credit Card	10	\$500.00	\$500.00	\$0.00
Direct Bill	0	\$0.00	\$0.00	\$0.00
Stock	0	\$0.00	\$0.00	\$0.00
Employee Gift Total	85	\$8,000.00	\$3,000.00	\$5,000.00
Corporate Pledge	1	\$5,000.00	\$0.00	\$5,000.00
Other	0	\$0.00	\$0.00	\$0.00
Grand Total	86	\$13,000.00	\$3,000.00	\$10,000.00

Corporate Pledged: \$5,000.00 Corporate Paid: \$0.00 Employee Pledged: \$7,950.00 Employee Paid: \$2,950.00

Enter account information first. For a constituent to be a United Way account, you must mark the **Organization is a United Way account** checkbox on the UW Account tab in the organization’s constituent record. If you enter or select an organization that has not yet been designated as an account, a message appears asking if you want to make it an account now.

When you enter Final in the **Employee** and **Corporate** fields on an envelope record, you are indicating that the account is final for the current campaign year. For example, an account can submit three envelopes in a campaign year. You would mark the first two Partial and the last as Final to indicate that no more envelopes are coming for that campaign year.

In the **Envelope** frame, enter information such as the identification name or number, campaign, and fund. The **Envelope Batch** field enables you to assign multiple envelopes to a group. For example, you can sort by the **Envelope Batch** column on the Pledge Envelopes page so that envelopes with the same batch information appear together.

All envelopes have the same fields in the grid, even if you do not use them. You enter all pledges of a particular type on a single row. Employee values are subtotaled in the **Employee Gift Total** row, and those values are added to the corporate numbers to give you the grand total appearing in the last row.

The **Credit Card** and **Cash** pledge types are assumed to be fully paid upon receipt, so for these pledge types the program automatically populates the total pledge amount into the **Payment** column.

Once you commit the envelope, the amounts in the grid are credited to the account and the selected campaign and locked as uneditable on the grid. For more information, see “Committing Pledge Envelopes” on page 38.

If your United Way uses appeals, from the menu bar select **View, Show Appeal in Summary Grid**. An **Appeal** column appears to the right of the **Balance** column in the summary grid.

For more information, see “Completing the Envelope Summary tab” on page 26.

Pledge Detail Tab

On the Pledge Detail, tab you enter specific information for individual pledge cards.

Constituent	Pledge Amount	Pay Method	Check No.	Check Date	Designations	Ack?	Anon?
Jane L. Vincent	\$100.00	Cash			ABC Learning Ce...	<input type="checkbox"/>	<input type="checkbox"/>
Theresa M. Vazquez	\$100.00	Cash				<input type="checkbox"/>	<input type="checkbox"/>

Selecting a Pledge Type from the list on the left changes the display on the right. Each pledge type has a different set of fields specific to its processing. You can add pledges in any order and move between pledge types, although it speeds data entry to add all pledges of a single type at one time.

For **Payroll Deduction**, **Corporate Pledge**, and **Other** pledge types, one or more data entry frames appear above the pledge card entry grid. For payroll deductions, a frame enables you to enter the check number and deposit date from the account. For other and corporate pledges, two frames are available, one for immediate payments and one for billing.

The **Constituent** and **Pledge Amount** columns in the pledge card entry grid are standard for all employee pledges. To increase efficiency when entering pledge card specifics, the remaining columns in each grid vary according to pledge type. For example, for single pledges placed on a credit card, the grid contains only columns relevant to that type of gift.

Running totals appear at the bottom of the tab based on the pledged and paid amount for each pledge type. As you add pledge cards, these fields automatically update to ensure that your cards balance with the summary information added for the envelope.

For more information, see “Entering Pledge Cards” on page 28.

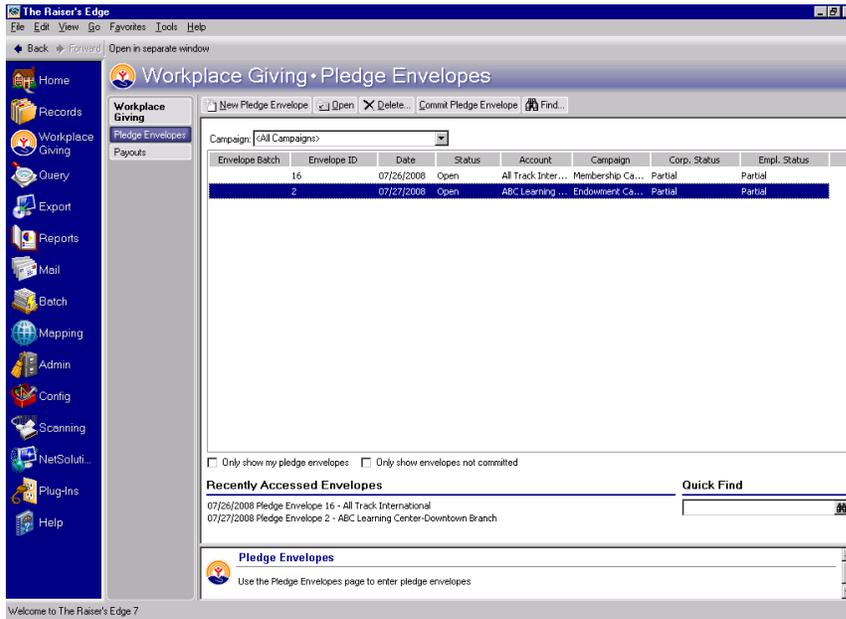
Creating Pledge Envelopes

When an account sends you an envelope, it is vital that you enter the contents of the envelope for accurate campaign reporting. The following procedure outlines the process of creating a new envelope in *The Raiser's Edge*.

► Completing the Envelope Summary tab

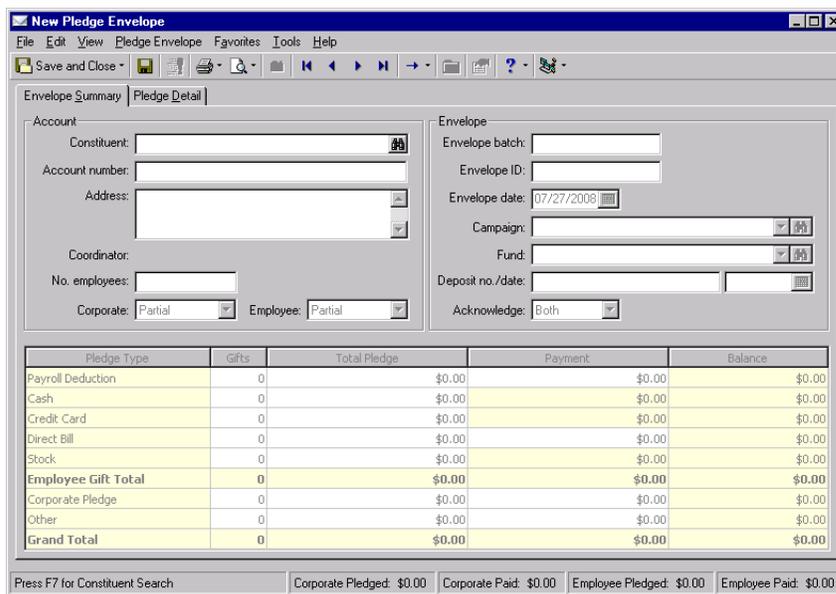
1. On the Raiser's Edge bar, click **Workplace Giving**. The Workplace Giving page appears.

2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.



Note: If the account does not have an existing constituent record, you must create one before proceeding. For more information about creating constituent records, see the *Constituent Data Entry Guide*.

3. On the action bar, click **New Pledge Envelope**. The New Pledge Envelope screen opens to the Envelope Summary tab.



4. In the **Account** frame, enter information about the organization from which the envelope came. Select the account in the **Constituent** field. If the organization you selected is not an account, a message appears asking if you want to make it an account at this time. When you click **Yes**, the ID from the constituent record defaults into the **ID** field on the pledge envelope record.

Note: When the number of employees defaults, compare it to the physical envelope. If these numbers do not match, enter the new number from the envelope. When you save the envelope, a message asks if you want to enter the new number of employees on the constituent record. Using this method, the current number of employees is always stored on the constituent record.

If the account exists in *The Raiser's Edge*, the constituent ID, address, coordinator, and the number of employees defaults from the constituent record into the fields in the **Account** frame.

In the **Corporate** and **Employee** fields, select a status for the envelope. A Final status indicates this envelope is the last for the account during this campaign year. For example, an account can submit three envelopes in a campaign year. You would mark the first two Partial and the last as Final to indicate that no more envelopes are coming for that campaign year.

5. In the **Envelope** frame, enter details about the envelope.

Enter a unique identifier for the envelope in the **Envelope ID** field. You can also optionally group this envelope with other envelopes by entering the same value in the **Batch** field for the envelopes.

Enter the date of the envelope. By default, the **Envelope Date** field displays today's date.

Select the **Campaign** and **Fund** with which the envelope is associated. The **Fund** field is equivalent to the former **Campaign Type** and **Subtypes** fields from CMS.

If you have any immediate payments such as personal checks or initial payroll deductions, enter the **Deposit number/date** of the bank transaction.

In the **Acknowledge** field, select whether you want to send the account acknowledgement for corporation gifts, employee gifts, or both.

To send acknowledgement letters to individual employee donors, on the Pledge Detail tab grids, you can mark the **Ack?** checkbox to indicate that you want an acknowledgement sent to that donor. For more information, see "Entering Pledge Cards" on page 28.

Note: Because the use of appeals is decided by each United Way, this column can be manually hidden or shown by selecting **Show Appeal in Summary Grid** on the **View** menu.

6. The rows in the Pledge grid are predefined by **Pledge Type** with employee pledge information appearing first, then corporate pledges.

The pledge type determines how the row functions. For example, if you enter two credit card pledge gifts from employees totaling \$200, *The Raiser's Edge* automatically populates \$200 in the **Payment** column.

These are running totals based on all envelopes for the same account, campaign, and fund.

The **Payment** column is only for immediate payments. Subsequent payments can be added as gift records individually or in batches.

7. To save the envelope, click **Save and Close** on the toolbar. You return to the Pledge Envelopes page. The new envelope appears in the grid.

Once you save the summary information for an envelope, you can go ahead and commit it now, or you can add pledge detail information to it. You can add pledge card detail information at any time later whether or not you commit the envelope now. For more information about adding pledge detail information, see the next section, Entering Pledge Cards.

Committing the envelope at this time credits the account and counts the envelope toward the campaign. For more information about committing, see "Committing Pledge Envelopes" on page 38.

Entering Pledge Cards

Note: The *Workplace Giving* reports are able to distinguish between the summary gifts attributed to the account and the detail gifts for the employees that make up the summary amount in order to avoid double counting them.

You can enter pledge cards at any time after you enter the summary information on an envelope. You do not need to have all pledge cards entered on the envelope before you commit them. Each commit creates gift records only for pledges that do not yet have corresponding gift records.

Employee Pledge Types

Payroll Deduction. For gifts deducted from employee paychecks. See “Entering a Payroll Deduction pledge card” on page 29.

Cash. For immediate payments in the form of cash or personal check. See “Entering a Cash pledge card” on page 30.

Credit Card. For immediate payments charged to an employee’s credit card. See “Entering a Credit Card pledge card” on page 31.

Direct Bill. For employees who want to send one payment at a later time or pay in installments. See “Entering a Direct Bill pledge card” on page 33.

Stock. For immediate donations of stock by an employee. See “Entering a Stock pledge card” on page 34.

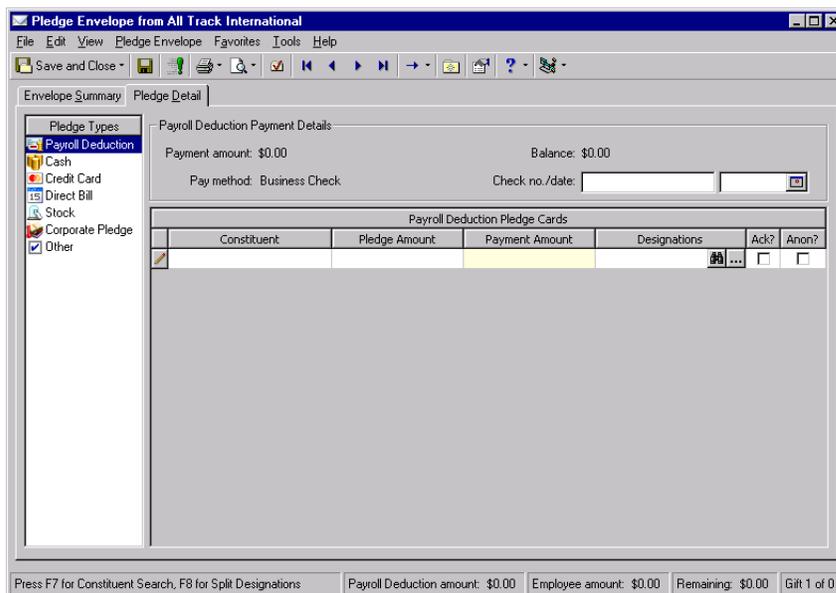
Corporate Pledge Types

Corporate Pledge. For immediate payments and direct billing of the organization. See “Entering a Corporate Pledge pledge card” on page 35.

Other. For alternate corporate pledges, allows for immediate payments and direct billing. Other can be used for special events or to separate corporate pledges for financial reasons. See “Entering an Other pledge card” on page 36.

▶ **Entering a Payroll Deduction pledge card**

1. On the Raiser’s Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.
3. Select the envelope for which you want to add a pledge and click **Open** on the action bar. The Pledge Envelope record appears.
4. Select the Pledge Detail tab.
5. Select **Payroll Deduction** from the **Pledge Types** list on the left. The Payroll Deduction fields appear on the right.



6. In the **Payroll Deduction Payment Details** frame, enter the **Check no./ Date** if an initial payroll deduction check is sent with the envelope.

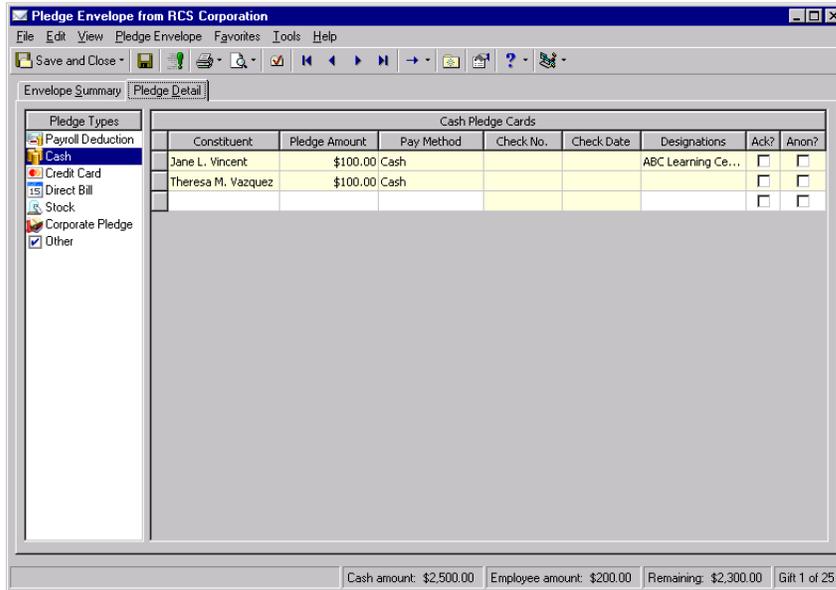
Note: If an employee on a pledge card is not yet a constituent in the database, you can add that person when you add the card. On the Open screen click **Add New**. A New Individual Constituent record appears where you enter the constituent information. Once you save and close the new record, you return to the Pledge Details tab where the information from the record you created appears.

7. In the **Payroll Deduction Pledge Cards** grid, enter the employee's name in the **Constituent** column, or press **F7** on your keyboard, or click the binoculars to access the Open screen and search for a constituent.
8. Enter the total **Pledge Amount** and an initial **Payment Amount** if the first payment has already been deducted from the employee's paycheck. Subsequent payments must be matched to pledges and can be added as gift records individually or in batches.
9. In the **Designations** column, enter an agency if the pledge card designates payments to a single agency or a fund if it designates payments to a single fund. Only funds included in the giving hierarchy for the campaign selected on the Envelope Summary tab are available.
If the pledge card designates payments to multiple agencies or funds, see "Splitting a Designation on a Pledge Card" on page 38.
10. Mark the **Ack?** checkbox to send the employee an acknowledgement letter. Mark the **Anon?** checkbox if the employee does not want the agency to know the donor's name.
11. To save the pledge card and return to the Pledge Envelopes page, click **Save and Close** on the toolbar.
Once you save the envelope, you can commit the pledge cards. Committing at this time creates gift records for the employee constituents as well as for any corporate direct bill pledges.
You can enter and commit pledge cards as they come in rather than all at once. Envelope summary and detail information that has already been committed becomes view-only.

▶ **Entering a Cash pledge card**

1. On the Raiser's Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.
3. Select the envelope for which you want to add a pledge and click **Open** on the action bar. The Pledge Envelope record appears.
4. Select the Pledge Detail tab.

5. Select **Cash** from the **Pledge Types** list on the left. The Cash Pledge Card fields appear on the right.



Note: If an employee on a pledge card is not yet a constituent in the database, you can add them when you add the card. On the Open screen click **Add New**. A New Individual Constituent record appears where you enter the constituent information. Once you save and close the new record, you return to the Pledge Details tab where the information from the record you created appears.

6. Enter the employee's name in the **Constituent** column.
7. Enter the **Pledge Amount** and select the **Pay Method**. For business and personal checks, the **Check No.** and **Check Date** columns are enabled.
8. In the **Designations** column, enter an agency if the pledge card designates payments to a single agency or a fund if it designates payments to a single fund. If the pledge card designates payments to multiple agencies or funds, see "Splitting a Designation on a Pledge Card" on page 38.
9. Mark the **Ack?** checkbox to send the employee an acknowledgement letter. Mark the **Anon?** checkbox if the employee does not want the agency to know his or her name.
10. To save the pledge card and return to the Pledge Envelopes page, click **Save and Close** on the toolbar.

Once you save the envelope, you can commit the pledge cards. Committing at this time creates gift records for the employee constituents as well as for any corporate direct bill pledges.

You can enter and commit pledge cards as they come in rather than all at once. Envelope summary and detail information that has already been committed becomes view-only.

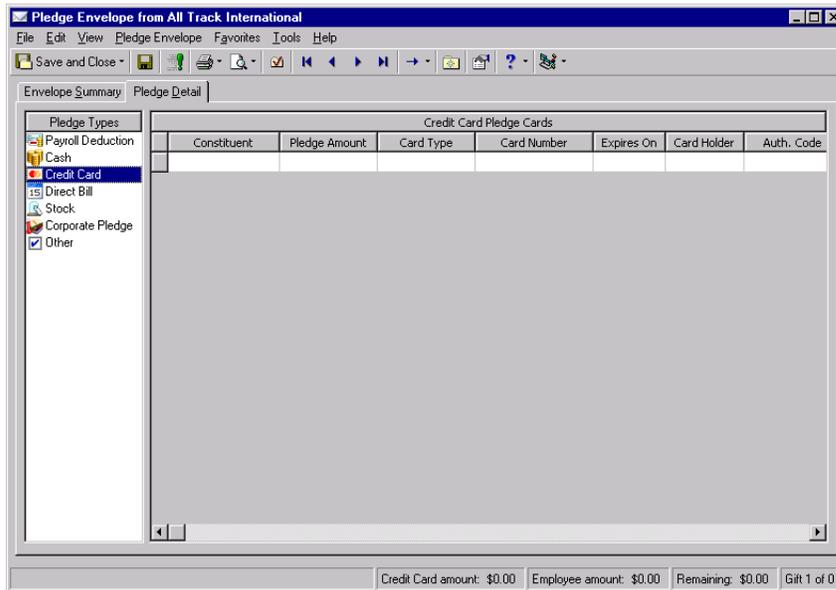
► **Entering a Credit Card pledge card**

The **Credit Card** pledge type is designed for immediate credit card payments.

1. On the Raiser's Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.
3. Select the envelope for which you want to add a pledge and click **Open** on the action bar. The Pledge Envelope record appears.
4. Select the Pledge Detail tab.

Note: Because the **Credit Card** pledge type is for single payments that are immediately charged to a credit card, you should pay close attention to the running totals at the bottom of the Pledge Detail tab. Unless a card was declined, these values should always match.

5. Select **Credit Card** from the **Pledge Types** list on the left. The Credit Card fields appear on the right.



6. Enter the employee's name in the **Constituent** column.

If an employee on a pledge card is not yet a constituent in the database, you can add them when you add the card. On the Open screen click **Add New**. A New Individual Constituent record appears where you enter the constituent information. Once you save and close the new record, you return to the Pledge Details tab where the information from the record you created appears.

7. Enter the **Pledge Amount**.
8. If credit card information has been previously entered on the donor's constituent record, it defaults into the grid. You can override this information where necessary; for example, if the constituent used another credit card. If you add information to the grid, it is not stored on the constituent record.

Note: *The Raiser's Edge* requires Internet access to connect to the Blackbaud *Payment Service*. If *The Raiser's Edge* cannot connect to the Blackbaud *Payment Service*, a message appears. Click **OK** and check your Internet connection. If you cannot restore your Internet connection, you can click the "X" in the upper right corner to close the pledge envelope without saving.

To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program immediately sends new or edited credit card information to the Blackbaud *Payment Service* when you click **Save and Close**. Depending on your Internet connection, you may experience a slight delay. In your database, *The Raiser's Edge* stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the pledge envelope, the **Card Number** column displays a masked credit card number, with only the last four digits visible. However, if the credit card number or expiration date is blank, *The Raiser's Edge* does not send the information to the Blackbaud *Payment Service* but instead stores and displays only the last four digits of the account number.

Note: Unless you integrate with a company such as VeriSign, authorization of credit cards is performed outside *The Raiser's Edge*. Entering the authorization code in is for reference purposes only.

9. For reference purposes, you can enter authorization information in the **Auth Code** column. This information is not required.

10. In the **Designations** column, enter an agency if the pledge card designates payments to a single agency or a fund if it designates payments to a single fund. If the pledge card designates payments to multiple agencies or funds, see “Splitting a Designation on a Pledge Card” on page 38.
11. Mark the **Ack?** checkbox to send the employee an acknowledgement letter. Mark the **Anon?** checkbox if the employee does not want the agency to know the donor’s name.
12. To save the pledge card and return to the Pledge Envelopes page, click **Save and Close** on the toolbar.

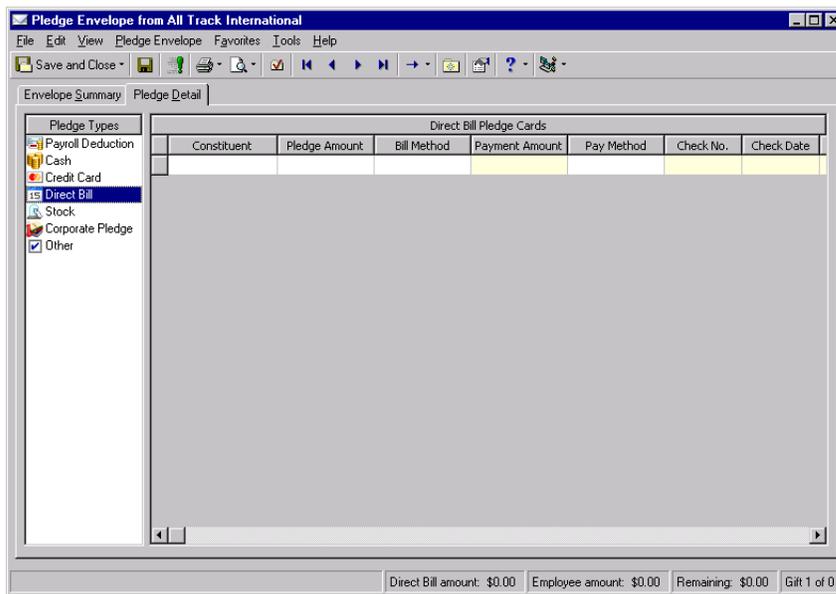
Once you save the envelope, you can commit the pledge cards. Committing at this time creates gift records for the employee constituents as well as for any corporate direct bill pledges.

You can enter and commit pledge cards as they come in rather than all at once. Envelope summary and detail information that has already been committed becomes view-only.

► **Entering a Direct Bill pledge card**

The **Direct Bill** pledge type is designed for direct bill payments.

1. On the Raiser’s Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.
3. Select the envelope for which you want to add a pledge and click **Open** on the action bar. The Pledge Envelope record appears.
4. Select the Pledge Detail tab.
5. Select **Direct Bill** from the **Pledge Types** list on the left. The Direct Bill fields appear on the right.



6. Enter the employee’s name in the **Constituent** column.

If an employee on a pledge card is not yet a constituent in the database, you can add them when you add the card. On the Open screen click **Add New**. A New Individual Constituent record appears where you enter the constituent information. Once you save and close the new record, you return to the Pledge Details tab where the information from the record you created appears.

7. Enter the **Pledge Amount**.

Note: For pledges, you designate whether you should send a bill, not send a bill, or bill a credit card. If you have any immediate payments, the **Pay Method** and **Amount** fields are available for entry. Based on the payment method, check or credit card fields are also active.

8. Select a **Bill Method**. You can specify to Send Bill, Don’t Send Bill, or Bill Credit Card.

9. Select the **Pay Method**. For business and personal checks, the **Check No.** and **Check Date** columns are enabled.
 - If the existing and/or future payments are to be made by credit card, enter the credit card number, expiration date, and cardholder name. For the initial payment, enter the amount and, optionally, the authorization number as well.
 - If you are sending a bill, enter the billing frequency, number of payments, and when the first bill should be sent. If no bill will be sent, you can still enter the frequency and payments.
10. In the **Designations** column, enter an agency if the pledge card designates payments to a single agency or a fund if it designates payments to a single fund. If the pledge card designates payments to multiple agencies or funds, see “Splitting a Designation on a Pledge Card” on page 38.
11. Mark the **Ack?** checkbox to send the employee an acknowledgement letter. Mark the **Anon?** checkbox if the employee does not want the agency to know his or her name.

Note: When you click **Save and Close**, the program immediately sends the credit card number to the Blackbaud *Payment Service*. Depending on your Internet connection, you may experience a slight delay. In your database, *The Raiser’s Edge* stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the pledge envelope, the **Card Number** column displays a masked credit card number, with only the last four digits visible.

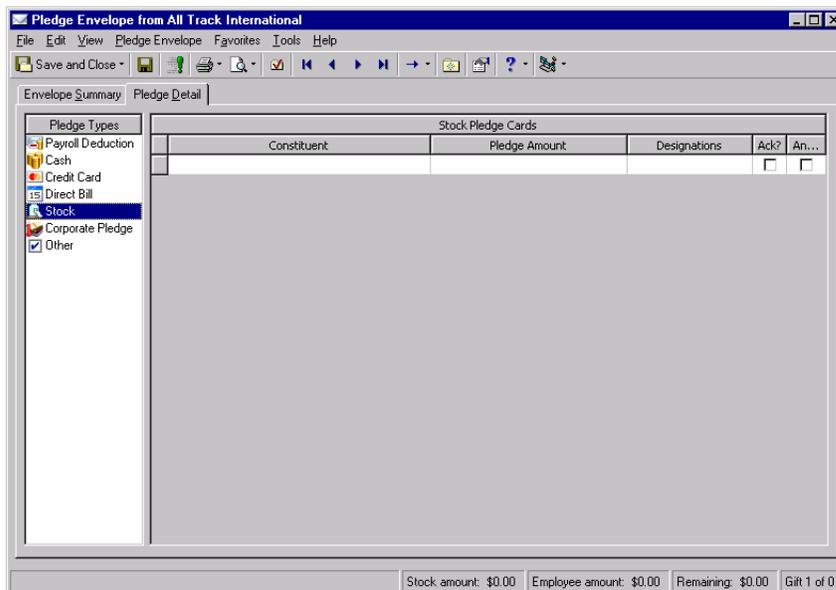
12. To save the pledge card and return to the Pledge Envelopes page, click **Save and Close** on the toolbar.

Once you save the envelope, you can commit the pledge cards. Committing at this time creates gift records for the employee constituents as well as for any corporate direct bill pledges.

You can enter and commit pledge cards as they come in rather than all at once. Envelope summary and detail information that has already been committed becomes view-only.

► Entering a Stock pledge card

1. On the Raiser’s Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.
3. Select the envelope for which you want to add a pledge and click **Open** on the action bar. The Pledge Envelope record appears.
4. Select the Pledge Detail tab.
5. Select **Stock** from the **Pledge Types** list on the left. The Stock fields appear on the right.



Note: If an employee on a pledge card is not yet a constituent in the database, you can add them when you add the card. On the Open screen click **Add New**. A New Individual Constituent record appears where you enter the constituent information. Once you save and close the new record, you return to the Pledge Details tab where the information from the record you created appears.

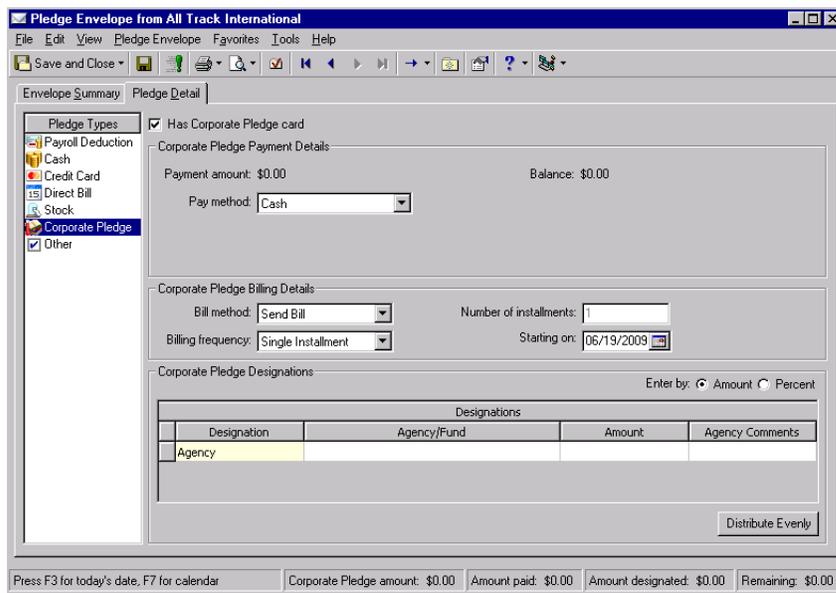
6. Enter the employee’s name in the **Constituent** column.
7. Enter the **Pledge Amount**.
8. In the **Designations** column, enter an agency if the pledge card designates payments to a single agency or a fund if it designates payments to a single fund. If the pledge card designates payments to multiple agencies or funds, see “Splitting a Designation on a Pledge Card” on page 38.
9. Mark the **Ack?** checkbox to send the employee an acknowledgement letter. Mark the **Anon?** checkbox if the employee does not want the agency to know his or her name.
10. To save the pledge card and return to the Pledge Envelopes page, click **Save and Close** on the toolbar.

Once you save the envelope, you can commit the pledge cards. Committing at this time creates gift records for the employee constituents as well as for any corporate direct bill pledges.

You can enter and commit pledge cards as they come in rather than all at once. Envelope summary and detail information that has already been committed becomes view-only.

► **Entering a Corporate Pledge pledge card**

1. On the Raiser’s Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.
3. Select the envelope for which you want to add a pledge and click **Open** on the action bar. The Pledge Envelope record appears.
4. Select the Pledge Detail tab.
5. Select **Corporate Pledge** from the **Pledge Types** list on the left. The Corporate Pledge fields appear on the right.



Note: **Payment amount** and **Balance** are for reference purposes only and display values from the Envelope Summary tab.

6. Mark the **Has Corporate Pledge card** checkbox.

7. In the **Corporate Pledge Payment Details** frame, enter corporate pledges and billed payments. If all or part of the corporate payment arrives with the envelope, enter the payment and associated information here. For example, if you receive a business check, selecting the corresponding payment method displays the **Check No./ date** fields to enter the deposit.
8. In the **Corporate Pledge Billing Details** frame, enter information for corporate pledges that are billed on a set schedule.
9. In the **Corporate Pledge Designations** frame, enter any designations in the grid.

In the **Designation** column, you can select Fund or Agency.

If you select Agency, the binoculars are available in the **Agency/Fund** column for you to access the Open screen and select an agency.

If you select Fund, the drop-down arrow in the **Agency/Fund** column includes all funds in the giving hierarchy established on the campaign you selected on the Envelope Summary tab. After an envelope is committed, rather than appearing in payouts or as designations on the gift, fund designations instead appear as individual rows on the Split Gift tab of the gift created from the envelope.

10. If there is more than one designee, you can specify to distribute the gift among them by percentage or amount, or to distribute it evenly among them.
11. To save the pledge card and return to the Pledge Envelopes page, click **Save and Close** on the toolbar.

Once you save the envelope, you can commit the pledge cards. Committing at this time creates gift records for the employee constituents as well as for any corporate direct bill pledges.

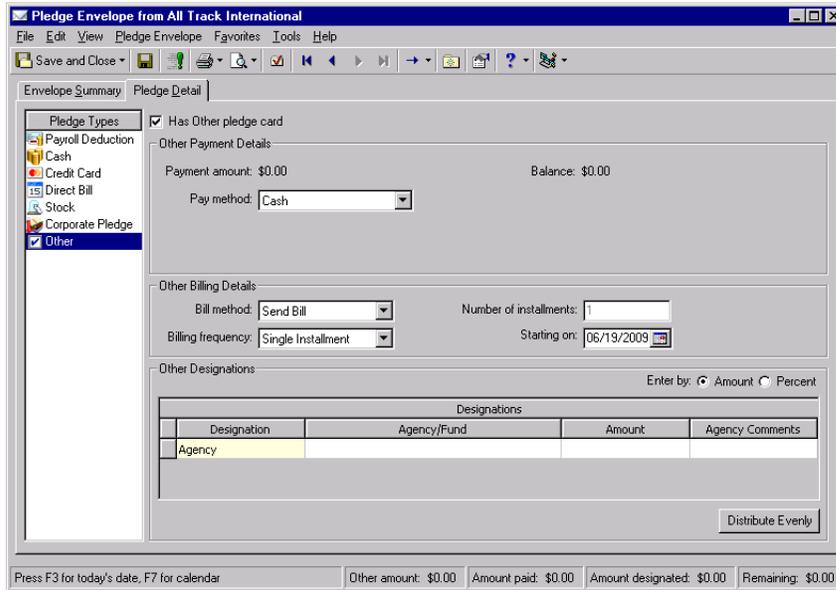
You can enter and commit pledge cards as they come in rather than all at once. Envelope summary and detail information that has already been committed becomes view-only.

▶ **Entering an Other pledge card**

The **Other** pledge type is intended for corporate pledges that require a separate entry. Reasons for using this pledge type may vary. For example, you may want to enter funds raised at a special event separately from other pledges. This pledge type has the same fields and functionality as corporate pledges.

1. On the Raiser's Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.
3. Select the envelope for which you want to add a pledge and click **Open** on the action bar. The Pledge Envelope record appears.
4. Select the Pledge Detail tab.

5. Select **Other** from the **Pledge Types** list on the left. The Other fields appear on the right.



6. Mark the **Has Other pledge card** checkbox.
7. In the **Other Payment Details** frame, enter corporate pledges and billed payments. If all or part of the corporate payment arrives with the envelope, enter the payment and associated information here. For example, if you receive a business check, selecting the corresponding payment method displays the **Check No./ date** fields to enter the deposit.
8. In the **Other Billing Details** frame, enter information for corporate pledges that are billed on a set schedule.
9. In the **Other Designations** frame, enter any designations in the grid.
In the **Designation** column, you can select Fund or Agency.
If you select Agency, the binoculars are available in the **Agency/Fund** column for you to access the Open screen and select an agency.
If you select Fund, the drop-down arrow in the **Agency/Fund** column includes all funds in the giving hierarchy established on the campaign you selected on the Envelope Summary tab. After an envelope is committed, rather than appearing in payouts or as designations on the gift, fund designations instead appear as individual rows on the Split Gift tab of the gift created from the envelope.
10. If there is more than one designee, you can specify to distribute the gift among them by percentage or amount, or to distribute it evenly among them.
11. To save the pledge card and return to the Pledge Envelopes page, click **Save and Close** on the toolbar.

Once you save the envelope, you can commit the pledge cards. Committing at this time creates gift records for the employee constituents as well as for any corporate direct bill pledges.

You can enter and commit pledge cards as they come in rather than all at once. Envelope summary and detail information that has already been committed becomes view-only.

Distributing Designations Among Multiple Agencies or Funds on Pledge Cards

When a donor specifies that a donation be split among multiple agencies or funds, you can enter that information on the pledge card. You can enter distributions by percent or amount, and specify that a pledge be distributed evenly among multiple agencies.

► Splitting a Designation on a Pledge Card

1. On the Raiser's Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.
3. Select the envelope for which you want to add a pledge and click **Open** on the action bar. The Pledge Envelope record appears.

Note: For **Corporate Pledge** and **Other** pledge types, designations are established directly on the Pledge Detail tab.

4. Select the Pledge Detail tab.
5. Select a **Pledge Type** on the left.
6. In the Pledge Card grid, place the cursor in the **Designations** column. To specify multiple agency or fund designations, click the ellipsis. The Designations screen appears.

Designation	Agency/Fund	Percent Credited	Comments
Agency	ABC Learning Center-Downtown Branch	50.000	
Agency	Business Information Systems	50.000	

7. Select to divide by amount or percent. You can also distribute evenly to all designees.
8. In the **Designations** column, select Fund or Agency.

If you select Agency, the binoculars are available in the **Agency/Fund** column for you to access the Open screen and select an agency.

If you select Fund, the drop-down arrow in the **Agency/Fund** column includes all funds in the giving hierarchy established on the campaign you selected on the Envelope Summary tab. After an envelope is committed, rather than appearing in payouts or as designations on the gift, fund designations instead appear as individual rows on the Split Gift tab of the gift created from the envelope.

9. To return to the Pledge Detail tab, click **OK**. The designees appear in the grid. However, due to space limitations all designees may not appear. You can always view details of the designations by clicking the ellipses and returning to the Designations screen.

When the envelope is committed, the designations are associated with each agency record and are ready for payout processing.

Committing Pledge Envelopes

When you are ready to create gift records from envelope summary or pledge card details, you can commit the envelope. During the commit process, aggregate gift records are created for the account based on the amounts you entered on the Envelope Summary tab, and detailed gift records are created for employees and direct billed corporate pledges based on information entered on the Pledge Detail tab. After you commit, the information in the grid on the Envelope Summary tab is locked, but you can still enter additional pledge cards that may come in on the Pledge Detail screen.

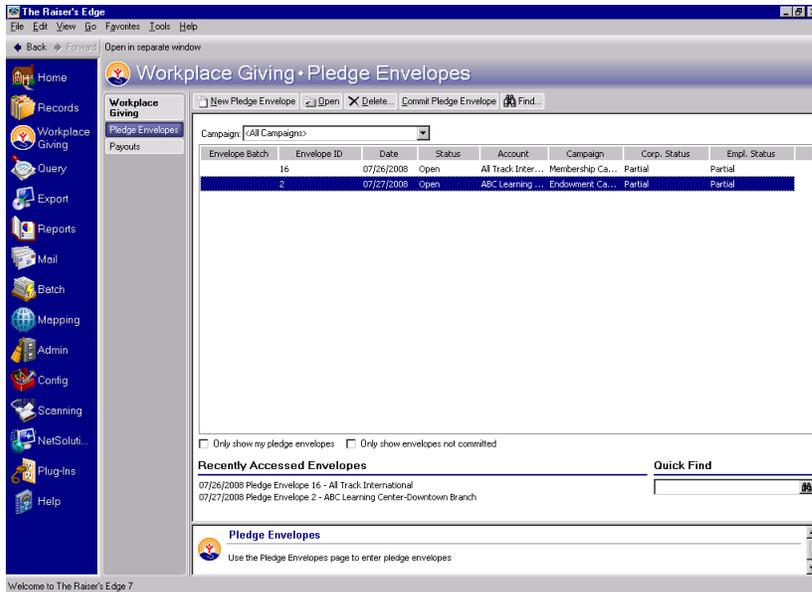
Warning: Once a pledge envelope has been committed, it can not be deleted.

Creating these records in the database enables you to perform detailed reporting and to easily acknowledge constituents, as well as to pay out agency designations. After you commit an envelope, if necessary, you can adjust gifts in it. For more information, see “Adjusting Gifts” on page 42.

For information about the types of gifts created when an envelope is committed, see “Gift Types Created During Commitment” on page 41.

▶ **Committing a Pledge Envelope**

1. On the Raiser’s Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.



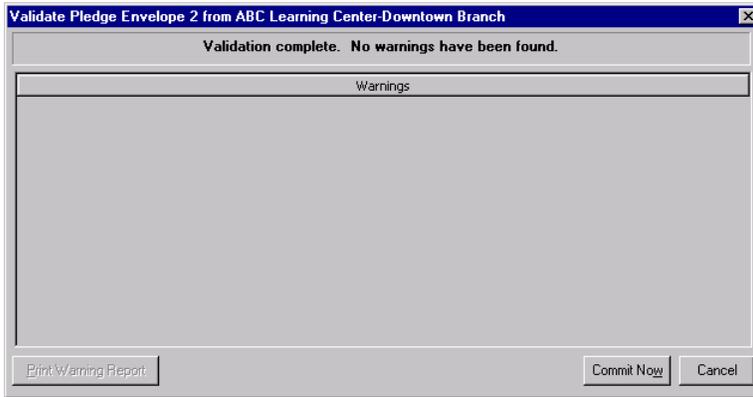
Note: You can also click **Open** on the action bar if you want to review the envelope’s contents before committing. After you verify the contents of the envelope, click **Commit** (exclamation point) on the toolbar.

3. Select the envelope to commit, and click **Commit Pledge Envelope** on the action bar. The Commit Pledge Envelope screen appears.



Note: You can validate the envelope independently of the commit process by selecting **Validate** from the **Tools** menu on an envelope record.

- When you mark the **Validate envelope before committing** checkbox a validation screen appears before the envelope is committed.



The validation screen indicates each instance where the summary data from the envelope does not match either the number or the amount of the corresponding pledge cards. These are simply warnings and do not prevent you from committing the data. If any warnings appear, you can print a warning report.

- To generate a query based on the envelope, mark the **Create gift query of committed gifts** checkbox.
- We recommend you mark the **Create control report** checkbox to create an exception report based on the committed data. Select an option to specify whether to **Preview** the report on screen or **Print** it. A sample report appears below.

08/06/2008 Page 1

Blackbaud
Pledge Envelope Commit Control Report
 Envelope 7

Campaign: Annual Campaign
 Fund: 2008 Annual Fund
 Date: 08/06/2008

	Account		Employee		
	Number	Amount	Number	Amount	
Payroll Deduction:	1	\$5,000.00	0	\$0.00	
Cash:	1	\$2,500.00	0	\$0.00	
Credit Card:	1	\$500.00	0	\$0.00	
Direct Bill:	0	\$0.00	0	\$0.00	
Stock:	0	\$0.00	0	\$0.00	
Corporate Pledge:	1	\$5,000.00	n/a	n/a	
Other:	0	\$0.00	n/a	n/a	

Constituent	Constituent ID	Gift Type	Pledge Type	Amount	Designations
RCS Corporation	112	Pledge	Payroll Deduction	\$5,000.00	
RCS Corporation	112	Cash	Cash	\$2,500.00	
RCS Corporation	112	Cash	Credit Card	\$500.00	
RCS Corporation	112	Pledge	Corporate Pledge	\$5,000.00	

Note: You can commit envelope summary data separately from pledge cards. Each time you commit an envelope record, only pledges without corresponding gifts in *The Raiser's Edge* are processed. After you commit the first time, the summary data on the record is locked.

7. Click **Commit Now**. A progress screen appears indicating the system is generating gifts. When the process is complete, a screen appears with detailed information.

Commit Complete

Envelope: 10

Account: Business Information Systems
 Campaign: Annual Campaign
 Fund: 2008 Annual Fund

Warnings: 0
 Exceptions: 0

	Account		Employee	
	Number	Amount	Number	Amount
Payroll Deduction	1	\$1,000.00	0	\$0.00
Cash	1	\$4,000.00	2	\$300.00
Credit Card	1	\$2,000.00	0	\$0.00
Direct Bill	1	\$500.00	0	\$0.00
Stock	1	\$250.00	0	\$0.00
Corporate Pledge	1	\$8,000.00	n/a	n/a
Other	0	\$0.00	n/a	n/a

Buttons: Close, Exception Report

For information about the types of gifts creating when a pledge envelope is committed, see Gift Types Created During Commitment.

Gift Types Created During Commitment

Three types of records are created when a pledge envelope is committed: account gift records, employee gift records, and gifts from any immediate payments. The following tables contain detail information about these records.

Account Pledge Gift Records by Pledge Type

Pledge Type on Envelope Summary	Gift Type Created for Account
Payroll Deduction Pledge	Pledge (subtype of Payroll Deduction)
Direct Bill	Other (subtype of Direct Bill)
Credit Card	Cash (subtype of Credit Card)
Cash	Cash (subtype of Cash)
Stock	Other (subtype of Stock)
Corporate Pledge	Pledge (subtype of Corporate Pledge)
Other	Pledge (subtype of Other)

Employee Pledge Gift Records by Pledge Type

Pledge Type on Pledge Detail	Gift Type Created for Employee
Payroll Deduction Pledge	Other (subtype of Payroll deduction)
Cash	Other (subtype of Cash)
Credit Card	Other (subtype of Credit Card)
Direct Bill	Pledge (subtype of Direct Bill)
Stock	Stock/Property (subtype of Stock)

Gifts from Immediate Pledge Payments

For each payment existing in the pledge envelope record, a gift record is created in *The Raiser's Edge* when the envelope is committed. These payments all have a gift type of Cash. The gift date is based on when the envelope was submitted. The associated campaign, fund, and appeal (if entered) from the envelope are included on each new gift record.

Adjusting Gifts

Once an envelope is committed and the gifts are created, you can use the envelope record to open gift records that require adjusting. For example, you may need to adjust a gift if a donor is unable to pay the full amount of the initial pledge. You do not need to update the envelope itself, because report and query data is based on the gift record, not the envelope. When you adjust a gift amount, you must also adjust the appropriate summary gift record on the account by the same amount to ensure the accuracy of your reports.

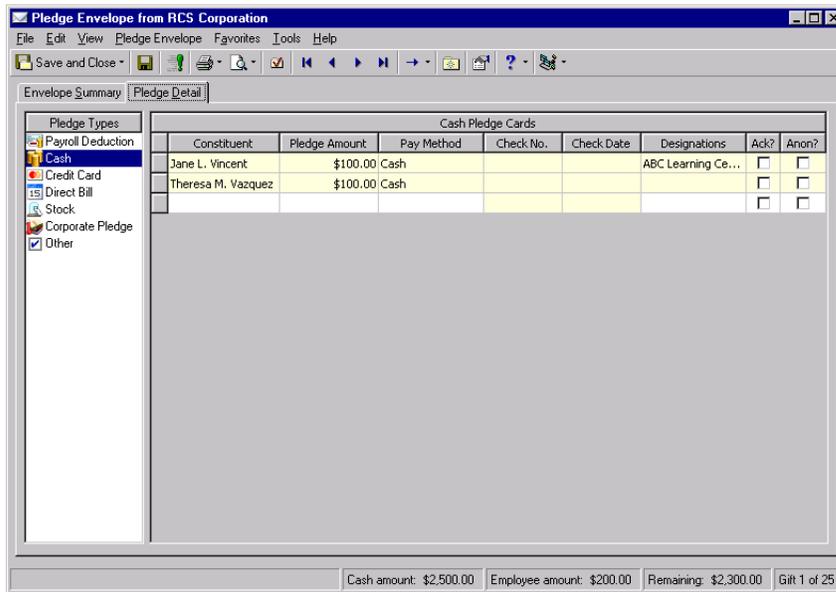
Warning: If you adjust anything other than the gift amount, you only need to update the gift on the employee's constituent record. If you adjust the amount, you also need to change it on the appropriate summary gift record on the account's constituent record.

Do not change the campaign or fund on a gift record. If you do change these values, the gift is associated with an envelope to which it is no longer applicable.

▶ Adjusting a gift

1. On the Raiser's Edge bar, click **Workplace Giving**. The Workplace Giving page appears.
2. Click **Pledge Envelopes**. The Pledge Envelopes page appears.
3. Select the envelope containing a gift you want to adjust and click **Open** on the action bar. The Pledge Envelope record appears.

4. Select the Pledge Detail tab



5. In the grid, select the pledge card to adjust.

6. From the **Pledge Envelope** menu, select **Go To, <Constituent's name>**. The constituent record appears.

Note: From the grid, you can right-click on a gift and display **Properties** for the individual gift. Properties information includes the envelope ID number, which you can compare to the envelope record to ensure you are updating the correct gift. Once a gift record is open, you can hold your cursor over the envelope icon on the bottom right to view the envelope ID number.

7. Select the Gifts tab.

You can reorganize the gifts using the **Show** field. A useful option for the United Way is showing gifts by "Pledges and Installments."

8. Select the gift to adjust and click **Open** on the action bar. The gift record appears.

Gift for Jane L. Vincent

File Edit View Gift Favorites Tools Help

Save and Close

Gift Miscellaneous Soft Credit Matching Gifts Tribute Attributes Split Gift

Constituent: Vincent, Jane ID: 177

Gift type: Cash Reference:

Gift subtype: Cash Acknowledge: Do Not Acknowledge

Gift date: 08/06/2008 Letter Benefits

Amount: \$100.00 Receipt: Not Received

Campaign: Annual Campaign Receipt amt/no.: \$100.00

Fund: 2008 Annual Fund

Appeal:

Package:

Solicitors: Hensley, Cole

Pay method: Cash EFT? Amount bills: \$0.00

Ref no./date: Amount coins: \$0.00

Date added: 08/06/2004

Press F7 for table lookup

Warning: Do not change the campaign or fund. If you change these values, the gift is associated with an envelope to which it is no longer applicable.

9. To adjust the gift record, change the gift subtype, amount, pay method, payment schedule, etc., where necessary.

For additional information about all **Raiser's Edge** gift data entry fields, see the *Gift Records Guide*.

10. For pledge gift types, review the installment schedule. To change the payment schedule, you do so on the gift record by performing the following steps.

a. Select the Installments/Payments tab. Review the current installment plan.

Note: You can also access the Pledge Installment Schedule from the Gift tab by clicking the **Schedule** button.

b. To change the payment schedule, click **Schedule**. The Pledge Installment Schedule screen appears.

Pledge Installment Schedule for Sean A. Davenport

Use the 'Schedule' fields, then select 'Distribute' to help generate an installment schedule.

Installment Schedule

Gift Amount: \$500.00

Frequency: Monthly No. Installments: 10

Day 1 of every 1 month(s)

Starting on: 11/01/2008

Installments due every month on the 1st day of the month

Date	Amount	Balance
11/01/2008	\$50.00	\$50.00
12/01/2008	\$50.00	\$50.00
01/01/2009	\$50.00	\$50.00
02/01/2009	\$50.00	\$50.00
03/01/2009	\$50.00	\$50.00

Distribute Reschedule

OK Cancel

- c. Click **Reschedule**. The Reschedule Unpaid Installments Wizard appears.

Reschedule Unpaid Installments Wizard

1: Installments/Create Schedule | 2: New Schedule Results

Installments to Include

Enter a date below to determine which installments to reschedule. Installments that have a balance as of the current date and a due date on or after the date entered will be rescheduled.

Reschedule installments due after: 07/26/2008 View Installments

Pledge balance: \$500.00

Amount to redistribute: \$500.00

Create New Schedule

Use the fields below to reschedule this pledge. The system will use this information along with the current installment schedule to generate a new schedule for this pledge.

Frequency: Single Installment No. Installments: 1

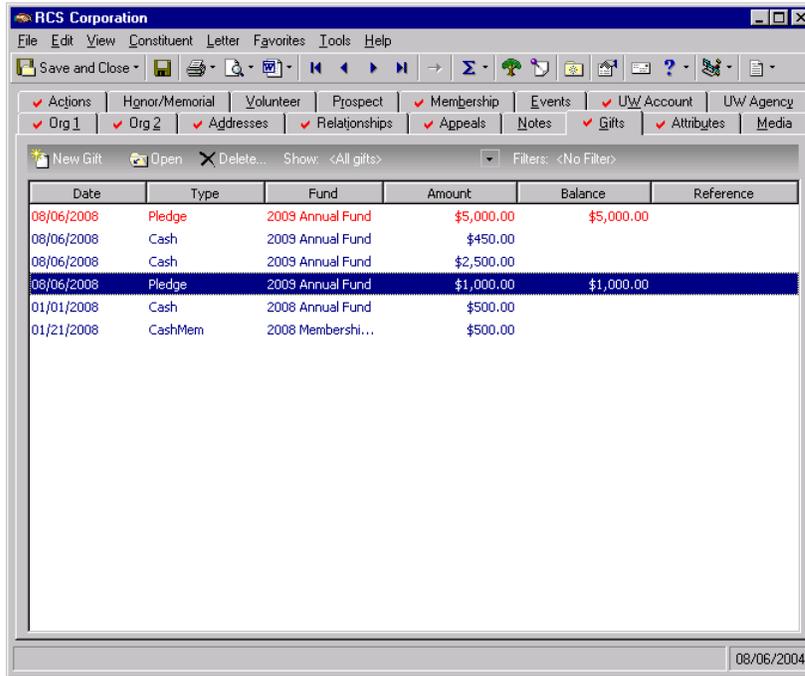
Single Installment

Starting on: 07/26/2008

Cancel < Previous Next > Finish

- d. Select when to begin rescheduling payments and create a new schedule.
- e. Select the new frequency, and enter the number of installments and associated dates.
- f. Select the New Schedule Results tab to review the new payment schedule.
- g. Click **Finish**.
- h. Click **OK**. You return to the Installments/Payments tab.
11. To save your changes and exit the gift record, click **Save and Close**.
12. To ensure reporting accuracy, if you adjusted a gift amount, you must also adjust the account's gift record as well. To do this, open the organization constituent record of the account.

13. Select the Gifts tab.



14. Select the summary gift that includes the individual gift you adjusted previously. Open the gift record and adjust it by the same amount you changed the individual gift record.
15. To save and exit the gift record, click **Save and Close** on the toolbar.

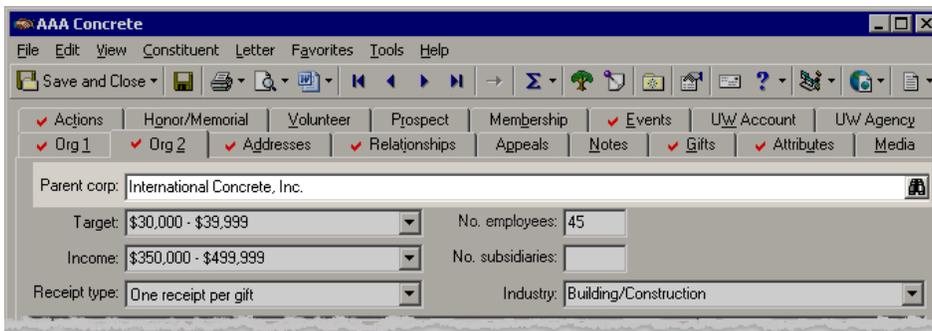
Parent Subsidiary Pledge Tracking

Workplace Giving enables you to apply payments received from a parent corporation to pledges received from one or more of its subsidiaries.

The Parent Subsidiary Report is available to group pledges and payments for parent corporations with those for their subsidiaries. For more information, see “Parent Subsidiary Report” on page 56.

Establishing the Parent Subsidiary Relationship

The initial parent/subsidiary relationship is established on the Org 2 tab of an organization constituent record. On a subsidiary company’s record, enter the parent in the **Parent corp** field.



On the constituent record of the parent organization, the relationship is indicated in the **No. Subsidiaries** field.

The screenshot shows a constituent record form with the following fields and values:

- Parent corp: [Empty field]
- Target: \$30,000 - \$39,999
- Income: \$350,000 - \$499,999
- Receipt type: One receipt per gift
- No. employees: 45
- No. subsidiaries: 1
- Industry: Building/Construction

Applying Payments from a Parent Corporation

Applying payments from a parent corporation includes the ability to apply those payments against the combined pledges from the parent and subsidiaries as an aggregate amount. Handling payments this way enables you to apply payments from a parent corporation without needing to select separate pledge envelopes from among all the envelopes of the parent’s subsidiaries.

▶ Applying payments from a Parent Corporation to a subsidiary

1. Create a new gift record for the parent organization for which to apply payments to a subsidiary.

Note: The **Apply to, Subsidiary Pledges** menu option is available only on gifts from constituents named as a Parent Corporation on at least one organization constituent record. This option also appears if a business rule in *Configuration* has been set to notify you when a constituent has outstanding pledges when adding a gift. The notification message displays whether the outstanding pledges are for the parent or any of its subsidiaries.

2. From the **Gift** menu, select **Apply to, Subsidiary Pledges**. The Apply Payment from Parent Corporation screen appears.

The screenshot shows the "Apply Payment from Parent Corporation" dialog box with the following details:

- Payment amount: \$20,000.00
- Auto-Distribute: [Checked]
- Show zero amount pledges: [Unchecked]
- Apply payment to:
 - Parent and Subsidiary Accounts as Aggregate Total
 - Specific Accounts as Aggregate Pledges
 - Specific Pledge Envelope(s)
- Buttons: View Installments..., Load Pledge(s) From..., OK, Cancel

3. Select an option in the **Apply payment to** frame.

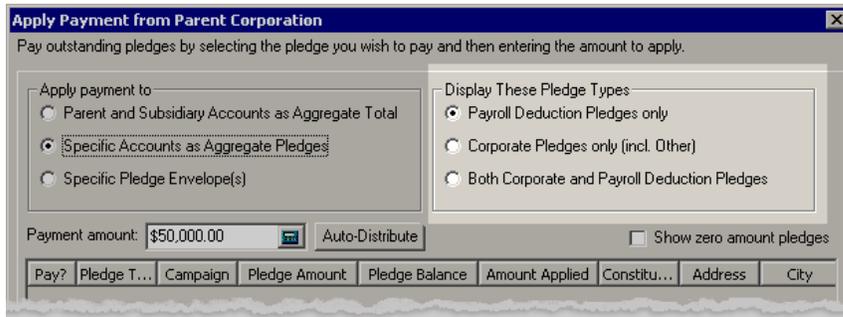
- **Parent and Subsidiary Accounts as Aggregate Total** - Applies the payment as one aggregate amount against an aggregate amount that represents the total of all pledges received from the parent and its subsidiaries, without the need to split the payment out and apply it to the separate pledge envelopes or to specific subsidiary accounts. This is the default method.

- **Specific Accounts as Aggregate Pledges** - Applies the payment as one aggregate amount against one or more aggregate pledge amounts, each of which represents the total of all pledges received from the parent or one specific subsidiary, without the need to split the payment out and apply it separately to specific pledge envelopes.
- **Specific Pledge Envelope(s)** - Applies the payment to separate, specific pledge envelopes from the parent corporation and/or one or more of its subsidiaries.

When you select either of the two aggregate methods, the aggregate pledge amounts are broken out into separate aggregate amounts for each campaign. When you select to apply the payment to specific accounts as aggregate pledges, the aggregate pledge amounts are broken out into separate aggregate amounts per pledge type, per campaign, and per account.

The available columns in the grid and their behavior depend on the selected payment application method. For more information about this and the differences between the methods, see the next section, “Payment Application Method Details” on page 48.

4. When you select either **Specific Accounts as Aggregate Pledges** or **Specific Pledge Envelope(s)**, the **Display these pledge types** frame appears.



You can limit the grid to display only pledges of a particular type to make the grid easier to read when many pledges exist for an account.

- **Payroll Deduction Pledges only**
- **Corporate Pledges only (incl. Other)**
- **Both Corporate and Payroll Deduction Pledges**

5. In the **Payment amount** field, enter the amount to apply to pledges.
6. Clicking **Auto-Distribute** has different results depending on your selected option in the **Apply payment to** frame. For more information, see the following section, “Payment Application Method Details.”
7. Mark the **Show zero amount pledges** checkbox if you want include them in the grid display.
8. When the **Specific Pledge Envelope(s)** option is selected, you can select a pledge and click **View Installments** to see installment information for it.
9. To include additional pledges in the grid, click **Load Pledge(s) From**. The Open screen for pledges appears so you can locate and select the pledges to include.
10. To apply the payment and return to the gift record, click **OK**.

Payment Application Method Details

When applying payments from a parent corporation to a subsidiary, it is important to understand the three different ways they can be applied. The available columns in the grid depend on the selected payment application method. Some columns also have different default behavior depending on the selection. Details about these particular columns appear below.

Parent and Subsidiary Accounts as Aggregate Total

This method applies the payment as a lump sum against an aggregate total of all outstanding pledges for the parent and its subsidiaries. Aggregate totals are calculated by campaign year so there is a separate total aggregate amount for each. This is the default method.

When you select this method, a separate row in the grid appears for each campaign with a remaining pledge balance. Each row shows the information for all applicable pledges, combined into a single aggregate amount for one campaign.

Note: You can manually change the values for any of the **Pay?** checkboxes in the grid. Doing so applies the payment to different aggregate pledges than the defaulted rows.

- **Pay?** - When you click **Auto-Distribute**, the checkboxes for the most current campaign are marked by default. The payment is applied to the oldest open balance in that campaign first, and progresses in chronological order, oldest to the most recent, until the full payment has been applied.
- **Pledge Amount** and **Pledge Balance** - The **Pledge Amount** and **Pledge Balance** columns for each row display the combined total respective amounts for all pledge envelopes with open balances for the applicable campaign. In effect, each row represents the aggregate of all the separate applicable pledge envelopes.

Specific Accounts as Aggregate Pledges

This method applies the payment as separate payments to each subsidiary account, but considers all outstanding pledges for each account as an aggregate pledge amount for each separate subsidiary. The aggregate pledge amounts for each subsidiary are also calculated by campaign year, with separate aggregate amounts per campaign.

You can apply the payment to aggregate pledges for each account (the parent and/or any of its subsidiary constituents), determined by pledge type and campaign.

When you select this method, a single row in the grid appears for each Account/Pledge Type/Campaign combination with a remaining pledge balance:

- **Pay?** - When you click **Auto-Distribute**, the checkboxes for the oldest displayed pledges are marked by default. The payment is applied to the oldest open balance first, progressing in chronological order, oldest to the most recent, until the full payment has been applied.
- **Pledge Amount** and **Pledge Balance** - The **Pledge Amount** and **Pledge Balance** columns for each row display the combined total respective amounts for all pledge envelopes with open balances for the applicable Account/Pledge Type/Campaign combination. In effect, each row represents the aggregate of all the separate applicable pledge envelopes for the account.

Specific Pledge Envelope(s)

This method applies the payment as separate payments against each separate pledge envelope for each subsidiary.

When you select this method, a row appears for every pledge envelope with an open balance.

- **Pay?** - When you click **Auto-Distribute**, the checkboxes for the oldest displayed pledges are marked by default. The payment is applied to the oldest open balance first, progressing in chronological order, oldest to the most recent, until the full payment has been applied.

Payouts

When gifts are designated to go to particular United Way agencies, you need to run periodic payouts to create payout records in *The Raiser's Edge*. All payouts that were accepted and generated database records appears on the Payouts page.



Once all pledges are in and an envelope is confirmed, you are ready to generate payouts based on the designations in the newly created gift records. You can pay the agencies based on either the actual payments or on the pledged amounts. Each account can select its own payout processing method. The selected method can then be applied when generating payouts, or you can specify a method to apply to every payout in the run.

Default Payout Settings

When payouts are processed, administrative and collection loss fees can be calculated for each pledge based on values set on the payout run. However, if you have special agreements with accounts regarding fees, you can specify that on the **Fees** grid of the UW Account tab on their constituent records. In addition, if an account is exempt from a particular fee, you can indicate that by marking the **Waive?** checkbox on the UW Account tab.

Note: Default settings specified on the UW Account tab on the organization constituent record are always used in a payout run.

If the default settings you established on the UW Account tab differ from settings specified in an actual payout run, the UW Account tab settings are always used in the payout. For more information about the UW Account tab, see “Constituent Record UW Account Tab” on page 15.

Creating Payouts

You set parameters at the time of each payout run. You can be selective in determining which payouts to process using date ranges as well as field level filters on account, campaign, fund, and gift subtype(s). You also set the payout basis for each run, enabling you to pay all agencies in the run based on payments made, pledges made, or according to the pay basis defined for each account.

► Creating a payout

1. From the Workplace Giving page, click **Payouts**.

2. On the action bar, click **New Payout**. A new payout record opens to the General tab.

The screenshot shows the 'Payouts' application window with the 'General' tab selected. The window title is 'Payouts' and it has a menu bar with 'File', 'Edit', 'Tools', and 'Help'. Below the menu bar is a toolbar with icons for search, print, and help. The main area is divided into several sections:

- Include... All Records**: A button labeled 'Include...' and the text 'All Records'.
- Payout through date:** A date field containing '07/27/2008'.
- Payout start date:** An empty date field.
- Payout Basis**: Three radio button options: 'Account default' (selected), 'Pledges paid', and 'Pledges designated'.
- Fees**: Four input fields: 'Admin fee %:', 'Collection loss fee %:', 'Max admin fee: \$0.00', and 'Max collection loss fee: \$0.00'.
- Filters**: A table with three columns: 'Filters', 'Filter Option', and 'Selected Filters'.

Filters	Filter Option	Selected Filters
Campaign	Include All	<All Campaigns>
Fund	Include All	<All Funds>
Gift SubType	Include All	<All Gift SubTypes>
- Buttons**: 'Create control report' (checkbox), 'Preview' (radio), 'Print' (radio), '< Back', 'Next >', 'Cancel', and 'Run Now'.

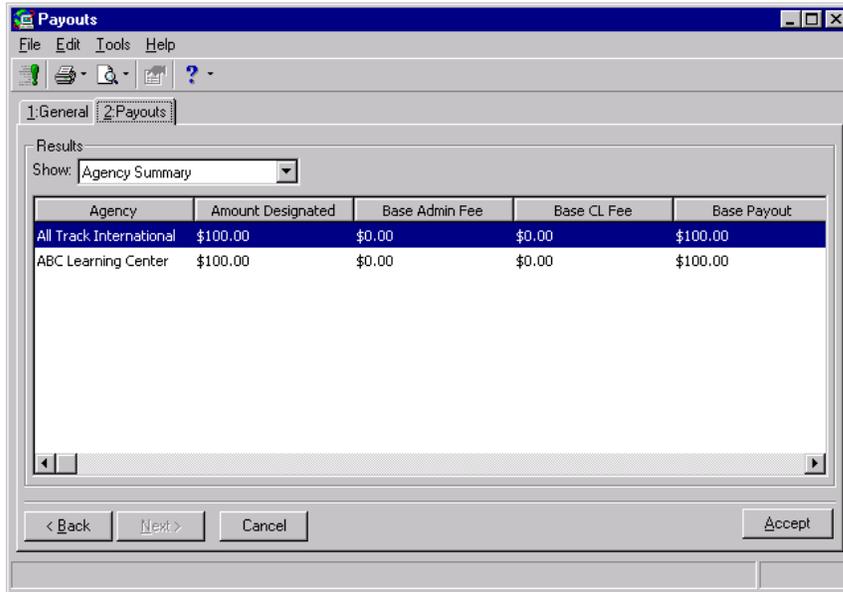
3. Enter a date in the **Payout through date** field to processes all payments on or before a specified date. This field is required. You can optionally designate a date on or after which payouts should start to be included in the run. Entering dates in both fields defines a set date range for payouts.
4. To select a single account or to use a query to run a subset of accounts, click **Include**. For more information about using queries, see the *Query & Export Guide*.
5. Select a **Payout Basis** option. These options are explained in detail in “Payout Processing Types” on page 52. The payout basis does not affect fees set on the UW Account tab of the organization’s constituent record.
6. In the **Fees** frame, enter administrative and loss collection fee information.

Note: Any fee amounts set on the account record override fee information set at the time of the payout.

The administrative and collection loss values determine the percentage of the pledge that is charged as a fee for service or uncollected donations. The maximum fields ensure that fee percentages do not exceed a set amount.

7. In the **Filters** frame, you can optionally specify to include only selected campaigns, funds, and gift subtypes in the payout run. Filter the payouts, if desired, to specify a single or multiple campaign(s), fund(s), and gift subtype(s). The default is set to include all.

8. To move to the Payouts tab, click **Next** or **Run Now**.



On this tab, you can view all payouts to be generated by this run before accepting them. You cannot edit individual payouts from this tab. However, you can review the payouts and return to the General tab to further define your parameters. You can also close the payout without generating any records.

9. In the **Show** field, you can select different views of the payouts in the grid below. You have three options:
- **Agency Summary** - totals all payouts into a single row per agency.
 - **Grid View** - shows each payout at the individual designation level. Data is sorted by account, then agency, then constituent.
 - **Detail** - rolls up payouts for each agency and then rolls up all agencies under the respective account. You can expand each account to view rows of agency data as well as expand each agency to view the individual payouts.
10. Right-click on any payout you do not want to process and select **Delete this payout** from the menu. The payout is removed from this run.
- You must delete a payout again if you return to the General tab before you run the payouts. Returning to the General tab resets *The Raiser's Edge* to check for agency payouts based on your parameters.
11. When you determine the payouts to be applied and are ready to generate them, click **Accept**.
- For each payout, the agency ID, pledge ID, payout date, base payout, administrative fee, collection loss fee, and payout amount are saved in *The Raiser's Edge*.

Payout Processing Types

The three options for payout processing are:

Pledges Designated Basis. This option processes payouts based on the total amount designated for all pledges rather than just those paid. The total amount of all pledges is used in the calculation of payout amounts.

Pledges Paid Basis. This option processes only payments made against pledges to designated agencies. The payout amount is calculated based on a prorated portion of the total amount of designated pledges.

Specifically, the amount of the pledge that has been paid is compared to the total amount pledged and the resulting ratio determines the payout amount. For example: if a \$100 pledge has been designated to go equally to two agencies, they are each due \$50. However, if the actual amount paid at the time payouts are processed is \$50, then each agency receives \$25.

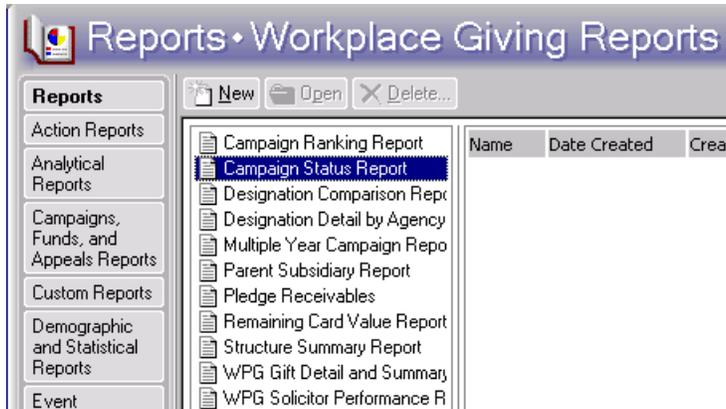
Account Default Basis. If you select this option, each account is processed according to the values set on its respective constituent record. Specifically, the program looks at settings on the UW Account tab to determine if the account should be run on a pledges designated or pledges paid basis.

Workplace Giving Reports

The Raiser's Edge features several reports developed especially to meet United Way's specific reporting needs. The Reports page is the central location for all standard reports in the program. To access the page, click **Reports** on the Raiser's Edge bar.



The Reports page contains links to all *Raiser's Edge* reports including those designed specifically for the United Way. To access these reports, click **Workplace Giving Reports**. The Workplace Giving Reports page appears.



Warning: The *Workplace Giving* reports are able to distinguish between the summary gifts attributed to the account and the detail gifts for the employees that make up the summary amount in order to avoid double counting them. However, for some other *Raiser's Edge* reports, you may need to use a gift query to appropriately filter the gifts to avoid them being counted twice.

To see samples of each available report, see “Workplace Giving Sample Reports” on page 63.

The following section contains details about the Workplace Giving reports and features that are unique to these reports. For information about the features available in all *Raiser's Edge* reports, see the *Reports Guide*.

Campaign Ranking Report

The Campaign Ranking Report displays a comparison of Employee Giving vs. Corporate Giving and provides an overall total given. The report provides a breakdown of employee and corporate pledging at organizations. Sorted by the total given by organization, the lines display employee participation, total employee and corporate gifts for the campaign, and total pledged. Each total is further broken down, such as by percent participation and average gift, allowing you to locate opportunities for greater pledge contributions or improved employee participation.

Report Features

- Individuals and organizations who made gifts not linked to pledge envelopes are listed in the report, in addition to the accounts previously listed.
- On the General tab, when you select to **Include All Records** both individual and organization constituents appear in the list.

When the **Individual** column is included on the report, it displays the constituent number for any individual constituent who made a gift not linked to a pledge envelope. The column does not display information for individuals included on the Pledge Detail tab of a pledge envelope.

- On the Format tab, when you select **Campaign** as the first sort field and break the report data out by that sort field using Sort/Break on the Format tab, the report continues to list and subtotal all information for gifts associated with pledge envelopes as it does in previous versions, but the heading for the **Totals** row below the listed accounts for each campaign reads “Envelope-Linked Gift Totals.” Below the envelope-linked totals for each campaign, information for constituents and gifts not linked to pledge envelopes is listed for the applicable campaign.

For other Sort/Break combinations, the report appears but with the addition of the **Individual** column, and with information included for constituents who have made gifts not linked to pledge envelopes.

Campaign Status Report

The Campaign Status Report provides current giving numbers as well as numbers for the past campaign year by solicitor team. The report also includes the number of employees and donors. Results are subtotaled by company and solicitor with a grand total appearing at the bottom of the report.

Report Features

- The Campaign Status Report includes gifts that are not linked to a pledge envelope.
Individuals not linked to pledge envelopes are listed in the report, in addition to the accounts included in previous versions. Gift amounts for gifts not linked to pledge envelopes are listed for each campaign.
- The report includes an Ind. Address tab on which you specify properties for individual constituent addresses to appear in the report.
- The Columns tab includes an **Individual** column.

When you include the **Individual** column in the report, it displays the Constituent Number for any individual constituent who has made a gift not linked to a pledge envelope.

The new column does not display information for individuals entered on the Pledge Detail tab of a pledge envelope. They display in the **Employee Detail** box on the report.

Because the **No. Emp** and **Part/Final** columns are specific to pledge envelopes, they are empty for individuals with gifts not linked to an envelope.

Designation Comparison Report

The Designation Comparison Report gives a side-by-side comparison between the designations for each agency and fund from the previous year's campaign and the pledges that have been designated to those agencies and funds to date for the current campaign. This report shows the results for each agency/fund, and can be sorted by Designation Type, Alias Type, Alias, Agency Name / Fund Description, Designation Code, or any combination thereof.

This report is new to version **7.81**.

Features of this new report

- Alias, Alias Type, and Designation Code are included as available columns, filters, and Sort/Break criteria because they can be used to store special identifying codes for UW Agencies.
- Codes may be saved as Designation Codes, rather than – or even in addition to – Aliases. When they are saved as Designation Codes, each code for an agency will be assigned to a specific Fund, which corresponds to the WPG organization for which that code is used.

Designation Detail by Agency Report

The Designation Detail by Agency Report provides designations made by individuals at the time of the employee gift. The report is grouped first by Campaign Type (Fund) and then by the Agency. Agencies are sorted alphabetically with individuals sorted alphabetically inside each agency.

Report Features

- The Designation Detail by Agency Report includes gifts that are not linked to a pledge envelope.
- Individual names for unlinked gifts appear in the **Constituent** column. The **Account** and **Envelope** columns are blank for unlinked individual gifts.

Multiple Year Campaign Report

The Multiple Year Campaign Report gives you detailed information about pledges for each account and individual over multiple campaigns. The report provides analysis of the giving participation for each account and individual. Grouping this data for multiple campaigns under each constituent listing lets you easily detect trends for each constituent. This report includes gifts made outside of pledge envelopes as well as those made through pledge envelopes.

The structure of the report is similar to the Campaign Ranking Report, but it incorporates some features from the Campaign Status Report to enhance the grouping of the information for multiple campaigns under each constituent.

This report is new to version **7.81**.

Features of this new report

- You can specify the order in which the campaigns are listed in this report, making it easier for you to identify trends in giving for each constituent.
- A number of options are available to display address and solicitor information for each constituent.

Parent Subsidiary Report

The Parent Subsidiary Report provides information about pledges and payments for parent corporations grouped with their designated subsidiary accounts.

The report displays these pledge and payment amounts without showing separate listings for each pledge envelope, rolling the totals for all envelopes together into a single amount for each account. The report includes gifts made outside of pledge envelopes as well as those made through pledge envelopes.

The layout of the report is similar to that of the Pledge Receivables Report, but it is tailored to group information so you can more easily see the total amounts pledged and paid by the combination of each Parent Corporation and its subsidiaries. To view a sample of the report, see “Parent Subsidiary Report” on page 74.

Pledge Receivables Report

The Pledge Receivables Report provides details on each pledge, including transaction date, pledge amount, initial and subsequent payments, any adjustments, and the pledge balance. The results are grouped by fund and then sorted alphabetically by individual and organization. Subtotals of pledges, initial payments, subsequent payments, adjustments, and pledge balances appear below each constituent. Totals for these fields appear at the bottom of the report. The report is subtitled with the Campaign Year (Campaign ID).

Report Features

- Donors and gifts not linked to pledge envelopes are included in this report, in addition to those linked to pledge envelopes.
- Immediate gifts (not actual pledge gift types in *The Raiser’s Edge*, recurring gifts, or scheduled payments for either of those gift types) that are not linked to a pledge envelope are included in the gift amount under the **Initial Payment** column.
- Payments for pledges and recurring gifts not linked to a pledge envelope are included in the **Other Payment** column. Because the **Initial Payment** column is intended to reflect the amount received at the same time the pledge is received, it does not apply for these payments.
- Write-offs for all gift types are handled as are gifts linked to pledge envelopes in this report.
- The Summary view applies gifts in the same way as the Detail view (described in the previous bullets) except in the Summary view, the data from **Initial Payments** and **Other Payments** is consolidated into a single **Payments** column, which includes all payments for gifts, whether linked to a pledge envelope or not.

Remaining Card Value Report

The Remaining Card Value Report gives you a side-by-side comparison between the results from the previous year’s campaign and the pledges that have been received to date for the current campaign. The report shows the results for each account, and can be sorted by Solicitor for the current campaign, Structure Code for a specific campaign, or both.

The pledge amounts for each account are divided into Employee Pledge Totals and Corporate Pledge Totals. The report also displays Address and Solicitor information. In addition, it gives you the option to display Employee Detail for each account.

This report is new to version **7.81**.

Features of this new report

- The reports allows you to compare each account’s giving for the current campaign and how it compares to previous years, displaying the differences in dollar amounts and percentages. In addition, it calculates the Remaining Card Value for each account.

- Accounts marked as Final for the current campaign do not have Remaining Card Value calculated because no additional pledges are anticipated. Partial/Final status – and, consequently, Remaining Card Value – is determined only for United Way Accounts, and not for individual donors who give outside of pledge envelopes. Because of that distinction, this report includes only pledge amounts in the name of United Way accounts and pledge amounts made through pledge envelopes for gifts from employees.

Structure Summary Report

The Structure Summary Report provides a breakdown of solicitor goals, pledges, and percent of goal attained for each account classification or structure. The results are sorted by Structure ID.

If you established structure code goals, you can use the Structure Summary Report to show how pledges compare to your goals, broken out by campaign and structure codes. For more information about setting up goals, see “Structure Code Goals” on page 20.

Report Features

- The Structure Summary Report General tab includes a **Report Type** frame. Selecting the **Summary** option shows how pledges compare to the goals, broken out by campaign and structure code goals. The **Detail** option enables you to break the data out by funds in addition to campaigns as in previous versions.

You can also select **Detail** or **Summary** view on the Columns tab to define the columns that appear for each view.

- On the Format tab, information on the Summary View is always sorted first by **Campaign**, and second by **Structure ID**. The Summary view is broken out by campaign, and **Campaign ID** is always the Break Header.

WPG Gift Detail and Summary Report

This report is based on the Gift Detail and Summary report under Financial Reports. It is customized to reflect the unique features of gift processing for the United Way. It offers a Detail View that provides detailed information regarding a constituent’s giving within a date range, in addition to a Summary View that totals gifts received in a date range by constituent code, fund, campaign or appeal. The Summary View includes a new Summarize by Account Structure Code view, as well. Gift Types are tailored specifically for *Workplace Giving*.

This report is new to version **7.81**.

Features of this new report

- The report ignores memo pledges, which are gifts linked to a pledge envelope that have a gift type of Other. This is necessary to prevent double reporting of gifts.
- Additional Sort/Break criteria is available for sorting and breaking out the data under each account listing.
- A Structures tab has been added to the report wizard to limit the result to specific structure codes.

WPG Solicitor Performance Report

This report is based on the Solicitor Performance Analysis report under Analytical Reports. It is customized to reflect the unique features of gift processing for the United Way. It allows you to track the progress of your organization’s solicitors against their assigned goals. It offers both a Detail View and a Summary View. Gift Types are hard-coded for the WPG Solicitor Performance Report, to comply with the United Way’s processing demands.

This report is new to version **7.81**.

Features of this new report

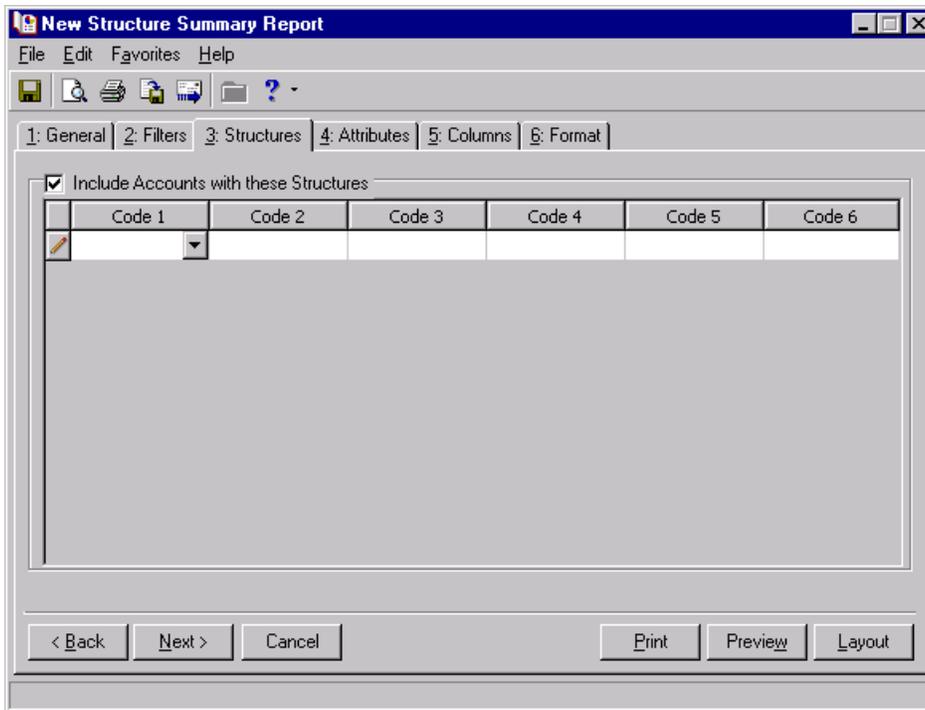
- You can compare solicitor performance against assigned goals. However, it only accommodates the traditional Raiser's Edge methodology of goals for solicitors assigned to constituents. *The Raiser's Edge* doesn't support the assignment of solicitors directly to structure codes.
- A Columns tab has been added to the report wizard. This enables you to take advantage of flexible reporting features in the new report.
- Sort/Break capability has been added to the Format tab of this report, so you can sort by Structure Codes.

Creating United Way Reports

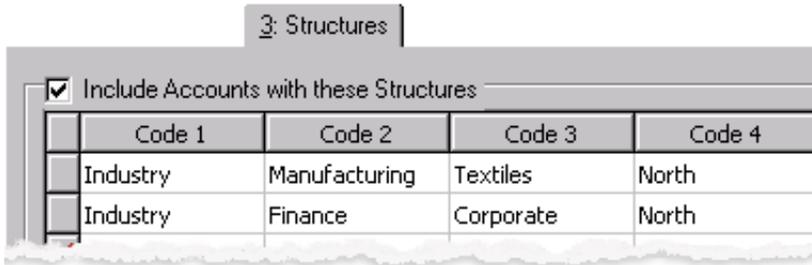
The standard reports created for the United Way are all accessible from a single page in *The Raiser's Edge*. For more details about general report parameters, see the *Reports Guide* or press **F1** on your keyboard from any Report tab. The Structures tab is unique to United Way reports.

Structures Tab

To filter the report to include only accounts with certain structure codes, mark the **Include Accounts with these Structures** checkbox.



In the **Structures** grid, specify the codes for accounts to include in the report. Selecting entries in different columns of the same row is the equivalent of inserting AND between them, so an account must contain each selected value to be included in the report. Selecting items in different rows is the equivalent of using OR between the rows, so accounts containing the values in either row are included in the report.



In the above example, accounts that include the codes Industry AND Manufacturing AND Textiles AND North, OR that include Industry AND Finance AND Corporate AND North are included in the report.

Workplace Giving Batches

The Raiser’s Edge Batch enables you to save data entry time by entering groups of gifts at the same time. With *Batch*, you can enter gift records quickly because you do not need to open each individual gift record to add information. Instead, you select the fields to add or update and the program lists these fields in a spreadsheet, called a batch, so you can efficiently enter information in the database.

Creating a batch includes the following main steps:

Setup. Before you add gifts to a batch, you need to set up a batch by selecting a batch number, specifying the type of pledge gifts that batch will include, the campaign to be credited for the gifts, and other information.

Data Entry grid. The Data Entry grid is a spreadsheet. When adding gifts to the batch, you add each new gift on a separate row.

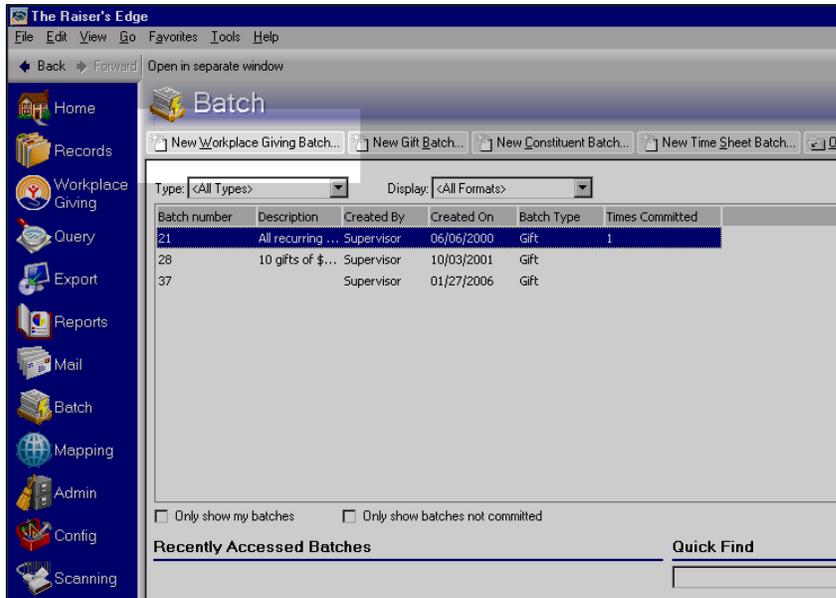
Validation. When you finish adding gifts to a batch, you validate the batch. When you validate a batch, the program determines if any errors in data entry will prevent gifts in the batch from being successfully added to your database. We strongly recommend validating a batch before or while committing it to the database.

Committing a batch to the database. When you commit a gift batch to the database, the program transfers the information entered in the batch to create new gift records.

Workplace Giving batches are similar to gift batches in **The Raiser’s Edge**. The following procedure contains an overview of the steps involved in creating a batch. For complete information about all the features and settings in a batch, see the Gift Batch chapter of the *Batch Guide*.

▶ Creating a Workplace Giving Batch

1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



2. On the action bar, click **New Workplace Giving Batch**. The Workplace Giving Batch Setup screen appears.

Workplace Giving Batch Setup

Batch number: 38

Pledge type: Cash

Campaign: Annual Campaign

Projected number of gifts: 30

Projected amount: \$600.00

Description: United Way Pledge Card Batch

Include batch for bank depositing

Other users may access this batch

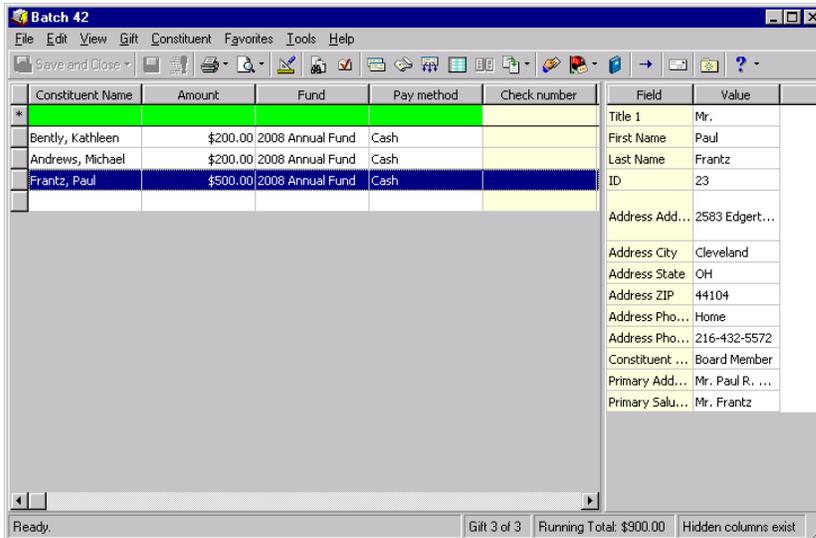
OK Cancel

3. **The Raiser's Edge** tracks each *Workplace Giving* batch with a unique number, called a **Batch number**. When you create a new batch, the program automatically generates a batch number and assigns it to the batch. You can use this number or select your own number. If you enter your own number, you can assign numbers and letters to the batch you are creating.

When the program generates a batch number, it selects the lowest unused batch number and formats the batch number based on specifications entered in the Business Rules section of *Configuration*.

4. In the **Pledge type** field, select the type of pledge cards the batch will contain.
5. In the **Campaign** field, enter the campaign toward which gifts will be credited.
6. In the **Projected number of gifts** field, enter the number of gifts you plan to enter in the batch. In the **Projected amount** field, enter the projected monetary amount for the gifts you plan to enter. Although these projections are not required, we recommend entering them because the program uses your projections to determine the accuracy of the data entry when you validate the batch.

7. To further help you identify the batch, enter a **Description**. This description appears on the Batch page so you can identify the batch before you open it. We recommend adding a description so you can quickly find a batch.
8. To print a deposit ticket for the gifts entered in the batch, mark the **Include batch for bank depositing** checkbox.
9. When you create a batch, to allow others to use and enter information into the batch, mark the **Other users may access this batch** checkbox. If a batch contains sensitive information, you may want to limit batch access only to the person who created the batch by not marking this checkbox.
10. Click **OK**. The Data Entry grid appears.



Note: To add a new row to the data entry grid, right-click on the gray box on the left of the current row and select **Insert row**.

11. The Default Row is the first row in the Data Entry grid. When you add gifts to the batch, any information you enter in the Default Row appears as a default for each new gift when you begin a new row in the batch.

Before you begin to enter data in a *Workplace Giving* batch, you must select in User Options how you want to enter defaults in the batch. The settings you specify for gift batches control how defaults are entered in *Workplace Giving* batches. You can enter defaults in the batch in three ways: by pressing **F2** on your keyboard when in a field to add the default for that field, inserting a default when you select a field, or inserting all available defaults when you begin a new row in the batch.

Warning: If you change an entry in the Default Row after entering gifts in the batch, the new default settings affect the gifts entered after you make the change. The new default settings do not affect gifts already entered in the batch.

12. In the **Data Entry** grid, each row of the spreadsheet that contains information becomes a gift record when you commit the batch to the database.
When a column is not applicable to the gift you are entering, the field is locked and appears in the color you selected in the **Locked cell color** field on the General section of the Color tab in User Options. For example, **Check number** fields are not applicable to a cash gift.
13. You can select the constituent fields to appear in the Constituent Window on the right by selecting **Define constituent fields** from the **Constituent** menu. Required fields automatically appear in the Constituent Window.

When you add gifts in a batch, you may discover a donor who is not a constituent in your database. You can use the Constituent Window to create a new constituent record for the donor or edit information on a donor's existing constituent record. When you display the Constituent Window, the program displays information about the constituent for whom you are adding a gift.

14. When you finish adding gifts to the batch, you can validate it. During validation, the program examines all gifts entered in the batch to determine whether any data entry errors exist. For example, you may have added two gifts with the same gift ID. Because all gift IDs must be unique, the program cannot add two gifts with identical gift IDs. We strongly recommend validating a batch before or while you commit the batch to the database so you can locate any data entry errors.

To validate a batch, select **Tools, Validate** from the menu bar. The Validate Gift Batch screen appears. For more information about this screen, see the Gift Batch chapter of the *Batch Guide*.

15. To return to the Data Entry screen, click **Close** on the Validate Gift Batch screen
16. After you finish data entry and validate the batch, you should commit it. When you commit a batch, the new gifts are added to your database. To commit the batch, select **File, Commit Completed Batch** from the menu bar. The Commit Gift Batch screen appears so you can specify options the program uses when it commits the batch. For more information about the tabs on this screen, see the Gift Batch chapter of the *Batch Guide*.

When the commit is complete, a screen appears with details about the process.



17. To return to the main Batch page, click **Close**. The new batch now appears in the grid.

Workplace Giving Sample Reports

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Chapter 1

Campaign Ranking Report

The **Campaign Ranking Report** displays a comparison of Employee Giving vs. Corporate Giving and provides an overall total given. The report provides a breakdown of employee and corporate pledging at organizations. Sorted by the total given by organization, the lines display employee participation, total employee and corporate gifts for the campaign, and total pledged. Each total is further broken down, such as by percent participation and average gift, allowing you to locate opportunities for greater pledge contributions or improved employee participation. The exact data included depends on your parameter tab settings.

Report Parameters

Records to include: All

Date to Use: Gift date

Date: This calendar yr

Campaigns, Funds, Appeals, Constituent Codes, Pledge Types to include: All

Structures: none

Attributes: none

Columns: Constituent ID, Constituent Name, No. of Employees, No. of Givers, Percent Participation, Total Employee Gifts, Avg. Employee Gift, Employee Per Capita, Total Corporate Gifts, Corporate Per Capita, Total Pledge, Total Per Capita

Title: Campaign Ranking Report

Align: Center

Print Page Number in Heading: Yes (Align: Right)

Print Date in Heading: Yes (Align: Left)

Campaign Ranking Report

Org #	Indiv	Name	Emp	Givers	ct Part	Emp Gifts	Avg Gift	Emp/Capita	Corp Gifts	Corp/Capita	Total Pledge	Total/Capita
ANNUAL												
163		AAA Concrete	45	3	6.67 %	\$600.00	\$200.00	\$13.33	\$0.00	\$0.00	\$600.00	\$13.33
238		Nagle's Bagels #102	10	3	30.00 %	\$600.00	\$200.00	\$60.00	\$500.00	\$50.00	\$1,100.00	\$110.00
239		Nagle's Bagels #103	12	5	41.67 %	\$500.00	\$100.00	\$41.67	\$750.00	\$62.50	\$1,250.00	\$104.17
237		Nagle's Bagels #101	15	7	46.67 %	\$850.00	\$121.43	\$56.67	\$1,000.00	\$66.67	\$1,850.00	\$123.33
135		City Insurance Compan	0	26	0.00 %	\$10,250.00	\$394.23	\$0.00	\$0.00	\$0.00	\$10,250.00	\$0.00
Envelope-Linked Gift Totals:			82	44	53.66 %	\$12,800.00	\$290.91	\$156.10	\$2,250.00	\$27.44	\$15,050.00	\$183.54
19		Jason D. Campbell	1	1	100.00 %	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$100.00
7		Timothy D. Billings	1	1	100.00 %	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$500.00
10		Ellen H. Crenshaw	1	1	100.00 %	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00
120		Angela Diresta	1	1	100.00 %	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$666,666.00	\$666,666.00
Unlinked Gift Totals:			4	4	100.00 %	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$668,266.00	\$167,066.50
Campaign Totals:			86	48	55.81 %	\$12,800.00	\$266.67	\$148.84	\$2,250.00	\$26.16	\$683,316.00	\$7,945.53
CAPITAL												
163		AAA Concrete	45	15	33.33 %	\$1,550.00	\$103.33	\$34.44	\$2,500.00	\$55.56	\$4,050.00	\$90.00
Envelope-Linked Gift Totals:			45	15	33.33 %	\$1,550.00	\$103.33	\$34.44	\$2,500.00	\$55.56	\$4,050.00	\$90.00
Campaign Totals:			45	15	33.33 %	\$1,550.00	\$103.33	\$34.44	\$2,500.00	\$55.56	\$4,050.00	\$90.00
Grand Totals:			131	63	48.09 %	\$14,350.00	\$227.78	\$109.54	\$4,750.00	\$36.26	\$687,366.00	\$5,247.07

Campaign Status Report

The **Campaign Status Report** provides current giving numbers as well as numbers for the past campaign year by solicitor team. The report also includes the number of employees and donors. Results are subtotaled by company and solicitor with a grand total appearing at the bottom of the report. The exact data included depends on your parameter tab settings.

Report Parameters

Records to include: All

Date to Use: Gift date

Date: This calendar yr

Include Gifts with these Campaigns: Annual Campaign, Capital Campaign

Filters: Include all Campaigns, Funds, Appeals, Constituent Codes

Structures: none

Attributes: none

Print Org address

Columns: Org #, Name, No. Emp, Part/Final, Appeal

Title: Campaign Status Report

Align: Center

Print Page Number in Heading: Yes (Align: Right)

Print Date in Heading: Yes (Align: Left)

Campaign Status Report

<u>Org #</u>	<u>Name</u>	<u>No. Emp</u>	<u>Part/Final</u>	<u>Appeal</u>	<u>Annual Campaign</u>	<u>Capital Campaign</u>
164	ABC Learning Center 29 Hitch Avenue Morgan, UT 84050	20	P		\$1,200.00	\$0.00
3	Mark D. Adamson				\$25.00	\$0.00
139	All Track International 1578 Old York Road Portland, OR 97217	125	P		\$0.00	\$5,900.00
151	Anonymous				\$0.00	\$30.00
5	Geoffrey T. Beckner				\$0.00	\$30.00
				INTERNET	\$1,500.00	\$0.00
7	Timothy D. Billings				\$500.00	\$0.00
				INTERNET		
11	Zachery J. Clover				\$0.00	\$30.00

Designation Comparison

The **Designation Comparison Report** gives you a side-by-side comparison between the designations for each agency and fund from the previous year's campaign and the pledges that have been designated to those agencies and funds to date for the current campaign. This report shows the results for each agency/fund, and can be sorted by Designation Type, Alias Type, Alias, Agency Name / Fund Description, Designation Code, or any combination thereof. The exact data included depends on your parameter tab settings.

Report Parameters

Records to include: All

Date to Use: Gift date

Date: Include all dates

Last Year refers to: 2007 Campaign

This Year refers to: 2008 Campaign

Filters: Include all Designated Funds, Funds, Appeals, Constituent Codes, Pledge Types, Alias Types

Attributes: none

Columns: Org. Number, Alias, Fund ID, Name/Description, Last Year's Designations, Previous No. Designations, This Year's Designations, No. Designations, Amount Difference, Percentage Change

Title: Designation Comparison Report

Align: Center

Print Page Number in Heading: Yes (Align: Right)

Print Date in Heading: Yes (Align: Left)

Print report heading on each page: Yes

Designations Comparison Report										
Org No.	Alias	Alias Type	Fund ID	Name / Description	Last Year's Designations	Prev. No. Designations	This Year's Designations	No. Designations	Amount Difference	Percentage Change
Designation Type: Agency										
234	A101	CFC		Lowcountry Social Services	\$1,200.00	30	\$800.00	20	(\$400.00)	-33.33%
	LSS04	SECA								
88	A102	CFC		Agape Ministries	\$1,500.00	32	\$3,000.00	38	\$1,500.00	100.00%
	AM02	SECA								
167	A103	CFC		Triad Women's Shelter	\$800.00	20	\$800.00	20	\$0.00	0.00%
	TMS01	SECA								
322	B101	CFC		ACE Basin Conservation	\$1,600.00	28	\$1,200.00	24	(\$400.00)	-25.00%
	ABC08	SECA								
387	B102	CFC		Coastal Children's Society	\$1,200.00	25	\$1,200.00	24	\$0.00	0.00%
	CCS12	SECA								
657	B103	CFC		Displaced Families Shelter	\$750.00	15	\$0.00	0	(\$750.00)	-100.00%
	DFS02	SECA								
				Agencies Total:	\$7,050.00	150	\$7,000.00	126	(\$50.00)	-0.71%
Designation Type: Fund										
		FOOD		Food Banks	\$1,500.00	42	\$1,000.00	36	(\$500.00)	-33.33%
		COUNS		Counseling Services	\$1,000.00	27	\$2,000.00	30	\$1,000.00	100.00%
		SOCIAL		Social Programs	\$500.00	22	\$750.00	27	\$250.00	50.00%
		SHELTR		Shelters	\$2,000.00	23	\$1,500.00	24	(\$500.00)	-25.00%
		HEALTH		Health Programs	\$2,500.00	30	\$2,500.00	30	\$0.00	0.00%
		HDCAP		Handicap Assistance	\$900.00	11	\$0.00	0	(\$900.00)	-100.00%
				Funds Total:	\$8,400.00	155	\$7,750.00	147	(\$650.00)	-7.74%
				Grand Total:	\$15,450.00	305	\$14,750.00	273	(\$700.00)	-4.53%

Designation Detail by Agency

The **Designation Detail by Agency** Report provides designations made by individuals at the time of the employee gift. The report is grouped first by Campaign Type (Fund) and then by the Agency. Agencies are sorted alphabetically with individuals sorted alphabetically inside each agency. The exact data included depends on your parameter tab settings.

Report Parameters

Agencies: Include: All

Accounts: Include All

Date to Use: Gift date

Date: This calendar yr

Filters: Include all Campaigns, Funds, Appeals, Constituent Codes, Pledge Types

Structures: none

Attributes: none

Ind address: none

Org address: none

Columns: Account, Constituent, Appeal, Pledge Type, Designation Amt

Title: Designation Detail by Agency

Align: Center

Print Page Number in Heading: Yes (Align: Right)

Print Date in Heading: Yes (Align: Left)

Designation Detail by Agency Report

<u>Account</u>	<u>Constituent</u>	<u>Appeal</u>	<u>Pledge Type</u>	<u>Designation Amt</u>
ANNUAL				
ABC Learning Center				
All Track International	Martin A. Schultz		Cash	\$100.00
Francis R. Heidt Memorial Hospital				
All Track International	All Track International		Other	\$500.00
South Carolina Blood Bank				
All Track International	Agnes M. Cone		Credit Card	\$100.00
Star Mission Shelter				
All Track International	Carl Davis		Credit Card	\$200.00
All Track International	Bethany M. Taylor		Cash	\$150.00
Totals:				\$1,050.00
Grand Totals:				\$1,050.00

Multi Year Campaign Report

The **Multiple Year Campaign Report** allows you to see detailed information about pledges for each account and individual over multiple campaigns. The report provides analysis of the giving participation for each account and individual. The grouping of this data for multiple campaigns under each constituent listing allows you to easily detect trends for each constituent. This report includes gifts made outside of pledge envelopes as well as those made through pledge envelopes.

The structure of the report is similar to the Campaign Ranking Report, but it incorporates features from the Campaign Status Report to enhance the grouping of the information for multiple campaigns under each constituent. The exact data included depends on your parameter tab settings.

Report Parameters

Records to include: All

Date to Use: Gift date

Date: Include all dates

Include Gifts with these Campaigns: 2002, 2003, 2004, 2005

Filters: Include all Funds, Appeals, Constituent Codes, Pledge Types

Structures: none

Attributes: none

What would you like to print: Address & phone

Phone type: First telephone found

Consider addresses with seasonal dates as of: Today

Address to use: Preferred address

Address Attributes: No address attributes specified

Specify what happens if no address is found: Print with no address

Columns: Campaign, No. of Employees, No. of Givers, Percent Participation, Total Employee Gifts, Avg Employee Gifts, Employee Per Capita, Total Corporate Gifts, Corporate Per Capita, Total Pledge

Report Orientation: Landscape

Title: Multiple Year Campaign Report

Align: Center

Print Page Number in Heading: Yes (Align: Right)

Print Date in Heading: Yes (Align: Left)

Print report heading on each page: Yes

Multiple Year Campaign Report

<u>Campaign</u>	<u>No. of Emp</u>	<u>No. of Givers</u>	<u>% Partic.</u>	<u>Emp Gifts</u>	<u>Avg Emp Gift</u>	<u>Emp/Capita</u>	<u>Corp Gifts</u>	<u>Corp/Capita</u>	<u>Total Pledge</u>
Derrick J. Baker 789 Westminster Place Paramus, NJ 21928-3542 (218) 555-1221 2005									
	1	1	100.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00
Francis Baker 9876 Humble Street Paramus, NJ 21928-3542 (218) 555-1212 2004									
	1	1	100.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$200.00
Francis Baker 9876 Humble Street Paramus, NJ 21928-3542 (218) 555-1212 2005									
	1	1	100.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30.00
City Insurance Company 123 Nagle Avenue Paramus, NJ 21928-3542 (218) 555-1211 2004									
	45	5	11.11%	\$12,945.00	\$2,589.00	\$287.67	\$0.00	\$0.00	\$12,945.00
City Insurance Company 123 Nagle Avenue Paramus, NJ 21928-3542 (218) 555-1211 2005									
	45	15	33.33%	\$1,550.00	\$103.33	\$34.44	\$2,500.00	\$55.56	\$4,050.00
Benjiman E. Connor 124 Nagle Avenue Paramus, NJ 21928-3542 (218) 555-1222 2002									
	15	0	0%	\$0.00	\$0.00	\$0.00	\$100.00	6.66%	\$100.00
Benjiman E. Connor 124 Nagle Avenue Paramus, NJ 21928-3542 (218) 555-1222 2003									
	25	5	20.00%	\$250.00	\$50.00	\$10.00	\$100.00	4.00%	\$350.00
Benjiman E. Connor 124 Nagle Avenue Paramus, NJ 21928-3542 (218) 555-1222 2004									
	45	5	11.11%	\$12,945.00	\$2,589.00	\$287.67	\$0.00	\$0.00	\$12,945.00
Benjiman E. Connor 124 Nagle Avenue Paramus, NJ 21928-3542 (218) 555-1222 2005									
	45	15	33.33%	\$1,550.00	\$103.33	\$34.44	\$2,500.00	\$55.56	\$4,050.00
Andrew Drenshaw 223 Nagle Avenue Paramus, NJ 21928-3542 (218) 555-1111 2004									
	45	5	11.11%	\$12,945.00	\$2,589.00	\$287.67	\$0.00	\$0.00	\$12,945.00
Andrew Drenshaw 223 Nagle Avenue Paramus, NJ 21928-3542 (218) 555-1111 2005									
	45	15	33.33%	\$1,550.00	\$103.33	\$34.44	\$2,500.00	\$55.56	\$4,050.00

Parent Subsidiary Report

The **Parent Subsidiary Report** provides information about pledges and payments for parent corporations grouped with their designated subsidiary accounts. The report displays these pledge and payment amounts without showing separate listings for each pledge envelope, rolling the totals for all envelopes together into a single amount for each account. The report includes gifts made outside of pledge envelopes as well as those made through pledge envelopes.

Report Parameters

Records to Include: All

Date to Use: Gift date

Date: This calendar yr

Report Type: Summary

Filters: Campaigns - include selected <Annual>; Include all Funds, Appeals, Constituent Codes

Structures: none

Attributes: none

Columns: Company ID, Parent, Individual, Name, Pledge Amount, Payments, Balance

Title: Parent Subsidiary Report

Align: Center

Print Page Number in Heading: Yes (Align: Right)

Print Date in Heading: Yes (Align: Left)

Parent Subsidiary Report

<u>Org #</u>	<u>Parent</u>	<u>Individual</u>	<u>Name</u>	<u>Pledge Amount</u>	<u>Payments</u>	<u>Balance</u>
163	Parent		AAA Concrete	\$75,990.00	\$35,300.00	\$40,690.00
		238	Boris Baden	\$150.00	\$100.00	\$50.00
135	Parent		City Insurance Company	\$1,500,000.00	\$250,000.00	\$1,250,000.00
		15	Sean A. Davenport	\$100.00	\$25.00	\$75.00
		120	Angela Diresta	\$1,999.00	\$1,999.00	\$0.00
240			Nagle's Bagels	\$2,000.00	\$1,200.00	\$800.00
171	Parent		The Good Life Assisted Care Facility	\$316,060.00	\$11,960.00	\$304,100.00
103			Graphic Images, Inc.	\$49,833.00	\$25,911.00	\$23,922.00
106	Parent		Jefferson Manufacturing	\$1,017,095.00	\$1,190.00	\$1,015,905.00
JWUMC			John Wesley United Methodist Church	\$987,654.00	\$987,654.00	\$0.00
		239	Peter Pamson	\$1,000.00	\$200.00	\$800.00
140			Stock Holder's Union	\$10,000.00	\$0.00	\$10,000.00
Grand Totals:				\$3,961,881.00	\$1,292,219.00	\$2,669,462.00

Pledge Receivables Report

The **Pledge Receivables Report** provides details on each pledge, including transaction date, pledge amount, initial and subsequent payments, any adjustments, and the pledge balance. The results are grouped by Fund and then sorted alphabetically by individual and organization. Subtotals of pledges, initial payments, subsequent payments, adjustments, and pledge balances appear below each constituent. Totals for these fields appear at the bottom of the report. The report is subtitled with the Campaign Year (Campaign ID). The exact data included depends on your parameter tab settings.

Report Parameters

Records to include: All

Date to Use: Gift date

Date: This calendar yr

Filters: Include all Campaigns, Funds, Appeals, Constituent Codes. Pledge Types

Structures: none

Attributes: none

Print Org address

Columns: Org #, Ind #, Name, Fund, Part/Final, Transaction, Pledge Amt, Initial Pmt, Other Pmt, Writeoffs, Balance

Title: Pledge Receivables

Align: Center

Print Page Number in Heading: Yes (Align: Right)

Print Date in Heading: Yes (Align: Left)

Pledge Receivables

<u>Org No.</u>	<u>Ind No.</u>	<u>Name</u>	<u>Fund</u>	<u>P/F</u>	<u>Transaction</u>	<u>Pledge Amt.</u>	<u>Initial Pmt.</u>	<u>Other Pmt.</u>	<u>Writeoffs</u>	<u>Balance</u>
164		ABC Learning Center	2005ANN	P	04/25/2005	\$425.00	\$0.00	\$0.00	\$0.00	
164		ABC Learning Center	2005ANN	P	04/25/2005	\$400.00	\$400.00	\$0.00	\$0.00	
164		ABC Learning Center	2005ANN	P	04/25/2005	\$375.00	\$375.00	\$0.00	\$0.00	
139		All Track International	BUILDIN	P	04/25/2005	\$300.00	\$300.00	\$0.00	\$0.00	
139		All Track International	BUILDIN	P	04/25/2005	\$600.00	\$600.00	\$0.00	\$0.00	
139		All Track International	BUILDIN	P	04/25/2005	\$5,000.00	\$0.00	\$0.00	\$0.00	
Grand Totals:						\$7,100.00	\$1,675.00	\$0.00	\$0.00	\$5,425.00

Remaining Card Value Report

The **Remaining Card Value Report** gives you a side-by-side comparison between the results from the previous year's campaign and the pledges that have been received to date for the current campaign. The report shows the results for each account, and can be sorted by Solicitor for the current campaign, Structure Code for a specific campaign, or both. The pledge amounts for each account are divided into Employee Pledge Totals and Corporate Pledge Totals. The report also displays Address and Solicitor information, as well as the option to display Employee Detail, for each account. The exact data included depends on your parameter tab settings.

Report Parameters

Records to include: All

Date to Use: Gift date

Date: Include all dates

Last Year refers to: 2007 Campaign

This Year refers to: 2008 Campaign

Filter: Include all Funds, Appeals, Constituent Codes, Pledge Types

Structures: none

Attributes: none

What would you like to print: Address & phone

Phone type: First telephone found

Print only the organization: Yes

Address to use: Preferred address

Address Attributes: No address attributes specified

Specify what happens if no address is found: Print with no address

Columns: Org. Number, Pledge Type, Last Year's Pledges, This Year's Pledges, Difference-Dollars, Difference-Percent, Remaining Card Value

Report Orientation: Landscape

Title: Remaining Card Value Report

Align: Center

Print Page Number in Heading: Yes (Align: Right)

Print Date in Heading: Yes (Align: Left)

Print report heading on each page: Yes

Remaining Card Value Report

<u>Org No.</u>	<u>Pledge Type</u>	<u>Last Year's Pledges</u>	<u>This Year's Pledges</u>	<u>Difference Dollar</u>	<u>Difference Percent</u>	<u>P/F Status</u>	<u>Remaining Card Value</u>
Solicitor: Paula Jamison							
01 01 00 Banks							
First Federal Savings & Loan							
1234 Oakhaven Dr.							
Paramus, NJ 21928-1234							
(218) 555-2111							
234	Employee	\$1,200.00	\$800.00	(\$400.00)	-33.33%	P	\$400.00
	Corporate	<u>\$1,000.00</u>	<u>\$1,000.00</u>	<u>\$0.00</u>		F	<u>\$0.00</u>
	Account Total:	\$2,200.00	\$1,800.00	(\$400.00)	-18.18%	P	\$400.00
New England National Bank							
5678 Fairmarket St.							
Paramus, NJ 21928-5678							
(218) 555-2112							
88	Employee	\$1,500.00	\$3,000.00	\$1,500.00	100.00%	F	\$0.00
	Corporate	<u>\$1,000.00</u>	<u>\$1,000.00</u>	<u>\$0.00</u>		F	<u>\$0.00</u>
	Account Total:	\$2,500.00	\$4,000.00	\$1,500.00	60.00%	F	\$0.00
01 01 00 Banks Subtotal		\$4,700.00	\$5,800.00	\$1,100.00	23.40%		\$400.00
01 01 05 Insurance							
Burnsdowne Fire and Casualty							
5678 Severn Ave.							
Paramus, NJ 21928-5678							
(218) 555-3242							
167	Employee	\$800.00	\$800.00	\$0.00	0.00%	P	\$0.00
	Corporate	\$1,000.00	\$2,000.00	\$1,000.00	100%	F	\$0.00
	Account Total:	\$1,800.00	\$2,800.00	\$1,000.00	55.55%	P	\$0.00
Citation Auto Insurance							
1234 Forest Rd.							
Paramus, NJ 21928-1234							
(218) 555-2133							
322	Employee	\$1,600.00	\$1,200.00	(\$400.00)	-25.00%	F	\$0.00
	Corporate	\$1,000.00	\$500.00	(\$500.00)	-50.00%	F	\$0.00
	Account Total:	\$2,600.00	\$1,700.00	(\$900.00)	-34.62%	F	\$0.00

Structure Summary Report

The **Structure Summary Report** provides a breakdown of pledges received for each account classification or structure. The results are sorted by Structure ID. The exact data included depends on your parameter tab settings.

The Summary View shows how pledges compare to goals, as broken out by Campaigns and Structure Codes. The Detail View can break out the data by Funds in addition to Campaigns.

Report Parameters

Records to include: All

Date to Use: Gift date

Date: This calendar yr

Report Type: Summary

Filters include all Campaigns, Funds, Appeals, Constituent Codes

Structures: none

Attributes: none

Columns: Structure ID, Description, Pledged,

Title: Structure Summary Report

Align: Center

Print Page Number in Heading: Yes (Align: Right)

Print Date in Heading: Yes (Align: Left)

Structure Summary Report

Structure ID	Description	Goal	Pledged	Percent of Goal
ANNUAL				
01 0100 00 01	Finance Insurance Property/Casualty Medium Size	\$2,000,000.00	\$1,566,149.00	78.31%
02 0100 00 01	Manufacturing Insurance Property/Casualty Medium Size	\$750,000.00	\$282,760.00	37.70%
Totals:		\$2,750,000.00	\$1,848,909.00	67.23%
CAPITAL				
02 0100 00 01	Manufacturing Insurance Property/Casualty Medium Size	\$100,000.00	\$29,000.00	29.00%
Totals:		\$100,000.00	\$29,000.00	29.00%
RELIEF				
02 0100 00 01	Manufacturing Insurance Property/Casualty Medium Size	\$75,000.00	\$4,600.00	6.13%
Totals:		\$75,000.00	\$4,600.00	6.13%
Grand Totals:		\$2,925,000.00	\$1,882,509.00	64.36%

WPG Gift Detail and Summary

This **WPG Gift Detail and Summary Report** is based on the Gift Detail and Summary Report under Financial Reports. It is customized to reflect the unique features of gift processing for the United Way. It offers a Detail View that provides detailed information regarding a constituent's giving within a range of dates and a Summary View that totals gifts received in a date range by constituent code, fund, campaign or appeal. The Summary View includes a new Summarize by Account Structure Code view, as well. Gift Types are tailored specifically for Workplace Giving. The exact data included depends on your parameter tab settings.

Report Parameters (for detail)

Records to include: All

Date to Use: Gift date

Date: Last quarter

Soft Credits Gifts To: Donor

Include these Constituents: Inactive, Constituents with no valid addresses

Credit Matching Gifts To: MG Company

Report Type: Both

Pledge Type: Master

Filters: Include all Constituent Codes, Funds, Appeals, Pledge Types, Campaigns

Structures: none

Gift Types for Empl. Pledges column: WPG Payroll Deduction, WPG Cash, WPG Credit Card, WPG Direct Bill, WPG Stock

Gift Types for Corp. Pledges Column: WPG Corporate, WPG Other.

Gift Types for Indiv. Pledges Column: Pledge, MG Pledge

Gift Types for MG Pledge Column: Cash

Exclude zero amount gifts: Yes

Attributes: none

What would you like to print: None

Columns: Constituent Name, Structure ID, Date, Fund ID, Column 1, Column 2, Column 3, Column 4

Report Orientation: Landscape

Title: WPG Gift Detail and Summary Report

Align: Center

Print report heading on each page: Yes

Sort Fields: Constituent Asc

WPG Gift Detail and Summary Report (Detail view)

<u>Structure Code - Account</u>	<u>Constituent</u>	<u>Structure ID</u>	<u>Date</u>	<u>Fund ID</u>	<u>Empl. Pledges</u>	<u>Corp. Pledges</u>	<u>Indiv. Pledges</u>	<u>Indiv. Cash</u>
Unknown Account								
	Barry Anderson	11 00	10/28/05	2005 RES	\$0.00	\$0.00	\$100.00	\$0.00
	Jeanette Anderson	11 00	09/15/05	2005 RES	\$0.00	\$0.00	\$150.00	\$0.00
	Herbert Brown	11 00	09/03/05	2005 RES	\$0.00	\$0.00	\$25.00	\$0.00
	Harison Cooper	11 00	11/07/05	2005 RES	\$0.00	\$0.00	\$0.00	\$50.00
	Bobby Moore	11 00	09/22/05	2005 RES	\$0.00	\$0.00	\$240.00	\$0.00
	Ernest Naylor	11 00	10/03/05	2005 RES	\$0.00	\$0.00	\$100.00	\$0.00
				Account Totals:	\$0.00	\$0.00	\$615.00	\$50.00
				Account Structure Code Totals:	\$0.00	\$0.00	\$615.00	\$50.00
01 00 01 - Acme Insurance								
	Acme Insurance	01 00 01	09/01/05	2005	\$1,500.00	\$0.00	\$0.00	\$0.00
	Acme Insurance	01 00 01	10/01/05	2005	\$1,200.00	\$0.00	\$0.00	\$0.00
	Acme Insurance	01 00 01	11/01/05	2005	\$1,650.00	\$5,000.00	\$0.00	\$0.00
	Acme Insurance	01 00 01	12/03/05	2005	\$800.00	\$0.00	\$0.00	\$0.00
	Bob Frapples	10 00	09/01/05	2005	\$120.00	\$0.00	\$0.00	\$0.00
	Eddie Johnson	10 00	09/01/05	2005	\$60.00	\$0.00	\$0.00	\$0.00
	Arnold Kendrick	10 00	09/01/05	2005	\$24.00	\$0.00	\$0.00	\$0.00
	Alice Lovett	10 00	10/01/05	2005	\$48.00	\$0.00	\$0.00	\$0.00
	Shondra Robinson	10 00	11/01/05	2005	\$100.00	\$0.00	\$0.00	\$0.00
	Bill Smith	10 00	12/03/05	2005	\$50.00	\$0.00	\$0.00	\$0.00
				Account Totals:	\$5,552.00	\$5,000.00	\$0.00	\$0.00
01 00 01 - Drivers Insurance								
	Drivers Insurance	01 00 01	09/15/05	2005	\$900.00	\$2,500.00	\$0.00	\$0.00
	Drivers Insurance	01 00 01	10/31/05	2005	\$850.00	\$0.00	\$0.00	\$0.00
	Drivers Insurance	01 00 01	11/30/05	2005	\$1,060.00	\$0.00	\$0.00	\$0.00
	Albert Fresco	10 00	09/15/05	2005	\$60.00	\$0.00	\$0.00	\$0.00
	Helen Highwater	10 00	09/15/05	2005	\$100.00	\$0.00	\$0.00	\$0.00
	Carl Jackson	10 00	09/15/05	2005	\$120.00	\$0.00	\$0.00	\$0.00
	James Nast	10 00	10/31/05	2005	\$60.00	\$0.00	\$0.00	\$0.00
	Elaine Poston	10 00	10/31/05	2005	\$48.00	\$0.00	\$0.00	\$0.00
	Fred Simson	10 00	11/30/05	2005	\$120.00	\$0.00	\$0.00	\$0.00

02/27/2006

WPG Gift Detail and Summary Report

Structure ID	Gift Count	Empl. Pledges	Corp. Pledges	Indiv. Pledges	Indiv. Cash
00 01 00	1	\$5,000.00	\$0.00	\$0.00	\$0.00
00 01 01	4	\$50.00	\$0.00	\$12,000.00	\$0.00
00 01 02	13	\$10,575.00	\$0.00	\$9,125.00	\$0.00
00 02 00	2	\$0.00	\$0.00	\$12,000.00	\$0.00
00 02 01	1	\$2,000.00	\$0.00	\$0.00	\$0.00
00 02 02	4	\$35,275.00	\$0.00	\$0.00	\$0.00
00 02 03	1	\$150.00	\$0.00	\$0.00	\$0.00
00 03 00	1	\$100.00	\$0.00	\$0.00	\$0.00
00 04 00	1	\$1,000.00	\$0.00	\$0.00	\$0.00
00 04 01	1	\$0.00	\$0.00	\$2,500.00	\$0.00
00 04 02	1	\$1,000.00	\$0.00	\$0.00	\$0.00
00 04 03	1	\$300.00	\$0.00	\$0.00	\$0.00
	Grand Totals:	\$55,450.00	\$0.00	\$35,625.00	\$0.00

31 Gift(s) listed

20 Donor(s) listed

WPG Solicitor Performance

The **WPG Solicitor Performance Report** is based on the Solicitor Performance Analysis report under Analytical Reports. It is customized to reflect the unique features of gift processing for the United Way. It allows you to track the progress of an organization's solicitors against their assigned goals. It offers both a Detail View and a Summary View. Gift Types are hard-coded for the WPG Solicitor Performance Report, to comply with The United Way's processing demands. The exact data included depends on your parameter tab settings.

Report Parameters (for detail)

Records to include: All

Date to Use: Gift date

Date: This calendar yr

Soft Credit Gifts To: Donor

Include these Constituents: Inactive, Constituents with no valid addresses

Credit Matching Gifts To: MG Company

Report Type: Both

Filters: Include all Constituent Codes, Funds, Appeals, Campaigns, Pledge Types

Solicitors: Base report on specific campaign goal

Campaign: Annual Campaign

Structures and Attributes: none

What would you like to print: Address & phone

Phone type: First telephone found

Consider addresses with seasonal dates as of: Today

Address to use: Preferred address

Address Attributes: No address attributes specified

Specify what happens if no address is found: Print with no address

Columns: Constituent, Structure ID, Employee Pledges, Corporate Pledges, Total Pledges, Pledge Balance

Report Orientation: Landscape

Title: WPG Solicitor Performance Report

Align: Center

Print report heading on each page: Yes

Include column totals: Yes

WPG Solicitor Performance Report (Detail view)

<u>Constituent</u>	<u>Structure ID</u>	<u>Employee Pledges</u>	<u>Corporate Pledges</u>	<u>Total Pledges</u>	<u>Pledge Balance</u>
Joseph Diresta					
Acme Insurance 123 Main St Charleston, SC 29401	01 01 02	\$ 7,000.00	\$ 5,000.00	\$ 12,000.00	\$ 4,000.00
Brown & Davidson Insurance 182 E. Bay St. Charleston, SC 29401 (843) 555-1121	01 01 02	\$ 4,000.00	\$ 2,000.00	\$ 6,000.00	\$ 1,500.00
		\$ 11,000.00	\$ 7,000.00	\$ 18,000.00	\$ 5,500.00
100.00% (2 of 2) gave/pledged					
2005 Campaign Goal:		\$ 20,000.00			
Total Raised:		\$ 18,000.00			
Over(Under):		\$ (2,000.00)			
Michael Robertson					
Bank of the Lowcountry 456 Main St Charleston, SC 29401	01 02 01	\$ 9,000.00	\$ 4,000.00	\$ 13,000.00	\$ 2,500.00
First Regional Bank 1002 King Street Charleston, SC 29401 (843) 555-2201	01 02 01	\$ 10,000.00	\$ 5,000.00	\$ 15,000.00	\$ 3,000.00
Security First Bank 876 Market Street Charleston, SC 29401 (843) 555-0229	01 02 01	\$ 6,500.00	\$ 3,000.00	\$ 9,500.00	\$ 1,800.00
		\$ 25,500.00	\$ 12,000.00	\$ 37,500.00	\$ 7,300.00
100.00% (3 of 3) gave/pledged					
2005 Campaign Goal:		\$ 25,000.00			
Total Raised:		\$ 37,500.00			
Over(Under):		\$ 12,500.00			
Grand Total:		\$ 36,500.00	\$ 19,000.00	\$ 55,500.00	\$ 12,800.00

WPG Solicitor Performance Report (Summary view)

<u>Solicitor</u>	<u>Employee Pledges</u>	<u>Corporate Pledges</u>	<u>Total Pledges</u>	<u>Pledge Balance</u>	<u>Goal</u>	<u>Over(Under)</u>	<u>Donors</u>	<u>Out Of</u>	<u>Percent</u>
Joseph Diresta	\$ 11,000.00	\$ 7,000.00	\$ 18,000.00	\$ 5,500.00	\$ 20,000.00	\$ (2,000.00)	2	2	100.00%
Michael Robertson	\$ 25,500.00	\$ 12,000.00	\$ 37,500.00	\$ 7,300.00	\$ 25,000.00	\$ 12,500.00	3	3	100.00%
Grand Total:	\$ 36,500.00	\$ 19,000.00	\$ 55,500.00	\$ 12,800.00	\$ 45,000.00	\$ 10,500.00	5	5	100.00%



Appendix A: Workplace Giving Import Fields

Constituent Imports

Using **Import**, you can import a new constituent record into *The Raiser's Edge*, update an existing constituent record, or create an import file with constituent information. You can import a large number of *Workplace Giving* specific fields into your constituent records. For more information about general constituent imports, see the *Import Guide*.

Constituent Import Fields

The following *Workplace Giving* nodes are available in constituent imports.

Structures Node

Raiser's Edge Field	Import Name	Required?	Notes
Campaign ID	CampID	Yes	
Ind. Structure Code Import ID	IndStCdImpID	When updating existing records or creating an Import File.	
Ind. Structure Code 1	IndStrCode1	No	
Ind. Structure Code 2	IndStrCode2	No	
Ind. Structure Code 3	IndStrCode3	No	
Ind. Structure Code 4	IndStrCode4	No	
Ind. Structure Code 5	IndStrCode5	No	
Ind. Structure Code 6	IndStrCode6	No	

UW Account Node

Raiser's Edge Field	Import Name	Required?	Notes
United Way Account?	UWAcct	Yes	
UW Account Import ID	UWAcctImpID	When updating existing org records as UW accounts or creating an Import File.	
Corporate status	CorStatus	When importing as a new UW acct or creating an Import File.	
Employee status	EmpStatus	When importing as a new UW acct or creating an Import File.	
SIC code	SICCode	No	
Budget decision date	BudDecDate	No	
NCC subsidiary code 1	NCCSubCode1	No	
NCC subsidiary code 2	NCCSubCode2	No	
NCC subsidiary code 3	NCCSubCode3	No	
EIN	EIN	No	
UW characteristic	UWChar	No	
Other characteristic	OtherCharc	No	
NCL account?	NCLAccount	No	
Payroll calculation?	PYCalc	No	
Own campaign material?	OwnCampMat	No	
Payout basis	PayoutBasis	No	
Admin fee waived?	AdminFeeWaived?	No	
CL fee waived?	CLFeeWaived?	No	
Admin fee %	AdminFee	No	
CL fee %	CLFee	No	
Max admin fee	MaxAdminFee	No	
Max CL fee	MaxCLFee	No	

UW Agency Node

Raiser's Edge Field	Import Name	Required?	Notes
UW Agency Import ID	UWAgencyImpID	When updating existing org. records as UW Agencies or creating an Import File.	
Is Agency?	IsAgency	Yes	
Payout begin date	PayoutBegDt	No	
UW Eligibility?	UWEligibility	No	
Eligibility code	ElgCd	No	
Payout status	PayoutStatus	No	
Vendor code	VendorCd	No	
In goal?	InGoal	No	

Constituent UW Account Import

The Constituent UW Account import is used to update or create United Way account information on organization constituent records, or to create an import file containing that information.

Structures Node

Raiser's Edge Field	Import Name	Required?	Notes
Campaign ID	CampID	Required if updating structure codes	This node not available when creating an Import file.
Structure Code Import ID	StrCdImpID	When updating existing records.	
Structure Code 1	StrCd1	No	
Structure Code 2	StrCd2	No	
Structure Code 3	StrCd3	No	
Structure Code 4	StrCd4	No	
Structure Code 5	StrCd5	No	
Structure Code 6	StrCd6	No	

UW Account Node

Raiser's Edge Field	Import Name	Required?	Notes
United Way Account?	UWAcct	When creating new records or creating an Import File.	
Constituent ID	ConID	When creating new records or updating existing records.	
Constituent Import ID	ConImpID	When creating new records or updating existing records.	
UW Account Import ID	UWAcImpID	When updating existing records or creating an Import File.	
Corporate status	CorpStat	When creating new records or creating an Import File.	
Employee status	EmpStatus	When creating new records or creating an Import File.	
SIC code	SICCd	No	
Budget decision date	BudDecDt	No	
NCC subsidiary code 1	NCCSubCd1	No	
NCC subsidiary code 2	NCCSubCd2	No	
NCC subsidiary code 3	NCCSubCd3	No	
EIN	EIN	No	
UW characteristic	UWChar	No	
Other characteristic	OtherChar	No	
NCL account?	NCLAcct	No	
Payroll calculation?	PayrollCalc	No	
Own campaign material?	OwnCampMat	No	
Payout basis	PayBasis	No	
Admin fee waived?	AdmFeeWaived?	No	
CL fee waived?	CLFeeWaived?	No	
Admin fee %	AdmFee	No	
CL fee %	CLFee	No	
Max admin fee	MaxAdFee	No	
Max CL fee	MaxCLFee	No	

Constituent UW Agencies Import

The Constituent UW Agencies import is used to update or create United Way agency information on organization constituent records, or to create an import file containing that information.

Eligibility Criteria Node

Raiser's Edge Field	Import Name	Required?	Notes
Eligibility Criteria Import ID	ElCrImpID	When updating existing records.	This node not available when creating an Import file.
Fund	Fund	No	
Designation Code	DesigCd	No	
Eligibility Date	ElgDt	No	
Group Code	GrpCd	No	
Allocation Amount	AllAmt	No	

UW Agency Node

Raiser's Edge Field	Import Name	Required?	Notes
UW Agency Import ID	UWAgImpID	When updating existing records or creating an Import File.	
Constituent Import ID	ConImpID	When importing new records or creating an Import File.	
Is Agency?	IsAgency	When importing new records or creating an Import File.	
Payout begin date	PayBegDt	No	
UW Eligibility?	UWEIg	No	
Eligibility code	ElgCd	No	
Payout status	PayoutStatus	No	
Vendor code	VenCd	No	
In goal?	InGoal	No	

Gift Imports

Using **Import**, you can import a new gift record into *The Raiser's Edge*, update an existing gift record, or create an import file with the gift information. You can import a large number of *Workplace Giving* specific fields into your gift records. For more information about general gift imports, see the *Import Guide*.

Gift Import Fields

The following *Workplace Giving* fields are available in gift imports.

Raiser's Edge Field	Import Name	Required?	Notes
Account Number	AccntNum	No	
Envelope ID	EnvID	When importing new records or creating an Import File.	
Pledge Envelope Import ID	PEImportID	When updating existing records or creating an Import File.	

UW Pledge Detail Imports

The UW Pledge Detail import is used to update or create detail information on pledge envelopes, or to create an import file containing that information.

Pledge Detail Import Fields

The following nodes are available in Pledge Detail imports.

Designations Node

Raiser's Edge Field	Import Name	Required?	Notes
Amount	UWPEDDAmount	No	This node not available when creating an Import file.
Comments	UWPEDDComments	No	
Detail Import ID	UWPEDIImportID	When importing new or updating existing records.	
Designation Import ID	UWPEDDDesImpID	When updating existing records or creating an Import File.	
Name	UWPEDDName	No	
Pledge Detail Import ID	UWPEDDUWPEDIImportID	No	
UW Agency Import ID	UWPEDDAgnImpID	No	
Fund ID	UWPEDDFundID	No	

UW Pledge Detail Node

Raiser's Edge Field	Import Name	Required?	Notes
Pledge type	UWPEDPledgeType	Yes	
Constituent ID	ConsID	When importing new or updating existing records.	
Constituent Import ID	UWPEDConstImpID	When importing new or updating existing records.	
Import ID	ImportID	Required when updating existing records.	
Pledge amount	UWPEDPledgeAmt	No	
Pay method	UWPEDPayMethod	No	
Check number	UWPEDCheckNum	No	
Check date	UWPEDCheckDate	No	
Pledge Envelope Import ID	UWPEDPledgeEnvImpID	When updating existing records or creating an Import File.	
Ack?	UWPEDAck	No	
Anon?	UWPEDAnon	No	
Card type	UWPEDCardType	No	
Card number	UWPEDCardNum	No	
Expires on	UWPEDExpiresOn	No	
Card holder	UWPEDCardHolder	No	
Auth. Code	UWPEDAuthCode	No	
Bill method	UWPEDBillMethod	No	
Payment amount	UWPEDPayAmt	No	
Billing frequency	UWPEDBillingFreq	No	
No. of installments	UWPEDNoOfIns	No	
Starting date	UWPEDStartDate	No	
Pledge Detail Import ID	UWPEDImportID		

UW Pledge Envelope Imports

The UW Pledge Envelope import is used to update or create pledge envelope records, or to create an import file containing that information.

Pledge Envelope Import Fields

The following nodes are available in Pledge Envelope imports.

Pledge Envelope Summary Node

Raiser's Edge Field	Import Name	Required?	Notes
Pledge type	UWPESPledgeType	No	This node not available when creating an Import file.
No. Gifts	UWPESNoGifts	No	
Total pledge amount	UWPESTotalPledgeAmount	No	
Initial payment amount	UWPESIniPayAmt	No	

UW Pledge Detail Node

Raiser's Edge Field	Import Name	Required?	Notes
Pledge Type	UWPEPD PledgeType	No	This node not available when creating an Import file.
Constituent ID	UWPEPDConsID	No	
Pledge amount	UWPEPD PledgeAmount	No	
Pay method	UWPEPD PayMethod	No	
Check number	UWPEPDCheckNumber	No	
Check date	UWPEPDCheckDate	No	
Ack?	UWPEPD Ack	No	
Anon?	UWPEPD Anon?	No	
Card type	UWPEPD Cardtype	No	
Card number	UWPEPD CardNum	No	
Expires on	UWPEPD ExpiresOn	No	
Card holder	UWPEPD CardHolder	No	
Auth. Code	UWPEPD AuthCode	No	
Bill method	UWPEPD BillMethod	No	
Payment amount	UWPEPD PayAmount	No	
Billing frequency	UWPEPD BillingFreq	No	
No. of installments	UWPEPD NoOfInst	No	
Starting date	UWPEPD StartDate	No	
Constituent Import ID	UWPEPD ConsImpID		
Pledge Detail Import ID	UWPEPD ImportID		

UW Pledge Envelope Node

Raiser's Edge Field	Import Name	Required?	Notes
Constituent ID	ConsID	No	

Raiser's Edge Field	Import Name	Required?	Notes
Constituent Import ID	ImportID	Yes	
Pledge Envelope Import ID	UWPEPledgeImportID	When updating existing records or creating an Import File.	
No. employees	UWPENoEmployees	No	
Corporate envelope status	UWPECorpEnvelopeStatus	When importing new records or creating an Import File.	
Employee envelope status	UWPEEmployeeEnvStatus	When importing new records or creating an Import File.	
Envelope batch	UWPEBatch	No	
Envelope ID	UWPEID	When importing new records or creating an Import File.	
Envelope date	UWPEEnvDate	When importing new records or creating an Import File.	
Campaign ID	UWPECampaignID	When importing new records or creating an Import File.	
Fund ID	UWPEFundID	When importing new records or creating an Import File.	
Deposit no.	UWPEDepositNo	No	
Deposit date	UWPEDepositDate	No	
Acknowledge status	UWPEAckStatus	When importing new records or creating an Import File.	

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