

The Raiser's Edge™

Campaigns, Funds, & Appeals Data Entry Guide

012512

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Contents



WHAT IS IN THIS GUIDE?	III
CAMPAIGNS, FUNDS, & APPEALS	1
Frequently Used Terms	4
Navigate in Campaigns, Funds, and Appeals	6
User Options	10
Campaigns, Funds, and Appeals: How Do They Work Together?	14
Campaigns	15
Funds	34
Appeals	56
Campaigns, Funds, and Appeals Reports	82
INDEX	85

What Is In This Guide?



In the *Campaigns, Funds, & Appeals Guide*, you learn how to create these records and how they interact. You can also learn about the following.

- “Navigate in Campaigns, Funds, and Appeals” on page 6
- “Campaigns” on page 15
- “Campaign Records” on page 15
- “Funds” on page 34
- “Fund Records” on page 34
- “Appeals” on page 56
- “Appeal Records” on page 56

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 topics with the complete phrase instead of those with the individual words.

Campaigns, Funds, & Appeals



Frequently Used Terms	4
Navigate in Campaigns, Funds, and Appeals	6
Access a Campaign Record, a Fund Record, or an Appeal Record	6
Toolbars	9
User Options	10
Campaigns, Funds, and Appeals: How Do They Work Together?	14
Campaigns	15
Campaign Records	15
General Tab	15
Solicitors Tab	16
Funds Tab	17
Appeals Tab	18
Attributes Tab	19
Events Tab	20
Add Campaigns	20
Campaign, Fund, and Appeal Solicitors	22
Manage Campaigns	26
Associate and Copy Funds	27
Associate and Copy Appeals	30
Campaign Attributes	32
Campaign Properties	33
Funds	34
Fund Records	34
General Tab	35
Solicitors Tab	36
Campaigns Tab	37
Appeals Tab	38
Fund Relationships Tab	39
GL Distributions Tab	39
Attributes Tab	41
Add Funds	42
Manage Funds	44
Associate and Copy Campaigns	46
Associate and Copy Appeals	48
Add Relationships to Funds	50
Add General Ledger Information to a Fund	51
Fund Properties	55
Appeals	56
Appeal Records	56

General Tab	57
Solicitors Tab	58
Campaigns Tab.....	59
Funds Tab.....	60
Packages Tab	61
Actions Tab.....	64
Attributes/Expenses Tab.....	65
Add Appeals.....	66
Manage Appeals	69
Associate and Copy Campaigns	70
Associate and Copy Funds	72
Add Packages to an Appeal.....	74
Attributes/Expenses Tab.....	77
Appeal Properties	81
Campaigns, Funds, and Appeals Reports	82
Summaries.....	82
Profiles	83
Gift Lists	83
Reports.....	83

Procedures

Open a campaign record	7
Establish Campaign, Fund, or Appeal user options	11
Establish options for General Ledger account number formatting in funds	13
Add a campaign.....	20
Add a solicitor to a campaign, a fund, or an appeal.....	23
Add a solicitor team to a campaign, a fund, or an appeal.....	24
Remove a solicitor or team from a campaign, a fund, or an appeal.....	25
Edit a campaign.....	26
Delete a campaign	27
Associate funds with a campaign.....	27
Copy associated funds from an existing campaign or appeal into a new campaign	29
Associate appeals with a campaign.....	30
Copy associated appeals from an existing campaign or fund into a new campaign	31
Assign attributes to a campaign.....	32
Delete attributes from a campaign	33
View campaign properties	33
Add a fund	42
Edit a fund	44
Delete a fund.....	45
Associate campaigns with a fund.....	46
Copy associated campaigns from an existing fund or appeal into a new fund	47
Associate appeals with a fund	48
Copy associated appeals from an existing campaign or fund into a new fund	49
Add a relationship to a fund.....	50
Add account information and General Ledger account distributions, projects, and transaction codes to a fund.....	52

View fund properties 55

Add an appeal 66

Edit an appeal 69

Delete an appeal 70

Associate campaigns with an appeal 70

Copy associated campaigns from an existing fund or appeal into a new
 appeal 72

Associate funds with an appeal 72

Copy associated funds from an existing campaign or appeal into a new
 appeal 74

Add a new package 75

Copy packages from one appeal to another 77

Assign attributes and expenses to an appeal 78

View Financial Edge expenses for an appeal 79

View appeal properties 81

Campaigns, funds, and appeals are the foundation on which you build your successful fundraising efforts. Although separate records, they are closely related. To manage your gifts and the expenses involved to obtain those gifts, you must understand how campaigns, funds, and appeals work with one another. To define the terms, think of campaigns as your overall objectives to raise money; funds as the specific financial purposes of gifts; and appeals as the solicitations and promotions that bring in gifts.

When you begin fundraising, you specify a purpose for the funds to raise, define a monetary goal to achieve, and develop a structured plan to realize your goals. Before you begin to add gifts to your database, you should define this structure and set your goals in *The Raiser's Edge*. Then, when you begin to receive gifts, you can track your progress and evaluate the cost-effectiveness of your efforts.

Note: To help associate records, you can have multiple campaigns, funds, and appeals open at the same time.

In *The Raiser's Edge*, you can establish new campaigns, funds, and appeals, and associate and cross reference existing ones. When you associate campaign, fund, and appeal records, you can specify a default so that, when you add a record to a gift, the default campaign, fund, or appeal also automatically appears on the gift. To save time when you enter gifts, associate your campaign, fund, and appeal records. For example, if you add gifts to several different funds, but also add them all to your Capital Campaign, you can associate each fund with the campaign. Now, when you add one of the funds to a gift, *The Raiser's Edge* automatically adds the Capital Campaign to the gift record. When you associate records, you can also narrow search results to show only associated records.

The Raiser's Edge helps you assign and manage solicitors for your campaigns, funds, and appeals. Solicitors are members of your organization who pursue donations through telephone contact with potential donors, personal meetings, or any other means your organization uses. You can arrange your solicitors in a hierarchical order and specify who solicitors report to. You can group solicitors into teams and assign team captains. When you assign goals for solicitors, you can run reports such as the Solicitor Performance Analysis to examine the effectiveness of your solicitors.

You can set goals for a campaign, fund, or appeal and produce a wide variety of reports to analyze the success of your fundraising activities. For example, the Campaign Progress Report and the Fund Performance Analysis show how your campaigns and funds perform, while Appeal summaries show the cost versus dollar amount donated for an appeal. You can also print lists of all your campaigns, funds, and appeals to keep for your records.

Although you can create campaigns, funds, and appeals as you add gifts in *The Raiser's Edge*, we recommend you set up your campaigns, funds, and appeals before you begin to enter gifts. By doing so, you can use information such as start and end dates and overall goals to take full advantage of reports that analyze the progress and success of your campaigns, funds, and appeals. When you receive gifts in response to your fundraising efforts, you can specify on the gift record the campaign, fund, and appeal to which the gift belongs. In the **Campaign** and **Fund** fields, specify how you plan to use the gift. In the **Appeal** field, select the appeal used to ask the constituent to give the gift. With campaigns, funds, and appeals in *The Raiser's Edge*, you can closely monitor your fundraising efforts and develop statistics to determine the financial progress of your campaigns and the cost-effectiveness of your appeals.

Frequently Used Terms

If you come across an unfamiliar term as you read this or any other chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file. These terms appear throughout this chapter.

Campaign. A campaign is your overall objective to raise money. For example, a museum can have a New Building Campaign with the objective to raise money for a new location. Of campaigns, funds, and appeals, campaigns are the broadest type of record. Campaigns act as an umbrella over funds and appeals.

A single campaign can have any number of funds and appeals under it. For example, the museum can have both a Moving Fund and a Computer Equipment Fund under the New Building Campaign. The overall objective is to raise money for the new building. Within this objective, gifts to the specific funds help to cover expenses for moving and to purchase computer equipment to use in the new building. Another example is a Disaster Relief Campaign for the National Red Cross. Within the overall objective to raise funds to assist victims of all types of disasters, the National Red Cross can have a Hurricane Relief Fund and the somewhat broader General Relief Fund. If your organization has many designated purposes for gifts, you can have numerous funds with only a few campaigns.

Fund. A fund identifies where to track gifts and pledges for financial purposes. Funds are key to gift management. Because funds are so closely linked with gifts, the **Fund** field is required when you enter gifts. On the fund record, you can specify to which bank accounts to apply gifts associated with the fund. To ensure you enter these account numbers accurately, we strongly recommend you consult with your business department. If you have Blackbaud's **General Ledger**, you can link the databases of the two programs so you can enter gifts once for both programs. This cuts your data entry time in half. When you enter gifts into **The Raiser's Edge**, the program automatically credits and debits selected accounts in **General Ledger** based on the gift type. The program can also distribute gifts among multiple **General Ledger** accounts and projects.

GL Distribution. A **General Ledger** account distribution is the accounting practice to spread or distribute percentage amounts of gifts to multiple **General Ledger** fund accounts. If you have the **General Ledger** optional module *GL:Project, Grant, and Endowment Management*, you can also distribute gifts among multiple projects. For example, a library can specify that gifts to its General Fund be distributed evenly among several **General Ledger** accounts and applied to its Auditorium Renovation, Antique Book Restoration, and Parking Lot Addition projects.

Appeal. An appeal is a solicitation that brings in your gifts. Solicitations can include auctions, direct mailings, and phonathons. Because some of your gifts can be unsolicited, you do not have to associate an appeal with a gift. You can set goals for your appeals and run reports to show how close you are to those goals. Additionally, you can create packages to track historic and statistical information for different facets of an appeal.

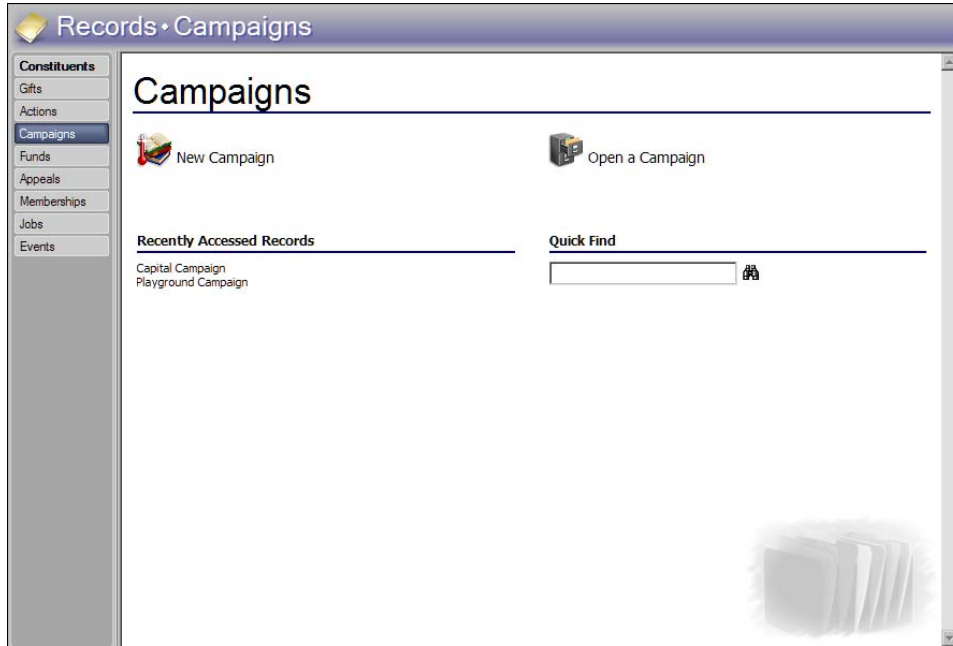
Package. A package allows you to track and analyze the profitability of different solicitations within a single appeal. For example, if you have a Summer Phonathon in which your organization calls low-level donors with a prerecorded message and major donors with a personal telephone contact, you can create a separate package for each. You can then break down summaries to pinpoint the effectiveness and expense of each type of call instead of a single summary for the entire phonathon. Packages let you precisely analyze the effectiveness of your appeals. You can analyze packages during or after an appeal.

Solicitor. A solicitor is a member of your organization who seeks donations from constituents. Solicitors play a vital role in your fundraising efforts. Your solicitors can have a range of duties, such as to call, visit, and dine with prospective donors and to organize campaigns and funds. In **The Raiser's Edge**, you must enter your solicitors in the database as constituents. For information about how to make a constituent a solicitor, see the *Constituent Data Entry Guide*.

On the Solicitors tab of a campaign record, a fund record, or an appeal record, you assign solicitors to the campaign, fund, or appeal. You can organize the solicitors in a hierarchy with solicitors who report to other solicitors. You can also arrange solicitors into teams with appointed captains. You can assign solicitors a goal and use a Solicitor Performance Analysis report to analyze their success.

Navigate in Campaigns, Funds, and Appeals

The Campaigns, Funds, and Appeals pages are where you go to add a new campaign, fund, or appeal record or open an existing one. To access the Campaigns, Funds, or Appeals pages, on the Raiser's Edge bar, click **Records**. The Records page appears. To access the page for a specific record type, click **Campaigns**, **Funds**, or **Appeals**. For example, when you click **Campaigns**, the Campaigns page appears.



Note: To open a record directly from the menu, select **File, Recently Accessed Campaigns, Funds, or Appeals**, depending on the record type you have open. From the **Campaign, Fund, or Appeal** menu (depending on which record type you open), you can access the first, previous, next, or last record in your database. To open a campaign, fund, appeal, or appeal package, select it in the grid and select **Go To**.

From the Campaigns, Funds, or Appeals pages, you can open your most recently accessed records or quickly search for another record. If you know all or part of the name of the record to open, use the **Quick Find** field. In the field, enter a single word or multiple words or, if you do not know the entire name, enter partial words, and click the binoculars or press **ENTER** on your keyboard. *The Raiser's Edge* searches for a campaign, a fund, or an appeal that begins with the words or parts of words entered. If the program finds multiple matches, the Open screen appears and lists those records. If the program cannot match your entry with a record, a message appears to inform you that no matches were found. For a more detailed search, see "Access a Campaign Record, a Fund Record, or an Appeal Record" on page 6.

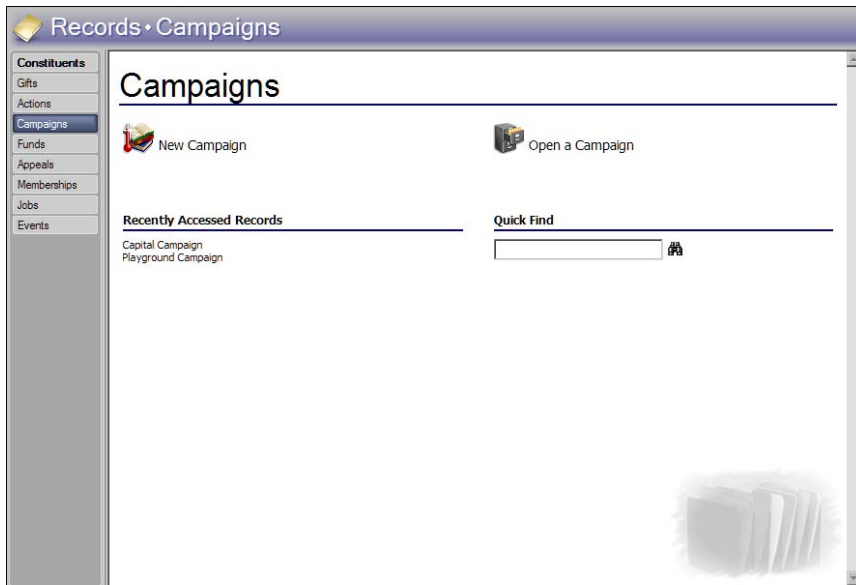
Access a Campaign Record, a Fund Record, or an Appeal Record

You can open a campaign record, a fund record, or an appeal record from the Campaigns, Funds, and Appeals pages of *Records*. For this procedure, we open a campaign record. To open a fund or an appeal, substitute either for campaigns in this procedure.

► **Open a campaign record**

You can use a wide variety of criteria to find and open a campaign. You do not have to make an entry in each field on the Open screen. To find a particular campaign, you can use the combination of filters that works best for you. For more information about the Open screen, see the “Program Basics” chapter of the *Program Basics Guide*.

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.



3. On the Campaigns page, if you know all or part of the name of the campaign to open, use the **Quick Find** field. In the field, enter a single word, multiple words, or, if you do not know the entire name, partial words and click the binoculars. *The Raiser’s Edge* searches for a campaign that begins with the words or parts of words entered.

If the program finds multiple matches, the Open screen appears and lists the campaigns. If the program cannot match your entry with a record, a message appears to ask whether to search for the record. If you click **Yes**, the Open screen for campaigns appears. If you click **No**, you return to the Campaigns page.

4. For a more detailed search, click **Open a Campaign**. The Open screen for campaigns appears.

5. The **Find** field is disabled with “Campaign” as the entry. In the **Search using query** field, select or edit the query with the criteria to use as part of your search. The default dynamic query contains no filters and lists **Campaign ID**, **Description**, **Start Date**, and **End Date** as output.

If you select a new or existing query in the **Search using query** field, **The search query is not the default. Click here to reset.** appears. To clear the criteria from the search query, click this link.

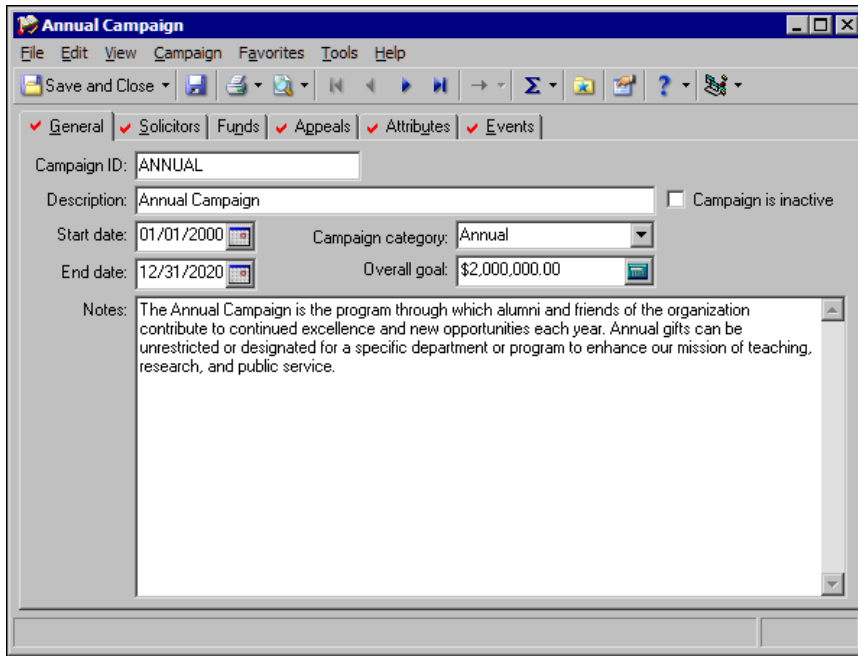
Note: If you do not know the correct spelling or number, enter the first few letters or characters in the criteria fields under **Find Campaigns that meet these criteria**. You can also use the wildcard characters * and ? as a substitute for all or part of your entries in these fields.

6. Under **Find Campaigns that meet these criteria**, decide how to filter campaigns in this search and enter the information in the appropriate criteria fields. You can enter a value in all the fields or none, depending on how you filter your search.
- In the **Campaign ID** field, enter the ID of the campaign. For example, enter “CAP08” for an annual Capital Campaign with that ID.
 - In the **Campaign desc** field, enter the complete title of a campaign, such as “Campaign for Excellence”.

Warning: Since the results that appear in the grid must match all criteria you enter, we recommend you search by one or two of the most helpful criteria types. Too much criteria information in the **Find Campaigns that meet these criteria** fields can prevent you from finding a campaign.

- In the **Category** field, enter the category of the campaign. For example, enter “Annual” to list all annual campaigns.
- To include campaigns flagged as inactive on the campaign records, mark **Display inactive campaigns**.
- To include campaigns that include a specific date, mark **Display campaigns with a date range containing** and enter the date in the field.
- To include only campaigns that match the criteria entered exactly, mark **Exact match only**.
- On the fund record only, to display only funds flagged as restricted, mark **Display restricted funds only**.

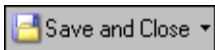
7. Click **Find Now**. If the search criteria entered matches a campaign in the database, the campaign appears in the grid. If you enter the first few letters or characters in the criteria fields or general criteria such as the category, multiple campaigns can appear.
8. In the grid, select the campaign record to open.
9. Click **Open**. The campaign record appears.



10. To save your changes, click **Save and Close** on the toolbar. You return to the Campaigns page.

Toolbars

Campaign, fund, and appeal records contain several toolbar buttons to help you carry out commands quickly and easily without using the menu bar. If you have security rights to change your user options, you can mark **Show Tooltips** on the General Tab of User Options so when you move the cursor across a button, a description of its function displays.



Save and close the current record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record, and open a new record.)



Save the record and keep the record open



Print



Preview



Go to the first record



Go to the previous record



Go to the next record



Go to the last record



Go to a selected record in a grid



Calculate and view a summary for the campaign, fund, or appeal



Add to Favorites



View properties



Access help contents



Run Macros (visible if you have the optional module *RE:VBA*)

User Options

You can establish certain user options, or preferences, for campaigns, funds, or appeals. For example, you can decide what tab first appears when you add or open a record, select the tabs the program checks for data when you open a record, and select how the campaign, fund, or appeal name appears on other records. Campaign, fund, and appeal options are similar. If you have Blackbaud's **General Ledger**, additional options are available to determine how **General Ledger** account numbers appear in funds. For more detailed information about user options, see the *Program Basics Guide*.

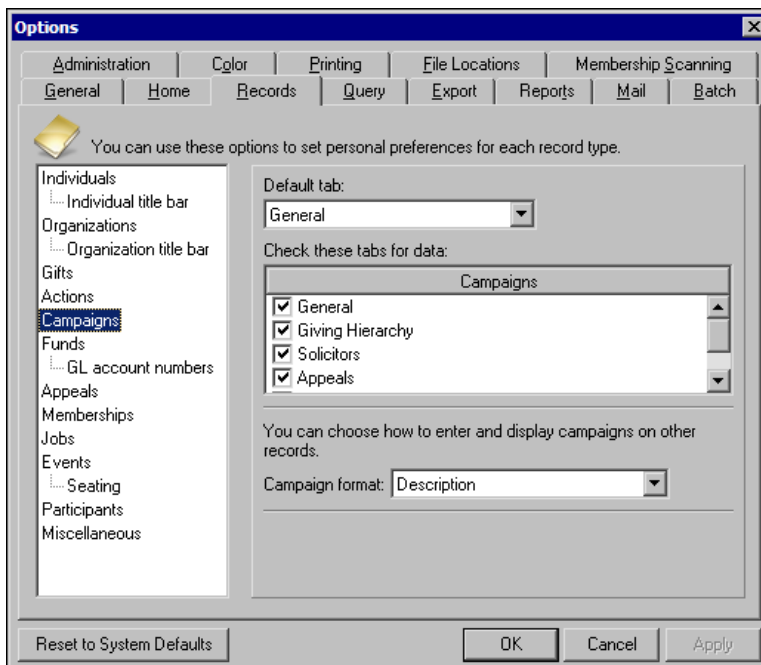
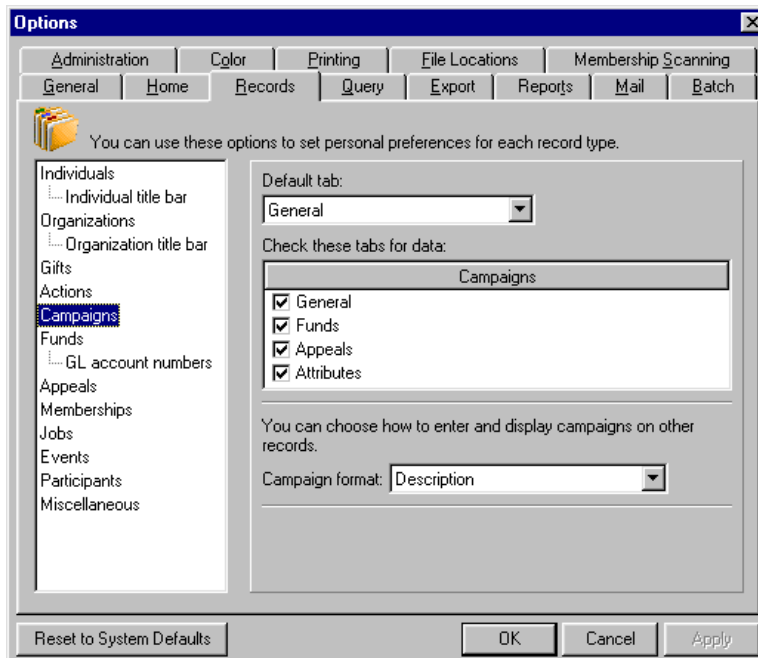
► **Establish Campaign, Fund, or Appeal user options**

Campaign, fund, and appeal options are almost identical for each record. For this procedure, we set options for campaigns. To set options for funds or appeals, substitute either for campaigns in this procedure.

Note: You can access user options from the menu bar of a campaign, fund, or appeal record. When you do so, the Options screen appears with the Records tab selected. The option selected in the tree view depends on the type of record from which you access User Options. For example, if you access User Options from an appeal record, the Options screen Records tab appears with **Appeals** selected in the tree view.

1. From the shell menu bar, select **Tools, User Options**. The Options screen appears.
2. Select the Records tab.

3. In the tree view, select **Campaigns**.

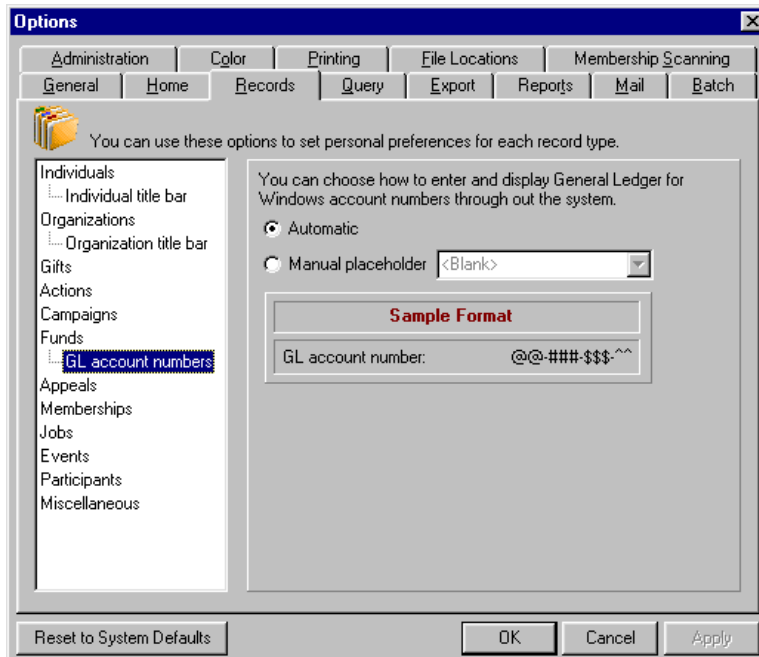


4. In the **Default tab** field, select the tab to automatically appear first when you add or open a campaign record.
5. In the **Campaigns** box, mark the checkbox by the tabs the program searches for data. When you open a campaign, a check mark appears on each tab that contains data. This allows you to analyze a campaign at a glance without opening each tab on the record.
6. In the **Campaign format** field, select how campaigns appear throughout the program — by Campaign ID or Description.
7. Click **Apply** to apply and save your changes, or click **OK** to save your changes and close the Options screen.

► **Establish options for General Ledger account number formatting in funds**

This option appears only if you have Blackbaud’s *General Ledger*. You can mark an option to determine how *General Ledger* account numbers appear in funds.

1. From the shell menu bar, select **Tools, User Options**. The Options screen appears.
2. Select the Records tab.
3. In the tree view, select **Funds**.
4. Under **Funds**, click **GL account numbers**. If **GL account numbers** is not visible in the tree view and you have *General Ledger*, double-click **Funds. GL Account Numbers** appears as a branch.



5. Select how to display *General Ledger* account numbers in funds.
 - To use predefined characters in place of missing numbers in an account number, select **Automatic**. If you have not entered all digits in a debit or credit account number on a fund record, placeholders appear in place of the missing digits.

Note: The format and number of digits in a validated *General Ledger* account number is always the same. When you enter an account number, a placeholder appears in the place of any missing digits to let you know the account number is incomplete.

- To select a character to appear if an account number is incomplete, select **Manual placeholder** and select a character in the field. If you have not entered all digits in a debit or credit account number on a fund record, the selected placeholder appears in place of the missing digits. The **Sample Format** display shows how a number appears with your selected placeholder.
6. Click **Apply** to apply and save your changes, or click **OK** to save your changes and close the Options screen.

Campaigns, Funds, and Appeals: How Do They Work Together?

Think of campaigns as your overall objectives to raise money; funds as the specific financial purposes of gifts; and appeals as the solicitations and promotions that bring in gifts.

For example, a university wants to build a new library. The organization plans to apply each gift to the building, landscaping, furniture, or books. To manage these gifts, the university defines an overall Library Campaign, separate funds for building, landscaping, furniture, and books to identify how each gift will be used, and an appeal structure to track the way each gift was solicited.

LIBRARY CAMPAIGN	FUNDS	APPEALS	PACKAGES
	Building Fund	Year 1 Fall Direct Mail	Color brochure
			Holiday card
		Year 2 Spring Email	Newsletter
			President's letter
	Book Fund	Year 1 Winter Phonathon	Phone
			Home page
		Year 2 Sprint Website	Donation page
	Furniture Fund	Year 1 Fall Direct Mail	Color brochure
Holiday card			
Year 2 Spring Email		Newsletter	
		President's letter	
Landscape Fund	Year 2 Winter Direct Mail	Holiday card	
		Newsletter	
	Year 3 Spring TV Ad	TV commercial	
		Local news story	

A single campaign can have multiple funds and appeals under it. If your organization has many designated purposes for gifts, you may have numerous funds and only a few campaigns.

You can associate campaigns, funds, and appeals with each other, and then specify that only associated records be entered on gifts. For example, when you create your Planned Giving Campaign, you mark a checkbox to limit gift entry to only associated funds and appeals. Then, when you enter the Planned Giving Campaign on a gift record, if you must search for a fund or appeal to add to the gift, only those records associated with the Planned Giving Campaign appear in the search results.

When you establish and associate campaigns, funds, and appeals, you can develop a structured plan to realize your fundraising goals; closely monitor and control the purposes for the funds raised; and track the expenses and effectiveness of the methods used to raise these funds.

Campaigns

Campaigns are your overall objectives to raise money. For example, you can have a New Building Campaign, an Endowment Campaign, or an Annual Giving Campaign. You can set up a campaign to include information such as goals and start and end dates, and use this information to create summaries and reports to analyze the progress and success of the campaign. You can also identify the funds and appeals which make up the campaign.

Campaign Records

The campaign record consists of several tabs. The General tab contains basic information such as the name of the campaign. On the Solicitors tab, you can add, edit, or delete the solicitors for the campaign. On the Funds tab, you can associate funds with the campaign. You can do the same with appeals on the Appeals tab. When you associate a fund or an appeal with a campaign, you help speed your data entry for gifts. On the Attributes tab, you can customize *The Raiser's Edge* to store additional information about a campaign, such as whether it targets only major donors.

General Tab

The General tab includes fields in which you can enter an ID and a description for the campaign. The ID can include letters and numbers. We recommend the description contain the full name of the campaign. In User Options, you can select whether campaigns appear by description or ID throughout the program. For example, your organization can give an annual Planned Giving Campaign the ID of "PLANNED", but can select **Description** in User Options so the entire name appears in Thank-You letters and Campaign Progress reports.

The screenshot shows a software window titled "Scholarship Campaign". The window has a menu bar with "File", "Edit", "View", "Campaign", "Favorites", "Tools", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into tabs: "General", "Solicitors", "Funds", "Appeals", "Attributes", and "Events". The "General" tab is selected and contains the following fields:

- Campaign ID: SCHOLAR
- Description: Scholarship Campaign
- Start date: 01/01/2000
- End date: 06/30/2025
- Campaign category: (empty dropdown)
- Overall goal: \$5,000,000.00
- Notes: Hope to provide ten scholarships annually.
- Campaign is inactive

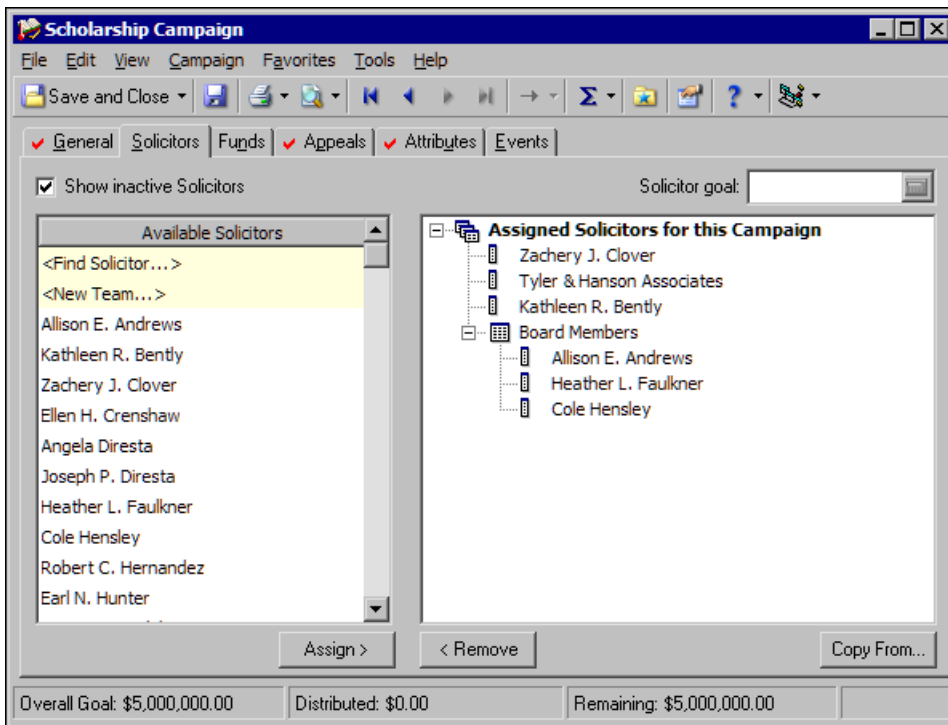
Note: To include inactive campaigns in a search, mark **Display inactive campaigns** on the Open screen.

If you mark **Campaign is inactive**, the program flags the campaign as inactive for campaign searches. If you have numerous campaigns, you can use this checkbox to limit searches to only current campaigns. You cannot add inactive campaigns to gift records. To define the duration of the campaign, enter a start and end date. You do not have to enter a date range for your campaign, but doing so allows you to base a campaign search on date ranges and increases the versatility of your reports.

To group campaigns together, enter a category in the **Campaign category** field, such as “Annual”, “Operating”, or “Capital”. You do not have to enter a value in the **Overall goal** field, but a goal can be helpful because you can use it to create a Campaign Goal Summary to show whether you are over or under your projected goal amount. In the **Notes** box, you can enter additional information about the campaign. For example, you can enter a note about the past success of a yearly campaign.

Solicitors Tab

On the Solicitors tab, you can assign solicitors and teams of solicitors to a campaign. The **Available Solicitors** box shows all constituents in your database who have been assigned as solicitors. To assign a constituent the role of solicitor, mark **Is a solicitor** on the Bio 1 or Org 1 tab of the constituent record. To display solicitors who are flagged as inactive, mark **Show inactive solicitors**. To assign a solicitor to the campaign, select the solicitor in the **Available Solicitors** box and click **Assign**. The solicitor moves to the box on the right.



If you have numerous solicitors and do not want to scroll through the entire list, or to search for a constituent who is not currently a solicitor, click **<Find Solicitor>** in the **Available Solicitors** box. The Open screen for constituents appears. When you find and select a constituent who is a solicitor on the Open screen, you return to the Solicitors tab and the selected solicitor appears in the box on the right.

Note: If you select an inactive solicitor on the Open screen, a message appears to ask whether to mark the solicitor as active again.

On the Open screen, **Constituent is a solicitor** is marked by default. To select a constituent who is not a solicitor, unmark the checkbox. If you select a constituent who is not a solicitor, a message appears to ask whether to make the constituent a solicitor. Click **Yes**. You return to the Solicitors tab and the constituent appears as a solicitor in the box on the right.

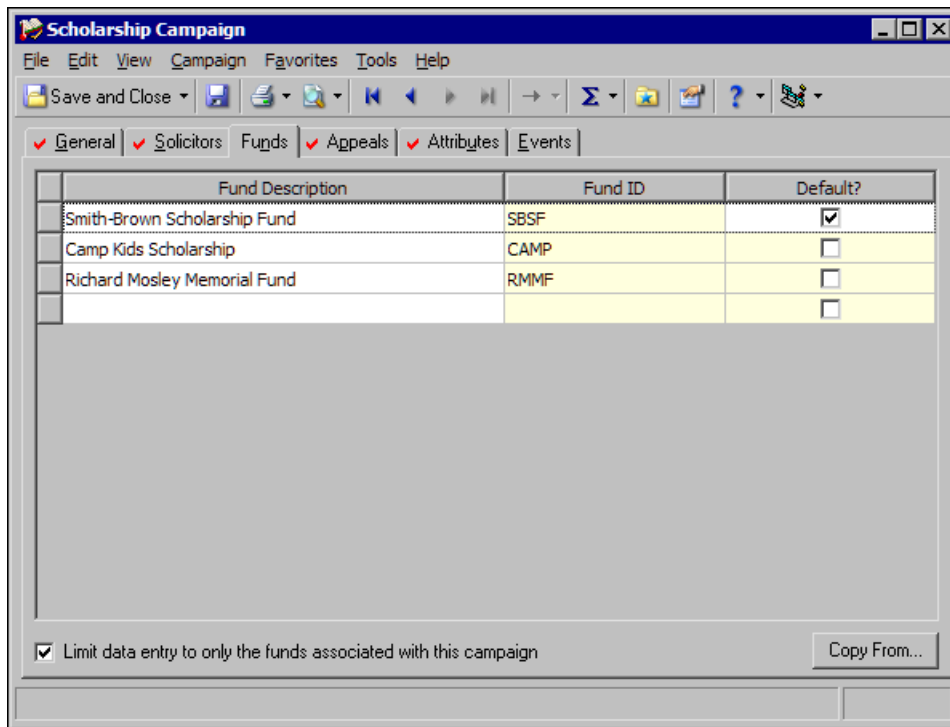
To copy solicitor assignments from another campaign, a fund, or an appeal, click **Copy From**. The Open screen appears so you can select the campaign, fund, or appeal from which to copy solicitor assignments into the current campaign.

You can assign solicitors individually or group them in teams. To create a new team, select **<New Team>** in the **Available Solicitors** box and click **Assign**. An entry appears in the box on the right. Enter the team name here. To assign a solicitor to a team, drag the solicitor entry over the team name.

To set a goal for an assigned solicitor, select the solicitor and enter the goal in the **Solicitor goal** field. To distribute the campaign goal evenly among the solicitors, select an assigned solicitor, right-click, and select **Distribute Overall goal** from the right-click menu.

Funds Tab

On the Funds tab, you can associate selected funds with a campaign. To quickly find and link a fund to a campaign, put the cursor in the **Fund Description** or **Fund ID** field (depending on how you enter and display funds in User Options), and click the binoculars or press **F7** on your keyboard. The Open screen for funds appears so you can find the fund to link to the campaign. From this tab, you can also create and add a new fund.

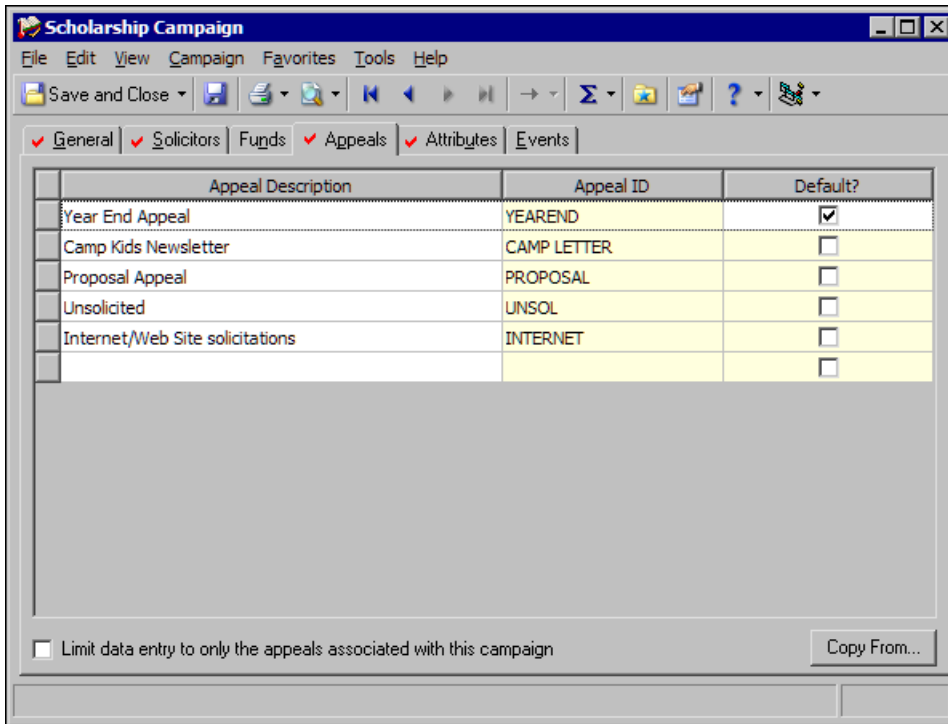


If you mark **Default?** for a fund, the **Fund** field automatically displays that fund when you assign gifts to the new campaign. You can select only one fund as the default. When you enter gifts given for this campaign, you can override the default and assign them to another fund, but a default fund can save time during gift entry.

If you leave **Limit data entry to only the funds associated with this campaign** unmarked, you can select and save any fund with any campaign when you enter gifts. If you mark the checkbox, when you enter a campaign on a gift record before you enter a fund or appeal, only funds associated with the campaign appear in fund searches when you try to associate the gift with a fund. When you click **Copy From**, the Open screen appears so you can locate another campaign or an appeal from which you can copy associated fund information.

Appeals Tab

On the Appeals tab, you can associate selected appeals with a campaign. To quickly find and associate an appeal to your campaign, put the cursor in the **Appeal Description** or **Appeal ID** field (depending on how you enter and display appeals in User Options), and click the binoculars or press **F7** on your keyboard. The Open screen for appeals appears so you can find the appeal to link to the campaign. From this tab, you can also create and add a new appeal.

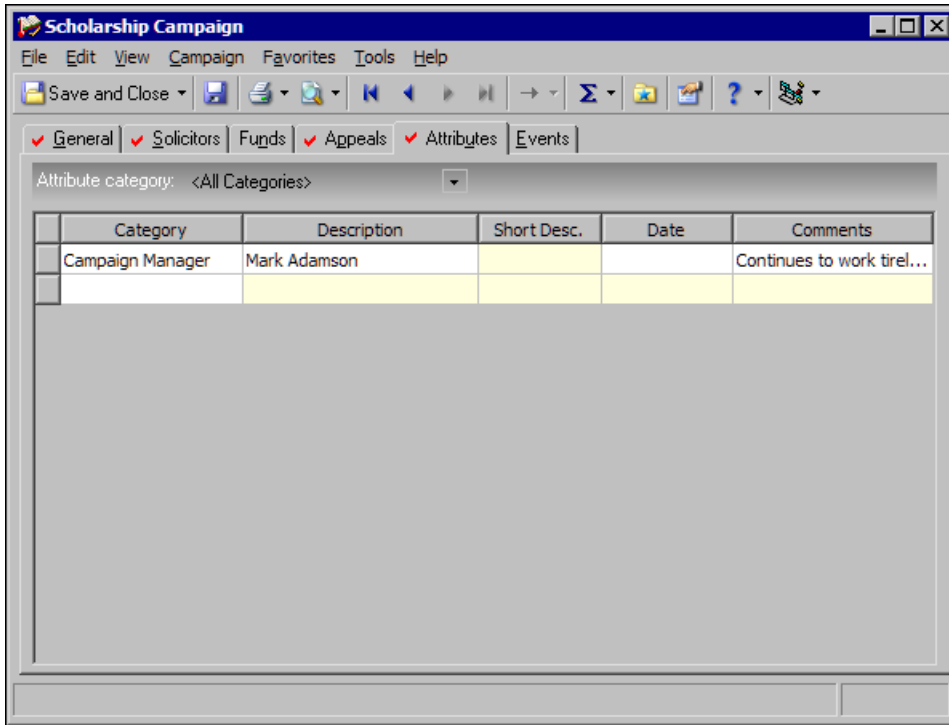


If you mark **Default?** for an appeal, the **Appeal** field automatically displays that appeal when you assign gifts to the new campaign. You can select only one appeal as the default. When you enter gifts given for this campaign, you can override the default and assign them to another appeal.

If you leave **Limit data entry to only the appeals associated with this campaign** unmarked, you can select and save any appeal with any campaign when you enter gifts. If you mark the checkbox, when you enter a campaign on a gift record before you enter a fund or appeal, only appeals associated with the campaign appear in appeal searches when you try to associate the gift with an appeal. When you click **Copy From**, the Open screen appears so you can locate another campaign or a fund from which you can copy associated appeal information.

Attributes Tab

On the Attributes tab, you can attach specialized information called attributes to your campaign records. You can then group records in queries by these attributes. If you have security rights, you can create attributes by category and then create individual entries for each category. For example, if some of your campaigns target only major donors, you can create a category called “Major donors only?” with a description of “Yes” or “No”.

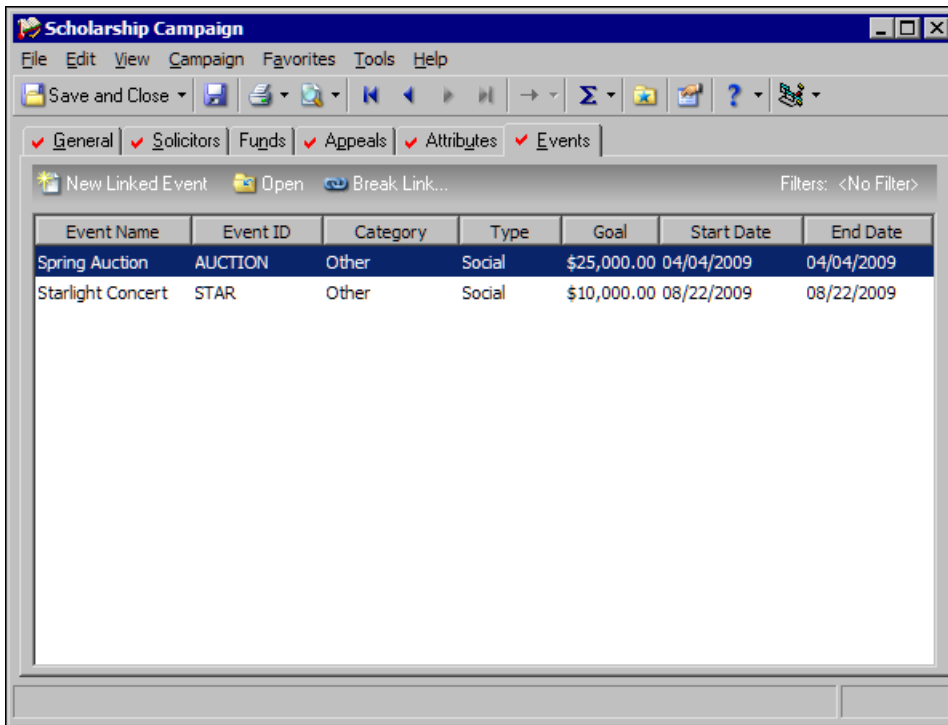


Note: You establish attributes through *Configuration*. If you do not have security rights to create and edit attributes, you can assign those that have already been established.

In the grid, when you put your cursor in the **Category** column, you can select attributes from a list of entries established in *Configuration*. In the **Description** or **Short Desc.** column, you can select a description for the attribute. If you define the attribute as a table with a short description in *Configuration*, the **Description** column is locked and the **Short Desc.** column is enabled. In the **Date** and **Comments** columns, enter the date you add the attribute to the campaign and any additional information to associate with the attribute.

Events Tab

On the Events tab, you can associate selected events with a campaign. To quickly find and associate an event with your campaign, put the cursor in the **Event Name** or **Event ID** column (depending on how you choose to enter and display events in User Options), and click the binoculars or press **F7** on your keyboard. The Open screen for events appears so you can find the event to link to the campaign. You can associate an event with only one campaign. If you select an event that is already associated with another campaign, a message appears to inform you that you cannot associate the event with the current campaign.



From this tab, you can also create and add a new event. If you enter a name or ID for an event that does not exist, when you move the cursor out of the **Event Name** or **Event ID** column, a message appears to ask whether to save the new event. So you can complete the most possible fields and have complete event records, we recommend that you not create event records in this manner.

For more information about events, see the *Event Management Data Entry Guide*.

Add Campaigns

You can assign your new campaign an ID and description, specify start and end dates, group the campaign under a category, and enter an overall goal for the campaign. You can make a campaign inactive so it does not appear in search results, and enter additional notes for the campaign.

► Add a campaign

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.

Note: To create a new campaign, you can also select **File, Open** from the menu bar and click **Add New** on the Open screen; select **New** from the **File** menu or **Save and New** from the toolbar; or press **CTRL + N** on your keyboard while a campaign record is open.

3. Click **New Campaign**. The New Campaign screen appears.

4. Select the General tab.

The screenshot shows a 'New Campaign' window with the following fields and values:

- Campaign ID:** EX2008
- Description:** The Campaign for Excellence
- Start date:** 01/01/2008
- End date:** 12/28/2008
- Campaign category:** Capital
- Overall goal:** \$250,000.00
- Campaign is inactive:**
- Notes:** Last year's Campaign for Excellence exceeded its goal by more than \$20,000. T.A. Wenk is the campaign manager.

Note: On the Records tab in User Options, select whether to enter and display campaigns by their IDs or descriptions on other records and in reports and mailings.

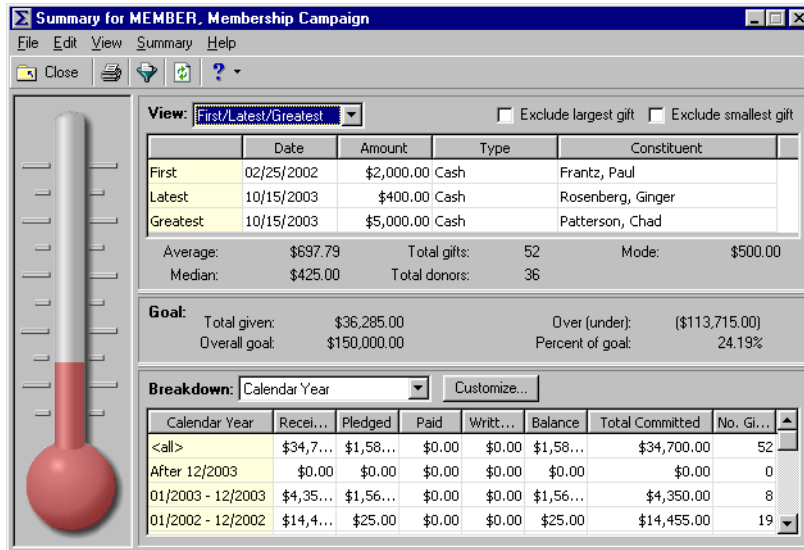
- In the **Campaign ID** field, enter a short identification of no more than 20 characters for the new campaign. The ID can include letters and numbers. For example, for a Scholarship Campaign for the year 2008, enter "SCHOLAR08". Before you can save the campaign, you must enter a unique entry in this field.
- In the **Description** field, enter the full campaign name. For example, if your organization has a campaign called "The Campaign for Excellence", enter this entire name. When you select to display campaigns by description in User Options, the name appears on Donor Acknowledgement letters and Campaign Detail reports. The description can contain up to 100 characters. Before you can save the campaign, you must enter a unique entry in this field.
- To flag the campaign as inactive for campaign searches, mark **Campaign is inactive**. If you have numerous campaigns, we recommend you use this checkbox to limit searches to only your current campaigns. When you mark this checkbox, you can continue to include inactive campaigns in searches when necessary. You cannot add an inactive campaign to a gift record, but you can edit gifts associated with the campaign. If you enter a campaign on a gift, save the gift, and then later make the campaign inactive, the campaign remains on the gift record. If you edit the gift and change the campaign, you cannot enter the inactive campaign on that gift again.

Note: When you make a campaign inactive, you ensure that it is not added to any more gift records without deleting the campaign from your database.

If a campaign appears on a gift record or has associated solicitors, you cannot delete the campaign. Instead, you can mark this checkbox to ensure that no more gifts or solicitors are added to a campaign, and that it is not associated with any new funds or appeals.

- To define the duration of the campaign, enter the start and end dates in the **Start date** and **End date** fields. If you attempt to enter a gift with a date prior to or after the dates you establish here, a warning message appears. You can save the gift anyway, but doing so affects the accuracy of your campaign reports when you base them on a date range. You do not have to enter a date range for your campaign, but doing so allows you to base a campaign search on date ranges and increases the versatility of your reports.

9. To group campaigns together, enter a category for the campaign in the **Campaign category** field. For example, a hospital can have a Building Campaign, Research Campaign, and Capital Campaign each year. The hospital can group these under the category “Annual.” To view a list of established categories, click the down arrow. To add a new campaign category, click the field name to add a new entry, if you have security rights to do so. You can use your entry in searches and as selection criteria in reports such as the Campaign Detail report.
10. To set an overall goal for the campaign, enter it in the **Overall goal** field. An entry in this field is not required; however, you can use it to create a Campaign Summary to show whether you are over or under your projected amount. The summary displays a thermometer so you can visually check the progress toward your goal.



The overall goal for funds associated with a campaign can exceed the overall goal for the campaign itself. For example, a campaign can have a goal of \$5,000,000 while the combined total of the goals of the funds associated with it can be \$10,000,000.

11. In the **Notes** box, enter additional text about the campaign, such as the campaign manager’s name, so you do not have to access the solicitor hierarchy to quickly identify the manager.
12. To save the record, click **Save and Close** on the toolbar. You return to the Campaigns page.

Campaign, Fund, and Appeal Solicitors

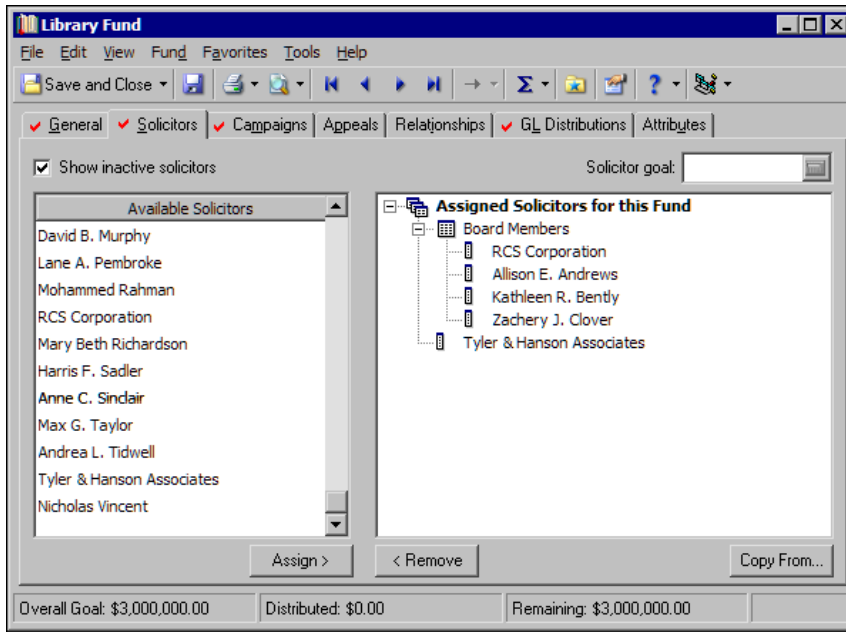
Solicitors are members of your organization who seek donations from constituents. A solicitor can have a range of duties, such as to call, visit, and dine with prospective donors and organize campaigns, funds, and appeals. In *The Raiser’s Edge*, you must enter your solicitors in the database as constituents. For more information about solicitors, see the “Solicitors” chapter of the *Constituent Data Entry Guide*.

Note: If you integrate with **Blackbaud NetCommunity**, we recommend you assign solicitors to fundraising teams rather than to other solicitors. The fundraising totals in **Blackbaud NetCommunity** do not include gifts raised by solicitors who report to other solicitors.

On the Solicitors tab of a campaign record, a fund record, or an appeal record, you assign solicitors to the campaign, fund, or appeal. You can organize the solicitors in a hierarchy where solicitors report to other solicitors. You can also arrange them into teams with appointed captains. You can assign solicitors a goal and use summaries and reports such as the Solicitor Performance Analysis report to analyze their success. The Solicitors tab contains a tree view that lists all solicitors for the campaign, fund, or appeal by individual and team in hierarchical order. On this tab, you can view, add, edit, or delete solicitors who contribute toward the campaign, fund, or appeal goal.

► **Add a solicitor to a campaign, a fund, or an appeal**

1. Open the record of the campaign, fund, or appeal to assign solicitors to. For more information about how to open a record, see “Access a Campaign Record, a Fund Record, or an Appeal Record” on page 6.
2. Select the Solicitors tab. If solicitors are already entered on the record, the Solicitors tab displays a red check mark.



In the **Available Solicitors** box, a list of all constituents specified as solicitors appear. To specify a constituent as a solicitor, mark **Is a solicitor** on the Bio 1 or Org 1 tab of the constituent record.

At the bottom of the screen, the **Overall Goal** field displays the goal entered for the campaign, fund, or appeal. If you do not enter a goal on the record, no value appears as the goal.

The **Distributed** field displays the goal amount assigned to solicitors. The **Remaining** field displays how much of the overall goal still needs to be assigned for the campaign, fund, or appeal. If the sum of the solicitors’ goals exceeds the overall goal, the **Remaining** field displays “0.00”.

3. To assign a solicitor to the campaign, fund, or appeal, select the solicitor in the **Available Solicitors** box and click **Assign**.
To copy solicitor assignments from another campaign, fund, or appeal, click **Copy From**. The Open screen appears so you can select the campaign, fund, or appeal from which to copy solicitor assignments.
4. If you have numerous solicitors and do not want to scroll through the list in the **Available Solicitors** box, or to select a constituent who is not currently a solicitor, search the database for the constituent.
 - a. In the **Available Solicitors** box, click **<Find Solicitor>**. The Open screen for constituents appears.
 - b. On the Open screen, **Constituent is a solicitor** is marked by default. To search for a constituent who is not a solicitor, unmark this checkbox.
 - c. Under **Find Constituents that meet these criteria**, enter the criteria of the constituent to select.
 - d. Click **Find Now**. In the grid, constituents that meet the criteria entered appear.
 - e. Select the constituent and click **Open**.

If you select a constituent who is not a solicitor, a message appears to ask whether to make the constituent a solicitor. Click **Yes**.

You return to the Solicitors tab. In the box on the right, the selected solicitor appears.

- To assign a goal for a solicitor, select the solicitor and, in the **Solicitor Goal** field, enter the goal. To distribute the goal evenly among assigned solicitors, select an assigned solicitor, right-click, and select **Distribute Overall goal**.

You do not have to assign a goal to each solicitor, but doing so increases the versatility of such reports as the Solicitor Performance Analysis. For more information about solicitor goals, see the *Constituent Data Entry Guide*.

Note: If you integrate with **Blackbaud NetCommunity**, we recommend you assign solicitors to fundraising teams rather than to other solicitors. The fundraising totals in **Blackbaud NetCommunity** do not include gifts raised by solicitors who report to other solicitors.

- To indicate that the new solicitor reports to another solicitor, drag and drop the new solicitor's name onto the name of the solicitor he reports to. The new solicitor appears under the other solicitor in the hierarchy.
- To make the solicitor part of a team, drag and drop the solicitor's name onto the team. In the hierarchy, the solicitor moves under the team.

To display each constituent who belongs to a team, right-click on the team and select **Expand**. To view only the team name, right-click on the team and select **Collapse**.

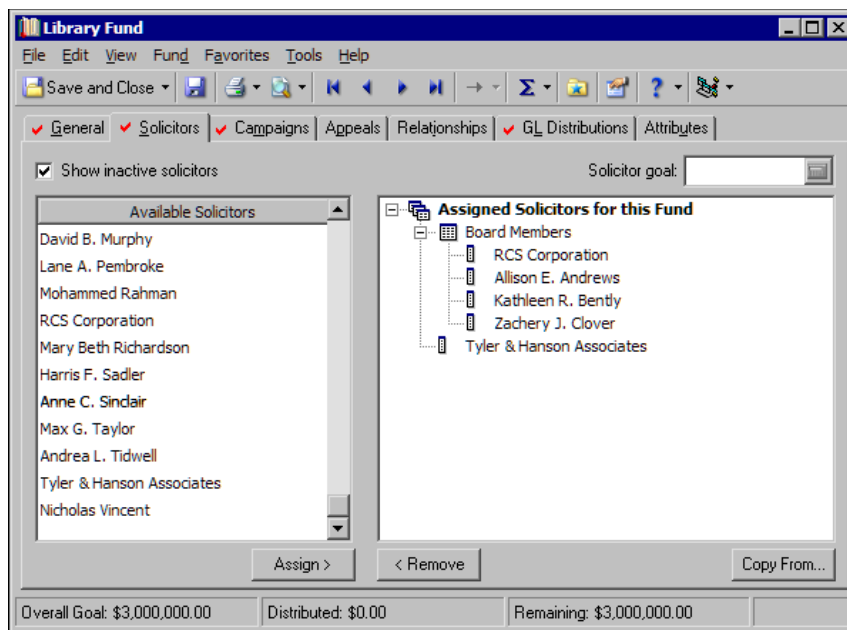
- To save your selections and close the record, click **Save and close**.

► Add a solicitor team to a campaign, a fund, or an appeal

Note: Team members work together to reach a team goal. Each team goal constitutes a portion of the overall goal.

You can create a team of solicitors for a campaign, a fund, or an appeal and appoint a captain for the team.

- Open the record of the campaign, fund, or appeal for which to assign a solicitor team. For more information about how to open a record, see "Access a Campaign Record, a Fund Record, or an Appeal Record" on page 6.
- Select the Solicitors tab. If solicitors are already entered on the record, the Solicitors tab displays a red check mark.



In the **Available Solicitors** box, a list of all constituents specified as solicitors appears. To specify a constituent as a solicitor, mark **Is a solicitor** on the Bio 1 or Org 1 tab of the constituent record.

At the bottom of the screen, the **Overall Goal** field displays the goal entered for the campaign, fund, or appeal. If you do not enter a goal on the record, no value appears as the goal.

The **Distributed** field displays the overall goal amount assigned to solicitors. The **Remaining** field displays how much of the overall goal still needs to be assigned. If the sum of the solicitors' goals exceeds the overall goal, the **Remaining** field displays "0.00".

3. To copy solicitor assignments from a campaign, a fund, or an appeal, click **Copy From**. The Open screen appears so you can select the campaign, fund, or appeal from which to copy solicitor assignments.
4. To create a new solicitor team:
 - a. In the **Available Solicitors** box, double-click **<New Team>**. The new team appears at the bottom of the hierarchy on the right, next to the cursor.
 - b. Enter the name for the new team. Team names do not have to be unique, but, to avoid confusion and ensure the accuracy of reports, we recommend you not duplicate team names.
5. To make a solicitor part of a team, drag and drop the solicitor's name over the team. The solicitor moves under the team in the hierarchy.

To display each constituent who belongs to a team, right-click on the team and select **Expand**. To view only the team name, right-click on the team and select **Collapse**.

The tree view lists in hierarchical order, with solicitors appearing under the team or individual they report to. A solicitor can report to himself.

Note: The team captain coordinates the team's efforts, keeps team members informed, offers assistance or advice to the team, and encourages members to reach their goals. You do not have to appoint a captain for a team.

6. To designate a solicitor in the team as the team captain, right-click on the solicitor and select **Promote to captain** from the right-click menu. In the hierarchy, the captain's name appears in blue and moves to the top of the list under the team name. If a team has a captain, members of the team report to the team, not the captain.
7. To save your selections and close the record, click **Save and close**.

► **Remove a solicitor or team from a campaign, a fund, or an appeal**

Note: When you remove a solicitor from a campaign, a fund, or an appeal, that solicitor is not deleted from your database.

You can remove teams or higher level solicitors alone, or along with all solicitors under them in the hierarchy. When you remove a solicitor from a campaign, a fund, or an appeal, the program does not delete that solicitor from the database. You can delete the solicitor from the database through the constituent record. For more information about how to delete a solicitor or change the status of a solicitor to a non-solicitor, see the *Constituent Data Entry Guide*.

1. Open the record of the campaign, fund, or appeal from which to remove a solicitor or team. For more information about how to open a record, see "Access a Campaign Record, a Fund Record, or an Appeal Record" on page 6.
2. Select the Solicitors tab.
3. In the solicitor hierarchy, right-click on the solicitor or team to remove.
4. From the right-click menu, select **Remove** and click **Delete**. A verification message appears.
5. If you select an individual solicitor who no other solicitors report to, click **Yes**.

Note: When you delete a solicitor team, follow the same rules as when you delete a solicitor who presides over lower levels.

If you select a solicitor team or an individual solicitor who other solicitors report to, when you click **Yes**, another verification message appears.

- To delete the selected solicitor along with all levels beneath that solicitor, click **Yes**.
 - To delete only the selected solicitor, click **No**. If you delete only the higher level solicitor, all solicitors below the solicitor move up one level in the hierarchy.
 - To delete nothing, click **Cancel**.
6. To save your selections and close the record, click **Save and close**.

Manage Campaigns

Note: If you change a record and notice the record does not update automatically, click **Save** on the toolbar before you add additional information.

You can edit and delete established campaigns. You can associate funds and appeals with a campaign and copy associated fund and appeal information from an existing campaign, fund, or appeal into a new campaign. You can also assign attributes and view properties for a campaign.

► Edit a campaign

Occasionally, you may need to change an established campaign.

Scenario: For the last several years, your school has held a Playground Campaign to raise money for a new playground. The campaign has been so successful that money is in place for the new playground before the campaign is scheduled to end. You want to make the campaign inactive so you can focus your fund-raising on other areas.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.
3. Open the Playground Campaign. The Playground Campaign screen appears. For information about how to open a campaign record, see "Open a campaign record" on page 7.

The screenshot shows a window titled "Playground Campaign" with a menu bar (File, Edit, View, Campaign, Favorites, Tools, Help) and a toolbar. Below the toolbar are tabs for General, Solicitors, Funds, Appeals, Attributes, and Events. The General tab is active, showing the following fields:

- Campaign ID: PLAYGROUND
- Description: Playground Campaign
- Start date: 01/01/2000
- End date: 12/31/2020
- Campaign category: (empty dropdown)
- Overall goal: \$2,000,000.00
- Notes: (empty text area)
- Campaign is inactive

4. Mark **Campaign is inactive**. Although the campaign remains in the database, you cannot add it to any other gifts or associate any further funds or appeals with it. To continue to use funds or appeals already associated with this campaign, link them to another campaign. Flagging a campaign as inactive is a good alternative to deleting it. The campaign remains in your records for reference purposes but cannot be associated with new records.
5. To save your changes, click **Save and Close** on the toolbar. You return to the Campaigns page.

▶ Delete a campaign

Warning: When you delete a campaign, the program automatically removes it from the Campaigns tab of any fund or appeal with which it is associated. Before you delete a campaign or other record in *The Raiser's Edge*, we recommend you have a complete backup of your database. To successfully back up your data, you must first shut down the database.

You cannot delete a campaign that appears on gift records or has solicitors associated with it. Before you delete a campaign or other record, we strongly recommend you back up your database.

Scenario: Against the advice of fellow employees, a member of the school staff decides that, because the Playground Campaign is inactive, he should delete it from the database.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.
3. Open the Playground Campaign record. For more information about how to open a campaign record, see "Open a campaign record" on page 7.
4. Select **File, Delete** from the menu bar or click **Delete** on the toolbar. A verification message appears.
5. To permanently delete the campaign, click **Yes**.
 - If the campaign has no gifts or solicitors associated with it, you return to the Campaigns page.
 - In this case, since the campaign has gifts or solicitors associated with it, a warning message appears. Click **OK**. You return to the campaign record. Before you can delete a campaign, you must remove it from all gifts and solicitors.

Associate and Copy Funds

To save time during gift entry, you can associate selected funds with a campaign. You can select a default fund to automatically appear in the **Fund** field when you enter a campaign in the **Campaign** field first on a gift record. This can save time if you have one fund to which you apply the majority of gifts for a campaign. You can also copy associated funds from an existing campaign into a new campaign. You can break down campaign goal summaries by the funds you associate with a campaign.

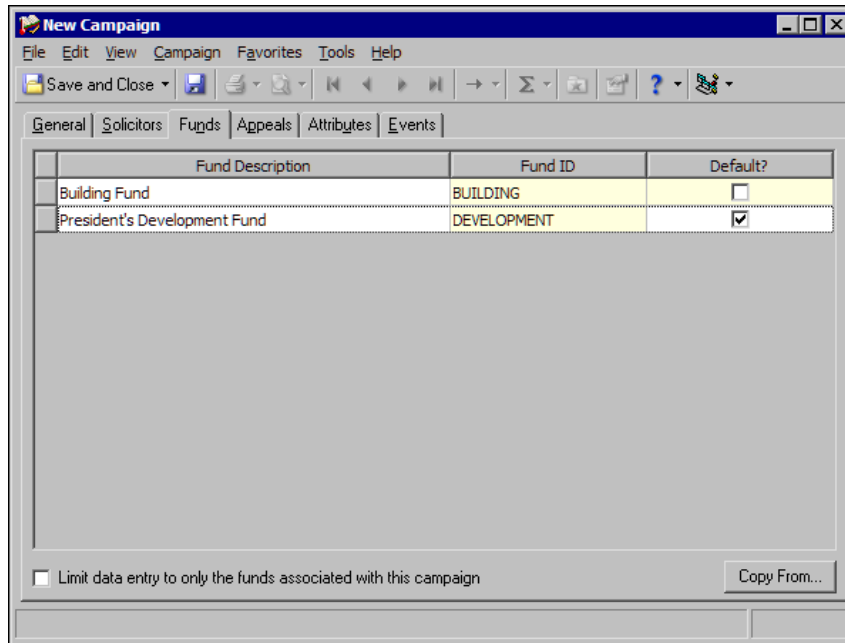
▶ Associate funds with a campaign

Warning: When you associate a fund with a campaign on the campaign record, the program automatically creates a reciprocal association on the Campaigns tab of the fund record. When you delete a fund association, the program automatically deletes the reciprocal campaign association from the fund record.

You can associate funds with a new or existing campaign. For this procedure, we associate funds with a new campaign.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.
3. Click **New Campaign**. The New Campaign screen appears.

4. Select the Funds tab.



Note: To access User Options directly from a campaign, fund, or appeal record, select **Tools, User Options** from the menu bar. User Options opens directly to the Records tab with **Campaign, Fund,** or **Appeal** selected in the tree view, depending on the record type currently open.

Depending on how you select to enter and display funds in User Options, you can enter data in either the **Fund Description** or **Fund ID** column and the other column is locked for data entry. For example, if you select to enter funds by description in User Options, you cannot enter a fund ID. When you select a fund in the **Fund Description** column, the ID automatically appears in the **Fund ID** column.

5. To quickly find and associate a fund with the campaign:
 - a. Put the cursor in the **Fund Description** or **Fund ID** column, depending on your selection in User Options.
 - b. Click the binoculars or press **F7** on your keyboard. The Open screen for funds appears.
 - c. After you find the fund with which to link the campaign, double-click the fund. You return to the Funds tab. In the grid, the selected fund appears.
6. To associate a new fund with the campaign:
 - a. Enter the name of a new fund in the **Fund Description** or **Fund ID** column, depending upon your selection in User Options. If the program does not recognize the entry as an existing fund, a message appears to ask whether to save the new fund.

Warning: We strongly recommend you create new funds through the **Funds** link of *Records* rather than add them through the campaign record. Therefore, you can fill in fields such as **Overall goal, Start date,** and **End date**. Although entries in these fields are not required, they greatly increase the versatility of your reports.

- b. Click **Yes**. The program saves your entry as a new fund. You return to the Funds tab. In the grid, the new fund appears. If the number of characters you entered was equal to or less than twenty, the fund ID and description are the same.

We recommend you add funds only through the **Funds** link in *Records* so you can include important information such as an overall goal in the fund record.

7. To designate a fund as the default fund for the campaign, mark its checkbox in the **Default?** column. When you add the campaign to a gift record, the default fund automatically appears in the **Fund** field. You can select only one fund as the default. This is the fund to which all donations should be applied unless otherwise specified by the constituent. If your organization has a General Fund, you probably want to make it your default entry.

After you mark **Default?** for one fund, the checkboxes by the other funds in the grid are disabled. When you enter gifts for this campaign, you can override the default and assign them to any fund. The default just allows you to enter a single fund quickly and consistently to save time during data entry.

8. To display only the funds associated with the campaign when you add the campaign to a gift, mark **Leave data entry to only the funds associated with this campaign**. When you enter a gift and add this campaign before you add a fund or an appeal, only associated funds appear in the **Fund** field on the gift record. The funds list in the same order in which they appear on the Funds tab of the campaign record. Additionally, when you try to add a fund to the gift record, only funds associated with the campaign appear in fund searches.

Warning: If a conflict exists between funds associated with a campaign and an appeal, you cannot save the gift. For example, Campaign A has Fund A associated with it and **Limit data entry to only the funds associated with this campaign** is marked. Appeal A does not have Fund A associated with it and the checkbox is also marked. If you try to add a gift to Campaign A, Fund A, and Appeal A, a message appears to inform you that you cannot save the gift.

If you mark this checkbox, you cannot override this setting or select unassociated funds when you enter gifts. If you enter an unassociated fund and enter the campaign on the gift record, you cannot save the gift until you replace the fund with an associated one. Only gifts entered after you mark the checkbox are affected. Gifts already entered with unassociated funds remain the same. However, if you edit previously entered gifts after you mark the checkbox, you must associate a new fund with the campaign. When you edit a gift, you cannot save the record if it contains funds that are no longer associated with the campaign.

If you mark **Leave data entry to only the funds associated with this campaign**, all areas of the program, including **Import** and **Global Change** in *Administration*, must use only associated funds. For example, if you try to globally change a gift record that contains the campaign from an associated to an unassociated fund, the program creates an exception.

To select and save any fund with any campaign when you enter gifts, leave **Leave data entry to only the funds associated with this campaign** unmarked.

9. To save your entries and proceed to another tab of the record, click **Save** on the toolbar.
To save your entries and close the record, click **Save and Close** on the toolbar.

► **Copy associated funds from an existing campaign or appeal into a new campaign**

You can copy funds associated with an established campaign or appeal into the new campaign instead of enter them manually. This saves data entry time and increases consistency.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.
3. Click **New Campaign**. The New Campaign screen appears.
4. Select the Funds tab.
5. Click **Copy From**. The Open screen appears.
6. In the **Find** field, select and double-click the appeal or campaign from which to copy funds. You return to the Funds tab. In the grid, the associated funds of the selected appeal or campaign appear.

If the same associated funds already appears in the grid, a message appears to ask whether to replace the existing entries. To use the new entries, click **Yes**.

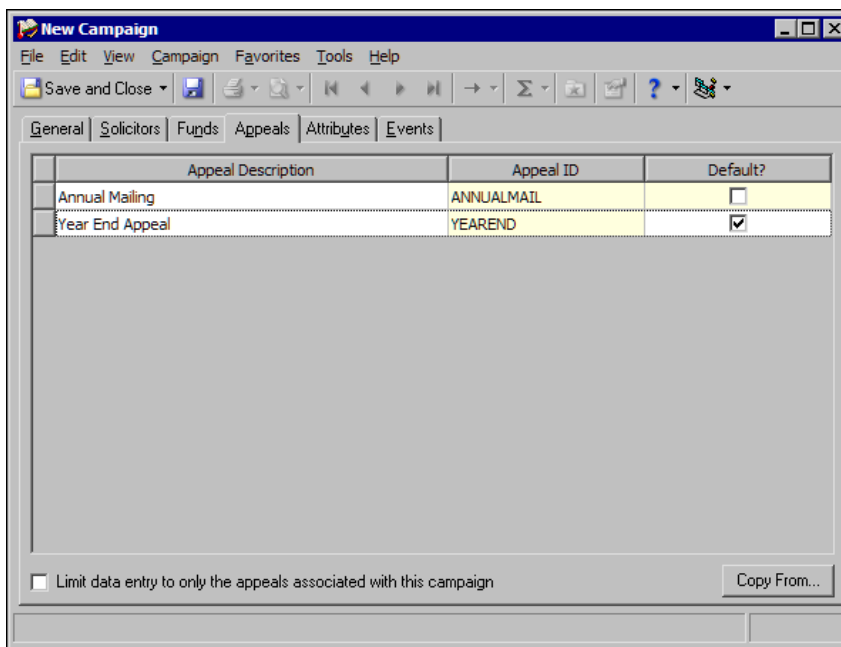
Associate and Copy Appeals

To save time during gift entry, you can associate selected appeals with a campaign. You can select a default appeal to automatically appear in the **Appeal** field when you enter a campaign in the **Campaign** field first on the gift record. To save time during data entry, you can also copy associated appeal information from an existing campaign or fund into a new campaign. You can break down campaign goal summaries by the appeals you associate with a campaign.

▶ Associate appeals with a campaign

You can associate appeals with a new or existing campaign. For this procedure, we link appeals to a new campaign.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.
3. Click **New Campaign**. The New Campaign screen appears.
4. Select the Appeals tab.



Depending on how you select to enter and display appeals in User Options, you can enter data in either the **Appeal Description** or **Appeal ID** column, and the other column is locked for data entry. For example, if you select to enter and display appeals by description in User Options, you cannot enter an appeal ID. When you select an appeal in the **Appeal Description** column, the ID automatically appears in the **Appeal ID** column.

Note: To access User Options directly from a campaign, fund, or appeal record, select **Tools, User Options** from the menu bar. User Options opens directly to the Records tab with either **Campaign**, **Fund**, or **Appeal** selected in the tree view, depending on the record type you currently have open.

5. To quickly find and associate an appeal with the campaign:
 - a. Put the cursor in the **Appeal Description** or **Appeal ID** field, depending on your selection in User Options.
 - b. Click the binoculars or press **F7**. The Open screen for appeals appears.
 - c. After you find the appeal with which to associate the campaign, double-click the appeal. You return to the Appeals tab. In the grid, the selected appeal appears.

6. To add a new appeal:

- a. In the **Appeal Description** or **Appeal ID** field, depending on your selection in User Options, enter the name of a new appeal. If the program does not recognize the entry as an existing appeal, a message appears to ask whether to save the new appeal.

Warning: We strongly recommend you create new appeals through the **Appeals** link of *Records* rather than add them through the campaign record. When you add an appeal through *Records*, you can fill in fields such as **Overall goal**, **Start date**, and **End date**. Although entries in these fields are not required, they greatly increase the versatility of your reports.

- b. Click **Yes**. The program saves your entry as a new appeal. You return to the Appeals tab. In the grid, the new appeal appears. If the number of characters you entered was equal to or less than twenty, the appeal ID and description are the same.

We recommend you add appeals only through the **Appeals** link of *Records* so you can include important information such as an **Overall Goal** in the appeal record. For more information about how to add a new appeal, see “Add an appeal” on page 66.

7. To designate an appeal as the default appeal for the campaign, mark its checkbox in the **Default?** column. When you add the campaign to a gift, the default appeal automatically appears in the **Appeal** field on the gift record. You can select only one appeal as the default.

After you mark **Default?** for one appeal, the checkboxes by the other appeals in the grid are disabled. When you enter gifts for this campaign, you can override the default and assign them to any appeal. If you have one appeal that brings in a majority of your gifts, set it as your default to save data entry time.

8. To display only the appeals associated with the campaign when you add the campaign to a gift, mark **Limit data entry to only the appeals associated with this campaign**. When you enter a gift and add this campaign before you add a fund or an appeal, only associated appeals appear in the **Appeal** field on the gift record. The appeals list in the same order in which they appear on the Appeals tab of the campaign record. Additionally, when you try to add an appeal to the gift record, only appeals associated with the campaign appear in appeal searches.

If you mark this checkbox, you cannot override this setting or select unassociated appeals when you enter gifts. If you enter an unassociated appeal and enter the campaign on the gift record, you cannot save the gift until you replace the appeal with an associated one. Only gifts entered after you mark the checkbox are affected. Gifts already entered with unassociated appeals remain the same. However, if you edit previously entered gifts after you mark the checkbox, you must associate a new appeal with the campaign. When you edit a gift, you cannot save the record if it contains appeals that are no longer associated with the campaign.

To select and save any appeal with any campaign, leave **Limit data entry to only the appeals associated with this campaign** unmarked.

9. To save your entries and proceed to another tab of the record, click **Save** on the toolbar.

To save your entries and close the record, click **Save and Close** on the toolbar.

► **Copy associated appeals from an existing campaign or fund into a new campaign**

To save data entry time and increase consistency, copy appeals associated with an established campaign or fund into the new campaign instead of entering them manually.

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.
3. Click **New Campaign**. The New Campaign screen appears.
4. Select the Appeals tab.
5. Click **Copy From**. The Open screen appears.
6. In the **Find** field, select and double-click the campaign or fund to copy the appeals from. You return to the Appeals tab. In the grid, the associated appeals of the selected campaign or fund appear.

If associated appeals already appear in the grid, a message appears to ask whether to replace the existing entries. To use the new entries, click **Yes**.

Campaign Attributes

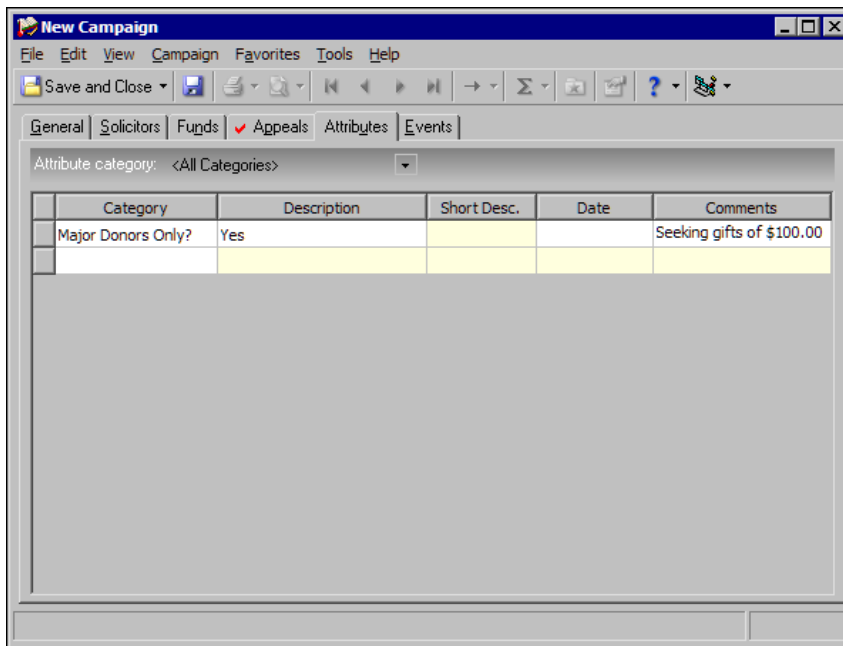
Note: Attributes are established through *Configuration*. If you do not have security rights to create and edit attributes, you can only assign those that have already been established.

You can attach specialized information called attributes to your campaign records and then group records in queries according to these attributes. If you have security rights, you can create attributes by category then create individual entries for each category. For example, if some campaigns target only major donors, you can create a category called “Major donors only?” with a description of “Yes” or “No”.

► Assign attributes to a campaign

Use attributes to assign customized information to your campaign records. You can filter campaign queries by the attributes you assign. You can assign attributes to a new or an existing campaign. For this procedure, we assign attributes to a new campaign.

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.
3. Click **New Campaign**. The New Campaign screen appears.
4. Select the Attributes tab.



5. On the action bar, in the **Attribute category** field, select “<All Categories>”. If you select a specific category, it appears in the **Category** column and all columns in the grid are locked.
6. In the grid, put your cursor in the **Category** column and select the attribute from the list of entries established in *Configuration*.
7. In the **Description** or **Short Desc.** column, select the description of the attribute for the campaign. If the attribute is defined as a table with a short description in *Configuration*, the **Description** column is locked and the **Short Desc.** column is enabled.
8. In the **Date** column, enter the date you add the attribute to the campaign.

9. In the **Comments** column, enter additional information to associate with the attribute, such as a comment “This is the first time we have created a campaign specifically for major donors.”
10. To save your entries and proceed to another tab of the record, click **Save** on the toolbar.
To save your entries and close the record, click **Save and Close** on the toolbar.

▶ **Delete attributes from a campaign**

You can remove attributes from the campaign record. When you delete an attribute from a campaign, the program does not remove the attribute from *Configuration*.

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.
3. Open a campaign record from which to delete attributes. For more information about how to open a campaign record, see “Open a campaign record” on page 7.
4. Select the Attributes tab.

Note: To delete rows in a grid, you can use the right-click shortcut menu.

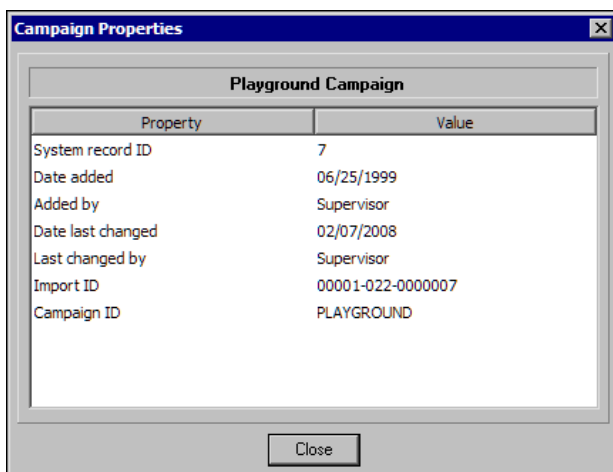
5. In the grid, right-click the gray box on the left of the attribute to delete and select **Delete**. A verification message appears.
6. To delete the attribute, click **Yes**.

Campaign Properties

You can view the system record ID, the dates a campaign was created and last changed, who created and last changed the campaign, the import ID of the campaign, and the ID and description of the campaign. For example, you may need to check and see who last changed a campaign record or when the campaign was last updated for security reasons.

▶ **View campaign properties**

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Campaigns**. The Campaigns page appears.
3. Open the campaign record for which to view properties. For information about how to open a record, see “Open a campaign record” on page 7.
4. From the menu bar, select **File, Properties**. The Campaign Properties screen appears.



Note: When you first save a record, *The Raiser's Edge* automatically assigns its import ID and system record ID.

At the top of the grid, the campaign description appears. The grid displays the system record ID, the date the campaign was added and who added it, the date it was last changed and who changed it, the import ID, and the campaign ID.

5. To return to the campaign record, click **Close**.

Funds

Warning: When you enter account numbers, we strongly recommend you have someone from your business office present to verify the account numbers are correct and gifts are linked to the appropriate accounts.

A fund is a specific financial purpose for a gift. For example, your organization can have a Building Fund, an Acquisition Fund, or a General Operating Fund. Funds identify the financial accounts in which you record gifts and pledges. Because all gifts must have a purpose, when you enter a gift, the **Fund** field is required on the gift record. You can associate funds with campaigns and appeals so when you add a fund to a gift, the associated campaigns or appeals automatically appear on the gift record. If your organization has many specific designated purposes for gifts, you can have many different funds and only a few campaigns.

Fund Records

The fund record contains a General tab where you can enter basic information about the fund, such as a description and an overall goal. On the Solicitors tab, you can assign solicitors and teams for the fund. On the Campaigns tab, you link campaigns to the fund; you can do the same with appeals on the Appeals tab. The Attributes tab allows you to customize *The Raiser's Edge* to store additional information about a fund.

Additionally, the fund record contains a GL Distributions tab. If you have Blackbaud's *General Ledger*, you can associate *General Ledger* accounting and project distributions with a fund. A distribution divides a gift among several *General Ledger* accounts or projects. When you integrate the two programs, your organization saves time because you can enter gifts one time instead of into each program separately.

Fund records also include a Relationships tab. On the Relationships tab, you define special relationships between funds and individual and organization constituents.

General Tab

The General tab includes fields where you can enter an ID and a description for the fund. In the **Fund ID** field, the ID you enter can include letters and numbers. In the **Description** field, we recommend you enter the full name of the fund. You can select in User Options whether to display funds by description or ID in other areas of the program. For example, if a zoo has a Botanical Garden Fund, the staff can enter an ID of "GARDEN", but if they enter the entire name for the description and select **Description** in User Options, the full name appears on Thank You letters and Fund Summaries.

Note: To include inactive funds in a search, you can mark a checkbox on the Open screen.

If you mark **Fund is inactive**, the fund is flagged as inactive for fund searches. If you have numerous funds, you can use this checkbox to limit searches to only current funds. You cannot add inactive funds to gift records.

To define the duration of a fund, enter a start and end date in the **Start date** and **End date** fields. You do not have to enter a date range for your fund, but start and end dates allow you to base a fund search on date ranges and increase the versatility of your reports. When you mark **Fund is restricted**, donations made to the fund are for a restricted purpose. For example, you can restrict a Scholarship Fund for a university so your organization can use gifts given to it only to finance certain scholarships.

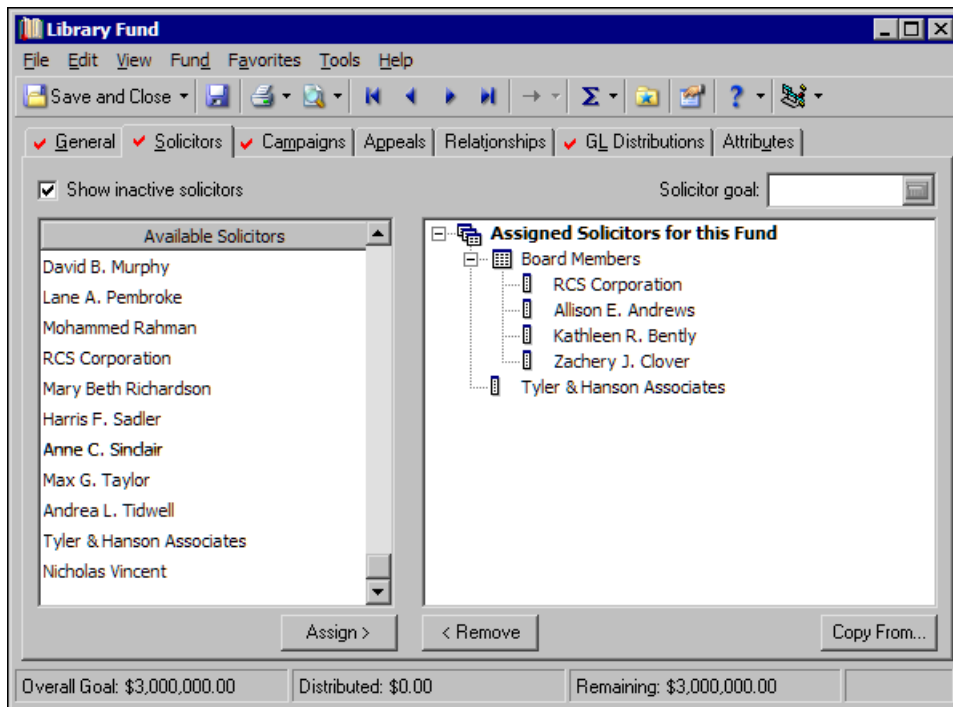
To group funds together, enter a category in the **Fund category** field. For example, a university can group funds in categories of "Annual", "Scholarship", "Capital", and "Endowment". You can use the category in search screens and as selection criteria in some reports.

You do not need to enter a goal for the fund in the **Overall goal** field, but a goal can be very useful because you can use it to create a Fund Performance Analysis report to show whether you are over or under your projected goal amount. In the **Notes** box, enter additional useful information about a fund, such as whether a scholarship is for general expenses or tuition.

To further identify the fund, you can enter a type in the **Type** field. For example, you can create types such as "General," "Scholarship," "Endowment" that you can use in queries, exports, and other functions.

Solicitors Tab

On the Solicitors tab, you can assign solicitors and teams of solicitors to a fund. The **Available Solicitors** box displays all constituents in your database who are assigned as solicitors. To designate a constituent as a solicitor, mark **Is a solicitor** on the Bio 1 or Org 1 tab of the constituent record.



To assign a solicitor to the fund, select the solicitor in the **Available Solicitors** box and click **Assign**. The solicitor moves to the hierarchy on the right. If you have numerous solicitors and do not want to scroll through the entire list in the **Available Solicitors** box, or to search for constituent who is not currently a solicitor, click **<Find Solicitor>** in the **Available Solicitors** box. The Open screen for constituents appears. When you find and select a constituent who is a solicitor on the Open screen, you return to the Solicitors tab and the selected solicitor appears in the hierarchy.

Note: If you select an inactive solicitor on the Open screen, a message appears to ask whether to mark the solicitor as active again.

By default, when you search for a constituent, **Constituent is a solicitor** is marked on the Open screen. To find a constituent who is not a solicitor, unmark this checkbox. When you select a constituent who is not a solicitor, a message appears to ask whether to make the constituent a solicitor. When you click **Yes**, you return to the Solicitors tab and the selected constituent appears as a solicitor in the hierarchy.

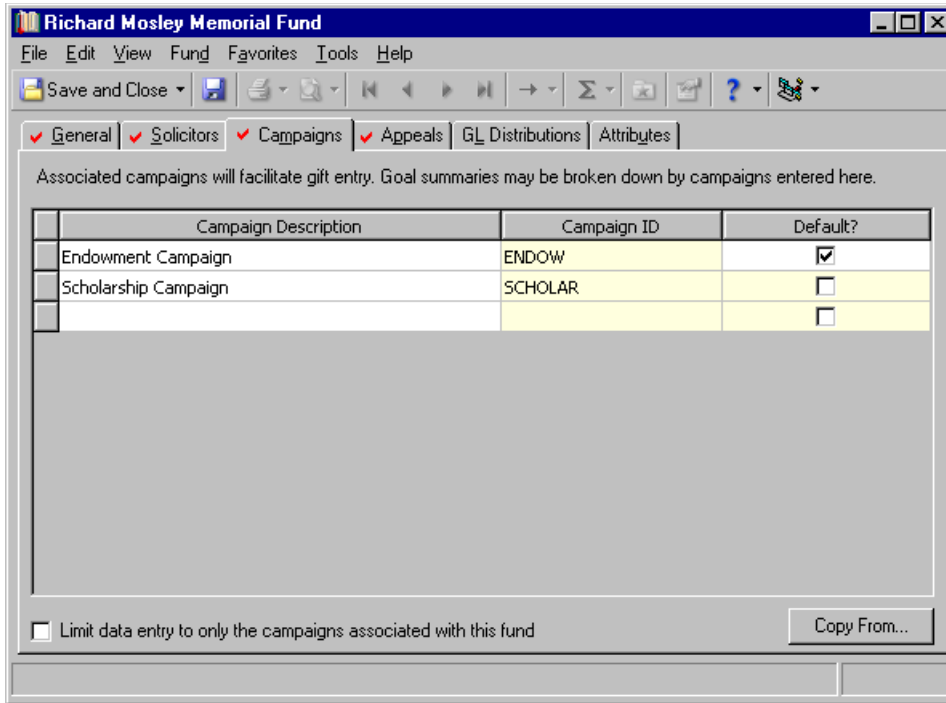
To copy solicitor assignments from another fund, a campaign, or an appeal into the current fund, click **Copy From**. The Open screen appears so you can select the campaign, fund, or appeal from which to copy solicitor assignments.

You can assign solicitors individually or group them in teams. To create a new team, select **<New Team>** in the **Available Solicitors** box and click **Assign**. An entry appears in the hierarchy. You must enter the team name here. To assign a solicitor as a member of the team, drag the solicitor entry over the team name in the hierarchy.

To assign goals, select a solicitor and enter a goal in the **Solicitor Goal** field. To distribute the fund goal evenly among solicitors, select an assigned solicitor, right-click, and select **Distribute Overall goal**.

Campaigns Tab

On the Campaigns tab, you can associate established or new campaigns with the fund to make gift entry easier. To quickly find and associate a campaign with your fund, put the cursor in the **Campaign Description** or **Campaign ID** column (depending on your selection in User Options), and click the binoculars or press **F7** on your keyboard. The Open screen for campaigns appears so you can find the campaign with which to associate the fund. You can also add a new campaign from this tab.



If you mark the checkbox in the **Default?** column for a campaign, that campaign automatically appears in the **Campaign** field when you assign the fund to a gift. You can select only one campaign as the default. When you enter gifts for this fund, you can override the default and assign them to any campaign.

If you leave **Limit data entry to only the campaigns associated with this fund** unmarked, you can select and save any campaign with any fund when you enter gifts. If you mark this checkbox, when you add this fund to a gift before you add a campaign or an appeal, only campaigns associated with the fund appear in campaign searches when you add a campaign to the gift. When you click **Copy From**, the Open screen appears so you can locate another fund or an appeal from which to copy associated campaign information.

Appeals Tab

On the Appeals tab, you can associate established or new appeals with a fund. You can break down goal summaries by the appeals entered on this tab. To quickly find and link an appeal to your fund, put the cursor in the **Appeal Description** or **Appeal ID** column (depending on your selection in User Options), and click the binoculars or press **F7** on your keyboard. The Open screen for appeals appears so you can find the appeal with which to associate the fund. On the Open screen, you can also add a new appeal.

Appeal Description	Appeal ID	Default?
Year End Appeal	YEAREND	<input checked="" type="checkbox"/>
Direct Mailing	DIRECT MAIL	<input type="checkbox"/>
Annual Newsletter	NEWSLETTER	<input type="checkbox"/>
Internet/Web Site solicitations	INTERNET	<input type="checkbox"/>
Annual Mailing	ANNUALMAIL	<input type="checkbox"/>

Limit data entry to only the appeals associated with this fund

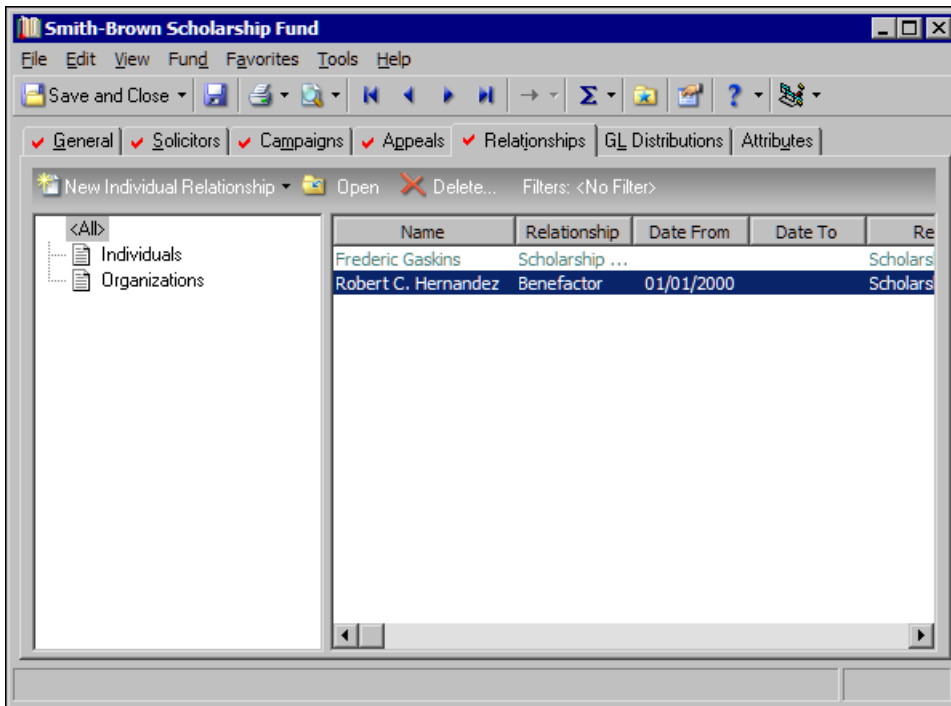
Copy From...

If you mark the checkbox in the **Default?** column for an appeal, that appeal automatically appears in the **Appeal** field when you assign the new fund to gifts. You can select only one appeal as the default. When you add a fund to a gift, you can override the default and add any appeal to the gift. If you have one appeal that brings in a majority of your gifts, you can set it as your default to save data entry time.

If you leave **Limit data entry to only the appeals associated with this fund** unmarked, you can select and save any appeal with any fund when you enter gifts. If you mark this checkbox, when you add this fund to a gift before you add a campaign or an appeal, only appeals associated with the fund appear in appeal searches when you add an appeal to the gift. When you click **Copy From**, the Open screen appears so you can locate another fund or a campaign from which to copy associated appeal information.

Fund Relationships Tab

On the Relationships tab, you can track fund relationships to constituents. Fund relationships are funds to which a constituent has a special affiliation. For example, Robert Hernandez gives \$1,000,000 to your organization to establish the Smith-Brown Scholarship Fund. Because Robert is the benefactor of the fund, you want to add him to the Smith-Brown Scholarship Fund record as a relationship. You can then reciprocate the relationship, which adds the fund to the Relationships tab of Robert's constituent record and links the two records together. The fund's relationship to Robert is "Benefactor" and Robert's constituent record reciprocal relationship to the fund is "Scholarship Fund".



Note: Fund relationships help you quickly answer questions about which funds constituents are involved, are affiliated with, or possibly donate heavily toward. To quickly see the fund's activity level or quickly report on the funds and constituents, you can run a constituent or fund profile.

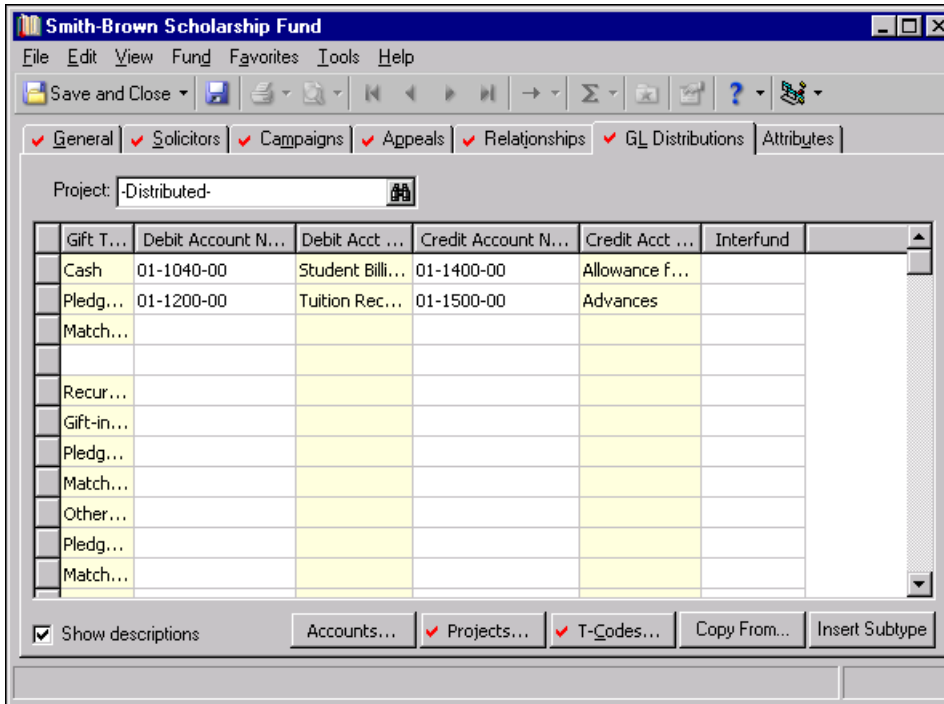
When you establish this fund relationship, you always know who initiated the fund. You can start to track all activity of the fund and each constituent who has a special "relationship" with the fund. For example, once the Smith-Brown Scholarship Fund is established, you start to award a yearly scholarship to a student recipient. Frederic Gaskins is the first recipient of the scholarship award. On the Relationships tab of the fund, you add Frederic as a "Scholarship Recipient" relationship, and the fund's reciprocal relationship to Frederic is "Scholarship Fund".

For information about how to add a relationship to a fund record, see "Add Relationships to Funds" on page 50.

GL Distributions Tab

Warning: When you enter account numbers into funds in *The Raiser's Edge*, we strongly recommend someone from your business office be present to ensure you enter the proper accounts and correct numbers.

The GL Distributions tab uses the link between the databases of Blackbaud's *General Ledger* and *The Raiser's Edge* to enhance your gift entry efficiency. However, the tab is useful even if you do not have *General Ledger*. You can store information from your accounting software to specify which accounts should be debited and credited when you enter specific gift types into *The Raiser's Edge*. You can also assign subtypes for each gift type, such as Check and Credit Card under the gift type Cash, and enter debit and credit account numbers for each subtype.



If you have *General Ledger*, you can enter credit and debit account information for gift types and subtypes into *The Raiser's Edge* directly from the *General Ledger* database. When you add a fund to gifts in *The Raiser's Edge*, the accounts specified are automatically debited and credited in *General Ledger*. When you share gift information between the programs, you can enter gifts one time instead of into each program separately. This reduces time spent on data entry. Before you can access *General Ledger* information in *The Raiser's Edge*, you must create a link between the two programs in the *General Ledger* link of *Configuration*. For more information, see the *Configuration & Security Guide*.

A *General Ledger* account distribution is the accounting practice to spread or distribute percentage amounts of gifts to multiple *General Ledger* fund accounts. If you have the *General Ledger* optional module *Project, Grant and Endowment Management*, you can also distribute gifts among different projects. For example, if a school is building a playground and gymnasium at the same time, it can distribute fund gifts between both projects. You can also assign interfund transfers for each gift type and subtype. Interfund transfers link debit and credit accounts that belong to different *General Ledger* funds.

Note: If you select **Add this Fund as a GL Project** from the **Fund** menu and successfully create a new project, the new project appears as an option in the **Project** field.

In the **Project** field on the GL Distributions tab, you can enter the number of a project you want associated with this fund directly into the field, or click the binoculars to search for a project in *General Ledger*. To associate the fund with multiple projects, click **Projects**. A screen appears for you to select the projects and the percentage to apply to each.

In the grid, the **Gift Types** column lists all program defined gift types and any subtypes you define. When you select a row in the **Gift Types** column and click **Insert Subtype**, another row appears below the selected one. If you have security rights to do so, you can place a new subtype in this row. Subtypes must be unique within a gift type.

In the **Debit Account No.** and **Credit Account No.** columns, you can enter the accounts to debit or credit when you enter a certain type of gift in *The Raiser's Edge*. If you have **General Ledger** linked with *The Raiser's Edge* in *Configuration*, click the binoculars. The Open screen appears so you can search the **General Ledger** database for an account number.

Note: When you add a fund to a campaign record Giving Hierarchy, you can apply the GL Distribution setup from the fund's "parent" in the giving hierarchy.

If you do not have **General Ledger**, you can enter an account number directly into the column. When you enter account numbers into *The Raiser's Edge*, we strongly recommend someone from your business office be present. The **Debit Acct Desc** and **Credit Acct Desc** columns appear only if you have **General Ledger** and mark **Show descriptions** at the bottom of the screen (also visible only if you have **General Ledger**).

To distribute a gift type or subtype among multiple debit and credit accounts, place the cursor in the row and click **Accounts** (visible only if you have **General Ledger**). On the Account Distribution screen, you can select multiple debit and credit account numbers to distribute the selected gift type or subtype among.

If the first two numbers of a **General Ledger** debit and credit account are different, the **General Ledger** funds to which they belong are different. In this case, you must specify a transfer account in the **Interfund** column.

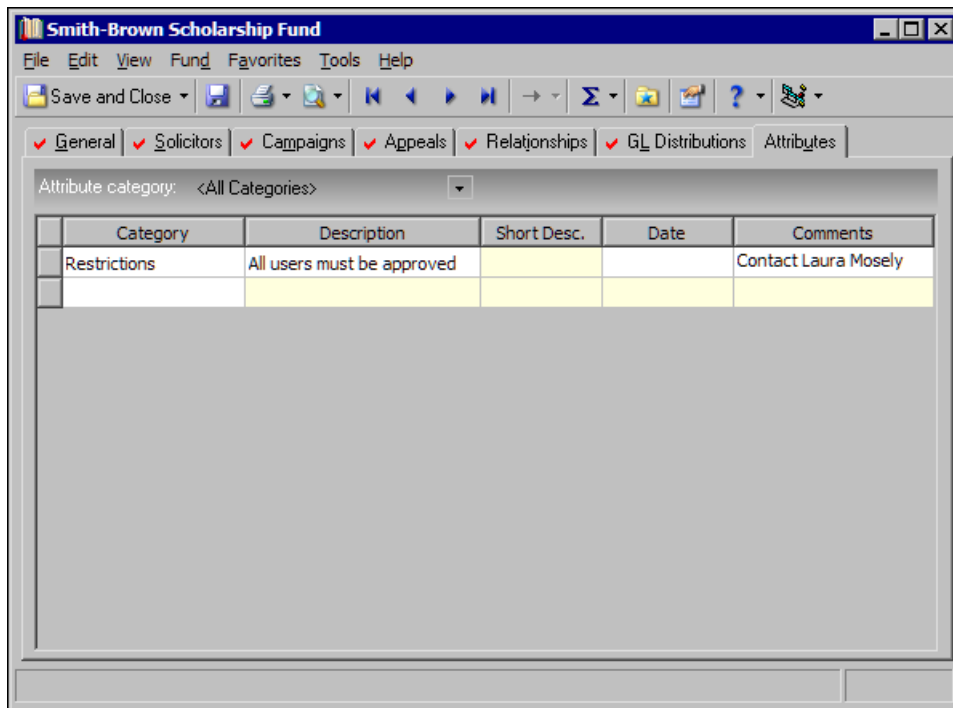
The **T-Codes** button appears if you establish a link on the General Ledger page of *Configuration*. To access the Transaction Code Values screen, click **T-codes**. On the Transaction Code Values screen, you can specify values for one or more transaction codes from **General Ledger**. These transaction codes are included as part of the GL Distributions posted for gifts applied to the fund.

To save time and avoid errors during data entry, you can click **Copy From** to import default distribution data entered in *Configuration* (or a distribution from another fund) into the new fund instead of entering it manually.

Attributes Tab

Note: You establish attributes in *Configuration*. If you do not have security rights to create and edit attributes, you can assign only those that have already been established.

On the Attributes tab, you can associate additional special information with the fund, such as exactly which restrictions are placed on a restricted fund. For more information about the Attributes tab, see “Campaign Attributes” on page 32.



Add Funds

You can assign your new fund an ID and description, specify start and end dates, group the fund under a category, and enter an overall goal for the fund. You can make a fund inactive so it does not appear in search results, and enter additional notes for the fund.

► Add a fund

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Funds**. The Funds page appears.

Note: To create a new fund, you can also select **File, Open** from the menu bar and click **Add New** on the Open screen; select **New, Fund** from the **File** menu or **Save and New** from the toolbar; or press **CTRL + N** on your keyboard while a fund record is open.

3. Click **New Fund**. The New Fund screen appears.

4. Select the General tab.

The screenshot shows a 'New Fund' window with the following data:

- Fund ID: BUILDING
- Description: Building Fund
- Start date: 01/01/2008
- End date: 12/31/2016
- Fund category: Capital
- Overall goal: \$350,000.00
- Type: Donor Advised Fund
- Fund is restricted
- Fund is inactive
- Notes: Hope to begin construction of the new building early summer 2016

Note: On the Records tab in User Options, you can select whether to enter and display funds by ID or description in other areas of the program.

- In the **Fund ID** field, enter a short identification of no more than 20 characters for the new fund. The ID can include letters and numbers. For example, a Building Fund can have a short ID of "BUILDING". Before you can save the new fund, you must enter a unique entry in this field.
- In the **Description** field, enter the full name of the fund, such as "Herbert Hoover Memorial Fund". When you select to view funds by description in User Options, the full name appears on brochures and Fund Detail Reports. The description can contain a maximum of 100 characters. Before you can save the new fund, you must enter a unique entry in this field.
- If you mark **Fund is inactive**, the fund is flagged as inactive for fund searches. If you have numerous funds, we recommend you use this checkbox to limit searches to only your current funds (although you can still include inactive funds in searches if you want). You cannot add an inactive fund to a gift record, but you can edit gifts that already have the fund on the record. If you enter a fund on a gift and save the gift, and later make the fund inactive, that fund remains on the gift record. If you later edit the gift and change the fund, you cannot enter the inactive fund again on that gift.

If a fund is on gift records or has solicitors associated with it, you cannot delete the fund. As an alternative, mark this checkbox to ensure it is not added to more gifts or solicitors or associated with new campaigns or appeals.

Note: You do not have to enter a date range for a fund, but when you do, you can use it to define fund searches.

- To define the duration of the fund, enter a start and end date in the **Start date** and **End date** fields. If you attempt to enter a gift with a date prior to or after the dates entered, a warning message appears. You can save the gift anyway, but doing so affects the accuracy of your fund reports when you base them on a date range. You do not have to enter a date range for your fund, but doing so allows you to base a fund search on date ranges and increases the versatility of your reports.
- When you mark **Fund is restricted**, donations made to the fund are for a restricted purpose. For example, if you renovate a hospital, you can have a Cardiac Equipment Fund to purchase new equipment for the renovated building. If you make the fund restricted, you can use gifts given to the fund only to buy equipment.

10. to group funds together, enter a category in the **Fund category** field. For example, the hospital can have a Cardiac Equipment Fund, Pediatric Equipment Fund, and Physical Therapy Equipment Fund grouped together under the category “Equipment”. Or, you can create a category for all restricted funds. To view a list of established categories, click the down arrow. Or, if you have security rights to do so, click the legend to add a new category.

You can use the category in search screens and in *Query* as selection criteria for use in reports such as the Fund Comparison Summary.

11. In the **Overall goal** field, enter the projected amount or goal for the fund. You do not have to enter a goal in the **Overall goal** field, but it can be very useful because you can use it to create a Fund Summary to show whether you are over or under your projected amount.
12. To further identify the fund, enter a fund type in the **Type** field, such as “General,” “Scholarship,” or “Endowment”. You can use fund types in queries, exports, and other functions.
13. In the **Notes** box, enter useful information about the fund. For example, list the equipment you hope to purchase with the proceeds from the fund.
14. To save the record, click **Save and Close** on the toolbar. You return to the Funds page.

Manage Funds

Note: If you change a record and notice the record is not updated automatically, click **Save** on the toolbar before you add additional information.

You can edit and delete established funds. You can associate campaigns and appeals with a fund and copy associated campaign and appeal information from an existing campaign, fund, or appeal into a new fund. You can associate account numbers for funds added to a gift. If you have **General Ledger**, you can distribute gifts among multiple accounts and projects. You can also assign attributes and view properties for a fund.

► Edit a fund

Occasionally, you may need to change a fund record.

Scenario: Your organization, a library, has an ongoing President’s Development Fund. When the you first created the fund, you did not enter an overall goal amount. Now, so you can run summaries with the thermometer visual to measure progress toward a goal, you decide to establish a goal of \$500,000 for the fund.

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Funds**. The Funds page appears.

- Open the President's Development Fund. The President's Development Fund screen appears. For more information about how to open a fund record, see "Access a Campaign Record, a Fund Record, or an Appeal Record" on page 6.

Note: Defaults for entering currency amounts, such as comma placement and whether zeros automatically appear after the decimal, are established from the **International** link of *Configuration*.

- In the **Overall goal** field, enter your new goal of \$500,000. When you run summaries, the program includes all gifts given to the fund in the goal, including those given before you enter this amount.
- In the **Notes** box, enter information about the fund, such as the date you establish the goal.
- To save your changes, click **Save and Close** on the toolbar. You return to the Funds page.

► Delete a fund

Warning: When you delete a fund, the program automatically removes it from the Funds tab of any campaign or appeal with which it is associated. Before you delete a fund or other record in *The Raiser's Edge*, we recommend you have a complete backup of your database. To successfully back up your data, you must first shut down the database.

You cannot delete a fund that has associated gifts or solicitors. Before you delete a fund or other record, we strongly recommend you back up your database.

Scenario: An employee at your organization accidentally clicks **Delete** while the President's Development Fund is open.

- On the Raiser's Edge bar, click **Records**. The Records page appears.
- Click **Funds**. The Funds page appears.
- Open the President's Development Fund. The President's Development Fund screen appears. For more information about how to open a fund, see "Access a Campaign Record, a Fund Record, or an Appeal Record" on page 6.
- Select **File, Delete** from the menu bar or click **Delete** on the toolbar. A verification message appears.
- Because you do not want to delete the fund, click **No**. To delete the fund, you can do so only if it has no associated gifts or solicitors.

Associate and Copy Campaigns

Note: When you associate a campaign with a fund on the fund record, the program automatically creates a reciprocal association on the Funds tab of the campaign record. When you delete a campaign association, the program automatically deletes the reciprocal fund association from the campaign record.

On the Campaigns tab, you can associate established or new campaigns with a fund to facilitate gift entry. Additionally, you can enter defaults so if you first enter the fund in the **Fund** field on the gift record, the default campaign automatically appears the **Campaign** field. To save time during data entry, you can also copy campaign information from an existing fund or appeal into a new fund. You can break down goal summaries by the campaigns associated with a fund.

▶ Associate campaigns with a fund

You can associate campaigns with new or existing funds. For this procedure, we associate a campaign with a new fund.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Funds**. The Funds page appears.
3. Click **New Fund**. The New Fund screen appears.
4. Select the Campaigns tab.

Campaign Description	Campaign ID	Default?
Annual Campaign	ANNUAL	<input checked="" type="checkbox"/>

5. Depending on how you select to enter and display campaigns in User Options, you can enter data in the **Campaign Description** or **Campaign ID** column, and the other column is locked for data entry. For example, if you select to enter and display campaigns by description in User Options, you cannot enter a campaign ID. When you select description in the **Campaign Description** column, the ID automatically appears in the **Campaign ID** column.

Note: To access User Options directly from a campaign record, a fund record, or an appeal record, select **Tools, User Options** from the menu bar. User Options opens directly to the Records tab with either **Campaign**, **Fund**, or **Appeal** selected in the tree view, depending on the record type you have open.

6. To quickly find and associate a campaign with your fund:
 - a. Put the cursor in the **Campaign Description** or **Campaign ID** column, depending on your selection in User Options.

- b. Click the binoculars or press **F7** on your keyboard. The Open screen for campaigns appears.
 - c. After you find the campaign to associate with the fund, double-click it. You return to the Campaigns tab. The selected campaign appears in the grid.
7. To add a new campaign:
- a. In the **Campaign Description** or **Campaign ID** field, depending on your selection in User Options, enter the name of a new campaign. If the program does not recognize the entry as an existing campaign, a message appears to ask whether to add the new campaign.

Warning: We strongly recommend you create new campaigns through the **Campaigns** link of *Records* rather than add them through the fund record. When you add a campaign through *Records*, you can enter information such as an overall goal and start and end dates. Although this information is not required, they greatly increase the versatility of your reports.

- b. Click **Yes**. You return to the Campaigns tab, and the program adds your entry as a new campaign. If the number of characters entered is equal to or less than twenty, the campaign ID and description are the same.
- We recommend you add campaigns only through the **Campaigns** link of *Records* so you can enter information such as an overall goal and start and end dates.
8. To designate a campaign as the default campaign for the fund, mark the checkbox in the **Default?** column for the campaign. When you assign the fund to a gift, the default campaign automatically appears in the **Campaign** field on the gift record. You can select only one campaign as the default.

After you mark the checkbox by one campaign, the checkboxes by the other campaigns in the grid are disabled. When you add this fund to gifts, you can override the default and enter any campaign. To save time during data entry, the default allows you to enter a single campaign quickly and consistently.

9. To display only campaigns associated with the fund in campaign searches when you add the fund to a gift before you add the campaign or appeal, mark **Limit data entry to only the campaigns associated with this fund**.

When you mark this checkbox, you cannot override this setting to select unassociated campaigns when you enter gifts. If you enter an unassociated campaign and then enter the fund on the gift record, you cannot save the gift until you replace the campaign with an associated one.

Only gifts entered after you mark this checkbox are affected. Gifts already entered with unassociated campaigns remain the same. However, if you edit any part of previously entered gift records after you mark the checkbox, you must enter a campaign that is associated with the fund before you can save the changes to the gift.

When you mark **Limit data entry to only the campaigns associated with this fund**, all other areas of the program must use only associated campaigns.

To select and save any campaign with any fund when you enter gifts, leave **Limit data entry to only the campaigns associated with this fund** unmarked.

10. To save your entries if you want to proceed to another tab of the record, click **Save** on the toolbar. To save your entries and exit the record, click **Save and Close** on the toolbar.

► **Copy associated campaigns from an existing fund or appeal into a new fund**

To save data entry time and increase consistency, you can copy campaigns associated with an established fund or appeal into a new fund instead of enter them manually.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Funds**. The Funds page appears.
3. Click **New Fund**. The New Fund screen appears.
4. Select the Campaigns tab.
5. Click **Copy From**. The Open screen appears.

6. In the **Find** field, find the appeal or fund from which to copy campaigns.
7. On the Open screen, select and double-click the appeal or fund to copy campaigns from. You return to the Campaigns tab. In the grid, the campaigns associated with the selected appeal or fund appear.
8. If associated campaigns already appear in the grid, a message appears to ask whether to replace the existing entries. To use the new entries, click **Yes**.

Associate and Copy Appeals

You can associate established or new appeals with an existing or new fund. You can enter a default appeal so if you first fill in the **Fund** field on the gift record, the default appeal automatically appears in the **Appeal** field. To save data entry time, you can copy appeal information from an existing fund or campaign into a fund. You can also break down fund goal summaries by the appeals associated with a fund.

▶ Associate appeals with a fund

You can associate appeals with a new or existing fund. For this procedure, we associate appeals with a new fund.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Funds**. The Funds page appears.
3. Click **New Fund**. The New Fund screen appears.
4. Select the Appeals tab.

Appeal Description	Appeal ID	Default?
Celebrity Auction	AUCTION	<input type="checkbox"/>
Walk-A-Thon	WALK-A-THON	<input type="checkbox"/>
Year End Appeal	YEAREND	<input checked="" type="checkbox"/>

5. Depending on how you select to enter and display appeals in User Options, you can enter data in the **Appeal Description** or **Appeal ID** column, and the other column is locked for data entry. For example, if you select to enter and display appeals by description in User Options, you cannot enter an appeal ID. When you select a description in the **Appeal Description** column, the ID automatically appears in the **Appeal ID** column.

Note: To access User Options directly from a campaign record, a fund record, or an appeal record, select **Tools, User Options** from the menu bar. User Options opens directly to the Records tab with either **Campaign**, **Fund**, or **Appeal** selected in the tree view, depending on the record type you have open.

6. To quickly find and link an appeal to the fund:

- a. Put the cursor in the **Appeal Description** or **Appeal ID** column, depending on your selection in User Options.
 - b. Click the binoculars or press **F7** on your keyboard. The Open screen for appeals appears.
 - c. Find and double-click the appeal with which to link the fund. You return to the Appeals tab. In the grid, the selected appeal appears.
7. To add a new appeal:
- a. Enter the name of a new appeal in the **Appeal Description** or **Appeal ID** field, depending upon your display selection in User Options. If the program does not recognize the entry as an existing appeal, a message appears to ask whether to add the new appeal.

Warning: We recommend you add new appeals only through the **Appeals** link of *Records* so you can fill in fields such as **Overall goal**, **Start date**, and **End date**. Although this information is not required, it greatly increases the versatility of your reports.

- b. Click **Yes**. You return to the Appeals tab. In the grid, the new appeal appears.

If the number of characters entered is equal to or less than twenty, the appeal ID and description are the same. We recommend you add appeals only through the **Appeals** link of *Records* so you can enter information such as an overall goal and start and end dates.

8. To designate an appeal as the default appeal for the fund, mark the checkbox in the **Default?** column for the appeal. When you add the fund to gifts, the default appeal automatically appears in the **Appeal** field. You can select only one appeal as the default.

After you mark **Default?** by one appeal, the checkboxes by the other appeals in the grid are disabled. When you add this fund to gifts, you can override the default and add any appeal. If you have one appeal that brings in a majority of your gifts, you can set it as your default to save data entry time.

9. To display only appeals associated with the fund in appeal searches when you add the fund to a gift before you add the campaign or appeal, mark **Limit data entry to only the appeals associated with this fund**.

When you mark this checkbox, when you enter a gift and add this fund before you add a campaign or an appeal, when you click the down arrow in the **Appeal** field on the gift record, only associated appeals appear. The appeals list in the same order in which they appear on the Appeals tab of the fund record. Additionally, only appeals associated with the fund appear in appeal searches when you try to add an appeal to the gift record.

When you mark this checkbox, you cannot override this setting to select unassociated appeals when you enter gifts. If you enter an unassociated appeal and then enter the fund on the gift record, you cannot save the gift until you replace the appeal with an associated one.

Only gifts entered after you mark this checkbox are affected. Gifts already entered with unassociated appeals remain the same. However, if you edit any part of previously entered gift records after you mark the checkbox, you must enter an appeal that is associated with the fund before you can save the changes to the gift.

When you mark **Limit data entry to only the appeals associated with this fund**, all other areas of the program must use only associated appeals.

To select and save any appeal with any fund when you enter gifts, leave **Limit data entry to only the appeals associated with this fund** unmarked.

10. To save your entries and proceed to another tab of the record, click **Save** on the toolbar.

To save your entries and close the record, click **Save and Close** on the toolbar.

► **Copy associated appeals from an existing campaign or fund into a new fund**

To save data entry time and increase consistency, you can copy appeals associated with an established campaign or fund into a new fund instead of enter them manually.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Funds**. The Funds page appears.

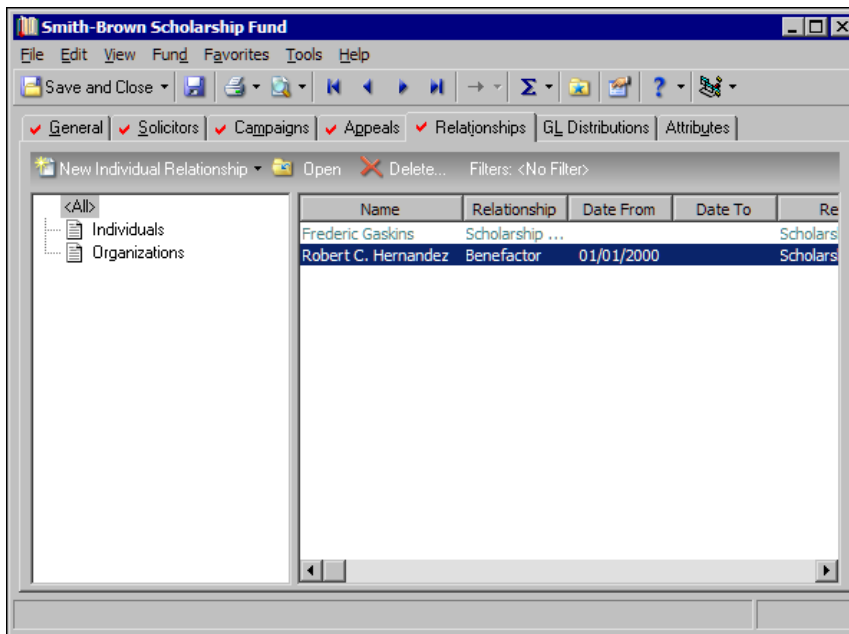
3. Click **New Fund**. The New Fund screen appears.
4. Select the Appeals tab.
5. Click **Copy From**. The Open screen appears.
6. In the **Find** field, select and double-click the campaign or fund from which to copy appeals. You return to the Appeals tab. In the grid, the appeals associated with the selected campaign or fund appear.
7. If associated appeals already appear in the grid, a message appears to ask whether to replace the existing entries. To use the new entries, click **Yes**.

Add Relationships to Funds

On the Relationships tab, you can create relationships between a fund and constituents. For example, for a constituent who receives a scholarship from one of your funds, you can specify “Scholarship Recipient” as the relationship on the fund record, with a reciprocal relationship of “Scholarship Fund” on the constituent record.

► Add a relationship to a fund

1. On the Raiser’s Edge bar, click **Records**. The Records pages appears.
2. Click **Funds**. The Funds page appears.
3. Open the fund to which to add a relationship.
4. Select the Relationships tab.



5. In the tree view, select the type of constituent for which to add a relationship, **Individuals** or **Organizations**. On the action bar, the **New Relationship** button changes to reflect your selection. Click **New Relationship**. The New Relationship screen appears.

6. In the **Individual** or **Organization** field, enter the constituent with whom to create the relationship.
 - a. Click the binoculars. The Open screen for constituents appears.
 - b. Select the constituent with whom to create a relationship.
 - c. Click **Open**. You return to the New Relationship screen. In the **Individual** or **Organization** field, the selected constituent appears.
7. In the **Relationship** field, select the relationship of the constituent to this fund, such as “Scholarship Recipient”.
8. In the **Reciprocal** field, specify the relationship of the fund to the constituent, such as “Scholarship Fund”. The reciprocal selection appears on the Relationships tab of the constituent record.
9. In the **Date from** and **Date to** fields, enter a duration for the relationship, such as to specify a range of four years as the duration for a Scholarship Recipient relationship.
10. In the **Notes** box, enter any additional information to include about the relationship.
11. To save the relationship, click **Save and Close**. You return to the Relationships tab of the fund record. In the grid, the new relationship appears.

Add General Ledger Information to a Fund

If you have both Blackbaud’s **General Ledger** and **The Raiser’s Edge**, you can link the databases of the two programs to increase your efficiency. You establish the interface between **The Raiser’s Edge** and **General Ledger** from the **General Ledger** page of *Configuration*. For more information, see the *Configuration & Security Guide*.

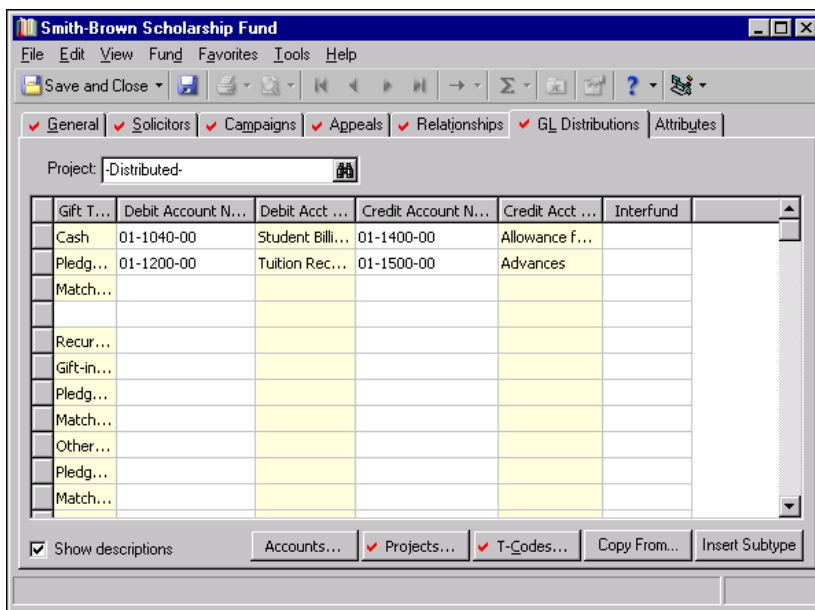
When you share gift information between the programs, you can enter gifts once instead of into each program separately. Although functionality is maximized when you have both programs, you can use this tab even if you do not have **General Ledger**, such as to store account information from other accounting software.

Warning: Make sure you do not confuse **General Ledger** and **The Raiser’s Edge** funds with each other. **General Ledger** funds contain the debit and credit account numbers you associate with a distribution. We recommend you enter these account numbers into **The Raiser’s Edge** funds when someone who handles your accounts can assist.

If you have **General Ledger**, you can distribute gift amounts among a number of different accounts. You can also associate the fund with one or multiple projects. For example, if a museum expands its gift shop and adds a planetarium at the same time, it can distribute gift amounts between both projects. You can print a list of the distributions for a fund to keep as records for your files.

► **Add account information and General Ledger account distributions, projects, and transaction codes to a fund**

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Funds**. The Funds page appears.
3. Open the fund to which to add General Ledger information. For information about how to open a fund, see "Access a Campaign Record, a Fund Record, or an Appeal Record" on page 6.
4. Select the GL Distributions tab.



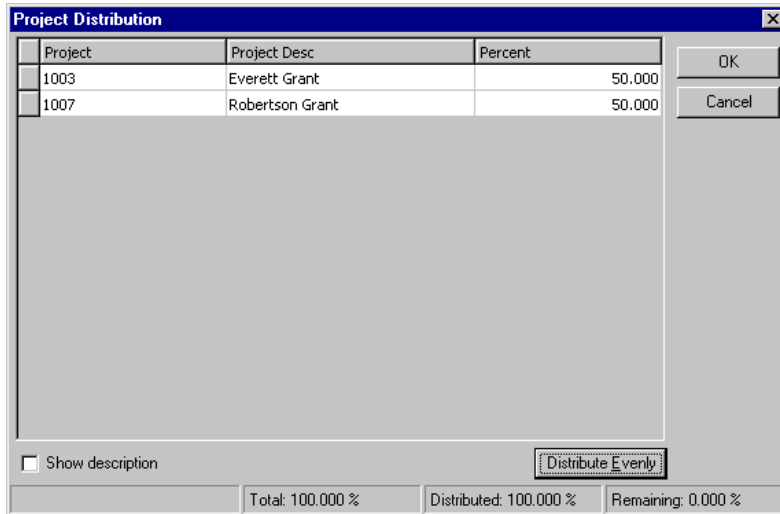
Note: From the **Fund** menu, you can open a **General Ledger** project associated with the fund. From the **Fund** menu, you can also select **Add this fund as a GL project** to add a saved fund record as a project in **General Ledger**.

5. In the **Project** field, enter the number of the project to associate with the fund or click the binoculars to search for a project in **General Ledger**.

If a **Project** column appears in the grid instead of a **Project** field above it, you can mark a checkbox on the General Ledger page of *Configuration* to make the field available. For more information, see General Ledger in the "Configuration" chapter of the *Configuration & Security Guide*.

To distribute the fund among multiple projects:

- a. Click **Projects**. The Project Distribution screen appears.



- b. Specify the projects to include in the distribution and the percentage to apply to each.
 - c. Click **OK**. You return to the GL Distributions tab. In the **Project** field, “Distributed” appears.
6. In the **Gift Types** column, all program-defined gift types and any user-defined subtypes appear. The program-defined gift types are locked and cannot be edited.

Note: If you enter a subtype for a stock gift type, such as “Common” or “Preferred”, the subtype automatically appears in under all program-defined gift types that involve Stock, including Unsold Stock and Sale Stock.

To define a subtype, select a row in the **Gift Types** column and click **Insert Subtype**. In the row that appears below the selected row, select an established subtype, or if you have security rights, press **F7** on your keyboard to add a new subtype. For example, enter “Furniture” and “Computer Equipment” under the gift type Gift In Kind. Subtypes must be unique within a gift type.

- 7. In the **Debit Account Number** and **Credit Account Number** columns, enter the accounts to automatically debit or credit when you enter a certain type of gift in **The Raiser’s Edge**. When you enter one type of account number, you must also enter the other before you can save the information.

You can enter an account number in either column regardless of whether you have **General Ledger**. If you have **General Ledger**, when you click the binoculars, the Open screen appears so you can search the **General Ledger** database for an account number.

If you specify from the **General Ledger** link of *Configuration* that the program validates **General Ledger** information, you can enter only valid accounts. On the GL Distributions tab, a down arrow appears in the **Debit Account Number** and **Credit Account Number** columns. If you click the down arrow in either column, a screen appears to help ensure the segments entered form a valid **General Ledger** account number.

Segment	Value	Description
Fund	01	UNRESTRICTED O...
Account Number	112401	
Expense Category	02	Telephone
Department/Cost...	01	Administration

You must enter an account in the ##-#####-##-## format. If you enter an invalid account number, a warning message appears. To return to the **Account** column, click **OK**.

Note: To ensure the accuracy of your information, we recommend you specify that the program validate all **General Ledger** information from the **General Ledger** link of *Configuration*.

If you do not mark the validation option in *Configuration*, you can still click the binoculars to find an account, but the down arrow does not appear. Your entry does not have to be valid in **General Ledger**. However, to ensure all **General Ledger** information is valid, we recommend you mark the validation option.

8. The **Debit Acct Desc** and **Credit Acct Desc** columns appear only if you have **General Ledger** and mark **Show descriptions** at the bottom of the screen, available only if you have **General Ledger**. The columns automatically display the account descriptions as defined in **General Ledger**. You cannot change the descriptions from *The Raiser's Edge*.

To distribute a gift type or subtype among multiple accounts:

- a. Place the cursor in either the **Debit Account Number** or **Credit Account Number** column of the appropriate row.
- b. Click **Accounts**, which appears only if you have **General Ledger**. The Account Distribution screen appears.

Debit Account Number	Credit Account Number	Percent	Interfund	Comment
01-111100-00-00	01-111300-00-00	50.000		
01-111400-00-00	01-112100-00-00	50.000		

Show descriptions
 Distribute Evenly

Press F7 for GL account lookup Total: 100.000 % Distributed: 100.000 % Remaining: 0.000 %

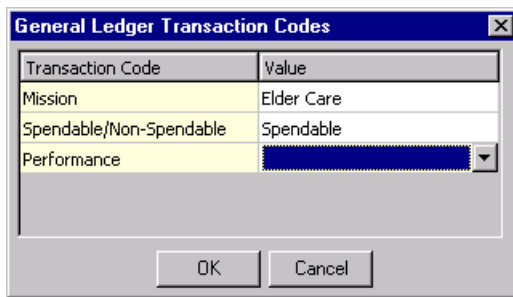
- c. In the grid, distribute the debit and credit account numbers for the selected gift type or subtype. Select one debit account number and one credit account number or select multiple account numbers among which to distribute the gift.

Because you must distribute an entire gift, the entries in the **Percent** column must equal 100%. If they do not, a warning message appears.
 - d. To return to the GL Distributions tab, click **OK**. If you divide the amount for a gift type entry among multiple accounts, the **Debit Account Number** and **Credit Account Number** columns display "Distributed".
9. If the first two numbers of a **General Ledger** debit and credit account are different, the **General Ledger** funds to which they belong are different. In this case, you must specify a transfer or interfund account in the **Interfund** column. If you attempt to enter debit and credit accounts from different **General Ledger** funds and do not specify an interfund transfer account, a message appears to instruct you to select a valid transfer entry. You create and store interfund entries on the **Interfund Entries** link of *Configuration*. To access your saved interfund entries, click the binoculars or press **F7** on your keyboard.

For more information about transfer accounts, see the *Configuration & Security Guide* and *General Ledger User's Guide*.

Note: If you do not specify that the program validate *General Ledger* information in *Configuration* and the account number or project is not found by *General Ledger* when you manually enter it into *The Raiser's Edge*, "No Description Available" appears in the selected description column. If this message appears, verify that you entered the account number or project correctly.

10. To save time and avoid errors during data entry, click **Copy From** to import distribution data entered in *Configuration* or another fund into the new fund instead of enter it manually.
11. To display the **Debit Acct Desc** and **Credit Acct Desc** columns, mark **Show descriptions**.
12. If you establish a link on the General Ledger page of *Configuration*, the **T-Codes** button appears. To establish values for transaction codes:
 - a. Click **T-Codes**. The General Ledger Transaction Codes screen appears. The **Transaction Code** column displays the list of transaction codes from *The Financial Edge*.



- b. In the **Value** column, select the transaction code table entry for each transaction code. These transaction codes are included as part of the GL Distributions posted for gifts applied to the fund. If you select a transaction code in the **Financial Edge Transaction Code** field on an appeal record for a gift involved in the posting, the transaction code selected on this screen for the fund record takes precedence over that transaction code.
- c. If your organization does not post directly to *The Financial Edge*, to accept the transaction codes, you may need to manually modify your import file used to import from *The Raiser's Edge* to *The Financial Edge*.
- d. To return to the GL Distributions tab, click **OK**.

Note: To print a list of the *General Ledger* information associated with a fund from the GL Distributions tab, such as to keep as a record for your files, right-click anywhere in the grid and select **Print**.

13. To save your settings and exit the fund record, click **Save and Close**.

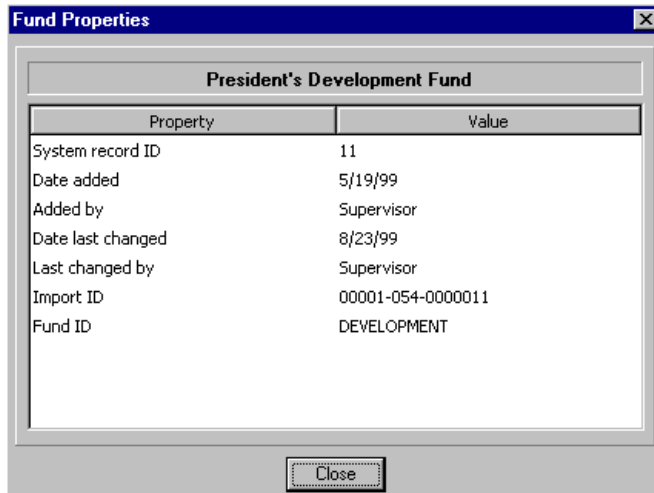
Fund Properties

You can view the system record ID; the dates a fund was created and last changed; who created and last changed the fund; and the fund's import ID, fund ID, and description. For example, for security reasons, you may need to see who last changed a fund record or when the fund was last updated.

► View fund properties

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Funds**. The Funds page appears.
3. Open the fund for which to view properties. For more information about how to open a fund record, see "Access a Campaign Record, a Fund Record, or an Appeal Record" on page 6.

- From the menu bar, select **File, Properties**. The Fund Properties screen appears.



Note: The first time you save a record, *The Raiser's Edge* automatically assigns its system record ID and import ID.

At the top of the grid, the fund description appears. The grid displays the system record ID, the date the fund was added and by whom, the date it was last changed and by whom, and the import ID and fund ID.

- To return to the fund record, click **Close**.

Appeals

Appeals track the sources your organization uses to generate gifts and the expenses associated with these sources. You can set up appeals such as direct mailings, phonathons, dinners, and auctions and track the number of constituents you solicit with each appeal. You can also define a default benefit, such as a t-shirt or newsletter subscription, given to those who give or donate in response to an appeal and how much each benefit costs your organization. You can run a wide variety of reports to determine the success and cost effectiveness of your appeals.

Appeal Records

The appeal record contains a General tab where you can enter basic information about the appeal such as a start and end date and overall goal. On this tab, you can also establish default benefits and track the number solicited for the appeal. On the Solicitors tab, you can assign solicitors and canvasser teams for the appeal. On the Campaigns tab, you can associate campaigns with the appeal. Similarly, on the Funds tab, you can associate funds with the appeal. You can select a default associated campaign and fund so when you add an appeal to a gift, the default campaign and fund automatically appear on the gift record. The Attributes/Expenses tab allows you to customize *The Raiser's Edge* to store additional information about an appeal, such as whether it targets major donors. You can also track expenses for your appeals such as postage for a mailing or food costs to feed volunteers for a phonathon.

Additionally, the appeal record contains a Packages tab, on which you can track historic and statistical information for different aspects of a single appeal. For example, you may use two separate mailing lists for your Holiday Card Appeal. One list of donors receives an embossed, expensive card, while the other list receives a simpler, less expensive card. If you specify each of these lists as a separate package, you can track the gifts generated by each list individually to determine whether the embossed cards are worth the extra expense.

General Tab

On the General tab, you can enter an ID and description for the appeal. The ID can include both letters and numbers. We recommend the description contain the full name of the appeal. In User Options, you can select whether appeals appear by description or ID in other areas of the program. For example, if your organization has a Presidential Breakfast each year, you can enter the ID “2008BREAKFAST” but probably want to select **Description** in User Options so the entire name appears in Thank You letters and Appeal reports.

If you mark **Appeal is inactive**, the appeal is flagged as inactive for appeal searches. If you have numerous appeals, you can use this checkbox to limit searches to only your current appeals (although you can still include inactive appeals in searches if you want to). To define the duration of the appeal, enter a start and end date in the **Start date** and **End date** fields. You do not have to enter a date range for your appeal, but start and end dates allow you to base appeal searches on date range and increase the versatility of your reports.

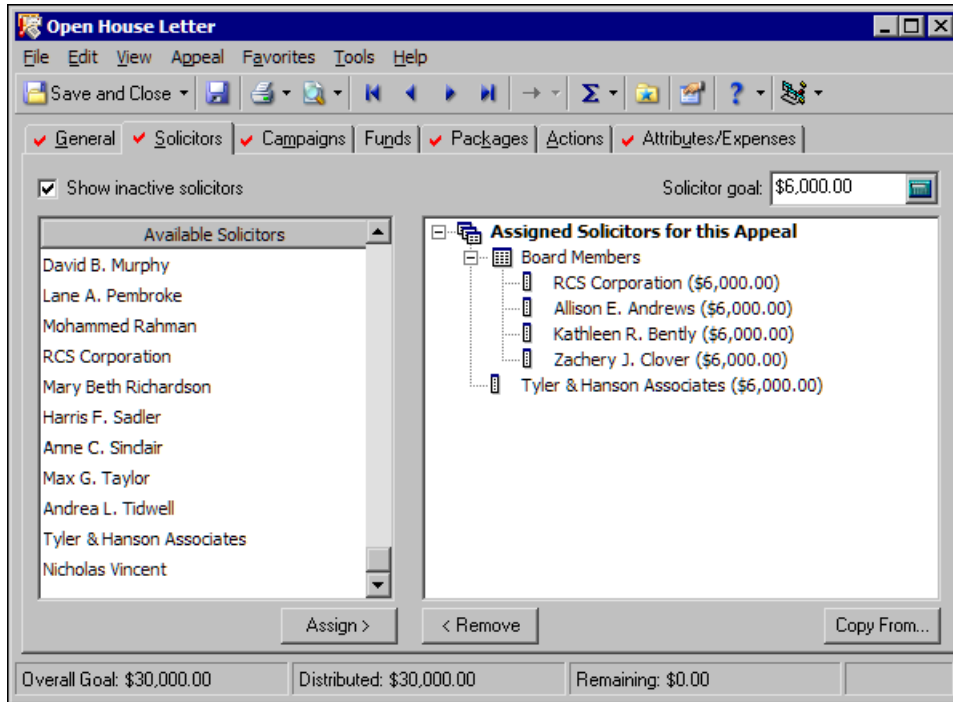
To group appeals together, enter a category in the **Appeal category** field, such as “Annual”, “Direct Mail”, or “Events”. You can use the category in search screens and as selection criteria in some reports such as the Appeal Comparison Summary.

In the **No. Solicited** field, enter the number of constituents asked to donate through this appeal. In the **Notes** box, enter additional useful information about the appeal, such as who organized it. In the **Overall goal** field, you can enter a projected goal amount for the appeal. An overall goal is not required but you can use it to create an Appeal Goal Summary to show whether you are over or under your projected amount.

In the **Default gift amount** field, enter a gift amount to default in *Batch* or the **Gifts** link of *Records* when you add this appeal to a gift before you enter an amount. If your appeal asks for a certain amount, you can enter the amount as the default to save time during data entry. To assign default benefits, such as tote bags or newsletters, for gifts associated with this appeal through *Batch* or the **Gifts** option of *Records*, click **Default Benefits**. When you click this button, the Benefits screen appears so you can add and update benefit information.

Solicitors Tab

On the Solicitors tab, you can assign solicitors and teams of solicitors to an appeal. The **Available Solicitors** box displays all constituents in your database who are assigned as solicitors. To designate a constituent as a solicitor, mark **Is a solicitor** on the Bio 1 or Org 1 tab of the constituent record.



To assign a solicitor to the appeal, select the solicitor in the **Available Solicitors** box and click **Assign**. The solicitor moves to the hierarchy on the right. If you have numerous solicitors and do not want to scroll through the entire list in the **Available Solicitors** box, or to search for constituent who is not currently a solicitor, click **<Find Solicitor>** in the **Available Solicitors** box. The Open screen for constituents appears. When you find and select a constituent who is a solicitor on the Open screen, you return to the Solicitors tab and the selected solicitor appears in the hierarchy.

Note: If you select an inactive solicitor on the Open screen, a message appears to ask whether to mark the solicitor as active again.

By default, when you search for a constituent, **Constituent is a solicitor** is marked on the Open screen. To find a constituent who is not a solicitor, unmark this checkbox. When you select a constituent who is not a solicitor, a message appears to ask whether to make the constituent a solicitor. When you click **Yes**, you return to the Solicitors tab and the selected constituent appears as a solicitor in the hierarchy.

To copy solicitor assignments from another campaign, a fund, or an appeal into the current appeal, click **Copy From**. The Open screen appears so you can select the campaign, fund, or appeal from which to copy solicitor assignments.

You can assign solicitors individually or group them in teams. To create a new team, select **<New Team>** in the **Available Solicitors** box and click **Assign**. An entry appears in the hierarchy. You must enter the team name here. To assign a solicitor as a member of the team, drag the solicitor entry over the team name in the hierarchy.

To assign goals, select a solicitor and enter a goal in the **Solicitor Goal** field. To distribute the appeal goal evenly among solicitors, select an assigned solicitor, right-click, and select **Distribute Overall goal**.

Campaigns Tab

On the Campaigns tab, you can associate established or new campaigns with an appeal. You can break down appeal goal summaries by the campaigns entered on this tab. To quickly find and associate a campaign with your appeal, put the cursor in the **Campaign Description** or **Campaign ID** field, depending on your selection in User Options, and click the binoculars or press **F7** on your keyboard. The Open screen for campaigns appears so you can find a campaign with which to associate the appeal. You can also add a new campaign from this tab, although we recommend you add campaigns only through the **Campaigns** link of *Records*.

Campaign Description	Campaign ID	Default?
Capital Campaign	CAPITAL	<input checked="" type="checkbox"/>
		<input type="checkbox"/>

Limit data entry to only the campaigns associated with this appeal

Copy From...

Distributed: \$30,000.00 Remaining: \$0.00

To designate a campaign as the default campaign for the appeal, mark the checkbox in the **Default?** column for the campaign. When you assign the appeal to gifts, the default campaign automatically appears the **Campaign** field on the gift record. You can select only one campaign as the default. When you enter gifts for this appeal, you can override the default and assign them to any campaign.

If you leave **Limit data entry to only the campaigns associated with this appeal** unmarked, you can select and save any campaign with any appeal when you enter gifts. If you mark this checkbox, when you add this appeal to a gift before you add a campaign or fund, only campaigns associated with the appeal appear in campaign searches when you try to add a campaign to the gift. When you click **Copy From**, the Open screen appears so you can locate another appeal or a fund from which you can copy associated campaign information.

Funds Tab

On the Funds tab, you can associate selected funds with an appeal. You can break down goal summaries by the funds entered on this tab. To quickly find and associate a fund with your appeal, put the cursor in the **Fund Description** or **Fund ID** column, depending on your selection in User Options, and click the binoculars or press **F7** on your keyboard. The Open screen for funds appears so you can find the fund with which to associate the appeal. You can also add a new fund from this tab, although we recommend you add funds only from the **Funds** link of *Records* so you can enter a more complete record.

Fund Description	Fund ID	Default?
Acquisition Fund	ACQUISITION	<input checked="" type="checkbox"/>

Limit data entry to only the funds associated with this appeal

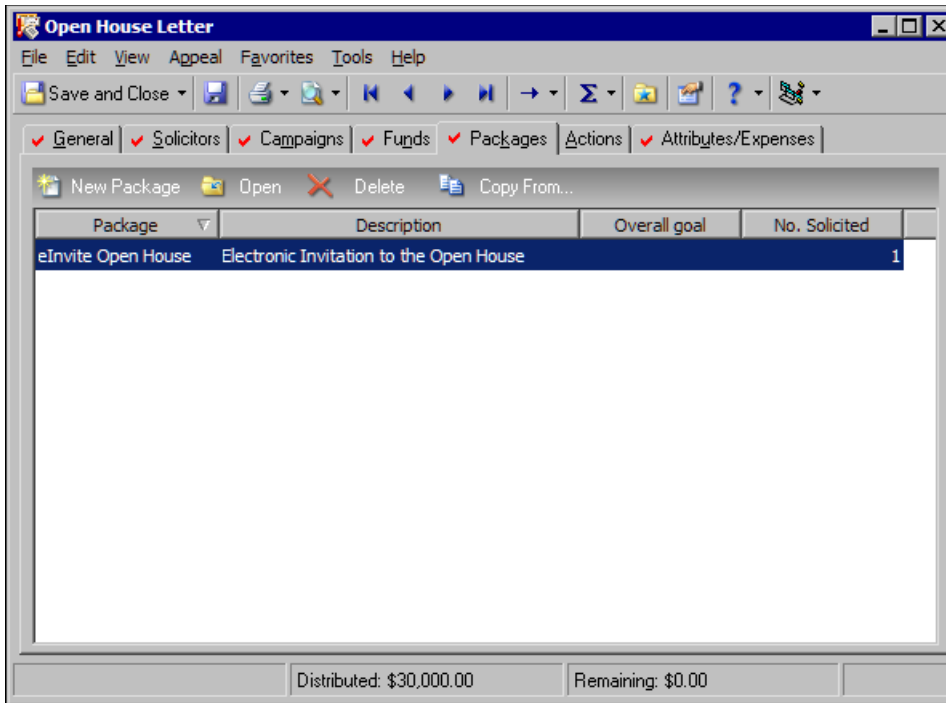
Distributed: \$30,000.00 Remaining: \$0.00

To designate a fund as the default fund for the appeal, mark the checkbox in the **Default?** column for the fund. When you add the appeal to gifts, the default fund automatically appears in the **Fund** field on the gift record. You can select only one fund as the default. This is the fund to which you apply all donations unless otherwise specified by the constituent. If your organization has a General Fund, we recommend you make it your default entry.

If you leave **Limit data entry to only the funds associated with this appeal** unmarked, you can select and save any fund with any appeal when you enter gifts. If you mark this checkbox, when you enter a gift and associate it with this appeal before you associate it with a fund or campaign, only funds associated with the appeal appear in fund searches when you try to add the fund to a gift. When you click **Copy From**, the Open screen appears so you can locate another appeal or a campaign or fund from which you can copy associated fund information.

Packages Tab

With packages, you can track historic and statistical information for different facets of a single appeal. For example, your Year End Appeal can consist of several different mailings, one that features a simple letter of appeal and another that features the letter plus a color brochure. When you make each mailing a separate package, you can analyze the effectiveness of each individual mailing to determine whether the color brochure is worth the additional expense. Packages let you precisely analyze the effectiveness of your appeals.



On the Packages tab, the grid displays any packages established for the appeal. By default, the **Package**, **Description**, **Overall Goal**, and **No. Solicited** columns appear. When you add or open a package in the grid, the individual package record includes a General tab and an Attributes tab.

General Tab

On the General tab, the **Package ID** and **Description** fields appear. Your entries in these fields must be unique within each appeal, but you can duplicate them among different appeals. For example, if you have a package named “Glossy Catalog” for your Annual Summer Mailing appeal, you cannot give another package that name in the same appeal, but you can in another appeal. A start and end date for the package are not required, but entering them in the **Start date** and **End date** fields increases the versatility of package reports and searches. To group packages, you can enter a category in the **Package category** field. For example, you can group packages for booklets, brochures, newsletters, and invitations under the category “Mailing”.

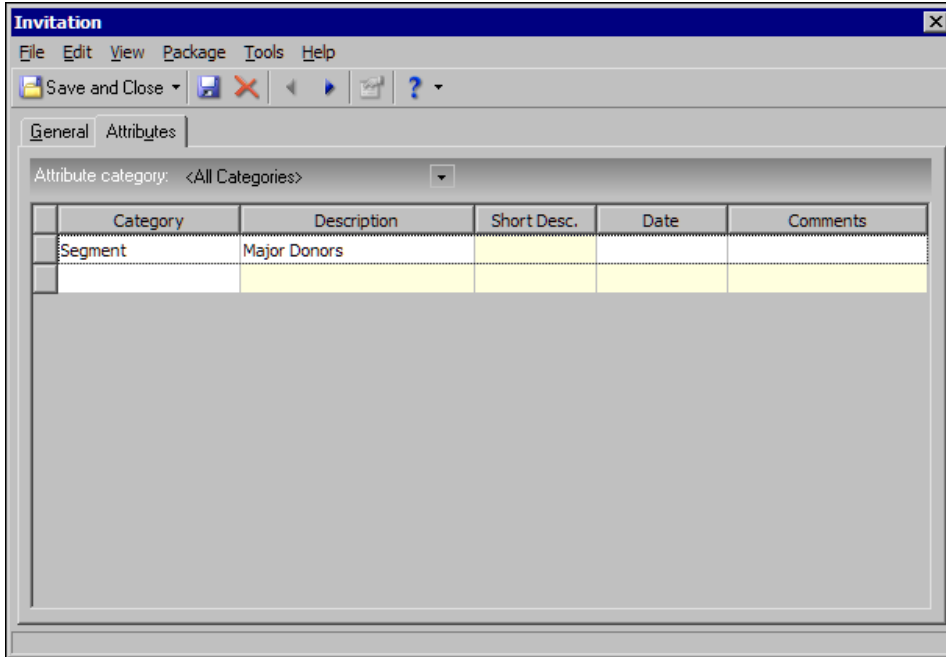
The screenshot shows a software window titled "Invitation" with a menu bar (File, Edit, View, Package, Tools, Help) and a toolbar. The "General" tab is selected, displaying the following fields and values:

- Package ID: INV
- Description: Invitation
- Start date: (empty)
- End date: (empty)
- Overall goal: \$10,000.00
- Default gift amount: (empty)
- Package category: Mail - Calendar
- Default Benefits: No benefits assigned
- No. solicited: 200
- Notes: Contact Pat Cruse at Concord Printing

In the **No. solicited** field, you can enter the number of constituents the package is offered to. The sum of the **No. solicited** fields on the packages for an appeal must be less than or equal to the **No. solicited** field entry on the General tab of the appeal record. If you enter an overall goal for the appeal, the sum of the package goals must be less than or equal to the overall appeal goal. You do not have to enter an amount in the **Default gift amount** field, but a default amount can speed up data entry if the package asks for a specific amount. To assign benefits for a package, click **Default Benefits**. In the **Notes** box, you can enter additional details about the package such as a contact name at the printing company for a brochure mailing.

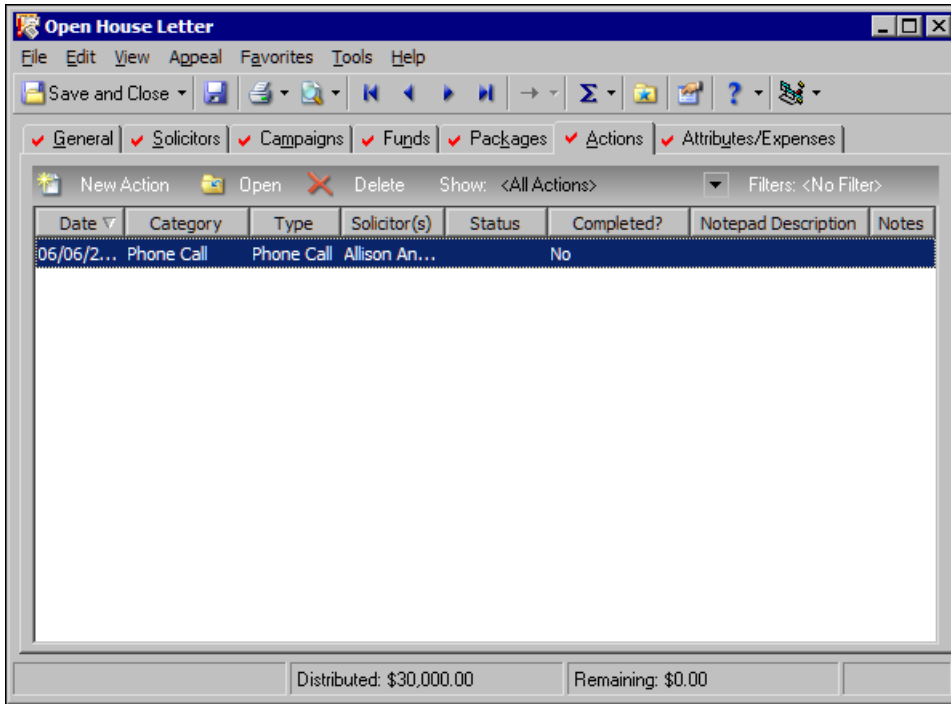
Attributes Tab

On the Attributes tab, the standard attributes grid appears. In the grid, you can associate additional information with the package, such as whether mailing lists were used and how much you paid for the lists.



Actions Tab

On the Actions tab, you can add and edit the actions associated with the appeal. You can use actions to specify when certain things related to the appeal happen. For example, for a Summer Mailing appeal, you can create actions to “Verify Addresses,” “Finalize brochure,” and “Send to Mailing House.” You can assign actions to make sure they are carried out by a certain time. To add a new action, click **New Action** in the action bar.

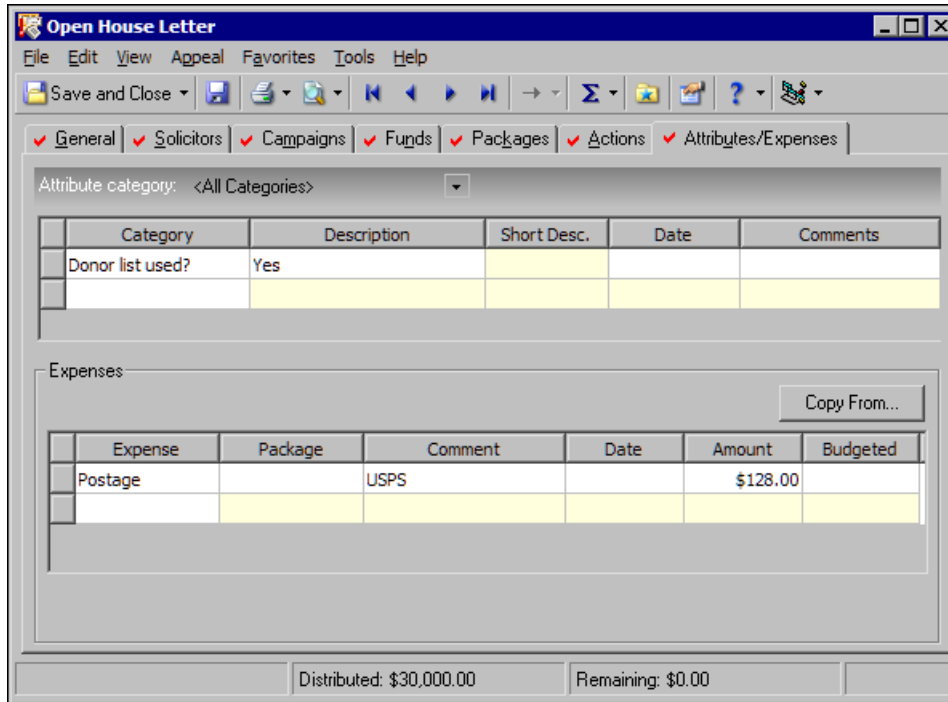


On an action record, the General tab stores detailed information, such as the appeal name, action category, action type, action date, solicitors assigned to the action, priority, reminder notification, campaign, and fund. The **Location** field changes depending on the category type. For Meeting, the **Location** field appears; for Phone Call, the **Phone** field appears; for Mailing or Task/Other, the **Letter** field appears; and for Email, the **Email** field appears. To help you maintain special preferences and specific notes for the action, the Attributes and Notes tabs appear.

For more information about actions, see the *Constituent Data Entry Guide*.

Attributes/Expenses Tab

On the Attributes/Expenses tab, you can assign attributes to the appeal. You can also create detailed records to track the related expenses of your appeals. The attributes grid contains the standard columns to associate additional information with the appeal. For example, if you have security rights to add attributes for a mailing, you can create a category entitled “Donor List Used?” and enter “Yes” or “No” as the description.



In the **Expenses** grid, enter the costs associated with the appeal. For example, with a direct mailing, you can select “Postage” and “Printer Costs” in the **Expense** column. You can also include the source and price of a mailing list so you can run a summary to determine if the list was worth its cost after the appeal ends.

In the **Package** column, you can select an established package or enter a new package for the expense. You do not have to select a package for an expense, but if you assign the expense to a package, so can run summaries and reports to analyze the package expenses. In the **Comments** column, enter any additional information about the expense. In the grid, you can also enter the date you record the expense, the amount of the expense, and the amount budgeted for the expense.

If you configure an interface between *The Raiser’s Edge* and *The Financial Edge* in *Configuration*, the **Financial Edge Transaction Code** field and **View GL Expenses** button appear.



Note: Transaction codes are available with *The Financial Edge* optional module *Projects and Grants*. To use transaction codes on appeal records, you must install *The Financial Edge* on the same workstation as *The Raiser’s Edge* and log into *The Financial Edge* at least once.

In the **Financial Edge Transaction Code** field, the code selected on the General Ledger page in *Configuration* appears. When you save the appeal record, a table entry of the appeal name is created in *The Financial Edge* for this transaction code. To see all expenses associated with this transaction code in *The Financial Edge*, click **View GL Expenses**.

Add Appeals

You can assign your new appeal an ID and description, specify start and end dates, group the appeal under a category, and enter an overall goal for the appeal. You can make an appeal inactive so it does not appear in search results and enter additional notes and the number of people solicited in the appeal. You can assign a default amount for gifts associated with the appeal and default benefits you give as a reward to constituents who give in response to the appeal.

► Add an appeal

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.

Note: To create a new appeal, you can also select **File, Open** from the menu bar and click **Add New** on the Open screen; select **New** from the **File** menu or **Save and New** from the toolbar; and press **CTRL + N** on your keyboard when an appeal record is open.

3. Click **New Appeal**. The New Appeal screen appears.
4. Select the General tab.

Note: On the Records tab in User Options, you can select whether to enter and display appeals by ID or description on other records.

5. In the **Appeal ID** field, enter a short identification of no more than 20 characters for the new appeal. The ID can include letters and numbers. For example, your Holiday Card appeal for the year 2008 can have a short ID of "HOLCARD08." You must enter a unique identifier in this field before you can save the appeal.
6. In the **Description** field, enter the full appeal name, such as "Summer Phonathon", "Spring Mailing", or "Celebrity Date Auction". Your description can contain a maximum of 100 characters. You must enter a unique description in this field before you can save the appeal.

7. To flag the appeal as inactive for appeal searches, mark **Appeal is inactive**. If you have numerous appeals, you can use this checkbox to limit searches to only your current appeals (although you can still include inactive appeals in searches if you want to). You cannot add an inactive appeal to a gift record, but you can edit gifts that already have the appeal on the record. If you enter an appeal on a gift, save the gift record and then later make the appeal inactive, the appeal remains on the gift record. If you edit the gift and change the appeal, you cannot enter the inactive appeal on the gift.

If an appeal appears on a gift record, you cannot delete the appeal from the database. However, to ensure users do not add the appeal to more gifts or associate the appeal with new campaigns or funds, mark this checkbox.

Note: You do not have to enter a date range for an appeal, but a date range allows you to define appeal searches.

8. To define the duration of the appeal, enter a start and end date in the **Start date** and **End date** fields. If you attempt to enter a gift with a date before or after the dates established here, a warning message appears. You can save the gift anyway, but doing so affects the accuracy of your appeal reports and summaries when you base them on a date range. A date range is not required for your appeal, but start and ends dates allow you to base appeal searches on the date range and increase the versatility of your reports.
9. To group appeals together, enter a category in the **Appeal category** field. For example, you can group appeals according to the campaigns they fall under or create categories for your annual, semiannual, and ongoing appeals. To view a list of established categories, click the down arrow. If you have rights to add a new category, click the field name to add the category. You can use the category in search screens and as selection criteria in some reports such as the Appeal Comparison Summary.

Note: When you globally add an appeal to a group of constituents, you can automatically update the number solicited to reflect the new total. You globally add appeals through the **Global Add** link of *Administration* and from the Segment tab of *Mail*.

10. In the **No. Solicited** field, enter the number of constituents you target for the appeal. If the appeal is already assigned to constituents, when you click the binoculars, the Open screen for queries appears. Use it to select or create a static or dynamic constituent, organization, or individual query of the constituents with this appeal on their record. The number of records from the query automatically appears in the **No. Solicited** field. To learn how to filter query results, see the “Query” chapter of the *Query & Export Guide*. Because this appeal is new, you have probably not yet assigned it to constituent records. If this is the case, click the calculator or manually enter the number of constituents.

The number entered must be greater than or equal to the total of the **No. Solicited** fields on the packages for the appeal. If you change the entry in this field to a number less than the total of the packages, a warning message appears. Click **OK** and enter a different number.

11. When you enter a number in the **No. solicited** field and run a query, a message appears before the program update the field with the new number. On the message, select whether to add the number of records in the query to the number solicited or replace the number solicited with the number of records in the query.
For example, you may make an entry in the **No. Solicited** field and then add the appeal to more constituent records. If you run a query to list all constituents with this appeal on their record, to update the number solicited, select **Replace existing no. solicited with the number of records in the query**.
12. In the **Notes** box, enter useful information about the appeal, such as whether it targets major donors or how it performed in previous years.
13. In the **Overall goal** field, enter the projected goal amount for the appeal. An overall goal is not required, but you can use it to create an Appeal Summary to show whether you are over or under your projected amount. The summary displays a thermometer so you can visually check the progress toward your goal.
14. In the **Default gift amount** field, enter a gift amount to automatically appear when you add this appeal to a gift before you enter an amount for the gift on the gift record or in *Batch*. If your appeal asks for a certain amount, we recommend you enter this amount as the default to save time during data entry.

15. To automatically assign benefits when you associate gifts with the appeal on the gift record or in *Batch*, click **Default Benefits**. If no benefits are assigned, “No benefits assigned” appears to the right of the button. When you assign default benefits, a check mark appears on the button and the total benefit values assigned appears to the right of the button. For example, if you give a coffee mug with a benefit value of \$10.00 and a t-shirt with a benefit value of \$20.00, “\$30.00” appears as the total benefit value for a giving response to this appeal.

To assign benefits to the appeal:

- a. Click **Default Benefits**. The Benefits screen appears.

Benefit	Count	Unit Cost	Total Benefit/Value	Sent/Fulfilled	Comments
Free Admission	2	\$50.00	\$100.00		Spring Gala

Total: \$100.00

Notes:
Two tickets to this year's Annual Spring Gala.

Include notes on receipt

- b. In the grid, enter the benefit in the **Benefit** column, such as “Mug”, “T-shirt”, or “Newsletter”.
- c. In the **Count** column, enter the number of units of the benefit a constituent who answers the appeal receives. For example, if you give two admission tickets to your Annual Spring Gala, enter “2”.

Note: The unit cost of a benefit is associated with the **Benefit Type** table entry in *Configuration*. If you edit the table entry, benefits you have entered do not update. If your benefit costs change, you must update the active appeals and packages with the new amounts.

- d. In the **Unit Cost** column, enter the cost of a single unit of the benefit. If you specify the unit cost of a benefit in the **Tables** link of *Configuration*, the amount automatically appears in the **Unit Cost** field when you leave the **Benefit** field.

When you leave the **Unit Cost** field, *The Raiser’s Edge* multiplies that entry times the entry in the **Count** field to automatically display the total in the **Total Benefit/Value** field. This amount appears on the constituent’s receipt. However, you can override the automatic entry.

- e. If the constituent received the benefit, or you know the date he will receive the benefit, enter the date in the **Sent/Fulfilled** column.
- f. In the **Comments** column, enter up to 255 characters of additional information about the benefit. The **Total** field displays the sum of the **Total Benefit/Value** column. This total also appears beside **Default Benefits** on the General tab. When you enter benefits, the button also displays a red check mark.
- g. To load the benefits from another appeal to the current appeal, click **Load From**. On the Open screen for appeals, select the appeal with the benefits to load and click **Open**. On the Benefits screen, the benefits for the selected appeal appear in the grid of the new appeal, along with the benefits already assigned to the new appeal.
- h. In the **Notes** box, enter detailed information about the benefit, such as a brand name. To include this information on receipts for a gift given in response to the appeal, mark **Include notes on receipt**.
- i. Click **OK**. You return to the General tab of the appeal record.

- To save the record, click **Save and Close** on the toolbar. Your return to the Appeals page.

Manage Appeals

You can add new appeals and edit and delete established appeals. You can associate campaigns and funds with an appeal and copy information about the campaigns and funds associated with an existing campaign, fund, or appeal into a new appeal. To analyze the effectiveness of different solicitations in a single appeal, you can create packages. You can assign attributes and keep detailed records of the expenses involved in an appeal. You can view properties for an appeal.

► Edit an appeal

Occasionally, you may need to change an appeal record.

Scenario: Your organization, Lancaster College, decides to associate its Building Fund with its Annual Mailing. The Building Fund will be mentioned in mail solicitations, but it is not currently associated with this appeal. The mailing targets gifts of \$50. To speed data entry, make this the default gift amount for the appeal.

- On the Raiser’s Edge bar, click **Records**. The Records page appears.
- Click **Appeals**. The Appeals page appears.
- Click **Open an Appeal**. The Open screen for appeals appears.
- Open the appeal record for the Annual Mailing. For information about how to find a record, see “Access a Campaign Record, a Fund Record, or an Appeal Record” on page 6.
- Select the General tab.

- In the **Default gift amount** field, enter the amount \$50. When you enter a gift from the **Gifts** link of *Records* or in *Batch* and associate the gift with the appeal before you enter an amount, the gift amount defaults to \$50. You can override this default, but because you anticipate most gifts will be for this amount, the default amount saves you time during data entry.
- Select the Funds tab.

8. Put the cursor in the **Fund Description** or **Fund ID** column, depending on your selection in User Options, and click the binoculars. The Open screen for funds appears.
9. Search for the Building Fund.
10. In the results grid, double-click “Building Fund”. You return to the Funds tab. In the grid, the Building Fund appears.
11. To save your changes, click **Save and Close** on the toolbar. You return to the Appeals page.

▶ Delete an appeal

Warning: When you delete an appeal, the program automatically removes it from the Appeals tab of any campaign or fund with which it is associated. Before you delete an appeal or other record in *The Raiser’s Edge*, we recommend you have a complete backup of your database. To successfully back up your data, you must first shut down the database.

You cannot delete an appeal that appears on gift records. Before you delete an appeal or other record, we strongly recommend you back up your database.

Scenario: You create a Summer Phonathon Appeal, but due to scheduling difficulties with volunteers, you decide to move it to the winter. Because the Summer Phonathon never takes place, you receive no gifts to associate with it. You want to remove the Summer Phonathon from your records.

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.
3. Open the Summer Phonathon Appeal. For more information about how to open an appeal record, see “Access a Campaign Record, a Fund Record, or an Appeal Record” on page 6.
4. Select **File, Delete** from the menu bar or click **Delete** in the toolbar. A verification message appears.
5. To delete the appeal, click **Yes**. You return to the Appeals page.

Associate and Copy Campaigns

Note: When you associate a campaign with an appeal on the appeal record, the program automatically creates a reciprocal association on the Appeals tab of the campaign record. When you delete a campaign association, the program automatically deletes the reciprocal appeal association from the campaign record.

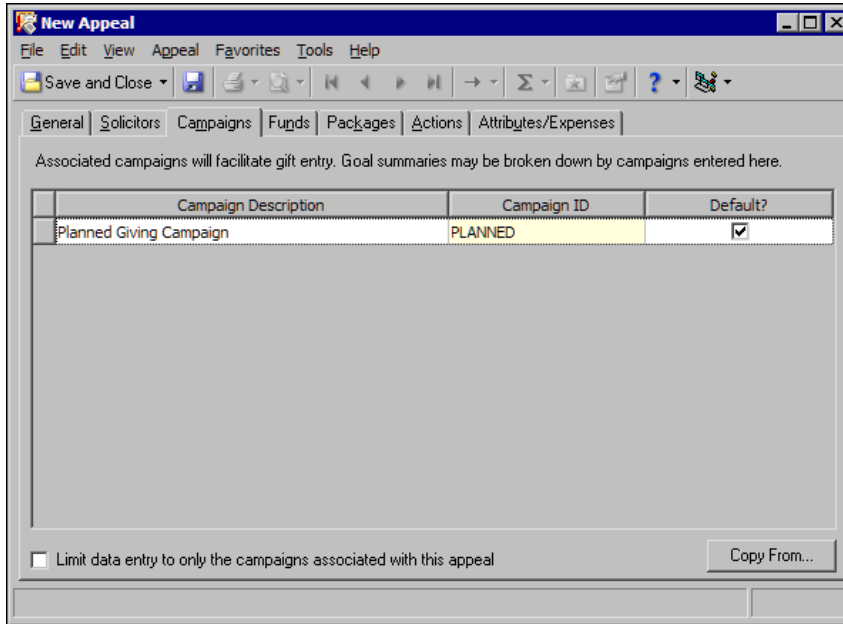
On the Campaigns tab of the appeal record, you can associate established or new campaigns with an appeal to save time during gift entry. Additionally, you can enter a default campaign for the appeal. When you enter data in the **Appeal** field first on the gift record, the program automatically enters the default campaign in the **Campaign** field. You can break down appeal goal summaries by the campaigns associated with an appeal.

▶ Associate campaigns with an appeal

You can associate campaigns with a new or existing appeal. For this procedure, we associate a campaign with a new appeal.

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.
3. Click **New Appeal**. The New Appeal screen appears.

4. Select the Campaigns tab.



5. Depending on how you select to enter and display campaigns in User Options, you can enter data in either the **Campaign Description** or **Campaign ID** column, and the other column is locked for data entry. For example, if you select to enter and display campaigns by description in User Options, you cannot enter a campaign ID. When you select a description in the **Campaign Description** field, the ID automatically appears in the **Campaign ID** column.

To quickly find and associate an existing campaign with your appeal:

- a. Put the cursor in the **Campaign Description** or **Campaign ID** column, depending on your selection in User Options.
- b. Click the binoculars or press **F7** on your keyboard. The Open screen for campaigns appears.
- c. Find and double-click the campaign to associate with the appeal. You return to the Campaigns tab. In the grid, the selected campaign appears.

6. To add a new campaign:

- a. In the **Campaign Description** or **Campaign ID** field, depending upon your selection in User Options, enter the name of the new campaign. If the program does not recognize the campaign name as an existing campaign, a message appears to ask whether to add the new campaign.

Warning: We recommend you create new campaigns only from the **Campaigns** link of *Records*. Through *Records*, you can fill in fields such as **Overall goal**, **Start date**, and **End date**. Although this information is not required, it greatly increases the versatility of your reports.

- b. Click **Yes**. The program creates the new campaign. If you enter twenty or fewer characters, the campaign ID and description are the same.

We recommend you create campaigns only from the **Campaigns** link of *Records*, so you can enter information in all fields and increase the versatility of your reports.

7. To designate a campaign as the default campaign for the appeal, mark the checkbox in the **Default?** column for the campaign. When you add the new appeal to gifts, the default campaign automatically appears in the **Campaign** column. You can select only one campaign as the default.

After you mark **Default?** for a campaign, the checkboxes by the other campaigns in the grid are disabled. When you add this appeal to gifts, you can override the default and add any campaign. To save time during data entry, the default campaign allows you to enter a single campaign quickly and consistently.

8. To display only campaigns associated with the appeal in campaign searches when you add the appeal to a gift before you add a campaign or fund, mark **Limit data entry to only the campaigns associated with this appeal**.

You cannot override this setting and select unassociated campaigns when you enter gifts. If you enter an unassociated campaign and then enter the appeal on the gift record, you cannot save the gift until you replace the unassociated campaign with an associated one.

Only gifts entered after you mark the checkbox are affected. Gifts already entered with unassociated campaigns remain the same. However, if you edit previously entered gifts after you mark the checkbox, you must enter a campaign associated with the appeal before you can save the gift record.

If you mark **Limit data entry to only the campaigns associated with this appeal**, all other areas of the program, including **Import** and **Global Change** in *Administration*, use only associated campaigns.

To select and save any campaign with any appeal when you enter gifts, leave **Limit data entry to only the campaigns associated with this appeal** unmarked.

9. To save your entries and proceed to another tab of the record, click **Save** on the toolbar.
To save your entries and exit the record, click **Save and Close** on the toolbar.

► **Copy associated campaigns from an existing fund or appeal into a new appeal**

To save time and increase consistency during data entry, you can copy the campaigns associated with an established fund or appeal into the new appeal instead of enter them manually.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.
3. Click **New Appeal**. The New Appeal screen appears.
4. Select the Campaigns tab.
5. Click **Copy From**. The Open screen appears.
6. In the **Find** field, select whether to copy associated campaigns from an appeal or a fund.
7. Search for and double-click the fund or appeal to copy associated campaigns from. You return to the Campaigns tab. In the grid, the campaigns associated with the selected fund or appeal appear.
8. If campaigns already appear in the grid, a message appears to ask whether to overwrite the existing entries. To use the new entries, click **Yes**.

Associate and Copy Funds

Warning: When you associate a fund with an appeal on the appeal record, the program automatically creates a reciprocal association on the Appeals tab of the fund record. When you delete a fund association, the program automatically deletes the reciprocal appeal association from the fund record.

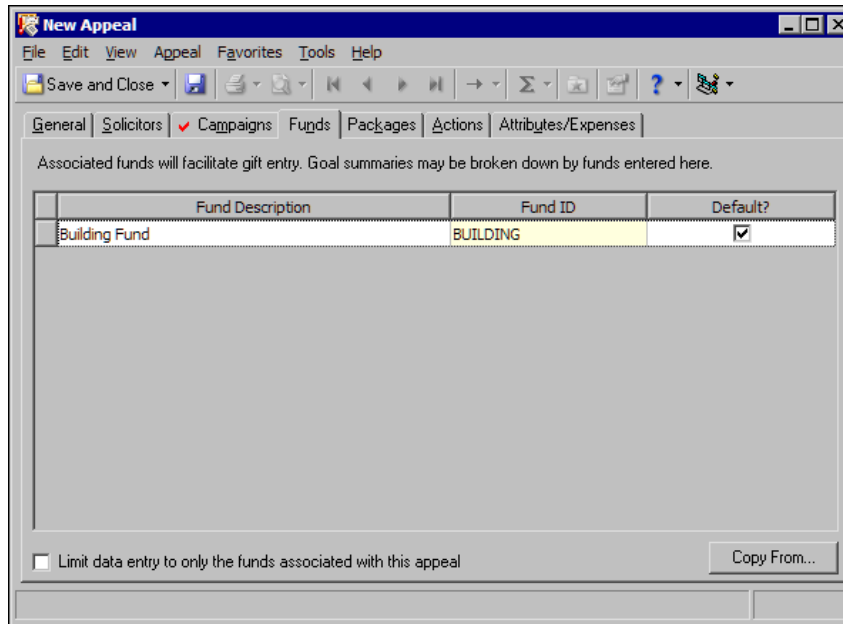
To save time during data entry, you can associate selected funds with an appeal. You can enter defaults so that if you first enter an appeal in the **Appeal** field on the gift record, the program automatically displays the default fund in the **Fund** field. This can save time if you have one fund to which you apply the majority of your gifts. You can break down goal summaries by the funds entered on this tab.

► **Associate funds with an appeal**

You can associate funds with new or existing appeals. For this procedure, we associate a fund with a new appeal.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.
3. Click **New Appeal**. The New Appeal screen appears.

4. Select the Funds tab.



Note: To access User Options directly from a campaign, fund, or appeal record, select **Tools, User Options** from the menu. User Options opens directly to the Records tab with either **Campaign, Fund, or Appeal** selected in the tree view, depending on the record type you have open.

5. Depending on how you select to enter and display funds in User Options, you can enter data in either the **Fund Description** or **Fund ID** column, and the other column is locked for data entry. For example, if you select to enter and display funds by description in User Options, you cannot enter a fund ID. When you select a description in the **Fund Description**, the ID automatically appears in the **Fund ID** column.

To quickly find and associate an existing fund with your appeal:

- a. Put the cursor in the **Fund Description** or **Fund ID** column, depending upon your selection in User Options.
- b. Click the binoculars or press **F7** on your keyboard. The Open screen for funds appears.
- c. Search for and double-click the fund to link to the appeal. You return to the Funds tab. In the grid, the selected fund appears.

Warning: We strongly recommend you create new funds only through the **Funds** link of *Records*. Through *Records*, you can fill in fields such as **Overall goal**, **Start date**, and **End date**. Although this information is not required, it greatly increases the versatility of your reports.

6. To add a new fund:

- a. In the **Fund Description** or **Fund ID** column, depending upon your selection in User Options, enter the name of a new fund. If the program does not recognize the entry as an existing fund, a message appears to ask whether to add the new fund.
- b. Click **Yes**. The program adds the new fund. If you entered twenty or fewer characters, the fund ID and description are the same.

We recommend you create funds only through the **Funds** link of *Records*, so you can enter information in all fields and increase the versatility of your reports.

7. To designate a fund as the default fund for the appeal, mark the checkbox in the **Default?** column for the fund. When you add the appeal to gifts, the default fund automatically appears in the **Fund** field. You can select only one fund as the default. This is the fund to which you apply all donations given to this appeal, unless otherwise specified by the constituent.

After you mark **Default?** by one fund, the checkboxes by the other funds in the grid are disabled. When you enter this appeal on gifts, you can override the default and assign them to another fund. To save time during data entry, the default fund allows you to enter a single fund quickly and consistently.

8. To display only funds associated with the appeal in fund searches when you add the appeal to a gift before you add a fund a campaign, mark **Limit data entry to only the funds associated with this appeal**.

You cannot override this setting and select unassociated funds when you enter gifts. If you enter an unassociated fund and then enter the appeal on the gift record, you cannot save the gift until you replace the fund with an associated one.

Only gifts entered after you mark the checkbox are affected. Gifts already entered with unassociated funds remain the same. However, if you open and edit previously entered gifts after you mark the checkbox, you must enter an associated fund before you can save the gift record.

If you mark **Limit data entry to only the funds associated with this appeal**, all other areas of the program, including **Import** and **Global Change** in *Administration*, use only associated funds.

To select and save any fund with any appeal when you enter gifts, leave **Limit data entry to only the funds associated with this appeal** unmarked.

Warning: If a conflict between associated funds with a campaign and an appeal exists on a gift, you cannot save the gift record. For example, Campaign A has Fund A associated with it and **Limit data entry to on the funds associated with this appeal** is marked. Appeal A does not have Fund A associated with it and the checkbox is also marked. If you try to add a gift to Campaign A, Fund A, and Appeal A, a message appears to inform you that you cannot save the gift.

9. To save your entries if you want to proceed to another tab of the record, click **Save** on the toolbar.

To save your entries and exit the record, click **Save and Close** on the toolbar.

► **Copy associated funds from an existing campaign or appeal into a new appeal**

To save time and increase consistency during data entry, you can copy funds associated with an established campaign or appeal into a new appeal instead of enter them manually.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.
3. Click **New Appeal**. The New Appeal screen appears.
4. Select the Funds tab.
5. Click **Copy From**. The Open screen appears.
6. In the **Find** field, select whether to copy associated funds from an appeal or a campaign.
7. Search for and double-click the campaign or appeal to copy funds from. You return to the Funds tab. In the grid, the funds associated with the selected campaign or appeal appear.
8. If funds already appear in the grid, a message appears to ask whether to replace the existing entries. To use the new entries, click **Yes**.

Add Packages to an Appeal

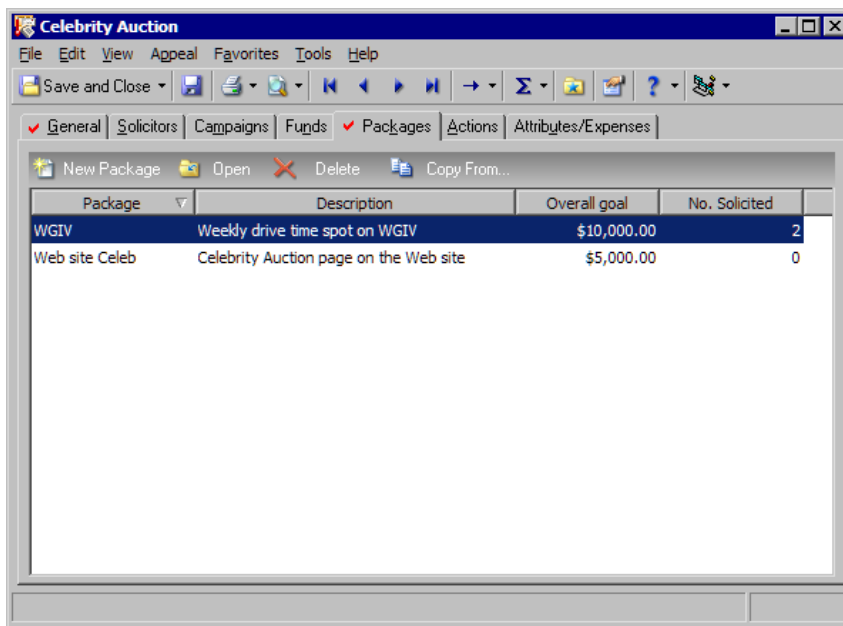
Note: You can use packages to create detailed reports that breakdown appeals by each package to show number of donors, percent response, cost per package, number of gifts, and the total dollar value of each package.

You can use packages to track historic and statistical information for different facets of a single appeal. For example, your Winter Mailing Appeal consists of a newsletter sent to minor donors, a glossy brochure sent to mid-level donors, and a full color booklet sent to major donors. When you make each of these a separate package, you can break down the effectiveness of each package rather than as a single mailing. Packages let you analyze the effectiveness of your appeals in a precise manner. You can use them to pinpoint the effectiveness of your individual solicitations. You can analyze packages as the appeal stands currently or when an appeal is over.

► **Add a new package**

You can assign your new package an ID and description, specify start and end dates, group the package under a category, and enter an overall goal for the package. You can make a package inactive so it does not appear in search results and enter additional notes and the number of people solicited in the package. You can assign a default amount for gifts associated with the package and default benefits you give as a reward to constituents who give in response to the package.

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.
3. Open the appeal to which to add a new package. For information about how to open an appeal record, see “Access a Campaign Record, a Fund Record, or an Appeal Record” on page 6.
4. Select the Packages tab.



In the grid, the packages established for the appeal appear. By default, the grid includes the **Package ID**, **Description**, **Goal**, and **No. Solicited** columns.

5. On the action bar, click **New Package**. The New Package screen appears.

The screenshot shows a 'New Package' window with a menu bar (File, Edit, View, Package, Tools, Help) and a toolbar with icons for Save and Close, and navigation arrows. The 'General' tab is selected. The form contains the following fields and values:

- Package ID: GLOSSY
- Description: Glossy Brochure
- Start date: (empty)
- End date: (empty)
- Overall goal: \$50,000.00
- Default gift amount: \$100.00
- Package category: (empty)
- No. solicited: 500
- Notes: Mr. Lewis at Contact Printing gives us a 15% discount.
- Package is inactive: (unchecked)

Note: To ensure the accuracy of reports you run to analyze the expenses and success of your packages, we recommend you maintain consistency when you name packages in different appeals.

6. On the General tab, enter the ID and description of the package in the **Package ID** and **Description**. The ID and description must be unique within each appeal, but you can duplicate them among different appeals. For example, if you name the brochure package “Glossy Brochure,” you cannot give another package that name in the same appeal, but you can in another appeal. The ID can contain no more than 20 characters and the description no more than 100.
7. In the **Start date** and **End date** fields, enter the date range for the package. Start and end dates are not required, but a date range helps increase the versatility of package reports and searches.
8. To group packages, enter a category for the package in the **Package category** field. For example, you can group packages for booklets, brochures, newsletters, and postcards under the category “Mailing”.
9. In the **No. solicited** field, enter the number of constituents targeted with the appeal. The sum of the **No. solicited** fields on the packages for an appeal must be less than or equal to the **No. solicited** field entry on the General tab of the appeal record. If the number solicited for the package exceeds that for the appeal, when you attempt to save the package, a warning screen appears with several options.
 - **Adjust the no. solicited on the appeal to match the total no. solicited on all packages** – When you edit packages, select this option to update the appeal to reflect any changes for the number solicited on the packages.
 - **Add this no. solicited on the package to the no. solicited on the appeal** – When you add a new package to an appeal, select this option to update the number solicited in the appeal.
 - **Change the no. solicited on the appeal** – To enter a new number in the **No. solicited** field for the appeal, select this option.

Note: An overall goal for the package is not required but can help determine the overall effectiveness of the package in package summaries and analyses.

10. In the **Overall goal** field, enter the projected goal amount for the package. If you enter a goal, the sum of the package goals must be less than or equal to that of the overall appeal. If a package goal or the sum of package goals exceeds the appeal goal, a warning screen appears with several options.
 - **Adjust the overall appeal goal to match the total of the package goals** – When you edit packages, select this option to update the appeal to reflect any changes on the package goals.

- **Add this package goal to the overall appeal goal** – When you add a new package to an appeal, select this option to update the overall goal of the appeal.
- **Change the overall appeal goal** – To enter a new goal amount in the **Overall goal** field for the appeal, select this option.

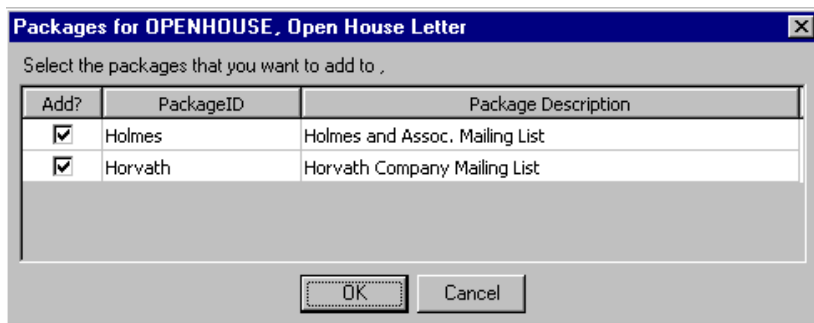
Tip: If your appeal asks for a standard gift amount, enter it as the default to save time during data entry.

11. In the **Default gift amount** field, enter the standard gift amount associated with the package. A default gift amount is not required but can speed data entry if you have a standard gift amount for this package. For example, if the package is a letter that asks for donations of \$100, make the default gift amount \$100.
12. To assign benefits to the package, click **Default Benefits**. You assign benefits for a package the same way you do for the overall appeal. For more information on default benefits, see “Add an appeal” on page 66.
13. In the **Notes** box, add any additional information about the package, such as a contact name at the printing company for a brochure mailing.
14. On the Attributes tab, the standard Attributes grid appears. In this grid, associate additional information with the package, such as the source and price of a mailing list.
15. Click **Save and Close**. You return to the Packages tab.

► **Copy packages from one appeal to another**

To save time during data entry, you can copy package information from an existing appeal into a new appeal rather than enter it manually.

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.
3. Click **New Appeal**. The New Appeal screen appears.
4. Select the Packages tab.
5. On the action bar, click **Copy From**. The Open screen appears.
6. Search for and select the appeal to copy packages from. The Packages screen appears.



7. Mark the checkboxes for the packages to copy to the new appeal.
8. Click **OK**. You return to the Packages tab. In the grid, the selected packages appear.

Attributes/Expenses Tab

You can assign attributes to your appeals the same way you assign them to campaigns and funds. You can also create detailed records to track the related expenses of appeals.

If you have Blackbaud's *The Financial Edge*, you can establish an interface between it and *The Raiser's Edge* in *Configuration*. As part of this interface, you can specify that a table entry for a *The Financial Edge* transaction code be created each time you save a new appeal. The table entry equals the name of the appeal. You can associate *General Ledger* expenses with this table entry in *The Financial Edge*. You can then view these *General Ledger* expenses directly from the Attributes/Expenses tab of the appeal record. For more information, see "View Financial Edge expenses for an appeal" on page 79.

► Assign attributes and expenses to an appeal

You can assign attributes and expenses to new or existing appeals. For this procedure, we assign attributes and expenses to a new appeal.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.
3. Click **New Appeal**. The New Appeal screen appears.
4. Select the Attributes/Expenses tab.

Note: You establish the attributes through *Configuration*. If you do not have security rights to create and edit attributes, you can only assign those that are already established.

The Attributes grid contains standard columns so you can associate additional information with the appeal.

5. In the **Expenses** grid, enter the expenses associated with the appeal, such as postage and printer costs for a direct mailing. You can also enter the cost of a mailing list so after the appeal ends, you can run a summary to determine if the list was worth its cost. Select a defined expense, or press **F7** on your keyboard to add a new expense if you have security rights to do so.

Note: To help track the effectiveness of the package, we recommend that you add packages from the Packages tab so you can enter information such as an overall goal.

6. In the **Package** column, select the package associated with each expense. A package is not required; however, when you assign the expense to a package, you can run summaries and reports to analyze package expenses. Select a previously saved package, or enter a new package directly into the grid.

If the program does not recognize your entry as a valid package, a message appears to ask whether to add the new package. Click **Yes**. The program saves the characters entered as both the ID and description of the new package. To enter information such as an overall goal and start and end dates for the new package, select the Packages tab and open the new package from the grid.

7. In the **Amount** column, enter the total amount of the expense.
8. In the **Comment** column, enter additional information about the expense.
9. In the **Date** column, enter the date you record the expense.
10. In the **Budgeted** column, enter the amount budgeted for the expense.

If you configured an interface between *The Raiser's Edge* and *The Financial Edge* in *Configuration*, the **Financial Edge Transaction Code** field and **View GL Expenses** button appear. For information about these features, see the following procedure.

11. To save your changes and exit the appeal, click **Save and Close**. You return to the Appeals page.

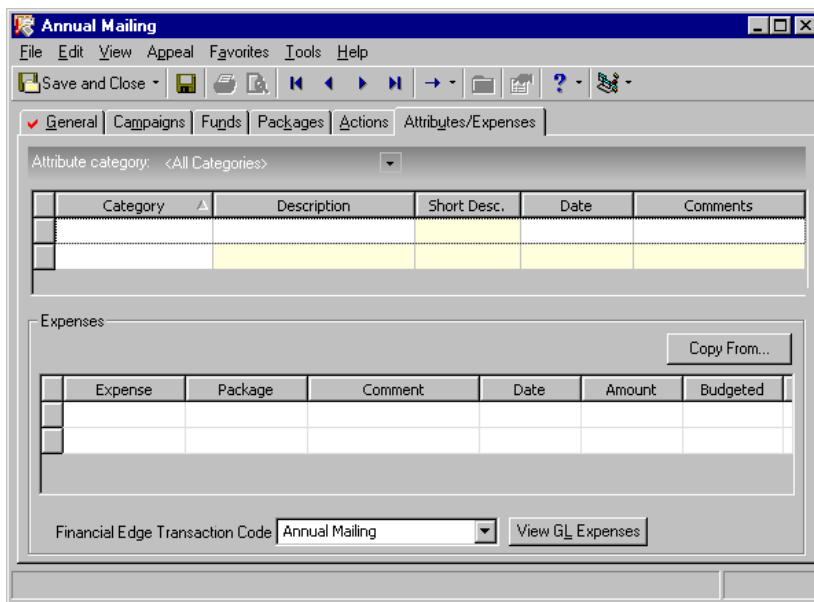
► **View Financial Edge expenses for an appeal**

Note: When you interface the two programs, we strongly recommend you create a separate transaction code in *The Financial Edge* to track your appeal expenses in *The Raiser's Edge*.

When you configure an interface between *The Financial Edge* and *The Raiser's Edge*, you can assign expenses in *The Financial Edge* to an appeal and view the expenses from the appeal record. For information about how to configure the interface between the two programs, see the "General Ledger" section of the *Configuration & Security Guide*.

When you record your appeal expenses in *The Financial Edge*, you can still use the grid on the Attributes/Expenses tab, but you should enter only the appeal expense information you do not track in *The Financial Edge*. The expenses entered here do not integrate with Blackbaud's *General Ledger*.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.
3. Click **Open an Appeal**. The Open screen appears.
4. Select the appeal for which to view *The Financial Edge* expenses and click **Open**.
5. The Appeal record appears. Select the Attributes/Expenses tab.



After you configure the interface between *The Raiser's Edge* and *The Financial Edge*, when you add and save an appeal, that appeal name is added as a code table value in *The Financial Edge* for the transaction code selected in *Configuration*. This new code table value automatically appears as a selection in the **Financial Edge Transaction Code** field on the Attributes/Expenses tab of the appeal record.

Financial Edge Transaction Code: Annual Mailing [v] View GL Expenses

Note: Transaction codes are available with *The Financial Edge* optional module *Projects and Grants*. To use transaction codes on appeal records, you must install *The Financial Edge* on the same workstation as *The Raiser's Edge*, and you must have logged into *The Financial Edge* at least once.

Other previously established transaction code values also appear as selections in the **Financial Edge Transaction Code** field.

- Click the **View GL Expenses** button. The Expenses from Financial Edge General Ledger screen appears.

Vendor Name	Transaction Type	Amount	Date	Number	Status	Description
<Unknown>	Journal Entry	\$5075.85	n/a	n/a	n/a	n/a
AlphaGraphics	Invoice	\$225.00	10/15/02	02-54368	Paid	
AlphaGraphics	Credit Memo	(\$95.00)	10/18/02	02-000147		
Charleston Printing	Invoice	\$210.15	12/02/02	113725	Paid	

Total Expenses from General Ledger: \$5,941.00

The grid displays all expenses (transactions) tracked in **General Ledger** that are associated with the entry in the **Financial Edge Transaction Code** field. For information about how to associate transactions with code tables in *The Financial Edge*, see your *The Financial Edge* user guides.

The grid displays a description for each transaction type of credit memo, invoice, and one-time check. Under the grid, the **Total Expenses from General Ledger** field displays the total amount of the expenses (transactions) in the grid.

If the source of a transaction cannot be traced to a credit memo, invoice, or one-time check, <Unknown> appears in the **Vendor Name** column, and Journal Entry appears in the **Transaction Type** column. The **Amount** column displays the sum of all the transaction amounts that cannot be traced to a credit memo, invoice, or one-time check. No date, number, or status appear.

- To open an invoice, a credit memo, or an one-time check, select the transaction in the grid and click **Open** on the action bar. The selected transaction opens.

When you open an <Unknown> transaction, the Expense Transactions from Financial Edge General Ledger screen appears and displays information about all the **General Ledger** transactions that cannot be traced back to an invoice, credit memo, or one-time check.

Account	Account Description	Transaction number	Debit/Credit	Amount	Journal
01-5200-01	Office Supplies - Administration	21-10	Debit	\$33.95	Journal Entry
01-5200-01	Office Supplies - Administration	3-067	Debit	\$40.00	Accounts Payable
01-5460-01	Printing - Administration	22-077	Debit	\$5001.90	Accounts Payable

Total Expenses from General Ledger: \$5075.85

8. To open a **General Ledger** transaction record from the Expense Transactions from Financial Edge General Ledger screen, select the transaction in the grid and click **Open** on the action bar. The selected transaction record appears.
To return to the Expense Transactions from Financial Edge General Ledger screen, close the transaction record.
9. When you finish viewing transaction information, click **Close** to exit the Expense Transactions from Financial Edge General Ledger screen. You return to the Expenses from Financial Edge General Ledger screen.
10. To exit the Expenses from Financial Edge General Ledger screen, click **Close**. You return to the appeal record.
11. To exit the appeal, click **Save and Close** on the toolbar.

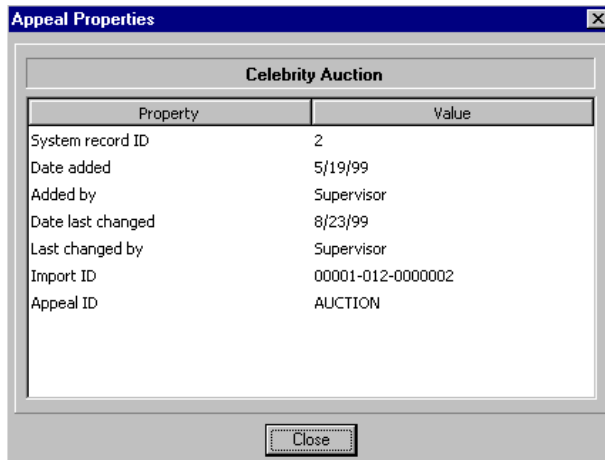
Appeal Properties

You can view the system record ID, the dates an appeal was created and last changed, who created or last changed it, its import ID, and its appeal ID and description. For example, for security reasons, you can check and see who last changed an appeal record or when the appeal was last updated.

▶ View appeal properties

1. On the Raiser’s Edge bar, click **Records**. The Records page appears.
2. Click **Appeals**. The Appeals page appears.
3. Open the appeal for which to view properties. For information about how to open an appeal, see “Access a Campaign Record, a Fund Record, or an Appeal Record” on page 6.

4. From the menu bar, select **File, Properties**. The Appeal Properties screen appears.



Note: The first time you save a record, *The Raiser's Edge* automatically assigns its system record ID and an import ID.

At the top of the grid, the appeal description appears. The grid displays the system record ID, the date the appeal was added and by whom, the date it was last changed and by whom, and the import ID and appeal description.

5. To return to the appeal record, click **Close**.

Campaigns, Funds, and Appeals Reports

Note: When you have a campaign, a fund, or an appeal open, you can open Campaign, Fund, and Appeal Gift Lists, Summaries, and Goal Summaries directly from the menu bar. On the **View** menu, select **Gifts** or **Summaries**. When you select **Summaries**, a menu appears with either **Campaign, Fund, or Appeal Summary** (depending on the type of record you have open) and **Goal Summary**. To access the Goal Summaries, click **Reports** in the Raiser's Edge bar.

With *The Raiser's Edge* reports, you can analyze all aspects of your campaigns, funds, and appeals. Profiles provide basic information about your records; lists display gifts to a particular campaign, fund, or appeal; and summaries provide insight into how a campaign, fund, or appeal performs. For information about how to create campaign, fund, and appeal reports, see the *Reports Guide*. With reports, you can track the success of all your campaigns, funds, and appeals.

Summaries

You can create a summary of activity or analyze progress toward your goals for a campaign, fund, appeal, or solicitor. To create Campaign, Fund, or Appeal Summaries and Goal Summaries, select **View, Summaries** from the menu bar of an open record. The versatility of summaries is unlimited. You can select from a variety of "views" for a summary, such as First/Latest/Greatest and Top Donors by Percent. You can break the summary down by such things as Actual vs. Goal and Fiscal Year. When you create summaries, you can click **Customize** to further manipulate a summary to suit your needs.

You can graph the summary results and export them to other areas of *The Raiser's Edge* or to other programs. Summaries are available through the **Reports** link, or when you have a campaign, fund, or appeal record open, select **View, Summary** from the menu bar. For more information, see the *Summaries Guide*.

Profiles

Use profiles to keep a record of each of your campaigns, funds, and appeals for your files. Profiles provide the basic information entered when you create the record, such as date ranges, IDs, descriptions and goals. Campaign profiles include the default fund. Fund profiles include a list of all associated financial accounts. Appeal profiles contain the number solicited and any expense information entered. You can print profiles from *Reports* or directly from an open campaign, fund, or appeal record. From an open record, select **File, Print, Profile** from the menu bar.

Gift Lists

You can create a list of individual gifts to a campaign, fund, or appeal and select gift filters to customize the content of the list. When you fill in all fields in the campaign, fund, or appeal record, you can filter these lists by information such as date ranges. You can keep a copy of gift lists as records in your files. To access lists when you have a campaign, fund, or appeal record open, select **View, Gifts** from the menu bar.

Reports

To track the success of your campaigns, funds, and appeals, you can run a wide variety of reports. For example, you can use a Campaign Progress Report to track the progress of a campaign toward its goal. A Fund Performance Analysis compares the number of donors and number of gifts given within a specified date range with a campaign goal. An Appeal Cost Breakdown reports in detail the expenditures related to an appeal. You can use it to compare costs of appeals with the gifts received to determine the success of your appeals. These are only a few of the many reports available to you in *Reports*. For more information, see the *Reports Guide*.

Index

A

- account
 - distributions 40, 51
- adding
 - appeals 66
 - campaigns 20
 - funds 42
 - solicitor teams 24
 - solicitors to campaigns and funds 23
- appeals
 - adding an appeal 66
 - associating
 - campaigns with 70
 - funds with 72
 - attributes
 - assigning attributes 77
 - attributes/expenses tab 65
 - campaigns tab 59
 - categories 67
 - default benefits 68
 - default gift amount 67
 - defined 4, 5, 56
 - deleting an appeal 70
 - editing an appeal 69
 - expenses 77
 - funds tab 60
 - general tab 57
 - inactive appeals 67
 - no. solicited 67
 - opening a record 6
 - packages
 - adding new 75
 - copying 77
 - packages tab
 - attributes tab 63
 - general tab 62
 - properties 81
 - records
 - attributes tab 63
 - campaigns tab 59
 - defined 56
 - funds tab 60
 - general tab 62
 - packages tab 61
 - reports 82
 - user options 10
- associating
 - appeals with campaigns

- copying appeals 31
- default appeals 31
- defined 30
- appeals with funds
 - copying appeals 49
 - default appeals 49
 - defined 48
- campaigns with appeals
 - copying campaigns 72
 - default campaigns 71
 - defined 70
 - limiting gift entry 72
- campaigns with funds
 - copying campaigns 47
 - default campaigns 47
 - defined 46
 - limiting gift entry 47
- funds with appeals
 - copying funds 74
 - default funds 74
 - defined 72
 - limiting gift entry 74
- funds with campaigns
 - copying funds 29
 - default funds 29
 - defined 27
 - limiting gift entry 29
- attributes
 - appeals 77
 - assigning 32
 - campaign 32

B

- benefits
 - appeals, defaults 68
 - packages, defaults 77

C

- campaigns
 - adding a campaign 20
 - appeals tab 18
 - assigning attributes to a campaign 32
 - associating
 - appeals with 30
 - funds with 27

- attributes 32
- attributes tab 19
- categories 22
- defined 4, 15
- deleting a campaign 27
- editing a campaign 26
- funds tab 17
- general tab 15
- inactive campaigns 21
- opening a record 6
- overall goal 22
- properties 33
- records 15
- reports 82
- solicitors 22
 - adding 23
 - adding a team 24
 - deleting 25
- user options 10
- campaigns, funds, and appeals 1
- campaigns, funds, and appeals, defined 14
- category
 - appeal 67
 - campaign 16
 - fund 44

D

- deleting
 - appeals 70
 - campaigns 27
 - fund 45

E

- editing
 - appeals 69
 - campaigns 26
 - fund 44
- expenses, appeals 77

F

- funds
 - adding
 - funds 42
 - General Ledger** account distributions 52
 - appeals tab 38
 - associating
 - appeals with 48
 - campaigns with 46
 - attributes tab 41
 - campaigns tab 37
 - defined 4, 5, 34
 - deleting a fund 45

- editing a fund 44
- fund categories 44
- General Ledger**
 - account number 13
 - transferring accounts 54
- general tab 35
- gift types 53
- GL distributions
 - see also* **General Ledger**
 - tab 39
- inactive funds 67
- interfund accounts 41
- opening a record 6
- properties 55
- record
 - defined 34
- relationships tab 39
- reports 82
- restricted funds 43
- solicitors 22
 - adding 23
 - adding a team 24
 - deleting 25
- user options 10

G

- General Ledger**
 - account, defined 40
 - distribution
 - adding to funds 52
 - defined 5
 - establishing display of account numbers 13
 - project, defined 40
 - transfer accounts 54
- gifts
 - default amount for appeals 67
 - types 53

I

- inactive
 - appeals 67
 - campaigns 21
 - funds 67

N

- navigating
 - appeals
 - opening 6
 - toolbar 9
 - user options 10
 - campaigns
 - opening 6

- toolbar 9
- user options 10
- funds
 - opening 6
 - toolbar 9
 - user options 10

P

- packages
 - appeals
 - adding 75
 - copying 77
 - benefits, default 77
 - defined 5
 - gift amount, default 77
 - no. solicited 76
 - overall goal 76
- preferences, *see* user options
- project distributions 40
- properties
 - appeals 81
 - campaigns 33
 - funds 55

R

- records
 - appeals
 - attributes/expenses tab 65
 - campaigns tab 59
 - funds tab 60
 - general tab 57
 - packages tab 61
 - campaigns
 - appeals tab 18
 - attributes tab 19
 - funds tab 17
 - general tab 15
 - funds
 - appeals tab 38
 - attributes tab 41
 - campaigns tab 37
 - defined 34
 - general tab 35
 - GL distributions tab 39
 - relationships tab 39
- reports
 - appeals 82
 - campaigns 82
 - funds 82
- restricted funds 43

S

- solicitors
 - adding
 - a team to campaigns and funds 24
 - to campaign or fund 23
 - defined 5, 22
 - deleting from a campaign or fund 25

T

- toolbar
 - appeals 9
 - campaigns 9
 - funds 9
- transfer accounts
 - see also* interfund entries
 - defined 41

U

- user options
 - appeals 10
 - campaigns 10
 - funds 10

