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C H A P T E R   1

Introduction and Welcome

In This Chapter

Overview

MatchFinder provides you with an innovative approach to tracking matching gift companies. Often, employees are not aware their employer matches gifts. If they are aware of a company's matching gifts program, they might still be unfamiliar with the guidelines and restrictions. Likewise, charities might be unfamiliar with which companies match gifts. *MatchFinder* is a unique tool that gives the development professional detailed information about companies' matching gifts programs. Blackbaud has incorporated information, gathered by our research staff, into one database that can be used in conjunction with *The Raiser's Edge* or as a supplement to another fund-raising package.

Hardware Requirements

System Requirements

The Setup Program will inform you of how much disk space is required. You will need approximately 15 MB of disk space to install *MatchFinder*.

Having the correct computer equipment is essential for Microsoft Windows™ and other Windows programs, including *MatchFinder*, to perform well.

Minimum Workstation Hardware

- 486 microprocessor (Pentium processor recommended)

- 12 MB RAM minimum (16 MB recommended)

- 300+ uncompressed hard disk (Fast SCSI or IDE)

> *Note:* 486 processors are varied; some are "SX" computers while others are "DX." Processors also have various clock speeds which are measured in megahertz. It is impossible for Blackbaud to set absolute minimums regarding processor and clock speed since there are many factors that should be considered. For example, your computer's performance is affected by the number of users on the network, the number of other applications running, the size of the database and the amount of "traffic" on the network. Some organizations may find the 486 suitable equipment for their operation, while others should consider a more powerful solution.
>
> Blackbaud will always recommend the most powerful equipment available to ensure optimum performance. Because computer technology changes so quickly, it is difficult to make recommendations beyond what is currently on the market. Therefore, if you are currently budgeting for a future installation of Blackbaud programs, you would be better served to wait until you are ready to install the software before purchasing new computer equipment. This will ensure you have the most powerful equipment on the market. Please be careful when you begin shopping for equipment; many computer retailers are offering deals on 486 computers because the demand has shifted towards the Pentium. Your organization would be better served by planning for the future and growing into, not out of, equipment.

Network Recommendations

- Fast Network (Ethernet, 16-bit Token Ring)

- NETBIOS compatible network software (Novell NetWare, Windows NTAS or Windows for Workgroups preferred)

- Powerful server (486 or Pentium with 12 MB+ RAM)

Other Recommendations

- Local bus architecture

- Fast graphics card with 1 MB or more of video RAM (e.g., Diamond Viper, Speedstar Pro, ATI Ultra)

- Non-interlaced monitor (at least 72 Hz refresh rate)

- Windows for Workgroups on your LOCAL hard drive or Windows 95/Windows NT Workstation (Recommended over Windows 3.11)

Installing MatchFinder

If you are familiar with installing Windows-based programs, you may choose to skip these instructions and run the SETUP.EXE program found on the CD-ROM for *MatchFinder*.

If you are not familiar with Windows or installing Windows programs, follow these steps:

Note: It is best to close all other applications, except for the Windows Program Manager, when installing *MatchFinder*. You should not have any virus scan programs or screen savers loaded while installing. Virus programs sometimes interpret the setup process as the contamination of existing files by a virus. Additionally, if you are using Microsoft Office, be sure to close the toolbar before installing. The Microsoft Office toolbar may interfere with the installation of some files.

---

1. Insert the Blackbaud CD into the CD-ROM drive.

2. From a Windows 95 or NT 4.0 workstation, select **Run** from the **Start** button on the taskbar and type *D:\MATCH\DISK1\SETUP.EXE* where *D* is the letter representing the location of (or complete path to) the CD-ROM drive.

    OR

    From a Windows 3.11 or Windows NT 3.51 workstation, select **File**, **Run** from the Program Manager and type *D:\MATCH\DISK1\SETUP.EXE* where D is the letter representing the location of (or complete path to) the CD-ROM drive.

3. The Welcome screen appears:
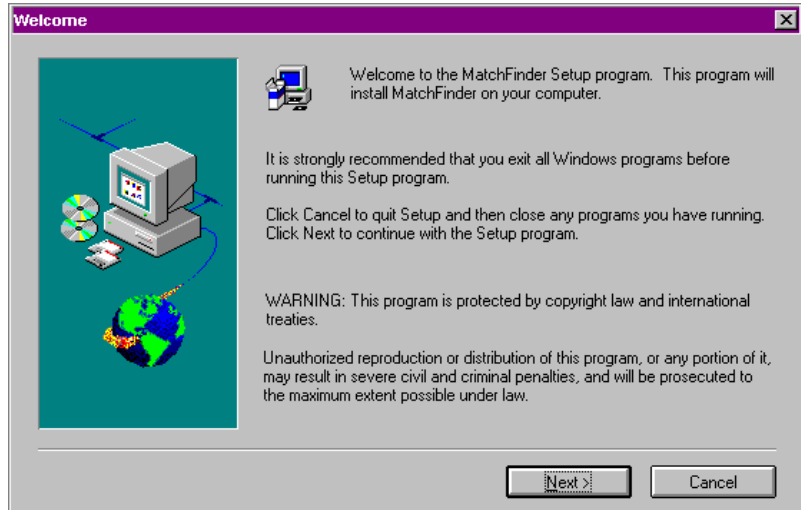
The screen gives you a final warning to exit all Windows programs before running the setup program.

Click **Next** to continue.

Note: Choose **Cancel** from any of the screens to exit the setup program without installing the software.

4. The Registration screen appears:
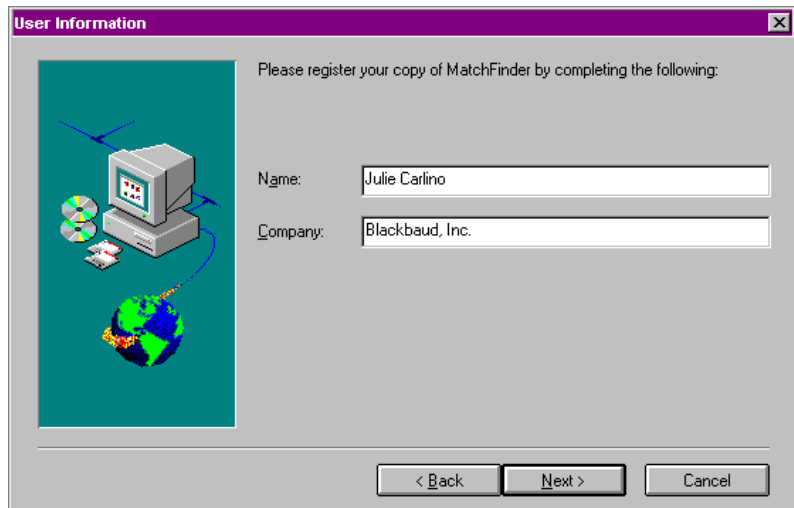
To register your copy of *The Raiser's Edge*, enter your complete name and organization name.

Click **Next** to continue.

5. The Enter Password screen appears.
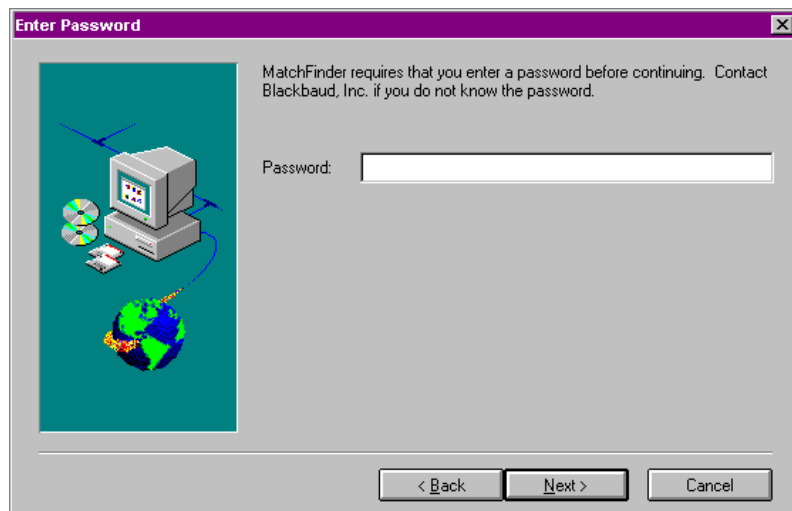
Enter the password assigned to your copy of *MatchFinder*. To find out your password, call Customer Support at (800) 468-8996.

Click **Next** to continue.

6. The MatchFinder Application Files screen appears.
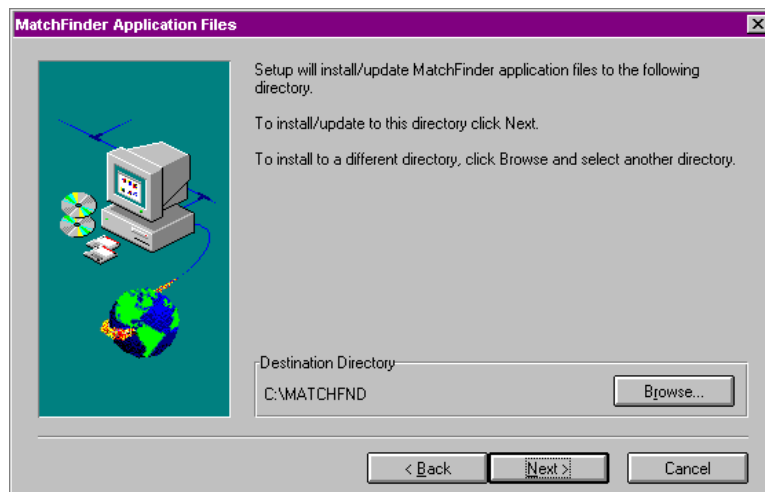
This screen allows you to select a destination for the program. The default directory is C:\MATCHFND. If you want to select a different directory, choose the **Browse** button to make your selection.

Click **Next** to continue.

7.   The MatchFinder Database Files Destination screen appears.
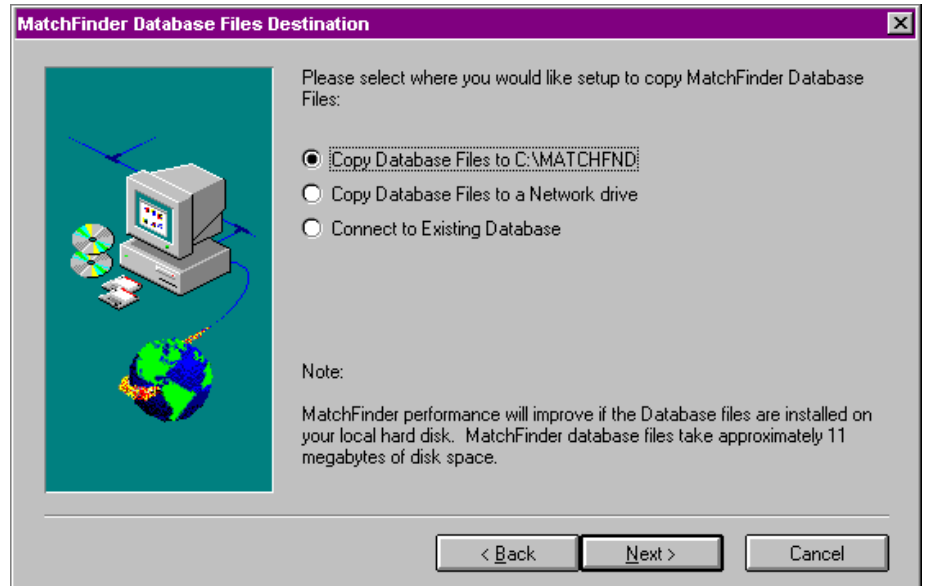
Choose whether to place the *MatchFinder* database in the default directory (go directly to step 10), in a different location on the network (go to the next step), or to connect to an existing database (go directly to step 9).

Click **Next** to continue.

8. If you select the **Copy Database Files to a Network drive**, an additional screen appears:
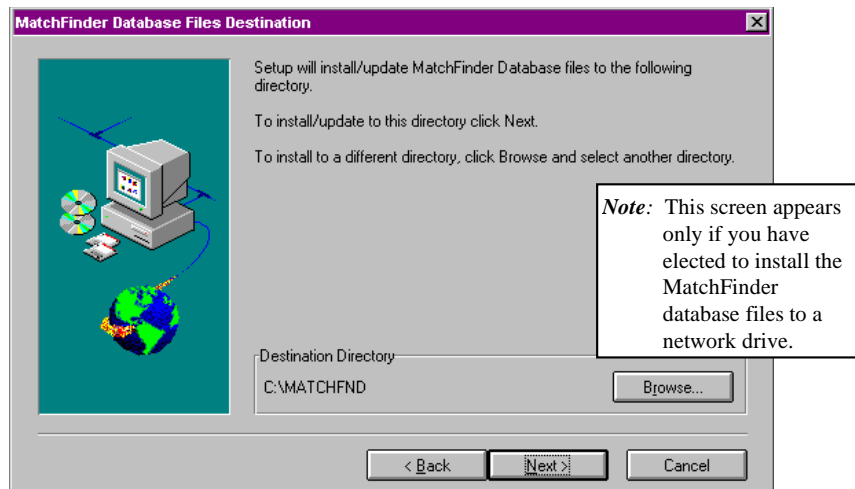
To place the database in a different directory, select the **Browse** button to find the desired location.

Click **Next** continue. Proceed to step 12.

9. If you select **Connect to Existing Database**, an additional screen appears:
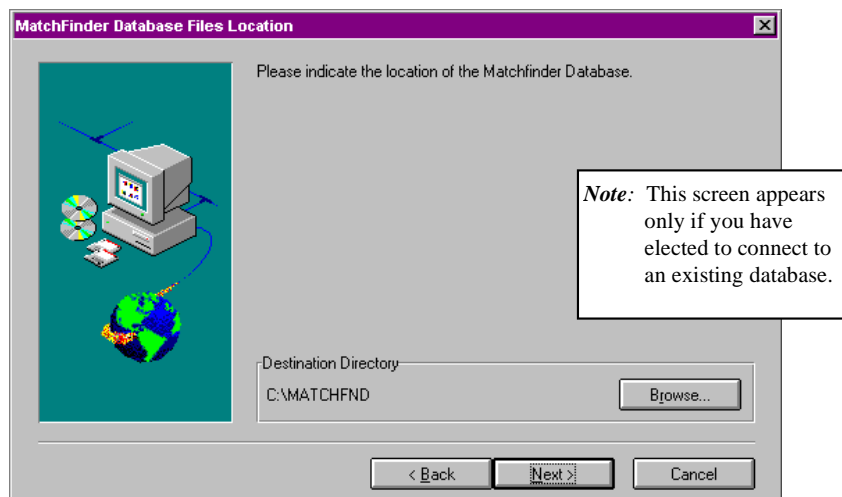
To place the database in a different directory, select the **Browse** button to find the desired location.

Click **Next** continue.

10. The Select Program Folder screen appears.
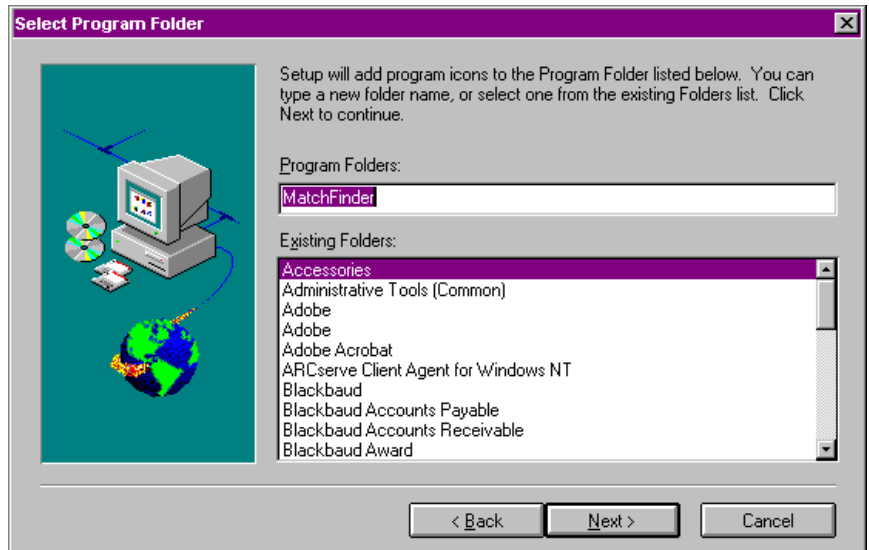
This screen allows you to choose a Program Group into which the *MatchFinder* program will go. The default is *MatchFinder*, but you can choose another group by either typing the name in the entry box or by highlighting the desired group.

Click **Next** to continue.

11. The Start Copying Files screen appears.
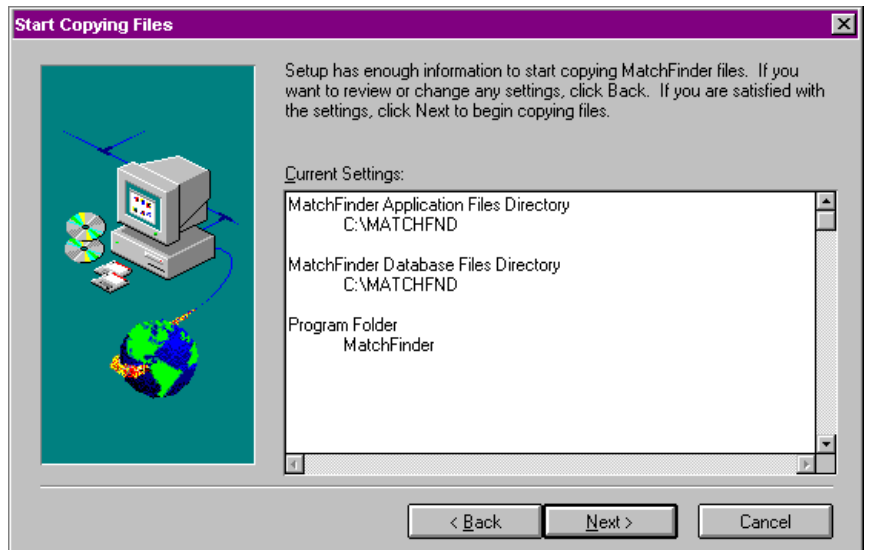
The **Current Settings** are listed. Please review these settings to ensure the program is being installed to the correct location.

Click **Next** to begin the installation.

12. A status bar indicates the percentage of files copied. Once the status bar reaches 100%, the following message displays:
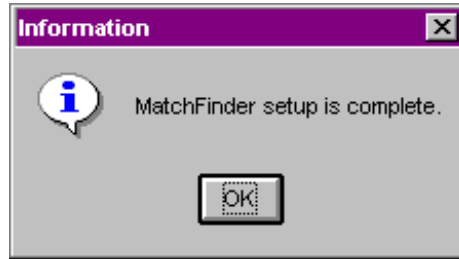
Select **OK** to close the message. To activate *MatchFinder*, locate the Program Group into which the program was installed and double click on the *MatchFinder* icon.

Documentation for MatchFinder

The documentation for *MatchFinder* consists of this guide and the on-line help.

After *MatchFinder* is installed, on-line help is also available. You can search for topics or press ⌑ at any point in the program to receive help.

This guide employs conventions to aid you in locating and identifying information. By understanding these conventions, you can quickly locate relevant topics.

Chapter Format

Most chapters consist of the following basic sections:

- **Introduction**: A brief overview of the program.
- **In This Chapter**: A listing of the contents of the chapter with the corresponding page number.
- **Body**: The step-by-step instructions, examples, and explanations of the topics of the chapter.

Conventions

Format	Denotes
Bold	The name of a field or button.
Italics	A program module name.
SMALL CAPS or ALT	A key on the keyboard.
KEY+**KEY**	Press the keys simultaneously. For example, if you are instructed to "Press ALT + ALT" you must press the **CONTROL** key and the ALT key at the same time.
KEY, KEY	Press the keys in the order in which they appear. For example, if you are instructed to press ALT , ALT you must press the ALT key, release it, then press the ALT key.
Bold and Partially Underlined	When a character in a word appears in bold and underlined, it is an indication of a method of activating a menu command. For example, if you are told to select **File**, **Open** then you can press the ALT key and the first underlined letter to activate the menu bar, then press the second underlined letter to perform the function.

Special Keys

Throughout *MatchFinder* there are special shortcut keys and shortcut methods to help you with data entry. Function keys are the primary source for shortcuts. When a function key is available, the status bar at the bottom of the open window tells you which key to press.

An arrow pointing down and to the left marks the Enter key (sometimes called the return key). On some keyboards the word "Enter" is also printed on the key. This key is used to signal to the computer the entry of a command, field, or data is complete. You can set your system preferences so this key moves the cursor forward to the next field.

or ALT   Two arrows pointing in opposite directions and/or the word "Tab" on the key usually mark the Tab key. It is also used to signal to the computer the entry of a command, field, or data is complete. Pressing this key also moves the cursor forward to the next field.

+   Pressing **SHIFT** and **TAB** keys at the same time moves the cursor back one field.

ALT   A large left-facing arrow marks the **BACKSPACE** key. Sometimes the word "Backspace" is on the key. This key is used to move the cursor back one character while deleting the character.

Place the cursor at the beginning of the field by pressing **HOME**.

Place the cursor at the end of a field by pressing the **END** key.

Pressing the **DELETE** key removes the highlighted characters or entry.

The **F1** key activates on-line help. Press this key from any point in the software to access context-sensitive help.

The **F3** key inserts the default value of a field into the current record. A message at the bottom of the screen indicates default fields. In date fields, **F3** inserts today's date.

The **F7** key activates Table Lookups. However, this key also activates the calendar in date fields and a calculator in currency fields. **F7** also accesses the Account Search Criteria in places where linking of records is available.

The **SHIFT** key allows you to select more than one item in a list. To select consecutive items, select the first item, press **SHIFT**, and select the last item.

The **CONTROL** key allows you to select more than one item in a list. To select items not in consecutive order, select the first item, press **CONTROL**, and select the next item.

Using On-line Help

The on-line help file can be accessed in several ways, including:

- selecting **<u>H</u>elp** from the menu bar,

- pressing **ALT** and **H**,

    OR

- pressing [F1] from any screen in the program.

The on-line help file contains concise information about specific processes and tasks within *MatchFinder*, as well as information about specific topics.

CHAPTER 2

Overview of MatchFinder

MatchFinder provides you with eligibility requirements, rules and guidelines, subsidiary information, and special terms about each company's program. In addition, *MatchFinder* stores the maximum and minimum amounts the company will match as well as the match ratio. A unique function, cross-referencing, allows you to take a file from another program and cross-reference it with companies stored in *MatchFinder*. Then, you can take the information from the cross-reference and update the information in your fund-raising software.

In This Chapter

Parts of the MatchFinder Screen

The *MatchFinder* screen includes standard Windows components that make it easy to navigate through the program.

Title Bar

Menu Bar

Maximize & Minimize Buttons

Toolbar

Status/Message Bar
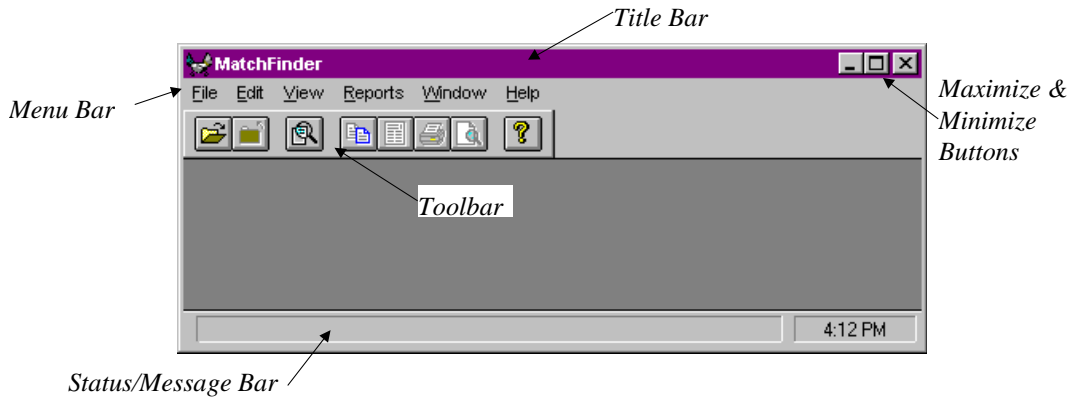
Title Bar

The Title Bar, across the top of the window, states the title of the program. This is standard in all Windows packages, including *MatchFinder*. The title bar also contains, in the upper right corner, the icons for minimizing, maximizing, and closing the window.

Status Bar

The status bar, across the bottom of the window, sometimes referred to as the message bar, acts as your guide through *MatchFinder*. As you move through the program, the Status Bar displays any important messages. For example, when your cursor crosses a button on the toolbar, the Status Bar displays the function of the button.

Menu Bar

The menu bar, below the title bar and across the top of the window, contains the commands for all *MatchFinder* functions. *MatchFinder* has basic menu options available from most program modules: **File**, **Edit**, **View**, **Window**, and **Help**. To access a command on the menu bar, either:

Position the pointer over the desired command and click the mouse button.

OR

Press ⌊ALT⌋ + the underlined letter. For example, to access **File**, press ⌊ALT⌋ + **F**.

MatchFinder Toolbar Buttons

The toolbar has buttons representing *MatchFinder's* common commands. You can use a mouse to activate any of these buttons. There are times when some of the buttons on the toolbar are disabled (not available) because their functions are not appropriate for the task you are currently performing. When this is the case, the buttons appear in a lighter shade.

The *MatchFinder* toolbar buttons are shortcuts to the commands accessed through the menu bar.

Opens a Company Record

Closes a Company Record

Accesses the Cross Reference Utility

Copies Contact Information to the Clipboard

Displays Company Guidelines

Prints the Company Profile

Print Previews the Company Profile to the Screen

Accesses the On-Line Help

MatchFinder Preferences

Preferences store certain settings for the *MatchFinder* program. You can determine characteristics for the toolbar and identify a number of recently opened company records to list. Preference settings are stored in the MATCHFND.INI on the computer's hard drive. If you enter *MatchFinder* from another computer, your settings are not carried over.

To establish MatchFinder Preferences:

1. Select the *MatchFinder* program.

2. From the main window, choose **Edit**, **Preferences** from the menu bar. The following screen appears:
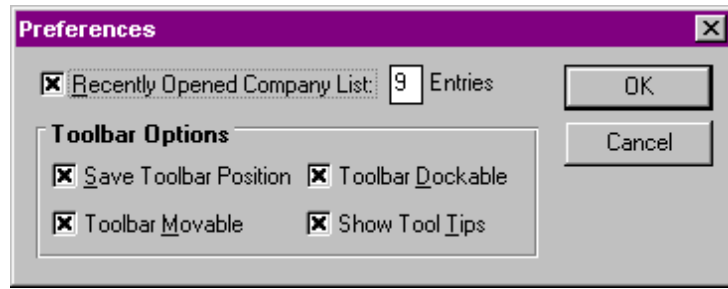
3. The **Recently Opened Company List** stores the names of the company records you have opened under the File menu. This shortcut allows you to select from the list rather than performing a search. An "X" in this box indicates your desire to have the system keep a list of records recently opened. Enter the number to list in the box next to the prompt.

4. In the **Toolbar Options** box, define the settings for the *MatchFinder* Toolbar.

    •   Selecting **Save Toolbar Position** saves the toolbar's previous position so it appears at the same location the next time you enter *MatchFinder*.

    •   When selected, the **Toolbar Movable** prompt lets you move the toolbar to any position on the screen at any time during a session in *MatchFinder*.

    •   The **Toolbar Dockable** prompt lets you move the toolbar on the screen, but when it nears the top, bottom, left or right side of the screen, the system "docks" the toolbar into a default position.

    •   Selecting **Show Tool Tips** displays the purpose or function of the toolbar buttons as the pointer moves across the button.

5. When you have finished defining Preferences, select the **OK** button to continue. If you select **Cancel**, your changes are not saved.

Opening a Company Record

To view a company's record or verify its matching gift policy, use the Open option to locate the appropriate record. The Open option accesses the Search Criteria window where you can enter parameters to locate the appropriate record. Refer to the "Using the Search Criteria Window" section in this chapter for specific information about the Search Criteria.

To open a company record:

1. Activate the *MatchFinder* program.

2. From the *MatchFinder* screen, activate the Open option by either:

    - Choosing ![icon] from the *MatchFinder* toolbar,

    - Selecting **File**, **Open** from the Menu Bar

      OR

    - Pressing **CTRL+O**.

3. The Search Criteria window appears. Enter the parameters to locate the company record. Click on the **Search** button to begin the search.

4. Once the search is complete, a list of company records that match the criteria appears at the bottom of the screen. Highlight the record you want to open and choose the **Select** button or press **ENTER**.

5. The company record appears on the screen.

Using the Search Criteria Window

The Search Criteria window is used to locate existing records in *MatchFinder*. It appears any time you need to locate a record or enter a company's name.

Open a Company				

Search Criteria

Company Name: a

City: State: NY

Search   Cancel   Previous   Select

Company Name (Alias)	Industry	Location	Parent
A/C Flyer	Publishing	New York, NY	McGraw-Hill
ABC Inc. (Capital Cities)	Telecommunications	New York, NY	
ABC News Holding Co. Inc.	Telecommunications	New York, NY	ABC Inc.
ABC Radio Network Inc.	Telecommunications	New York, NY	ABC Inc.
ABC Sports Holding Co. Inc.	Telecommunications	New York, NY	ABC Inc.
ABC Sports Inc.	Telecommunications	New York, NY	ABC Inc.
ABC/Kane Productions International Inc.	Telecommunications	New York, NY	ABC Inc.
ABS News Interactive Inc.	Telecommunications	New York, NY	ABC Inc.
Acme Newspaper Inc. (News of Delaware	Manufacturing	Amherst, NY	Mark IV Industries,
Actuarial Sciences Associates, Inc.	Telecommunications	New York, NY	AT&T Corp.
Adelson Entertainment Inc.	Telecommunications	New York, NY	ABC Inc.

Search Criteria

The **Search Criteria** are the parameters you enter to locate a record. There are three search fields, but you do not have to enter information in all of the fields.

Company Name: Here you can enter all or a portion of the company's name in order to locate it. If you enter "Smith" in the Company Name field, the system lists any company whose name or alias begins with Smith. You can also use special characters in the company name to help locate records. You can use an asterisk (*) to list all records or a question mark (?) in place of a character (e.g., Sm?th) to list every company with the specified name pattern. You can use brackets if you are searching for a range of names (e.g., [A-C] lists all names beginning with A, B and C). If you want to search for names beginning with several letters that are not in sequence, you can use brackets with a comma between the desired letters (i.e., [A,F] for names beginning with A and F). You can also use combinations of these special characters to locate records.

City or **State**: You can enter either or both of these criteria to narrow your search to companies in a particular city and/or state.

The **Search** button begins the search based on the criteria you define.

The **Cancel** button aborts the search.

The **Previous** button defaults to the information previously entered in the Search Criteria window. This is only available during the same session. If you close the program and re-enter it later, the previous criteria are not saved.

Search Results

The **Search Results** box lists all of the companies that match the criteria you enter. To select a record, simply move your cursor to highlight the desired record and choose the **Select** button or press **ENTER**.

Alphabetization Guidelines

MatchFinder uses the following guidelines when alphabetizing companies and their subsidiaries:

1. Companies that have a name beginning with "The" are alphabetized by the second piece of information in their name. For example, The ABC Corporation will be alphabetized by ABC.

2. Names that can be identified as proper names will typically be alphabetized by the last name (e.g., S.C. Johnson & Sons Inc. would be alphabetized by Johnson rather than S.).

3. *MatchFinder* ignores spaces and periods when alphabetizing companies. For example, a company listed as C.D.C. Industries or C D C Industries will be alphabetized by where it would fall within the alphabet, in this case, by CDC.

4. Company names beginning with one letter that includes hyphens (W-G, Inc.), slashes (A/C), or ampersands (A&G) will fall at the beginning of that letter's section in the alphabet. This occurs regardless of spacing (e.g., W & G and W&P would both fall at the beginning of the Ws). Names with ampersands appear first, hyphens are second, and slashes are third.

5. If the name begins with a whole word and then an ampersand (e.g., California & Hawaiian), the organization is listed alphabetically by the first name at the beginning of companies with that word (e.g., California & Hawaiian, California National). If the name begins with a whole word then a dash or hyphen, the name will fall after other companies with the same name (e.g., Federal Homes, Federal-Mogul, Federal/Danville).

6. Two-word names appear before one-word names that begin with the same word (e.g., Health Care Partners would appear before Healthcare International).

7. Company names that begin with numbers (e.g., 21st Century Insurance) fall at the very beginning of the alphabet, before the A's.

8. Companies with names beginning with St. (e.g., St. Paul Insurance) are alphabetized by "St" rather than Saint.

9. Company names beginning with "US" – regardless of periods or spacing (i.e., U.S. or U S) – will appear at the beginning of the list of names beginning with "Us" and will be followed by company names beginning with "USA."

Printing a Company Profile

MatchFinder allows you to print a profile outlining a matching gift company's record. You can print a profile as a hard copy of the data stored in *MatchFinder*.

To print a company profile:

1. Activate the *MatchFinder* program.

2. Use the **Open** option to locate the company for which you wish to print a profile.

Note: For information on using the Open option or the Search Criteria window, refer to the sections of this chapter on "Opening a Company Record" and "Using the Search Criteria Window."
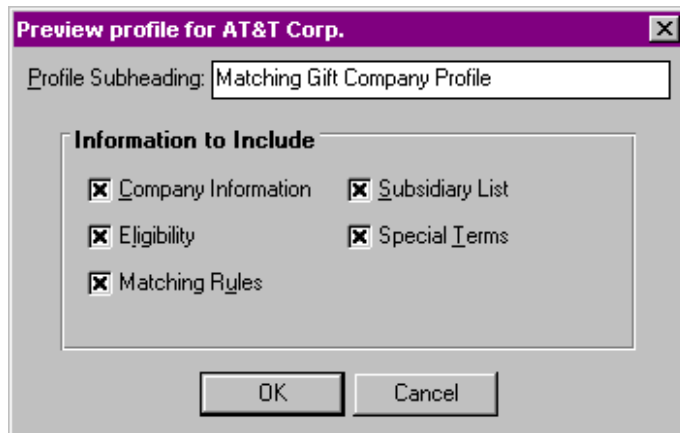
---

3. Once the record appears on the screen, you can print the profile by either:

   • Selecting 🖨 from the toolbar.

      OR

   • Choosing **File, Print** from the Menu Bar.

4. The following screen appears:

Preview profile for AT&T Corp.	✕
Profile Subheading: Matching Gift Company Profile	

Information to Include

☒ Company Information   ☒ Subsidiary List

☒ Eligibility   ☒ Special Terms

☒ Matching Rules

[OK]   [Cancel]

5. Enter an additional name for the profile in the **Profile Subheading** prompt. The subheading appears just below the main heading generated by *MatchFinder*.

6. The **Information to Include** box lists the different categories of information stored on the company record. Indicate the categories you wish to include by selecting the box next to the option. Your choices are:

- **Company Information**: Includes the information that is stored on the Company tab. This includes the name, alias, address, contact name, fiscal year end, and the industry.

- **Eligibility**: Includes the data stored on the Employee Restrictions and Nonprofit Eligibility tabs, including which category of employees are eligible to have gifts matched and which nonprofit organizations and educational institutions the company will support through the matching gifts program.

- **Matching Rules**: Includes the information that is stored on the Rules tab, including minimum and maximum match amounts, the match ratio, any special notes, information about procedures, and when the gifts are distributed.

- **Subsidiaries**: Includes the list of secondary companies as stored on the Subsidiaries tab.

- **Special Terms**: Includes the special notes related to information on the other tabs stored on the Special Terms tab.

7. Once you have determined what to include, select the **OK** button to continue. Selecting **Cancel** leaves the print profile option without printing the profile.

Sample Profile

Tri-County Historical Society
Wickcombe Manufacturing, Inc.

Wickcombe Manufacturing, Inc.
W.M., Inc.
Wickcombe Foundation
Manufacturing
Status: Active on 1/1/95

75 Edisto Plaza
Charleston, SC 29445
803-555-2312 ext 1213

Contact

Mrs. Lillian J. Abbott
Manager, Grants Program

Eligibility

Eligible Employee Status
    All full-time employees are eligible
    All full-time, salaried employees are eligible
    Retired employees are eligible
    Outside directors are eligible

Employee Affiliation with Nonprofit
    No affiliation required

Eligibility of Educational Institutions
    Four year colleges and universities
    Graduate and professional schools
    Junior/Community colleges
    Technical schools
    Secondary schools
    Elementary schools

Eligibility of Other Nonprofits
    Museums
    Cultural organizations
    Public Broadcasting
    Environmental/Conservation groups

Matching Rules

Minimum Per Gift: $25.00
Maximum Per Gift: $5,000.00
Maximum Annual Per Donor: $5,000.00
Lifetime Total: $25,000

Match Ratio: 2.00
Gift Distribution: Continuous
Receipting: No Receipt
Notification by: December 31

Types of Gifts Matched
    Cash gifts

Donor Gets Matching Gift By
    Filing company's matching gift form

Match Notes
Matching is 2:1 up to $1,000/year; 1:1 from $1,000 - $5,000/year.

Subsidiaries

Name	Alias	Match
Wickcombe Packaging & Supply	WPS	Yes
Wickcombe Container Corporation		Yes

Special Terms

Both public and private elementary and secondary schools are eligible to receive matching gifts.
Educational funds are eligible if their sole purpose is to raise money for constituent colleges.
Alumni funds or associations which college funds for eligible institutions are eligible to receive matching gifts.

C H A P T E R   3

Parts of a Company Record

The matching gift company record consists of a series of tabs. Each tab stores specific information such as employee restrictions, special terms, subsidiaries, contact name, and address. The company record cannot be edited (i.e., you cannot change the data stored in the fields). If you subscribe to *MatchFinder*, you will receive regular updates to the database to ensure you have the latest information about matching gift companies.

In This Chapter

Company Tab

The **Company** tab stores information about the matching gift company and the contact. Included on this tab are the company name, the alias, an industry code, the address, and the contact's name and position. The information on this screen cannot be edited.

Company Name/Alias

The **Company Name** field contains the organization name. The **Alias** field can contain an acronym for the organization or another name by which it is known. The information in these fields is used when locating a record.

Contact

Information about the company's contact person is stored in the **Contact** box. It includes the contact's name and position.

Fund/Foundation

If the company makes its matching gifts through a corporate foundation, the foundation name is listed in the **Fund/Foundation** field.

Industry

The **Industry** is the sector of business in which the company is classified. For example, Blackbaud's Industry is the Computer Industry.

Fiscal Year

This is the date on which the company's **Fiscal Year** ends. Many companies have a limit on the amount they will match within a fiscal year.

Status/Date

The **Status** describes the standing of the matching gifts program. The Date field is the date on which the status was defined. Examples include Active, Suspended, and Terminated.

Company Address

The **Company Address** box stores the mailing address and the telephone number for the company. The **Address** lines and the **City**, **State**, and **ZIP** are all stored in separate fields. If the **Address** is too long to fit in the **Address** box, you can use the scroll bar on the right to view the entire entry.

Employee Restrictions Tab

The **Employee Restrictions** tab lists guidelines for employees requesting that their donations be matched. The Restrictions include the required statuses and nonprofit affiliations for eligible employees.

Eligible Employee Status

The **Eligible Employee Status** box lists the employment conditions that must be met for gifts to be matched. Some examples include All Full-Time Employees are Eligible, Retired Employees are Eligible, etc. Statuses that apply to the employees are listed with a ✔ .

Employee Affiliation with Nonprofit

The **Employee Affiliation with Nonprofit** box lists the associations that are required between an employee and the nonprofit organization for a gift to be matched. Some examples of affiliations include Must be a graduate, Must be an alumnus/a or Must be a member. Required affiliations are listed with a ✔ .

See Special Terms for Comments

If there are special terms that are associated with the **Employee Restrictions**, this prompt indicates you must look at the **Special Terms** tab for more information.

Nonprofit Eligibility Tab

The **Nonprofit Eligibility** tab lists the requirements for educational institutions and other charities.

Eligibility of Educational Institutions

The **Eligibility of Educational Institutions** lists the company's requirements to match gifts given to educational nonprofits. For example, some companies require the institution be a four-year college or university, a seminary, etc. Eligibility requirements for the company are listed with a ✔.

Eligibility of Other Nonprofits

The **Eligibility of Other Nonprofits** box lists the company's requirements to match gifts given to other nonprofits. Other nonprofits, eligible for the matching gifts program, are listed with a ✔.

See Special Terms for Comments

When this option is selected, additional information about **Nonprofit Eligibility** is listed on the **Special Terms** tab.

Rules Tab

The **Rules** tab provides you with specific company regulations for the matching gifts program including maximum and minimum match amounts, the ratio, the types of gifts, when gifts are distributed, and instructions on sending receipts. It also indicates what donors must do to request their gifts be matched.

Distribution

The **Distribution** field indicates the frequency with which the matching gift company issues checks. The possible distribution entries are: Continual, Monthly, Quarterly, Annually, and Semi-Annually.

When

The **When** field further defines the **Distribution** by indicating a more specific time that a company will issue checks. For example, if the company issues checks at the end of every month, the **Distribution** field would list "Monthly" and the **When** field would list "End of Month."

Receipting

The **Receipting** field lists how the company wants receipts to be handled. The choices are: No Receipt, For Each Gift, For Each Gift >= $250, or One Annual Receipt.

Notification

Notification is the date or deadline by which the matching gift request must be filed.

Minimum Gift

The **Minimum Gift** field is the minimum amount the company will match. If the company does not require a minimum, this field will be left blank.

Max Per Gift

The **Max Per Gift** field is the maximum gift amount the company will match for a single gift.

Donor Annual Max

The **Donor Annual Max** is the maximum total amount the company will match for each donor per fiscal year.

Lifetime Total

If the company sets a maximum **Lifetime Total** per donor that will be matched, it is stored in this field.

Match Ratio

The **Match Ratio** is the rate at which the company matches gifts. For example, if the company gives $2 for every $1 donated by its employees, the match ratio is two.

Donor Gets Matching Gift By

The **Donor Gets Matching Gifts By** prompt lists the different possible procedures for requesting a gift be matched. The procedure that applies to the company appears with a ✔.

Types of Gifts Matched

The **Types of Gifts Matched** box lists the different classifications of gifts that a company can match. The gift types that the company will match appear with a ✔.

Match Notes

The **Match Notes** field is used to store additional information about the company's matching gifts program. Most often, this field is used to store additional notes about the match ratio.

See Special Terms for Comments

Additional information needed to clarify the rules for matching gifts is stored on the Special Terms tab. When the **See Special Terms for Comments** prompt is selected, more information about the company's rules for matching gifts is available on the **Special Terms** tab.

Subsidiaries Tab

The **Subsidiaries** tab lists the companies that fall under the parent corporation. You can retrieve a parent company's record by entering a subsidiary company name in the Search Criteria window.

Rules	Employee Restrictions	Special Terms
Company	**Subsidiaries**	Nonprofit Eligibility

Subsidary/Division	Alias	Match
535 Corp.		Don't Know
American Delivery Service Co.		Yes
Continental Transprotation		Don't Know
Forum Insurance Co. Inc.		Don't Know
Greater California Dental Plan Inc.	Smile Saver	Don't Know
Lechmere Inc.		Don't Know
LMR Acquisition Inc.		Don't Know
Montgomery Ward Auto Club Inc.		Don't Know
Montgomery Ward Enterprises Inc.		Don't Know
Montgomery Ward Insurance Co. Inc.		Don't Know
Montgomery Ward Life Insurance Co. Inc.		Don't Know
Signature Financial Marketing Inc.	Signature Concepts	Yes
Standard T Chemical Co. Inc.		Don't Know

Subsidiaries List

These subsidiaries are a part of the parent corporation. For each subsidiary, the system lists the **Alias** and whether or not the employees of that subsidiary are eligible to participate in the parent company's matching gifts program.

Special Terms Tab

The **Special Terms** tab displays any special conditions for matching gifts. On some of the tabs, there is a prompt **See Special Terms for Comments** that indicates additional information is on the **Special Terms** tab.

Rules	Subsidiaries	Nonprofit Eligibility
Company	Employee Restrictions	**Special Terms**

All employees who are participants in the Tandy Stock Purchase Program and participants in the Salary Continuation Plan are eligible to participate in the matching gifts program.

Hospitals and healthcare organizations are eligible to receive matching gifts if they are nonprofit and tax-exempt and listed in the American Hospital Association Guide to the Health Care Field.

Public broadcasting stations are eligible to receive matching gifts if they are listed in the Public Broadcasting Directory.

The Nature Conservancy is the only environmental/conservation group eligible to receive matching gifts.

Viewing the Guidelines Document

The **Guidelines** button displays the actual guidelines that appear on the company's matching gift form.

To view the guidelines document:

1.   From the *MatchFinder* program, either:

   •   Select 🗒 from the toolbar,

     OR

   •   Choose **View**, **Guidelines** from the Menu Bar.

2.   The following screen appears:
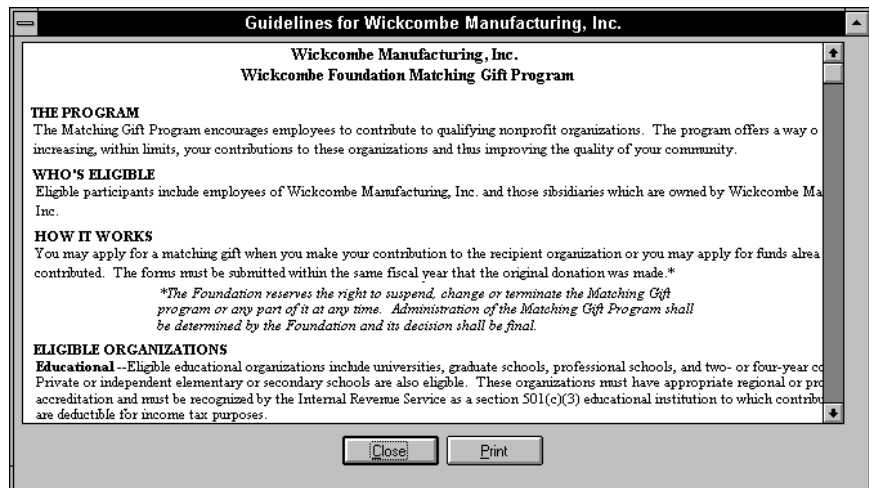
3.   You can print the guidelines by selecting the **Print** button.

4.   When you are finished viewing the guidelines, select the **Close** button to return to the company screen.

Copying a Contact's Information

If you are writing a letter to a matching gift company and wish to address the contact, you can use the Copy Contact Information option to place the information on the clipboard. You can then paste the contents of the clipboard into your word processing document.

To copy a contact's information:

1. From the *MatchFinder* program, open the desired matching gift company's record by either:

   - Clicking on ![folder icon],

   - Choosing **File**, **Open**,

     OR

   - Typing **CTRL+O**.

2. Enter the name of the organization record you wish to open. Once the record appears on the screen, either :

   - Select ![copy icon] from the toolbar

     OR

   - Choose **Edit**, **Copy Contact Information**.

3. The following screen appears:

4. The information is now in the Windows clipboard. You can paste this information into another software application. Click on **OK** to return to the company record.

C H A P T E R   4

Cross-Referencing Companies

Cross-referencing is one of the most important and unique features of *MatchFinder*. The Cross-Reference option matches records from a text file generated by your fund-raising software with the records stored in *MatchFinder*. Once the cross-referencing is complete, you can print a report of the records that have been matched and ones that *MatchFinder* was unable to automatically match. You can also view the lists and make manual changes to the cross-referenced records. There are three cross-referencing options which determine how the information is handled by the system.

In This Chapter

Cross-Referencing Files

Cross-referencing allows you to check companies against those stored in the MatchFinder master database. The companies can be contained in your *Raiser's Edge for Windows* database, *Raiser's Edge for DOS* database, or another format.

➢ **To cross-reference a text file:**

1. Activate the *MatchFinder* program.

2. To access the Cross Reference option, either:

   - Select ⬚ from the *MatchFinder* toolbar.

     OR

   - Choose **File**, **Cross Reference** from the Menu Bar.

3. The following screen appears:
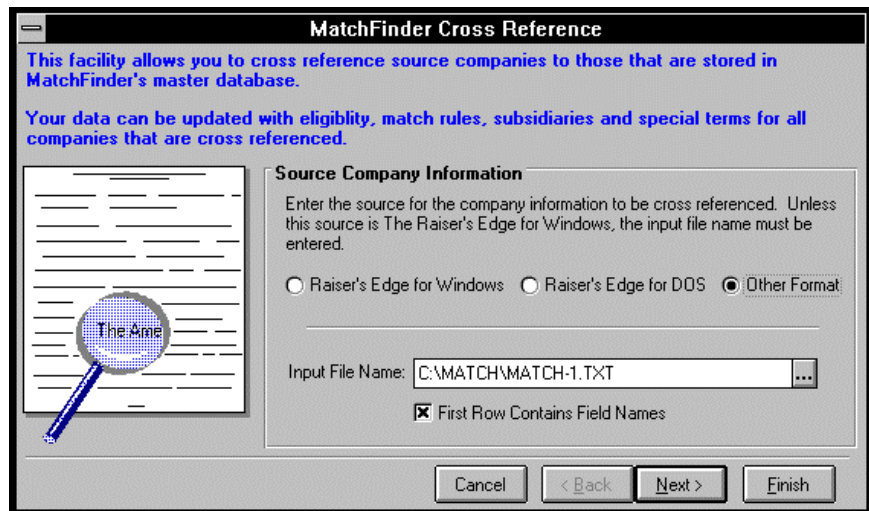
This procedure lists all the possible steps in the most complicated process, cross referencing with the **Other Format**. For *The Raiser's Edge for Windows* option and *Raiser's Edge for DOS* option, you will not see all of the steps shown.

In the **Source Company Information** box, select the option for **Other Format**. This means you are cross-referencing a file other than one generated by *The Raiser's Edge*.

Cross-referencing an Other Format file matches records from a text file with *MatchFinder* to update your data with the latest matching gift company information. First, you must generate the text file from your fund-raising package. Once you have generated the text file, you can use it in the Cross Reference option.

Note: When you select ***Raiser's Edge for Windows***, *MatchFinder* will locate the Windows database and compare companies. It then generates a report with a list of matching gift companies.
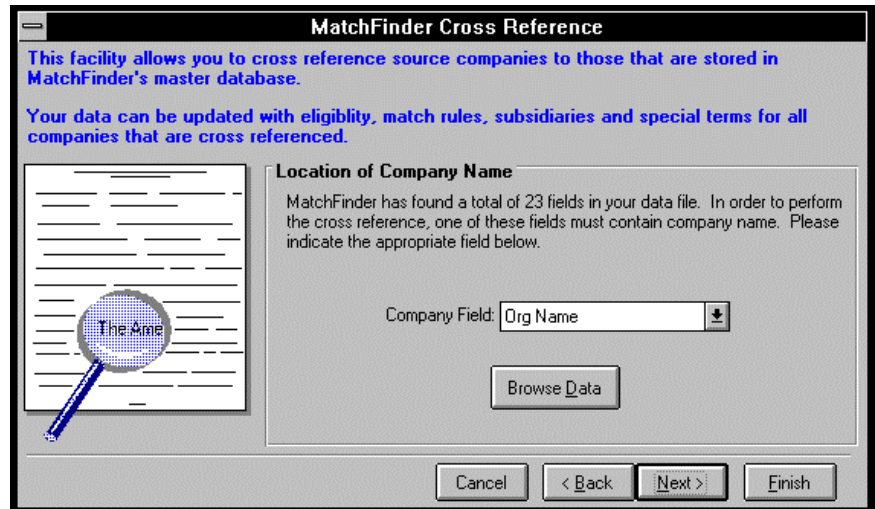
When you select ***Raiser's Edge for DOS***, you need to export the file first and provide the path of the DOS export file through the *MatchFinder* Interface Facility in System Utilities.

The **Input File Name** is the name of the file you generated from your fund-raising package. You can either enter the name and location of the file or you can click on ▣ to browse through the files and directories on your computer or diskette.

MatchFinder needs to know what data is contained in your text file to properly match it with the information in the program. To do this, the system uses the first row of fields in the data file. Select the **First Row Contains Field Names** prompt to indicate that the first row of the text file has the field names listed. If the data file does not include field names, do not select this box.

When you have completed this screen, choose the **Next** button to continue.
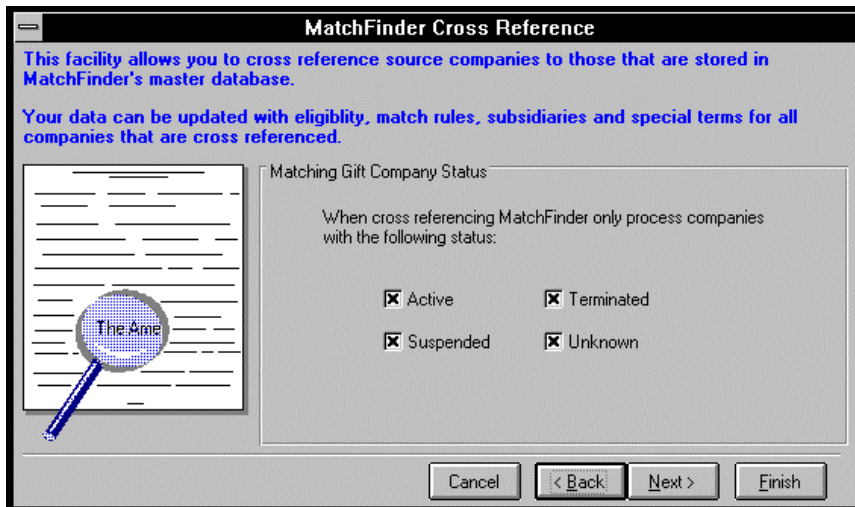
4. The following screen appears:

At the **Company Field** prompt, select the name of the field that has the organization's name. Click on ⬦ to select from the list. If you are not sure what field holds the name, you can select the **Browse Data** button to review the records in the text file.

When you choose the **Browse Data** button, the following screen appears:

	Org Name	Address 1	Address 2
1	Abbott Laboratories	c/o Dr. Isa K. Mushahwar	Dir. Experimental Bio
2	Aetna Life & Casualty	151 Farmington Avenue, A105	
3	Air Products and Chemicals Inc	7201 Hamilton Boulevard	
4	Alcan Aluminum Corporation	P. O. Box 6977	
5	Alco Standard Foundation	P.O. Box 834	
6	Allied-Signal Inc	Box 2245-R	
7	Allmerica Financial	Corporate Communications N115	440 Lincoln Street
8	Allstate Insurance Companies	Allstate Plaza	
9	American Airlines	P. O. Box 619616	
10	American Cyanamid Company	One Cyanamid Plaza	
11	American Express Company	American Express Tower	World Financial Cen
12	American Home Products Corp.	Five Giralda Farms	

OK

This screen lists all of the fields in the text file so you can locate the organization's name. Select the **OK** button to return to the Cross-Reference option.

5. When you have indicated the field containing the company name, select the **Next** button to continue. The following screen appears:

Note: If you selected either *The Raiser's Edge for Windows* or *DOS* options, this is the second screen you will see.

In *MatchFinder*, each organization has a status field that defines the current standing of the company's matching gifts program. Select the Statuses that you want to process. **Active** means the company currently has a matching gifts program; **Terminated** means the program has been canceled; **Suspended** means the program has been canceled, but it is unknown whether it is a permanent cancellation; and **Unknown** indicates that no data regarding the program's status is available.

When you have finished, choose the **Next** button to continue.

6. The following screen appears.
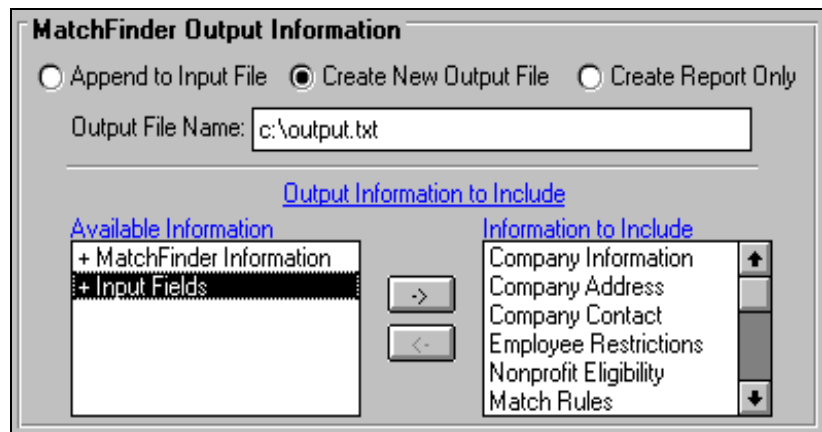
Note: The **Back** button returns to the previous screen.

In the **MatchFinder Output Information** box, select the option for the output information found through the cross-reference. You can:

- **Append to Input File**: The new data is added to your original file.

- **Create New Output File**: The information found is made into a new text file. An additional prompt, **Output File Name**, appears if you choose this option. Indicate the drive, directory, and name of the output file. You should also include an extension like the sample shown below.

- **Create Report Only**: If you choose to create a report, the system generates a report that includes the Input Company and the *MatchFinder* Company to which it was cross-referenced. The report also includes summary information such as the total number of input records, the total number of distinct companies, the elapsed time, and the percentage of companies the system was able to cross-reference.

You must also indicate the **Output Information to Include** in the file. Select the information to include by highlighting the desired field in **Available Information** and selecting ⟶ to move it to the **Information to Include** box. If you would like to change another setting on a previous screen, choose the **Back** button. Select the **Finish** button to proceed and skip to step 8.

7. If you selected either *The Raiser's Edge for Windows* or *DOS*, you will see the following screen or a portion of it.
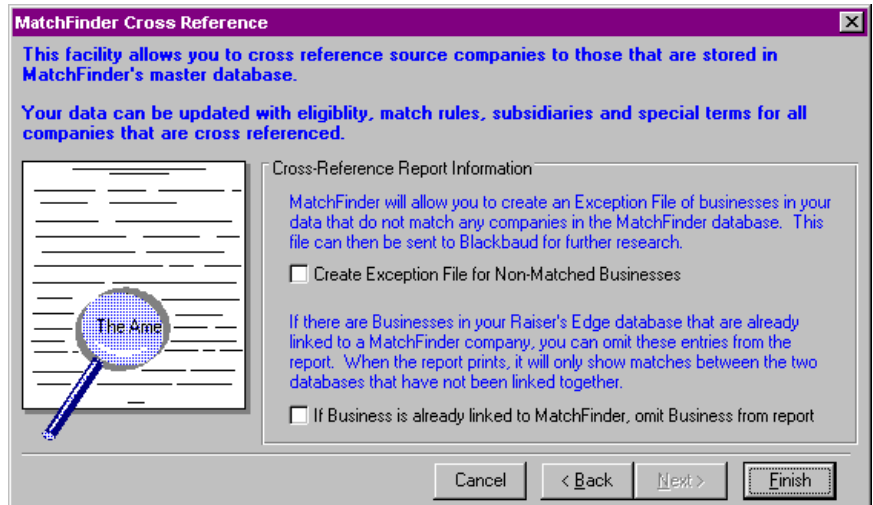
Check the boxes if you want to create an exception file of companies that did not match or if the companies are already matched to the *MatchFinder* database. Select the **Finish** button to proceed.

8. The system begins cross-referencing. A status bar, like the one below, indicates the percentage of records processed.
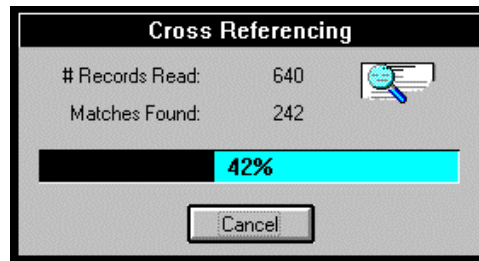
9. Once the cross-referencing is complete, the following screen appears:
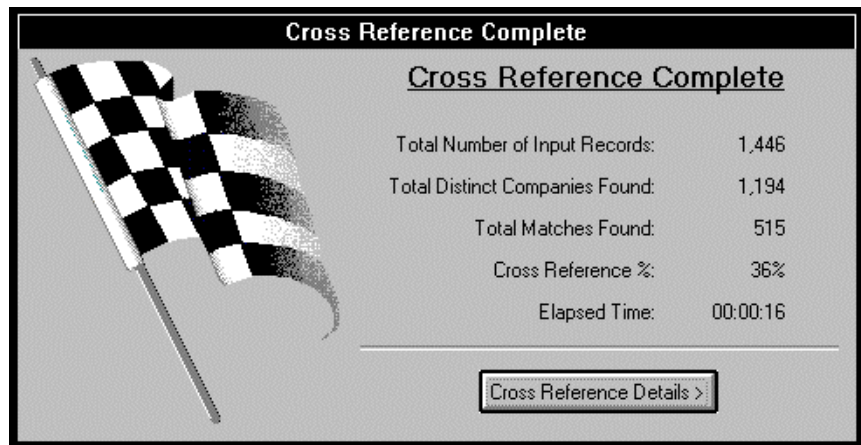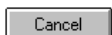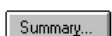
Select the **Cross Reference Details** button to view the records that were cross-referenced.

10. A screen listing the companies that were and were not cross-referenced appears.

At the top of this screen are the options for viewing either **Unmatched Companies**, **Matched Companies**, or **Both**. Select the circle next to your choice.

The buttons at the bottom of the screen allow you to perform additional functions:

Save	Saves the cross-referenced information. This option is not available if you are only running the report.
Cancel	Cancels the current Cross-Reference without saving the information.
Summary...	Returns to the Summary Information.
Match...	Allows you to manually match a company. See this chapter's section on "Manually Matching a Company" for more information.
Unmatch...	Allows you to manually unmatch a company that was matched through the Cross-Reference option.

Saving a Cross-Referenced File

The process of saving a cross-referenced file varies depending on whether you have chosen to **Append the Input File** or **Create an Output File**. If you choose to **Create Report Only**, you are not able to save the cross-referenced file.

To save a cross-referenced file:

1. When the *MatchFinder* Cross Reference Results screen appears, select the **Save** button.

2. If you have chosen to **Append the Input File**, the following screen appears:

3. If you have selected the option to create an **Output File** of the records that were cross-referenced, the following screen appears:
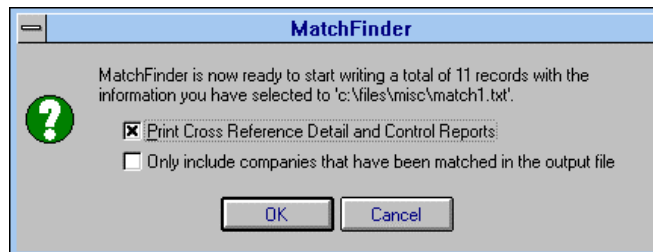
4. The message at the top indicates the name assigned to the file. If you want to print a listing of the records processed, select the **Print Cross Reference Detail and Control Reports** prompt. The **Only include companies that have been matched in the output file** prompt is available only if you have elected to create an output file. Selecting this prompt excludes unmatched records from the output file created.

5. Once you are ready to append the input file or write the output file, select the **OK** button. Choosing **Cancel** returns to the *MatchFinder* Cross Reference Results window. If you have selected **OK**, a status window indicates the number of records written to the file and the percentage of completion.

6. If you have elected to print the reports, they will be displayed on the screen once the status bar reaches 100%.

Sample Cross-Reference Results Report

Tri-County Historical Society

MatchFinder Cross Reference Results

Source Company Information:	Other Format
Input File Name:	C:\FILES\MATCH.TXT
Output Information:	The following information has been written to 'c:\files\ match1.txt': Company Information, Company Address, Company Contact, Employee Restrictions, Nonprofit Eligibility, Match Rules, Special Terms

Summary Information

Total Number of Input Records	10
Total Distinct Companies Foun	10
Total Matches Found:	10
Cross Reference %:	100%
Elapsed Time:	00:00:00

1

Input Company	# Records	Match	MatchFinder Company	Parent Company
3M Community Affairs	1	Yes		
A O Smith Foundation	1	No		
A.G. Edwards	1	Yes	A.G. Edwards	
Abbott Laboratories Fund	1	No		
ADP Foundation, Inc.	1	No		
Advanced Cardiovascular Systems	1	Yes	Advanced Cardiovascular Systems	
Air Products & Chemicals, Inc.	1	No		
Albano Cleaners Inc.	1	No		
The Coca-Cola Company	1	Yes	Coca-Cola Company	

Sample Cross-Reference Control Report

Tri-County Historical Society

MatchFinder Cross Reference Control Report

Output Data File Created C:\FILES\MATCH.TXT

THE FOLLOWING DATA HAS BEEN WRITTEN FOR EACH RECORD

1. Company Name
2. Alias
3. Fund/Foundation
4. Industry
5. Fiscal Year Ends
6. Status
7. Status Date
8. Address
9. City
10. State
11. ZIP
12. Phone
13. Ext
14. Contact Last Name
15. Contact First Name
16. Contact Middle Name
17. Contact Title
18. Contact Suffix
19. Contact Position
20. All full-time employees are eligible
21. All full-time, salaried employees are eligible
22. All part time employees are eligible
23. Retired employees are eligible
24. Spouses of eligible employees are eligible
25. Outside directors are eligible
26. No affiliation required
27. Must be a graduate
28. Must be an alumnus/a
29. Must be a member
30. Must be a recipient of patient care
31. Child or spouse must be affiliated
32. All educational institutions are eligible
33. Four year colleges and universities
34. Graduate and professional schools
35. Junior/Community colleges
36. Seminaries
37. Technical schools
38. Secondary schools
39. Elementary schools
40. All other nonprofits are eligible
41. Hospitals
42. Other Healthcare organizations
43. Museums
44. Social Services
45. Cultural organizations
46. Public Broadcasting
47. Political/Advocacy groups
48. Religious organizations
49. Environmental/Conservation groups
50. Charities
51. Other
52. Minimum Per Gift
53. Maximum Per Gift
54. Maximum Annual Per Donor
55. Lifetime Total
56. Match Ratio
57. Match Notes
58. Gift Distribution
59. Distribute On
60. Receipting
61. Notification by
62. GuideLines
63. Matched

Manually Matching a Company

If the Cross-Reference option was unable to automatically match a record in the input file with a *MatchFinder* record, you can manually match the records.

1. When you choose the **Match** button, the following screen appears:

2. Use this screen to find companies that could possibly match the record. The **Criteria** box lists two fields you can use to locate records. The **Find** box lists several variations of the company name. Click on ⬇ to select from the list. The **Match** prompt has two options: **Start of Field** and **Any Part of Field**. The **Start of Field** option means that the records selected must have the entry in the **Find** box at the beginning of the **Company Name** field. The **Any Part of Field** means the entry in the **Find** box can appear in any part of the **Company Name** field.

3. Once you have defined the Criteria, select the **Find** button to locate companies that are possible matches. The **Browse Data** button lets you view the records in the input file that you are matching.

4. To match from the records found, highlight the company listed in the box and choose the **OK** button. If you choose **Cancel**, you are leaving the screen without making a match.

Cross-Referencing Companies

C H A P T E R 5

Using MatchFinder with The Raiser's Edge for Windows

The Raiser's Edge offers a seamless interface with *MatchFinder*'s database. You can cross-reference each record in *The Raiser's Edge* with the information stored in *MatchFinder* in order to keep the matching gift information in *The Raiser's Edge* current and to quickly research matching gift potential. The cross-reference process takes place in the *Constituent Management* module of *The Raiser's Edge*. You can cross-reference organization records, constituents' business records, and matching gift records.

In This Chapter

Cross-Referencing an Organization Record

To cross-reference an organization record in *The Raiser's Edge for Windows*:

1. Activate the *Constituent Management* program from *The Raiser's Edge* program group.

2. Follow the steps for "Adding, Updating an Organization."

Note: For specific information on Adding or Updating an Organization, see Chapter 2 of The Raiser's Edge for Windows User's Guide, "Overview of Constituent Management."

---

3. On the Bio 1 tab, choose the **MatchFinder** button to cross-reference this organization with the *MatchFinder* database.

4. If you are editing a record, the MatchFinder Search window appears with the **Organization Name**, **City**, and **State** fields entered. You can make any changes to these fields at this point to modify your search. If you are adding a new organization record, these fields will be empty and you must fill in the appropriate search criteria. Select the **Search** button or press **ALT+S** to search the *MatchFinder* database for this company record.

5. All matching company records found in the *MatchFinder* database are displayed in the listing. Highlight the appropriate company record and choose the **Select** button or press the **ENTER** key.

6. The company record from the *MatchFinder* database is displayed on the screen.

7. You can view any of the information stored on this record by clicking on the tab or pressing **ALT+** the corresponding underlined letter.

8. Four buttons are available at the bottom of the screen:

OK	Saves the cross-referenced information.
Cancel	Cancels the current cross-reference without saving the information.
Break Link	Breaks the link between the Organization's record in *Constituent Management* and the corresponding record in the *MatchFinder* database.
New Link	Breaks the current link between the Organization and *MatchFinder* records in order to create a new link with another *MatchFinder* record.

9. Select the button that represents the function you want to perform.

10. A link is created by choosing the **OK** or **New Link** button. Once an organization record is linked to a *MatchFinder* record, the **MatchFinder** button can be used to view the company's matching gift information. In addition, any individuals who are linked to this organization record via their business record will have access to this company record as well.

11. If a link is created, the following window appears:

The Raiser's Edge

Overwrite existing information with MatchFinder information?

Yes   No
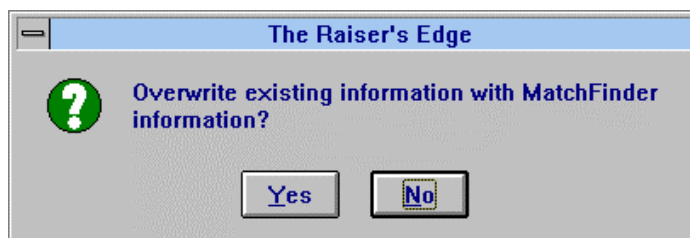
12. The following fields will be updated on Bio 1 if you choose to overwrite the existing information:

- Organization Name
- Address Block
- City
- State
- ZIP Code
- Organization Matches Gifts?
- Factor
- Minimum/Maximum Per Donor
- Matching Gifts Notes

Cross-Referencing an Individual's Business Record

To cross-reference an individual's business record in *The Raiser's Edge for Windows***:**

1. Activate the *Constituent Management* program from **The Raiser's Edge** program group.

2. Follow the steps for "Adding, Updating an Individual."

Note: For specific information on Adding or Updating an Individual, see Chapter 2 of The Raiser's Edge for Windows User's Guide, "Overview of Constituent Management."

3. Select the **Business** button from the **Bio 1** tab or the **Spouse** tab. Choose the **MatchFinder** button to cross-reference this company with the *MatchFinder* database.

4. If you are editing a business record, the MatchFinder Search window appears with the **Organization Name**, **City**, and **State** fields entered. If you are adding a new business record, these fields will be empty and you must fill in the appropriate search criteria. Select the **Search** button or press **ALT+S** to search the *MatchFinder* database for this company record.

5. All matching company records found in the *MatchFinder* database are displayed in the listing. Highlight the appropriate company record and choose the **Select** button or press **ENTER** on the keyboard.

6. The company record from the *MatchFinder* database is displayed on the screen.

7. You can view any of the information stored on this record by clicking on the tab or pressing **ALT+** the corresponding underlined letter.

8. Four buttons are available at the bottom of the screen:

OK	Saves the cross-referenced information.
Cancel	Cancels the current cross-reference without saving the information.
Break Link	Breaks the link between the individual's business record in *Constituent Management* and the corresponding record in the *MatchFinder* database.
New Link	Breaks the current link between the individual's business record and *MatchFinder* records in order to create a new link with another *MatchFinder* record.

9. Select the button that represents the function you want to perform.

10. A link is created by choosing the **OK** or **New Link** button. Once an organization record is linked to a *MatchFinder* record, the **MatchFinder** button can be used to view the company's matching information.
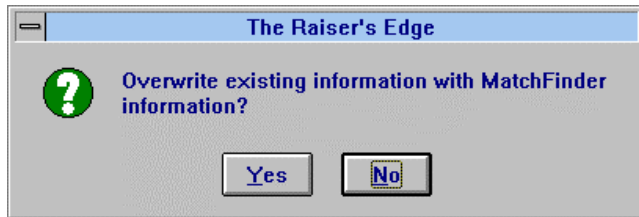
Note: For specific information on Linking Business Information, see Chapter 3 of The Raiser's Edge for Windows User's Guide, "Parts of a Constituent Record."

---

11. The following fields will be updated on the individual's business record if you choose to overwrite the existing information:

- Organization Name
- Address Block
- City
- State
- ZIP Code
- Organization Matches Gifts?
- Factor
- Minimum/Maximum Per Donor
- Matching Gifts Notes

Cross-Referencing a Matching Gift Record

To cross-reference a matching gift record in *The Raiser's Edge for Windows*:

1. Activate the *Constituent Management* program from *The Raiser's Edge* program group.

2. Follow the steps for "Entering a Gift."

Note: For specific information on Entering a Gift, see Chapter 4 of The Raiser's Edge for Windows User's Guide, "Tracking Gifts."

---

3. Choose the **Match** tab of the gift record to add or edit the matching gift record.

Edit a Matching Gift for Elizabeth A. Cooper

Constituent Name: Coca-Cola Company

Multiplication Factor: 2.00   **Notes:**

Minimum Gift: $15.00

Maximum Gift: $6,000.00

Fund: Annual Fund 1996

Campaign: Annual Campaign

Amount: $100.00   **Gift Code:**

Date: 04/17/96   **Letter:**

Reference: Cooper, Elizabeth

OK   **Cancel**   **MatchFinder**

4. You can access all matching gift information right from the gift record. Click on the **MatchFinder** button to view details stored on this business' company record in the *MatchFinder* database.

5. You can view any of the information stored on this record by clicking on the tab or pressing **ALT+** the corresponding underlined letter.

Note: This option is only available when the corresponding organization record is linked to the **MatchFinder** database. For specific information on Linking an Organization to **MatchFinder**, see the section "Cross Referencing an Organization Record."

C H A P T E R   6

MatchFinder Reports

There are several reports in *MatchFinder* you can use as a hard copy of the information in the company records. You can produce a summary of the matching gift companies or print a list of contacts, subsidiaries, or companies with aliases. Each report has filters that limit the company records that are included in the report. For example, you can limit the Matching Gift Company Summary report to include only companies that are based in Atlanta or companies of a certain industry.

In This Chapter

MatchFinder Report Parameters

Below is a list of the parameters by tab with an explanation of each. These parameters define the output of the report.

Note: Not all parameters exist for every report.

General Parameters

Sort Report By

When printing the Matching Gift Company Summary Report, you must determine the order in which the records will appear. Your choices are:

- **Alpha**: Selecting Alpha sorts the records in alphabetical order (A-Z) by company name. Records with unusual characters and numbers at the beginning of their names appear at the top of the list.

- **City**: The report will appear in alphabetical order by city. Records are grouped by the city in which they are located.

- **State**: If you choose state, the report alphabetizes by state then lists all companies that are located in the corresponding state.

- **Industry**: Selecting Industry sorts the records in alphabetical order by their assigned industry.

- **Ratio**: The report groups records by the match ratio, starting with the smallest ratio.

- **Minimum Gift**: The report groups records by the Minimum Gift amount listed on the **Rules** tab.

- **Maximum Gift**: The report groups records by the Maximum Gift amount listed on the **Rules** tab.

Include Parent Company

On the Contact Directory, you can choose to include the entry from the **Alias** field of the parent company's record. Click on the box next to the prompt to include the **Alias**.

Include Subsidiaries

On the Contact Directory, you can choose to include the subsidiaries listed on the **Subsidiary** tab of the company record. Click on the box next to the prompt to include the subsidiaries.

Include Subsidiary Alias

On the Contact Directory, you can choose to include the subsidiaries' aliases. Click on the box next to the prompt to include the subsidiary alias.

Company Information

On the Matching Gift Company Profiles, you must select the information to include. If you select **Company Information**, the report will include all data entered on the **Company** tab of the company record.

Eligibility

On the Matching Gift Company Profiles, you must select the information to include. If you select **Eligibility**, the report will include all data entered on the **Nonprofit Eligibility** tab of the company record.

Matching Rules

On the Matching Gift Company Profiles, you must select the information to include. If you select **Matching Rules**, the report will include all data entered on the **Rules** tab of the company record.

Subsidiary List

On the Matching Gift Company Profiles, you must select the information to include. If you select **Subsidiary List**, the report will include all data entered on the **Subsidiary** tab of the company record.

Special Terms

On the Matching Gift Company Profiles, you must select the information to include. If you select **Special Terms**, the report will include all data entered on the **Special Terms** tab of the company record.

Subheading

Each report lists your organization's name and the name of the report at the top of the page. If you would like to assign another title that appears just below the report's name, enter it in the **Subheading** field. For example, if your Matching Gift Company Report is for companies in Georgia, you may want to assign a subheading of "Georgia Matching Gift Companies."

Location Filters

The **Location Filters** limit the report to include companies from a **City**, **State** or **ZIP** Code you select. Next to each field is a prompt that lists operators that define the filter. These operators include:

- **Equals**: When you choose Equals, records selected for the report must have the exact entry you define. For example, if you choose City Equals Charleston, only records that have the exact entry "Charleston" are included in the report.

- **Does Not Equal**: When choosing Does Not Equal, you are selecting only those records that have an entry other than the one you define. For example, if you choose State Does Not Equal South Carolina, every company except those located in South Carolina are included.

- **Greater Than**: The Greater Than operator indicates that records included must have a value greater than the one you define. For example, if you choose ZIP Code Greater Than 29000, the report includes records that have a ZIP Code that is 29001 or greater.

- **Greater Than or Equal to**: The Greater Than or Equal to operator works the same as the Greater Than operator except it includes the entry you define. For example, if you choose ZIP Code Greater Than or Equal to 29000, the system selects records with a ZIP Code of 29000 or greater.

- **Less Than**: When you select Less Than, the report includes records with a value that is less than the entry you define. For example, if you choose ZIP Code Less Than 29000, the system selects records that have a ZIP Code of 28999 or less.

- **Less Than or Equal to**: The Less Than or Equal to operator works the same as the Less Than operator except it also includes the entry you define. For example, if you choose ZIP Code Less Than or Equal to 29000, the report includes records that have a ZIP Code of 29000 or less.

- **One Of**: The One Of operator lets you define several entries for your criteria. Records selected for the report must have one of the defined entries. For example, if you choose State is One Of CA, NY, and GA, the report includes only those companies in the states of California, New York, or Georgia.

- **Not One Of**: The Not One Of operator is used to exclude records that have one of several entries you define. Records with one of the entries you define will not be included in the report. For example, if you choose State is Not One Of CA, NY, and GA, the report will include companies from every state except these three.

- **Between**: The Between operator includes records that have any one of the entries that fall within the range you define. For example, if you choose ZIP Code Between 29000 and 29005, the report includes only records with 29000, 29001, 29002, 29003, 29004, and 29005.

- **Not Between**: The Not Between operator excludes records that fall within a selected range of entries. For example, if you choose ZIP Code Not Between 29000 and 29005, the report includes all ZIP Codes except 29000, 29001, 29002, 29003, 29004, and 29005.

- **Begins With***: The Begins With operator means records selected for the report must have an entry that begins with the entry you define. For example, if you select City Begins With Cha, the report includes any record that has a city beginning with Cha (Charleston, Charlotte, Charlottesville, etc.).

- **Does Not Begin With***: The Does Not Begin With operator means the report will include all records except those that begin with the entry you define. For example, if you select State Does Not Begin With S, the system includes all states except SC and SD.

- **Contains**: The Contains operator selects records that have the entry you define anywhere in the field. For example, if you select City Contains North, the report includes all companies that have North somewhere in the City field.

- **Does Not Contain**: The Does Not Contain operator selects records that do not have the entry you define anywhere in the field. For example, if you select City Does Not Contain North, the report includes all companies except those with North somewhere in the City field.

- **Like***: The Like operator lets you use wildcards (special characters) to replace a character or set of characters in a field. These wildcards are particularly useful when you are not sure of the spelling of a name or if you suspect something might be spelled incorrectly.

- **Not Like***: The Not Like operator includes records that do not have the entry you define. You can use wildcard characters with this operator also.

- **Blank**: The Blank operator selects any record with a blank field. For example, if you choose the criteria City is Blank, the system selects all records with an empty City field.

- **Not Blank**: The Not Blank operator selects any record with anything in the field you select. For example, if you select the criteria State Not Blank, the report includes records that have an entry in the State field.

Note: Some criteria operators (those marked with * above) allow you to use special wildcard characters in place of a letter or series of characters in an entry. Below is a list of the wildcards you can use:

- **Question Mark (?)**: Use the question mark to replace a single character. For example, if you want to include any record that has the ZIP Code with the last four characters of 0000, you can use the criteria ZIP Code Like ?0000.

- **Asterisk (*)**: Use the asterisk to replace a series of characters. For example, if you want to include any city that ends in "son," you can define the criteria City Like *son and the report will include cities like Henderson, Anderson, etc.).

- **Brackets ([ ])**: Use the brackets to select a range of characters or a list of selected characters. For example, use the criteria State Begins with [A-C] to include only those states that begin with an A, B or C. When you use the brackets with a comma between characters, the report will include only those records with the values listed in the brackets. For example, if you use the criteria State Begins with [A, M, P, W], the report will only include those states that begin with an A, M, P, or W.

Industries Tab

The **I**ndustries tab lets you limit the report to include only the companies with the industry classifications you define. The records selected must also meet the criteria you define on the other tabs of the report.

First you must indicate whether you want to include **All Industries** or **Selected Industries**. If you choose **Selected**, you must choose the ones you want to include from the available industries. To select industries, use the arrow buttons:

| -> | Moves the highlighted industry to the Industries to Include box. |

| ->> | Moves all of the industries to the Industries to Include box. |

| <- | Removes the highlighted industry from the Industries to Include box. |

| <<- | Removes all of the industries from the Industries to Include box. |

Educational Institutions Tab

The **Educational Institutions** tab lets you limit the report to include companies based on an educational institution's eligibility, which is assigned on the **Nonprofit Eligibility** tab.

You must first indicate whether you want to include **All Eligibility of Educational Institutions** or **Selected Eligibility of Educational Institutions**. If you choose Selected, you must choose the ones you want to include from the available entries. To select eligibilities, use the arrow buttons:

| -> | Moves the highlighted entry to the Eligibility of Educational Institution to Include box. |

| ->> | Moves all of the entries to the Eligibility of Educational Institution to Include box. |

| <- | Removes the highlighted entry from the Eligibility of Educational Institution to Include box. |

| <<- | Removes all of the entries from the Eligibility of Educational Institution to Include box. |

Other Nonprofits Tab

The **Other Nonprofits** tab lets you limit the report to include companies based on the other nonprofit eligibility assigned on the **Nonprofit Eligibility** tab.

You must first indicate whether you want to include **All Eligibility of Other Nonprofits** or **Selected Eligibility of Other Nonprofits**. If you choose Selected, you must choose the ones you want to include from the available entries. To select other nonprofits, use the arrow buttons:

| -> | Moves the highlighted entry to the Eligibility of Other Nonprofits to Include box. |

| ->> | Moves all of the entries to the Eligibility of Other Nonprofits to Include box. |

| <- | Removes the highlighted entry from the Eligibility of Other Nonprofits to Include box. |

| <<- | Removes all of the entries from the Eligibility of Other Nonprofits to Include box. |

Exporting a Report

Exporting a report lets you send it to another program in a form the program will understand. For example, you can export a report in Microsoft Word or Lotus 1-2-3 format.

To export a report:

1. Select the desired report from the **Reports** Menu Bar option.

2. Fill in the parameters. For specific information on parameters, refer to the Help topic for the report you are running.

3. Preview the report on the screen by either:

   - Selecting ⬛ from the *MatchFinder* toolbar.

     or

   - Choosing **File**, **Print Preview** from the Menu Bar.

4. When the report appears on the screen, it is in a window that has toolbar buttons at the bottom. To export the report, select ⬛. The following screen appears:

5. Select the **Format** of the file. Choose a format that is readable by the target application.

6. Choose the **Destination** of the file. The Destination defaults to **Disk File** for export. The option for Microsoft Mail should only be used if you are sending the file through e-mail. Select the **OK** button to continue.

Note: Additional screens appear depending on the format you select.

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7. A screen to define a location for the file appears. The default **File Name** is assigned by the program, but it can be changed. Select the directory and drive where the file should go. Once you have finished, select the **OK** button.

8. *MatchFinder* will then print the report to the location you defined in the format you selected.

Sending a Report through E-Mail

If your organization utilizes an on-line messaging system that is MAPI (Messaging Application Program Interface) compliant, you can send a *MatchFinder* report to other users. MAPI is a standard set by Microsoft Corporation for Windows-compatible on-line messaging systems and applications (e.g., electronic mail, scheduling systems, etc.). MAPI offers a layer of communication between applications created by different software developers.

To send a report via e-mail:

1. Select the desired report from the **Reports** Menu Bar option.

2. Fill in the parameters. For specific information on parameters, refer to the Help topic for the report you are running.

3. Preview the report on the screen by either:

   - Selecting from the *MatchFinder* toolbar.

     OR

   - Choosing **File**, **Print Preview** from the Menu Bar.

4. When the report appears on the screen, it is in a window that has toolbar buttons at the bottom. To e-mail the report, select . The following screen appears:

5. Select the **Format** of the file. Choose a format that can be opened by the person who will receive the mail message.

6. Choose the **Destination** of the file. The Destination defaults to **Microsoft Mail (MAPI)** for e-mail. Select the **OK** button to continue.

*Note***:**   Additional screens appear depending on the format you select.

7. *MatchFinder* accesses your e-mail system to begin preparing the message. Fill in the message just as you would in your e-mail system.

Matching Gift Company Summary

The **Matching Gift Company Summary** report includes general information for the companies that meet the parameters you define. Included on the report are the company name, city, state, industry classification, the match ratio, and the minimum and maximum amounts the company will match. Use this report as a means of checking companies that are in a particular area with constituents who live and work in the same area.

To run the Matching Gift Company Summary:

1. Activate the *MatchFinder* program.

2. Select **Reports**, **MG Company Summary** from the Menu Bar. The MG Company Summary Report parameter screens appear. Each tab represents a new screen of parameters. To switch between screens, simply click on the tab or press **ALT** plus the underlined letter.

Note: For information about the parameters, refer to the "MatchFinder Report Parameters" section of this chapter.

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3. Once you have filled in the parameters, you can:

   • Print the report to screen by choosing 🔍 from the toolbar or by selecting **File**, **Preview** from the Menu Bar.

   or

   • Print the report to your printer by choosing 🖨 from the toolbar or by selecting **File**, **Print** from the Menu Bar.

Sample Matching Gift Company Summary

1/23/96   **Tri-County Historical Society**   Page 1
                         Matching Gift Company Summary
                              Companies in Florida

Company Name	City	State	Industry	Ratio	Min Gift	Max Gift
Abbott Banks, Inc.	Jacksonville	FL	Banking	1.00	$25.00	$5,000.00
Cambridge-Bright Corporation	Largo	FL	Retail	1.00	$50.00	$1,000.00
Evans Group, Inc.	Miami	FL	Utility	2.00	$50.00	$10,000.00
Giles' Supermarkets Inc.	Altamonte Springs	FL	Retail	0.50	$10.00	$1,000.00
Gulver Power Company	Pensacola	FL	Utility	1.00	$25.00	$5,000.00
Hendricks Corporation	Melbourne	FL	Electronics	1.00	$10.00	$10,000.00
Insbrook Life Insurance Group	Jacksonville	FL	Insurance	1.00	$50.00	$500.00
Jernigan Corporation	Tampa	FL	Computer	1.00	$25.00	$2,000.00
King-Trenam, Inc.	Miami	FL	Publishing	1.00	$25.00	$1,000.00
Polygon System, Inc.	Miami	FL	Transportation	1.00	$25.00	$1,000.00
Tampa Insurance, Inc.	Tampa	FL	Insurance	0.50	$25.00	$1,000.00
Tiller Publishing Company Inc.	St. Petersburg	FL	Publishing	1.00	$0.00	$2,500.00
Toller, Mitchell & Culver	Tampa	FL	Legal	1.00	$25.00	$1,500.00
Tyler Brothers Co., Inc.	Fort Lauderdale	FL	Retail	1.00	$0.00	$2,500.00
Tropical Products, Inc.	Bradenton	FL	Manufacturning	1.00	$25.00	$1,500.00
Tupperton, Inc.	Orlando	FL	Retail	0.50	$10.00	$1,000.00
Wilson-Snyder Stores, Inc.	Jacksonville	FL	Retail	1.00	$50.00	$2,500.00
W.R. Williams & Company Inc.	Boca Raton	FL	Chemical	1.00	$100.00	$5,000.00

Total Companies Listed: 18

Contact Directory

The **Contact Directory** is a listing of employees who are contacts for the matching gifts program. You can use the parameters to limit the contacts that are included on the report. The directory includes the company name, city, state, and the contact's name and phone number.

To run the Contact Directory:

1. Activate the *MatchFinder* program.

2. Select **Reports**, **Contact Directory** from the Menu Bar. The Contact Directory parameter screens appear. Each tab represents a new screen of parameters. To switch between screens, simply click on the tab or press **ALT** plus the underlined letter.

Note: For information about the parameters, refer to the "MatchFinder Report Parameters" section of this chapter.

3. Once you have filled in the parameters, you can:

   • Print the report to screen by choosing [icon] from the toolbar or by selecting **File**, **Preview** from the Menu Bar.

   or

   • Print the report to your printer by choosing [icon] from the toolbar or by selecting **File**, **Print** from the Menu Bar.

Sample Contact Directory

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Contact Directory
Contact List for Florida Companies

Company Name	City	State	Contact Name	Phone
Abbott Banks, Inc.	Jacksonville	FL	Mr. Michael Wilson	904-555-5212
Cambridge-Bright Corporation	Largo	FL	Ms. Fiona Harrison	813-555-6234
Evans Group, Inc.	Miami	FL	Ms. Linda Grant	305-555-9890
Giles' Supermarkets Inc.	Altamonte Springs	FL	Mr. Jeffrey Orcutt	407-555-8123
Gulver Power Company	Pensacola	FL	Mr. Jim Schaffner	904-555-6981
Hendricks Corporation	Melbourne	FL	Mrs. Sherri Tyler	407-555-9493
Insbrook Life Insurance Group	Jacksonville	FL	Ms. Karen Frye	904-555-5091
Jernigan Corporation	Tampa	FL	Ms. Julia Long	813-555-5071
King-Trenam, Inc.	Miami	FL	Mr. Danny Michaels	305-555-3093
Polygon Systems, Inc.	Miami	FL	Ms. Cathy Barrett	305-555-3604
Tampa Insurance. Inc.	Tampa	FL	Mrs. Sharon Long	813-555-4773
Tiller Publishing Company Inc.	St. Petersburg	FL	Mr. Gary Smith	813-555-8122
Toller, Mitchell & Culver	Tampa	FL	Mr. Kim Ott	813-555-7047
Tyler Brothers Co., Inc.	Fort Lauderdale	FL	Ms. Gwendolyn Mays	305-555-4360
Tropical Products, Inc.	Bradenton	FL	Mr. Tim Yates	813-555-4044 ext 219
Tupperton, Inc.	Orlando	FL	Ms. Lonnie Hutchison	407-555-5000 ext 346
Wilson-Snyder Stores, Inc.	Jacksonville	FL	Mr. Jerry Quinton	904-555-9551
W.R. Williams & Company Inc.	Boca Raton	FL	Mrs. Kathleen Williams	407-555-1887

Total Companies Listed: 18

Parent/Subsidiary List

The **Parent/Subsidiary List** reports information about the parent company and all of its subsidiaries. The report lists the parent company, city, state, industry, match ratio, and the associated subsidiaries.

To run the Parent/Subsidiary List:

1. Activate the *MatchFinder* program.

2. Select **Reports**, **Parent/Subsidiary** List from the Menu Bar. The Parent/Subsidiary parameter screens appear. Each tab represents a new screen of parameters. To switch between screens, simply click on the tab or press **ALT** plus the underlined letter.

Note: For information about the parameters, refer to the "MatchFinder Report Parameters section of this chapter."

3. Once you have filled in the parameters, you can:

   - Print the report to screen by choosing [image] from the toolbar or by selecting **File**, **Preview** from the Menu Bar.

     or

   - Print the report to your printer by choosing [image] from the toolbar or by selecting **File**, **Print** from the Menu Bar.

Sample Parent/Subsidiary List

1/23/96	**Tri-County Historical Society** *Parent/Subsidiary List* **Florida Companies with Subsidiaries**				
Parent Company		**City**	**State**	**Industry**	**Ratio**
Abbott Banks, Inc. First Florida Bank Southeastern National Bank		Jacksonville	FL	Banking	1.00
Cambridge-Bright Corporation Cambridge Products, Inc. Cambridge-Bright International Vicks Yardley, Inc.		Largo	FL	Retail	1.00
Evans Group, Inc. Southeast Utilities, Inc.		Miami	FL	Utility	2.00
Giles' Supermarkets Inc. Blackmon's Market Marco's Pet Supplies, Inc. Zink's Gourmet Emporium		Altamonte Springs	FL	Retail	0.50
Jernigan Corporation New Technologies, Inc. M.C.C., Inc. J.L. Holdings Web Computers, Inc.		Tampa	FL	Computers	1.00
King-Trenam, Inc. Trenam Communication		Miami	FL	Publishing	1.00
Wilson-Snyder Stores, Inc. Books Emporium, Inc. Hazelton Shirt Company Schaffner European Limited		Jacksonville	FL	Retail	1.00
Total Companies Listed: 6					

Subsidiary List

The **Subsidiary List** is a roster of all subsidiaries and the associated parent companies.

To run the Subsidiary List:

1. Activate the *MatchFinder* program.

2. Select **Reports**, **Subsidiary List** from the Menu Bar. The Subsidiary parameter screens appear. Each tab represents a new screen of parameters. To switch between screens, simply click on the tab or press **ALT** plus the underlined letter.

Note: For information about the parameters, refer to the MatchFinder Report Parameters section of this chapter.

3. Once you have filled in the parameters, you can:

   - Print the report to screen by choosing from the toolbar or by selecting **File**, **Preview** from the Menu Bar.

     or

   - Print the report to your printer by choosing from the toolbar or by selecting **File**, **Print** from the Menu Bar.

Sample Subsidiary List

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Subsidiary List
Computer Companies and Subsidiaries

Subsidiary	Parent Company	City	State
Albany Publishing	International Computers, Inc.	Framingham	MA
Alta Inc.	Data Electronics, Inc.	Armonk	NY
Alhambra Computers	International Computers, Inc.	Charleston	SC
BTTC Publishing, Inc.	Dellton Computers, Inc.	Framingham	MA
Cambridge Computers	Cambridge-Bright Corporation	Jacksonville	FL
TeleCom Plus, Inc.	Data Electronics, Inc.	Armonk	NY
Connell Worldwide, Inc.	International Computers, Inc.	Framingham	MA
DPT Electronics Systems	Southeastern Business Technology Corp.	Atlanta	GA
DPT/ILG Inc.	Southeastern Business Technology Corp.	Atlanta	GA
Faircom-West Technologies	International Computers, Inc.	San Jose	CA
Furgott-Bright Publishing, Inc.	Cambridge-Bright Corporation	St. Petersburg	FL
ICI Credit Corp.	International Computers, Inc.	Framingham	MA
ICI International Services Corp.	International Computers, Inc.	Framingham	MA
Intelligent Books Worldwide Inc.	Dellton Computers, Inc.	Charleston	SC
International List Services Inc.	Dellton Computers, Inc.	Charleston	SC
Links America Publishing	MarketPlace Computers Inc.	Philadelphia	PA
Links Worldwide	MarketPlace Computers Inc.	Philadelphia	PA
Vend World Communications	Harrison Corporation	Minneapolis	MN
Baud Inc.	Southeastern Business Technology Corp.	Atlanta	GA
Morton Publishing Inc.	International Computers, Inc	Framingham	MA
Perry Communications Inc.	International Computers, Inc.	San Jose	CA
TechnoSolutions Worldwide	Harrison Corporation	Minneapolis	MN
Williams Telecom Inc.	Data Electronics, Inc.	Armonk	NY

Total Companies Listed: 23

Alias List

The **Alias List** is a directory of companies by their alias name. The report includes the company alias, parent company, city, and state.

To run the Alias List:

1. Activate the *MatchFinder* program.

2. Select **Reports**, **Alias List** from the Menu Bar. The Alias List parameter screens appear. Each tab represents a new screen of parameters. To switch between screens, simply click on the tab or press **ALT** plus the underlined letter.

Note: For information about the parameters, refer to the" MatchFinder Report Parameters section of this chapter."

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3. Once you have filled in the parameters, you can:

    •   Print the report to screen by choosing from the toolbar or by selecting **File**, **Preview** from the Menu Bar.

        or

    •   Print the report to your printer by choosing from the toolbar or by selecting **File**, **Print** from the Menu Bar.

Sample Alias List

1/23/96   **Tri-County Historical Society**   Page 1
                                              Alias List
                                  Florida Companies with Alias

Alias	Parent Corporation	City	State
AB, Inc.	Abbott Banks, Inc	Jacksonville	FL
C B C	Cambridge-Bright Corporation	Largo	FL
Evans, Inc.	Evans Group, Inc.	Miami	FL
GPC	Gulver Power Company	Pensacola	FL
I L I G	Insbrook Life Insurance Group	Jacksonville	FL
K T I	King-Trenam, Inc.	Miami	FL
T P C, Inc.	Tiller Publishing Co., Inc.	St. Petersburg	FL
W R W	W.R. Williams & Company, Inc.	Boca Raton	FL

Matching Gift Company Profiles

The **Matching Gift Company Profiles** is a printed copy of the information stored in a company's record. You can choose the information to print on the report, including matching rules, nonprofit eligibility requirements, the company guidelines, and the subsidiaries associated with the company.

To run the Matching Gift Company Profiles:

1. Activate the *MatchFinder* program.

2. Select **Reports**, **M**G Company Profiles from the Menu Bar. The MG Company Profiles parameter screens appear. Each tab represents a new screen of parameters. To switch between screens, simply click on the tab or press **ALT** plus the underlined letter.

Note: For information about the parameters, refer to the "MatchFinder Report Parameters section of this chapter."

---

3. Once you have filled in the parameters, you can:

   •   Print the report to screen by choosing ![icon] from the toolbar or by selecting **File, Preview** from the Menu Bar.

       or

   •   Print the report to your printer by choosing ![icon] from the toolbar or by selecting **File**, **Print** from the Menu Bar.

Sample Matching Gift Company Profile

Tri-County Historical Society
Wickcombe Manufacturing, Inc.

Wickcombe Manufacturing, Inc.
W.M., Inc.
Wickcombe Foundation
Manufacturing
Status: Active on 1/1/95

75 Edisto Plaza
Charleston, SC 29445
803-555-2312 ext 1213

Contact

Mrs. Lillian J. Abbott
Manager, Grants Program

Eligibility

Eligible Employee Status
    All full-time employees are eligible
    All full-time, salaried employees are eligible
    Retired employees are eligible
    Outside directors are eligible

Employee Affiliation with Nonprofit
    No affiliation required

Eligibility of Educational Institutions
    Four year colleges and universities
    Graduate and professional schools
    Junior/Community colleges
    Technical schools
    Secondary schools
    Elementary schools

Eligibility of Other Nonprofits
    Museums
    Cultural organizations
    Public Broadcasting
    Environmental/Conservation groups

Matching Rules

Minimum Per Gift: $25.00
Maximum Per Gift: $5,000.00
Maximum Annual Per Donor: $5,000.00
Lifetime Total: $25,000

Match Ratio: 2.00
Gift Distribution: Continuous
Receipting: No Receipt
Notification by: December 31

Types of Gifts Matched
    Cash gifts

Donor Gets Matching Gift By
    Filing company's matching gift form

Match Notes
Matching is 2:1 up to $1,000/year; 1:1 from $1,000 - $5,000/year.

Subsidiaries

Name	Alias	Match
Wickcombe Packaging & Supply	WPS	Yes
Wickcombe Container Corporation		Yes

Special Terms

Both public and private elementary and secondary schools are eligible to receive matching gifts.
Educational funds are eligible if their sole purpose is to raise money for constituent colleges.
Alumni funds or associations which college funds for eligible institutions are eligible to receive matching gifts.