The Raiser's Edge™

Event Gifts Guide

Contents

What Is In This Guide?

In the *Event Gifts Guide*, you learn to add, edit, and delete event gift records(when you have the optional module *Event Gifts Management*). You can also learn about the following.

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How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the *Raiser's Edge* documentation from several places.

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

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

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

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

Gifts for Events

Event Management, Blackbaud's events tracking module, works in conjunction with **The Raiser's Edge** to help manage all aspects of your events. Whether you are organizing a golf tournament, an awards banquet, a training class for your volunteers, or an afternoon tea, the information you need — from registrant lists and expenses to income generated — is kept in one package.

> **Note**: Optional modules such as *Event Management*, *Membership Management*, and *Alumni Tracking* enable you to customize **The Raiser's Edge** to meet the specific needs of your organization. When you purchase an optional module from Blackbaud, you are given a code. You must enter this code to "unlock" or activate the optional module. For more information, see the Program Basics chapter of the *Program Basics Guide*.

Event gifts, such as registration fees, donations, and sponsoring pledges, can be entered from a participant or gift record. Once you add a gift record for an event gift, you can link the gift record to a participant record for the individual or organization which is associated with the gift. When you use the linking capability, you can easily track from the participant record whether registration fees have been paid, other donations have been made, or sponsoring pledges have been fulfilled.

A gift record can be linked to a participant record from the gift record or the participant record. This book explains all aspects of linking a gift record to an event from a gift record and from a gift batch. For more information about the other features of the optional module *Event Management*, see the *Event Management Data Entry Guide*.

Frequently Used Terms

This section defines words and phrases you need to know as you work with the optional module *Event Management*. If you come across an unfamiliar term when reading this or any chapter in **The Raiser's Edge** documentation, make sure you check the online glossary in the help file.

Participant. A participant is an individual or organization associated with an event. For example, if you are hosting a formal dinner event, the participants are the attendees, the caterer, speakers, coordinators, and volunteers associated with the dinner event. Each participant must be entered as a registrant, guest, or sponsor on the event record for the dinner.

Registrant. A registrant is an individual or organization attending or providing a service or product for an event. A registrant can participate in the event, but does not have to. For example, you are giving a CPR class and invite a local doctor to give a speech on strokes. The doctor does not pay registration fees like the students of the class, but you need to enter the doctor in the database as a registrant to track any expenses paid for the doctor's services and to track the doctor as a speaker for the CPR class. The students of the CPR class are also entered as registrants because they participate in the class as students. You need to track their names, addresses, attendance, registration fees, seating arrangements, and other important information.

Guest. A guest is an individual or organization attending an event as an invitee (guest) of a registrant. For example, you enter Jane Cothran as a registrant for your organization's golf tournament. She decides to bring a friend, Bill Cone, whom you enter in the database as a guest.

Sponsor. A sponsor is an individual or organization sponsoring or representing a registrant. For example, your organization is holding a tennis tournament. The Midwest Tennis company sponsors a team in the tournament by representing the team and paying the registration fees for each player. You enter the Midwest Tennis company as a sponsor.

Registration fees. A registration fee is the monetary amount a participant must pay to attend the event. For example, your organization is holding a golf tournament and each individual participating in the tournament must pay a registration fee of $50.00. This fee can cover any costs for the event, as well as a donation to your organization. For the golf tournament registration fee, $20.00 may cover the cost of the event and $30.00 may be a donation to your organization.

Other donations. An other donation is a gift made to an event by a constituent in your database. For example, a company that is sponsoring 10 participants in your event may choose to make an additional donation to support the event. Because the company's gift is associated with the event, you can link the gift record for the additional donation to the company's participant record as an "other donation".

Sponsoring pledges. A sponsoring pledge is a donation made on behalf of a registrant, guest, or sponsor participating in a sporting event. For example, if you are hosting a marathon, the participants can encourage donations based on the distance they are able to run. You can enter these donations in the database as sponsoring pledges.

Navigating in Events

Note: When *MatchFinder* is installed on your computer, a **MatchFinder** button appears on the Records page. A **MatchFinder** button appears on the Org 1 tab of an organization record and on the General 2 tab of all organization relationship records. Also, if a constituent's matching gift is linked to a MatchFinder record, a **MatchFinder** button appears on the Matching Gifts screen of the Matching Gifts tab of the gift record. For more information, see the *MatchFinder Guide*.

From the Gifts page, you can create new gift records for gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, Recurring Gift, Planned Gift (if you have the optional module *PlannedGiftTracker*), and Other. After you create a gift record for event registration fees, donations, or sponsoring pledges, you can access the gift record from the Gifts page. To access the Gifts page, click **Records** on the Raiser's Edge bar, then click the **Gifts** link.
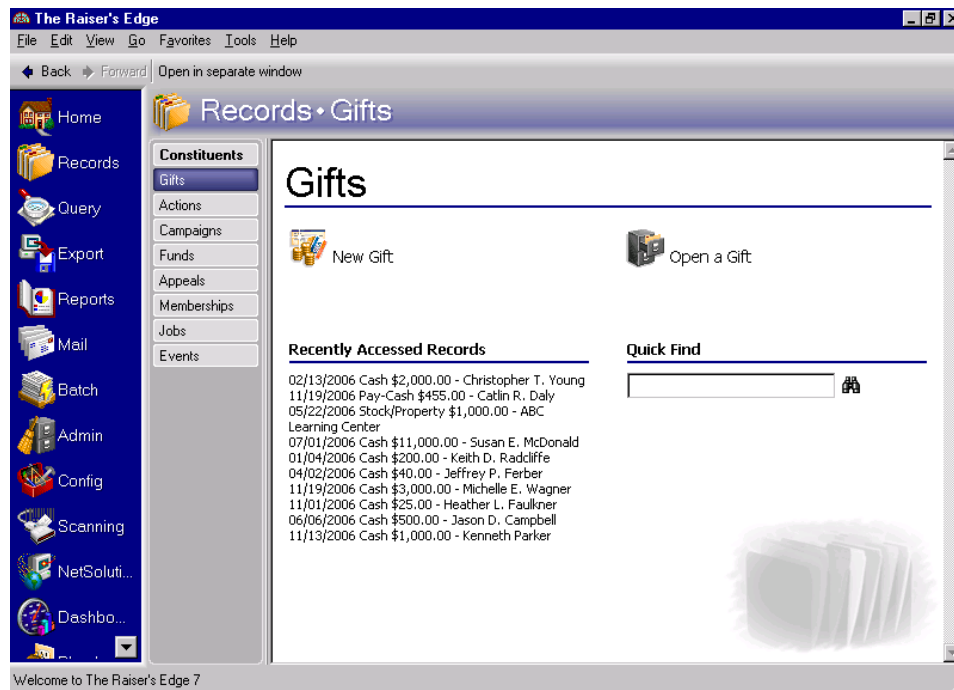

The Gifts page contains a list of recently accessed records. You can open any gift record in this list by clicking the gift description. To quickly find a gift donated by a constituent, enter the constituent's name in the **Quick Find** field and click the binoculars to display a list of all gifts donated by the constituent.

Accessing Event Gifts

After you create a gift record for event registration fees, donations, or sponsoring pledges, you can open the gift record from the Records page or the Gifts tab of the donor's constituent record the same way you open any other type of gift record. For more information about opening a gift record from the Records page, see the Gift Record chapter of the *Gift Records Guide*. For more information about opening a gift record from the Gifts tab of a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

Toolbar

The toolbar contains buttons representing common commands on a gift record. You can use these buttons as alternatives to menu commands to save time during data entry.
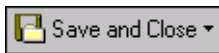
Save and close the record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record, and open a new record.)

Save the gift record

Preview a receipt, acknowledgement letter, pledge reminder, label, or envelope for the current gift record

Print a receipt, acknowledgement letter, pledge reminder, label, or envelope for the current gift record

View the first gift record listed on the Gifts tab of a constituent record for the donor of the current gift record

View the previous gift record listed on the Gifts tab of a constituent record for the donor of the current gift record

View the next gift record listed on the Gifts tab of a constituent record for the donor of the current gift record

View the last gift record listed on the Gifts tab of a constituent record for the donor of the current gift record

Go to a record linked to the current gift record

Apply gift record to existing pledge or recurring gift

Link gift to membership, event, or proposal

Add gift record to favorites

View the Gift Properties screen

Access help contents

Create and edit macros to create shortcuts for functions you perform repeatedly in *The Raiser's Edge*. This toolbar button is available only if you have the module *VBA for Advanced Customization*.

Event Business Rules

By setting business rules, you can control certain functions and displays throughout *The Raiser's Edge*. Unlike user options, business rules affect all users of the program. Several business rules are specific to the optional module *Event Management*. When you add a participant to an event, the program can automatically create a gift record for registration fees, ask if you want to create a gift record for registration fees, or do neither. When adding gifts to your database, the program can also warn you when a constituent has outstanding registration fees. For complete information about business rules, see the Configuration chapter of the *Configuration & Security Guide*.

Warning: To define business rules, you must have security rights. For more information, see the Security chapter of the *Configuration & Security Guide*.

▸ **Defining business rules**

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

2. Click **Business Rules**. The Business Rules page appears.

> **Note**: If the **Gift options** folder is closed, double-click the folder name to open the folder.

3. From the tree view on the left, select **Activity options** in the **Gift options** folder. The Business Rules screen now appears with the gift-related options.
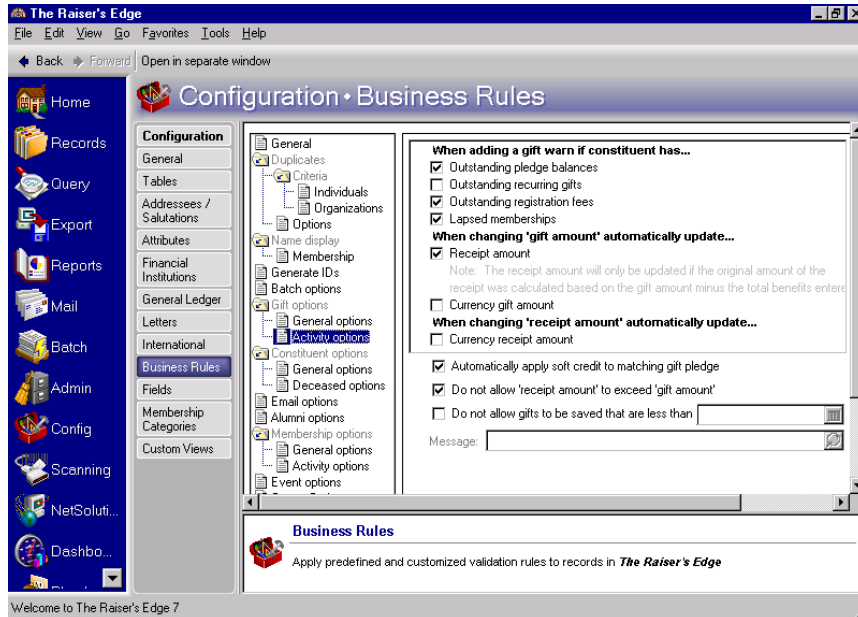
4. Under **When adding a gift warn if constituent has**, mark the **Outstanding registration fees** checkbox if you want to be reminded when you add a gift for a constituent who has outstanding registration fees.

5. From the tree view on the left, select **Event options**. The Business Rules screen now appears with event-related options.
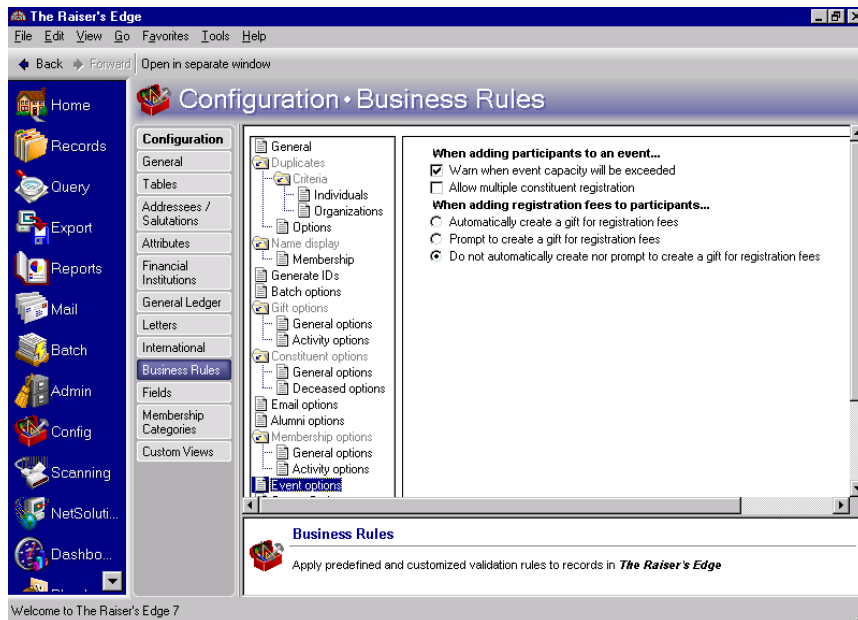
> **Note**: Your selection for **When adding registration fees to participants** should depend on your data entry methods. For example, if you decide to add participants to your database only after receiving registration fees, you can mark the **Automatically create a gift for registration fees** option to save time during data entry.

6. Under **When adding registration fees to participants**, select if you want the program to automatically create a gift record for registration fees, ask if you want to create a gift record for registration fees, or neither.

7. After you make changes to business rules, your preferences are updated right away.

Understanding Event Gifts

Gifts can be associated with participant records in three ways: to pay registration fees, track donations, and record sponsoring pledges. When you receive registration fees, sponsoring pledges, or other donations, you need to create a gift record to record gift information. Gift information can include the campaign, fund, appeal, and package to which the gift should be attributed; the payment method for the gift; and the solicitor responsible for obtaining the gift. After you create a gift record, you need to link the gift record to the participant record of the individual or organization who is associated with the gift.

For example, if John Smith paid a registration fee of $20 for an upcoming event, you need to create a gift record for John's registration fee. After entering the appropriate information on the gift record, you need to link the gift record to John Smith's participant record. When you link a gift and participant record, you are showing John Smith paid his registration fee for a particular event. Once you link a gift record and a participant record, information about the gift can be viewed and tracked from the participant record.

The next sections explain details related to linking a gift record for registration fees, sponsoring pledges, or other donations for a participant record. For basic information about the fields and options available on a gift record, see the Gift Record chapter of the *Gift Records Guide*.

Registration Fees

When you add a participant to an event, you can enter registration fees that must be paid before the participant can attend the event. For example, your organization is holding a CPR class this summer. Each student in the class must pay $50 to cover the cost of books and instruction. When you add a participant for the CPR class, you can enter the registration fees due for the class on the Registration Fees tab of the participant record.

To pay registration fees, you need to create a gift record and link the gift record to the participant record. For example, Nicholas Vincent wants to attend the CPR class. You add a CPR class participant record for Nicholas and add a $75 registration fee on the Registration Fees tab. When you receive $75 from Nicholas, you need to create a gift record as normal. For more information about adding a gift record, see the Gift Record chapter of the *Gift Records Guide*.

After you create the gift record, you can link Nicholas's gift to his CPR class participant record to show he paid his registration fees. Once you link a gift record to a participant record, the **Amount paid** and **Date paid** fields on the participant record update with information from the linked gift.

On the participant record, you can click the **View Gifts** button on the Registration Fees tab to view the gifts paying the registration fees for this event. When you click **View Gifts**, the Linked Gifts screen appears displaying all gifts linked to this participant record.

For more information about viewing linked gifts from a participant record, see the *Event Management Data Entry Guide*.

Linking a Gift to Pay Existing Registration Fees

After you create a gift record for registration fees, you need to link the gift record to the participant record of the person attending the event. To pay registration fees, the participant must be a constituent in your database. If a participant who is not a constituent pays registration fees for an event, you must add the participant as a constituent before you can add a gift for the participant.

Any constituent can pay registration fees for another participant. For example, a parent and child may attend your event. You need to create separate participant records for the parent and child. However, the parent can send a single payment that you link to both participant records.

When linking a gift record to a participant record, you can add a gift record for the registration fees from the Gifts page or the Gifts tab of a constituent record. You can also create a gift record using a gift batch. This section explains how to link a gift record for registration fees to a participant record from the Gifts page and from a gift batch.

▶ **Linking a gift to pay existing registration fees from a gift record**

Scenario: Nicholas Vincent and his daughter, Jane, want to attend your Summer CPR class. You already created a participant record for both Nicholas and Jane and you added a $75 registration fee on the Registration Fees tab of both records. On 06/04/2004, you receive a check for $150 from Nicholas Vincent to pay the registration fees for the CPR class. Now you need to create a gift record for Nicholas's fees and link the gift to both Nicholas and Jane's CPR class participant records.

1. On the Raiser's Edge bar, click **Records**.
2. Click the **Gifts** link. The Gifts page appears.
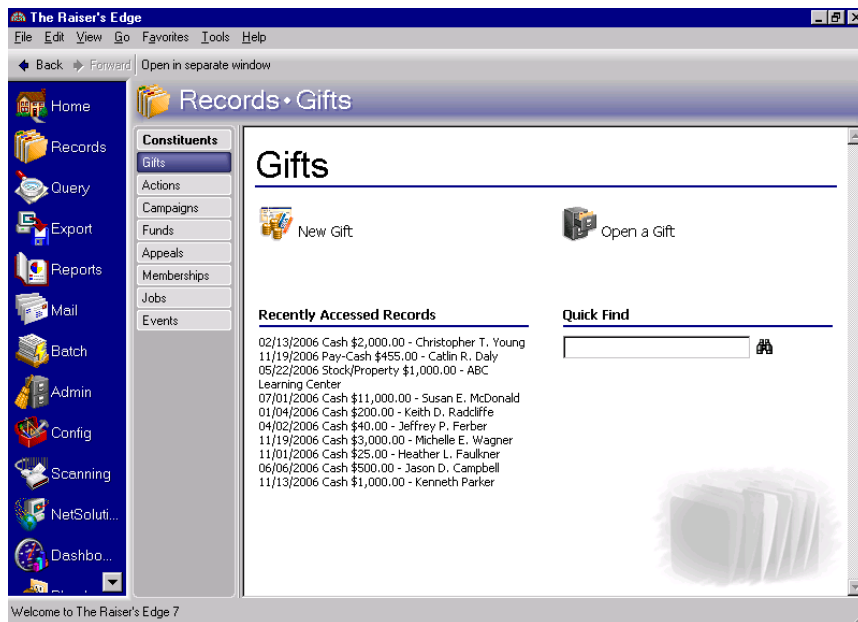
Note: If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

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

Note: Once you enter a name in the **Constituent** field, the program disables the field.

4. In the **Constituent** field, click the binoculars. The Open screen appears so you can search for Nicholas Vincent in the database. When you locate and select Nicholas, his name appears in the **Constituent** field. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

5. Select the Gift tab and add information about Nicholas's gift as shown on the screen below. For more information about adding a cash gift record, see the Gift Record chapter of the *Gift Records Guide*.

Note: Because you entered Nicholas Vincent in the **Constituent** field on the gift record, any existing registrations for Nicholas automatically appear on the Pay Registration Fees screen.

6. To link the gift to Nicholas and Jane's existing participant records, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Event**, **Registration Fees**. The Pay Registration Fees screen appears.

7. Click **Load Registrations From**. The Open screen appears so you can locate Jane Vincent in the database. When you locate Jane, all Jane's participant information appears in the grid on the Pay Registration Fees screen.

8. In the **Link?** column, mark the checkbox in the rows containing Nicholas and Jane's CPR class information.

9. In the **Amount Applied** column for Nicholas and Jane's registration, enter the amount $75.

10. Click **OK**. You return to Nicholas's gift record.

11. On the toolbar of the gift record, click **Save and Close**. Nicholas's gift record is added to your database and is now linked to both his and Jane's CPR class participant record to pay the registration fees.

▶ **Linking a gift to pay existing registration fees from a gift batch**

> *Scenario:* Nicholas Vincent and his daughter Jane want to attend your Summer CPR class. You already created a participant record for both Nicholas and Jane and you added a $75 registration fee on the Registration Fees tab of both records. On 06/04/2004, you receive a check for $150 from Nicholas to pay the registration fees for the CPR class. Now, you need to create a gift record for Nicholas's fees and link the gift to both Nicholas and Jane's CPR class participant records.

Note: While in the gift record, if you ever need to view the batch number a gift was posted through, select **File**, **Properties** on the menu bar. The **Batch number** appears on the Gift Properties screen.

1. From a gift batch, add a gift of $150 for Nicholas Vincent as shown on the screen below. For more information about setting up a gift batch and entering gifts into a batch, see the *Batch Guide*.
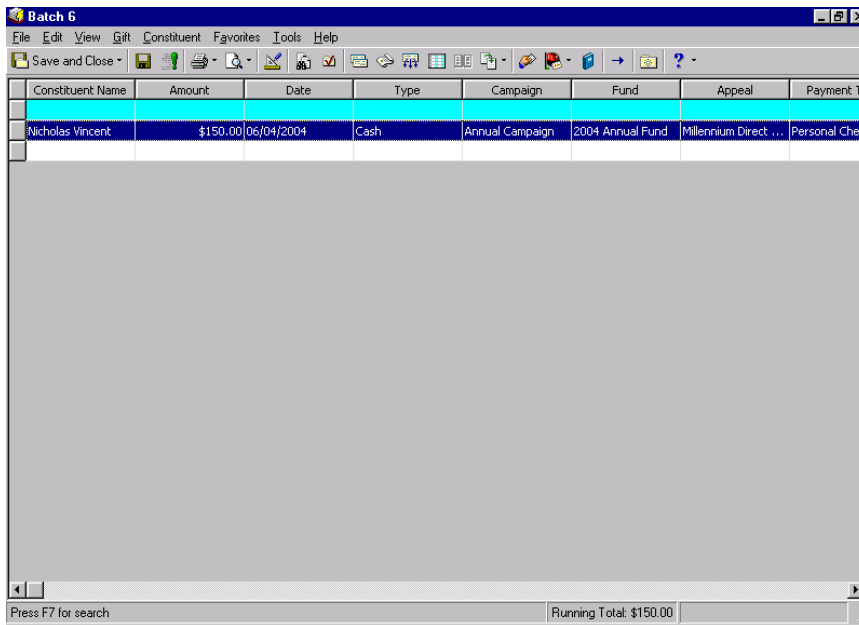
Note: Because you entered Nicholas Vincent in the **Constituent Name** column of the Data Entry grid, any existing registrations for Nicholas automatically appear on the Pay Registration Fees screen.

2. With your cursor in the row of the batch containing Nicholas's gift, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Event**, **Registration Fees**. The Pay Registration Fees screen appears.
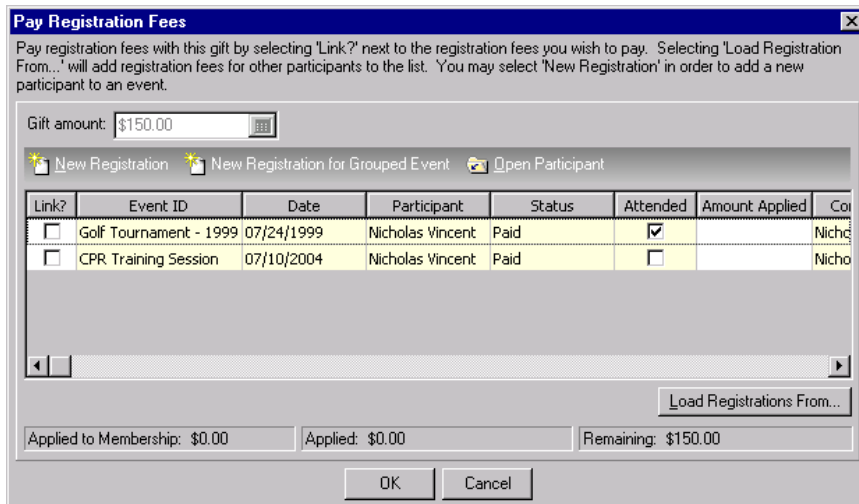
3. Click **Load Registrations From**. The Open screen appears so you can search for Jane Vincent in your database. When you locate Jane, all Jane's participant information appears in the grid on the Pay Registration Fees screen.

4. In the **Link?** column, mark the checkbox in the rows containing Nicholas and Jane's CPR class information.

5. In the **Amount Applied** column for Nicholas and Jane's registration, enter the amount $75.

Warning: Although you set up the link between Nicholas's gift and Jane and Nicholas's participant records for the CPR class, the link between the gift and participant records are actually created when you commit the batch to the database.

6. Click **OK**. You return to the Batch Data Entry screen.

7. To create a gift record in the database for Nicholas, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.

Other Donations

Note: Gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, and Other can be linked to a participant record as an other donation.

Other donations are gifts made to an event, other than registration fees, by anyone in your database. For example, Jennifer Kennick decides to donate $1,000 to your annual auction. She is not participating in or attending your event. She just believes in your cause and wants to donate money. Because Jennifer's gift is associated with the event, you can link her other donation on the Registration Fees tab of her participant record.

To give an other donation, the donor must be a constituent in your database. If a participant who is not a constituent makes an other donation to your event, you must add the participant as a constituent before you can link the gift and participant record. For more information about adding participants as constituents, see the *Event Management Data Entry Guide*.

After you link a gift to a participant record, the gift appears on the Registration Fees tab of the participant record.

From the Registration Fees tab, you can open linked gift records and break the link for gifts listed in the grid. Also, you can link the participant record to new or existing gifts in the database. For more information about this tab, see the *Event Management Data Entry Guide*.

Linking a Gift to an Event as an Other Donation

After you create a gift record for an other donation, you need to link the gift record to the participant record of the individual or organization you want to associate with this gift. Any constituent can give a donation on behalf of another participant. For example, a participant's relative may choose to give a donation on behalf of the relative participating in the event.

You can create a gift record for an other donation from the Gifts page or the Gifts tab of a constituent record. You can also create a gift record using a gift batch. This section explains how to link a gift record for an other donation to a participant record from the Gifts page and from a gift batch.
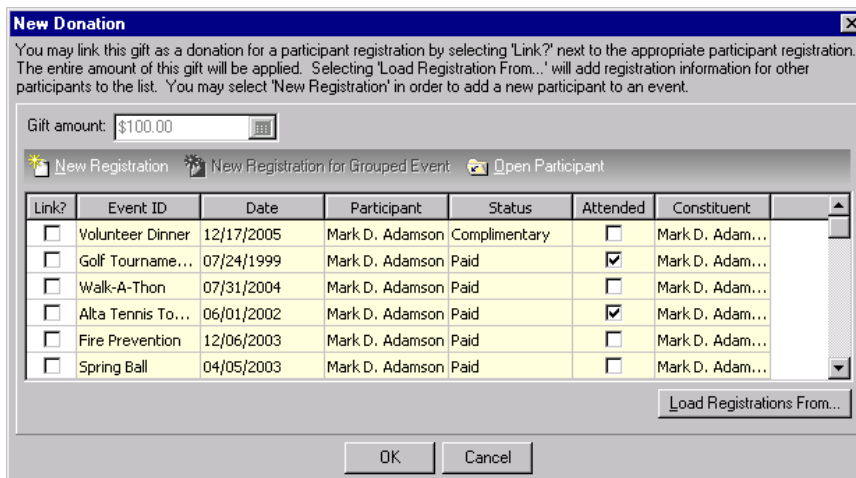
▶ **Linking a gift record to an event as an other donation from a gift record**

> *Scenario:* You invited Mark Adamson, one of your best volunteers, to attend your volunteer dinner. After Mark pays his registration fees, he decides to donate an additional $100 to help fund the dinner. You already created a participant record for Mark. Now, you need to create a gift record for Mark's additional gift and link the gift record to his volunteer dinner participant record as an other donation.

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

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

Note: Once you enter a name in the **Constituent** field, the program disables the field.

4. In the **Constituent** field, click the binoculars. The Open screen appears so you can search for Mark Adamson in your database. When you locate and select Mark, his name appears in the **Constituent** field. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

5. From the New Gift screen, add the information about Mark's gift as shown on the screen below. For more information about adding a cash gift record, see the Gift Record chapter of the *Gift Records Guide*.

6. To link the gift to Mark's existing participant record, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Event**, **Other Donations**. The New Donation screen appears.

Note: An other donation can be linked to only one participant record. For example, you cannot link Mark's donation to both the volunteer dinner and golf tournament event records.

7. In the **Link?** column, mark the checkbox in the row containing Mark's volunteer dinner information. When you mark this checkbox, the full amount of the gift is linked as an other donation to Mark's participant record for the volunteer dinner.

Note: If you integrate with *Blackbaud NetCommunity*, you should not link an offline donation to an event registration fee. If you do so, the gift will not appear online. For example, if the offline gift is in response to a NetCommunity Team Fundraiser, once it is linked to an event registration fee, it will not appear in the Fundraiser Dashboard, Report (Fundraiser), or other applicable areas of Team Fundraising such as a Donor List Fundraiser Page Element part.

8. Click **OK**. You return to Mark's gift record.

9. Click **Save and Close** on the toolbar. Mark's gift record is added to the database and is now linked to his participant record for the volunteer dinner.

▶ **Linking a gift record to an event as an other donation from a gift batch**

> *Scenario:* You invited Mark Adamson, one of your best volunteers, to attend a volunteer dinner you are hosting. After Mark pays his registration fees, he decides to donate an additional $100 to help fund the dinner. You already created a participant record for Mark. Now you need to create a gift record for Mark's additional gift and link the gift record to his volunteer dinner participant record as an other donation.

1. From a gift batch, add a gift of $100 for Mark Adamson as shown on the screen below. For more information about setting up a gift batch and entering gifts into a batch, see the *Batch Guide*.
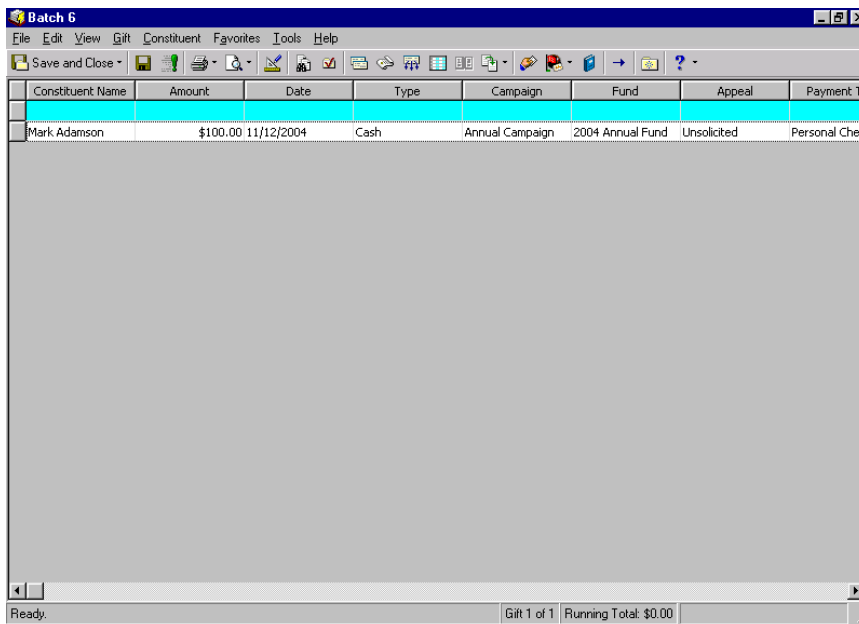
2. With your cursor in the row of the batch containing Mark's gift, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Event**, **Other Donations**. The New Donation screen appears.

Note: An other donation can be linked to only one participant record. For example, you cannot link Mark's donation to both the volunteer dinner and golf tournament event records.

3. In the **Link?** column, mark the checkbox in the row containing Mark's volunteer dinner information. When you mark this checkbox, the full amount of the gift is linked as an other donation to Mark's participant record for the volunteer dinner.

4. Click **OK**. You return to the Batch Data Entry screen.

5. To create a gift record in the database for Mark, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.

▸ **Linking a constituent's gift to another person's participant record as an other donation from a gift record**

Scenario: Paul Frantz, the cousin of your volunteer Mark Adamson, is very pleased your organization is honoring Mark at the volunteer dinner. To support his cousin's interests, Paul decides to donate $50 to your organization. Because this gift was donated on behalf of Mark, you can link the gift to Mark's participant record for the volunteer dinner as an other donation.

1. On the Raiser's Edge bar, click **Records**.

Note: You can add gift annotations to your gift records. For example, if you have a unique constituent that requires specific gift data entry, you can display a message that says "Please see the Supervisor before changing information to this gift record." The message displays when a user opens the constituent record or the gift record. To add an annotation, open the gift record, and select **Edit**, **Annotate** from the menu bar. The Annotate screen appears. Enter your message in the box. Mark the **Display annotation automatically** checkbox and the message appears whenever the record opens.

2. Click the **Gifts** link. The Gifts page appears.

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

Note: Once you enter a name in the **Constituent** field, the field is disabled.

4. In the **Constituent** field, click the binoculars. The Open screen appears so you can search for Paul Frantz in your database. When you find and select Paul, his name appears in the **Constituent** field. For more information about searching for a constituent in the database, see the Program Basics chapter of the *Program Basics Guide*.

5. From the New Gift screen, add the information about Paul's gift as shown on the screen below. For more information about adding a cash gift record, see the Gift Record chapter of the *Gift Records Guide*.

Note: The grid on the New Donation screen does not contain any information if Paul does not have a participant record for any event.

6. To link Paul's gift to Mark's existing participant record, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Event**, **Other Donations**. The New Donation screen appears.

7. Click **Load Registrations From**. The Open screen appears so you can locate Mark Adamson in the database. When you locate Mark, all Mark's participant information appears in the grid on the New Donation screen.

Note: A donation can be linked to only one participant record. For example, you cannot link Mark's donation to both the volunteer dinner and golf tournament events.

8. In the **Link?** column, mark the checkbox in the row containing Mark's 2005 volunteer dinner information. When you mark this checkbox, the full amount of Paul's gift is linked as an other donation on Mark's participant record for the volunteer dinner.

9. Click **OK**. You return to Paul's gift record.

10. Click **Save and Close** on the toolbar. Paul's gift record is added to your database and is now linked as an other donation to Mark's participant record for the volunteer dinner.

▶ **Linking a constituent's gift to another person's participant record as an other donation from a gift batch**

> *Scenario:* Paul Frantz, the cousin of your volunteer Mark Adamson, is very pleased your organization is honoring Mark at the volunteer dinner. To support his cousin's interests, Paul decides to donate $50 to your organization. Because this gift was donated on behalf of Mark, you can link the gift to Mark's participant record for the volunteer dinner as an other donation.

1. From a gift batch, add a gift of $50 for Paul Frantz as shown on the screen below. For more information about setting up a gift batch and entering a gift into a batch, see the *Batch Guide*.
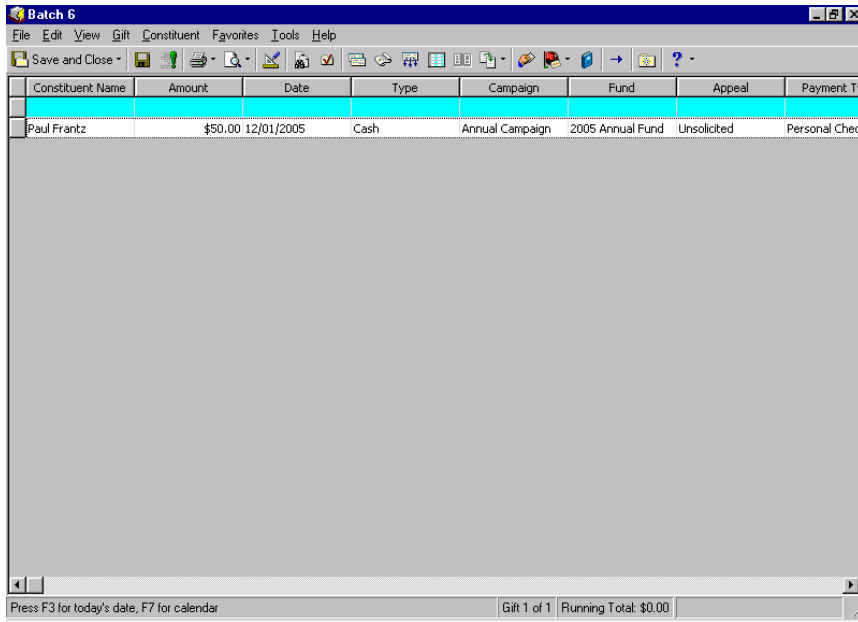
Note: The grid on the New Donation screen does not contain any information because Paul does not have a participant record for any event.

2. With your cursor in the row of the batch containing Paul's gift, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Event**, **Other Donations**. The New Donation screen appears.
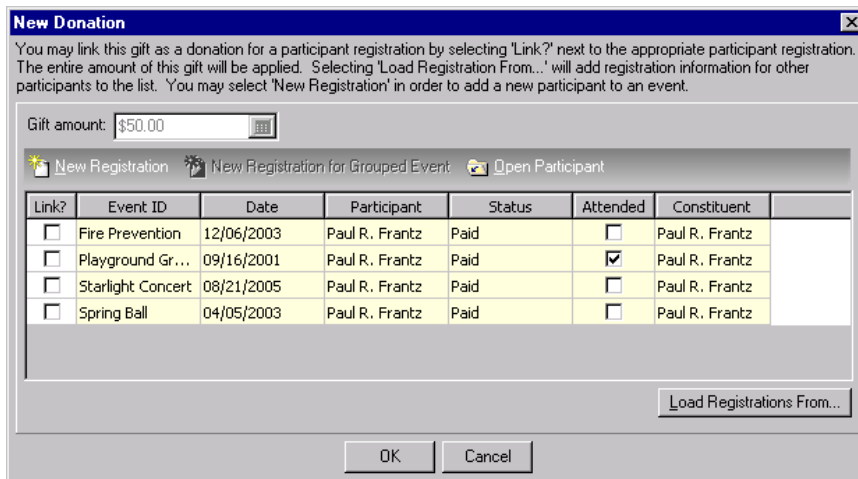
3. Click **Load Registrations From**. The Open screen appears so you can search for Mark Adamson in your database. When you find and select Mark, all Mark's participant information appears in the grid on the New Donation screen.

Note: A donation can be linked to only one participant record. For example, you cannot link Mark's donation to both the volunteer dinner and golf tournament event records.

4. In the **Link?** column, mark the checkbox in the row containing Mark's volunteer dinner information. When you mark this checkbox, the full amount of Paul's gift is linked as an other donation on Mark's participant record for the volunteer dinner.

Warning: Although you set up the link between Paul's gift and Mark's participant record, the link between the gift and participant record is actually created when you commit the batch to the database.

5. Click **OK**. You return to the Batch Data Entry screen.

6. To create a gift record in the database for Paul, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.

Sponsoring Pledges

Note: Sponsoring pledges can be given only for participants of sporting events.

Sponsoring pledges are donations made on behalf of a registrant, guest, or sponsor participating in a sporting event. For example, your organization is holding a walk-a-thon for breast cancer awareness. All proceeds from the walk-a-thon will be donated toward breast cancer research. To participate in the walk-a-thon, each participant must find as many people as possible to donate money for each mile they walk. Elizabeth Ashton is participating in your walk-a-thon and asks many of her friends to pledge their financial support. Cynthia Urban agrees to donate $50 if Elizabeth completes the 5 kilometer walk. To record Cynthia's pledge, you can create a pledge gift record for Cynthia and link Cynthia's gift record to Elizabeth's participant record.

Note: You can also add new sponsoring pledges from the Sponsoring Pledges tab of a participant record. For more information, see the *Event Management Data Entry Guide*.

When you link a gift record for a sponsoring pledge to a participant record, an entry is added to the Sponsoring Pledges tab on the participant record.

Adding a Sponsoring Pledge for an Existing Participant

To add a sponsoring pledge to a participant record, you need to create a pledge gift record to add pledge information, such as the campaign, fund, appeal, and package to which the gift is attributed. After you add a pledge gift record, you need to link the pledge to the participant record of the individual or organization you want to associate with the gift.

Any constituent can give a sponsoring pledge for a participant. For example, a company may make a sponsoring pledge donation for each of its employees participating in an event. To give a sponsoring pledge, the donor of the pledge must be a constituent in your database. If the donor of the sponsoring pledge is not a constituent, you must add the donor as a constituent before you can link the gift and participant records. For more information about adding participants as constituents, see the *Event Management Data Entry Guide*.

You can create a gift record for a sponsoring pledge from the Gifts page or the Gifts tab of a constituent record. You can also create a gift record using a gift batch. This section explains how to link a gift record for a sponsoring pledge to an existing participant record from the Gifts tab of a constituent record and from a gift batch.

▶ **Adding a sponsoring pledge from a gift record**

> *Scenario:* Elizabeth Ashton is participating in your walk-a-thon and has asked many of her friends to pledge money for each mile she walks. Cynthia Urban agrees to donate $50 if Elizabeth completes the 5 kilometer walk. To record Cynthia's pledge, you can create a pledge gift record for Cynthia and link Cynthia's gift record to Elizabeth's participant record.

Note: If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

1. From Cynthia Urban's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.
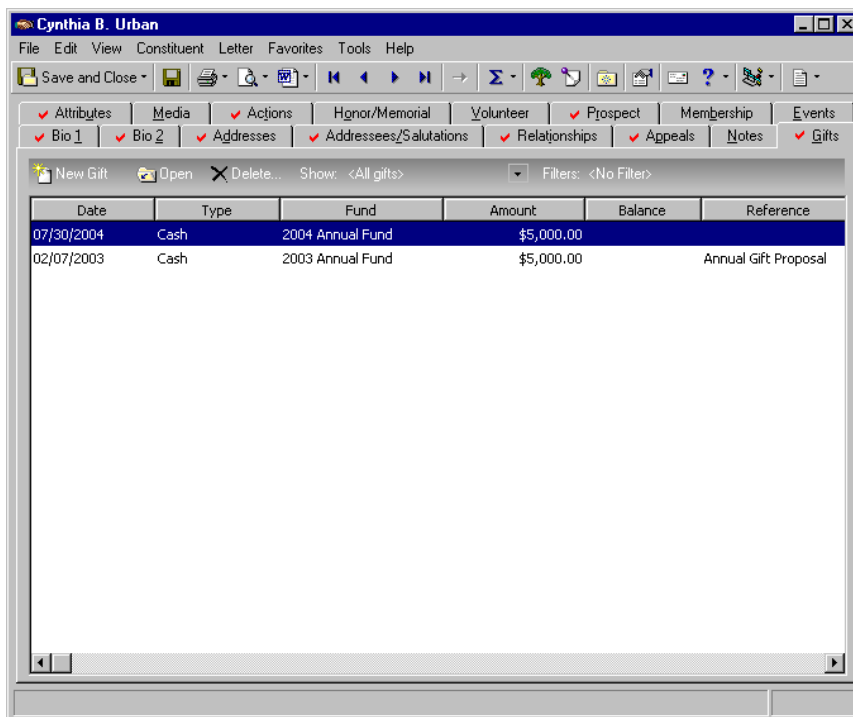
2. On the action bar, click **New Gift**. The New Gift screen appears.

3. From the New Gift screen, select the Gift tab and add the information about Cynthia's pledge as shown on the screen below. For more information about adding a gift record for a pledge, see the Pledges chapter of the *Gift Records Guide*.

4. Select the Installments/Payments tab.

5. Click **Schedule**. The Pledge Installment Schedule screen appears. Schedule Cynthia's pledge as shown on the screen below. For more information about scheduling pledges, see the Pledges chapter of the *Gift Records Guide*.

Note: Once "Pledge" is selected in the **Gift type** field on the gift record, the **Gift**, **Links**, **Events**, **Sponsoring Pledges** menu option is enabled.

6. Click **OK**. You return to the Installments/Payments tab.

7. To link this gift record to Elizabeth's existing participant record, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Event**, **Sponsoring Pledges**. The New Sponsoring Pledge screen appears.

Note: The grid on the New Sponsoring Pledge screen does not contain any information because Cynthia does not have a participant record for any event.

8. Click **Load Registration From**. The Open screen appears so you can search for Elizabeth Ashton in your database. When you find and select Elizabeth, her event information appears in the grid on the New Sponsoring Pledge screen.

Note: A donation can be linked to only one participant record. For example, you cannot link Cynthia's donation to more than one participant record.

9. In the **Link?** column, mark the checkbox in the row containing Elizabeth's walk-a-thon information.

10. Click **OK**. You return to Cynthia's gift record.

11. On the toolbar of the gift record, click **Save and Close**. Cynthia's sponsoring pledge is now linked to Elizabeth's participant record for the walk-a-thon. You return to the Gifts tab of Cynthia's constituent record.

12. Click **Save and Close**.

▶ **Adding a sponsoring pledge from a gift batch**

> *Scenario:* Elizabeth Ashton is participating in your walk-a-thon and has asked many of her friends to pledge money for each mile she walks. Cynthia Urban agrees to donate $50 if Elizabeth completes the 5 kilometer walk. To record Cynthia's pledge, you can create a pledge gift record for Cynthia and link Cynthia's gift record to Elizabeth's participant record.

1. From a gift batch, add a gift of $50 for Cynthia Urban as shown on the screen below. For more information about setting up a gift batch and entering gifts into a batch, see the *Batch Guide*.
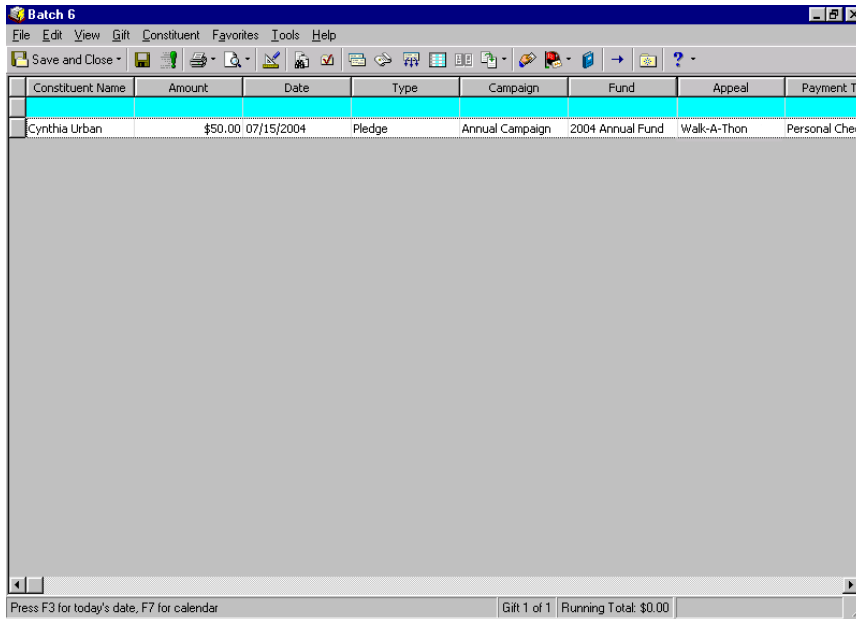
Note: Once "Pledge" is selected in the **Gift type** field on the gift record, the **Gift**, **Installment Information** menu option is enabled.

2. With your cursor in the row of the batch containing Cynthia's gift, select **Gift**, **Installment Information** from the menu bar. The Pledge Installment Schedule screen appears. Schedule Cynthia's pledge as shown on the screen below. For more information about scheduling pledges, see the Pledges chapter of the *Gift Records Guide*.
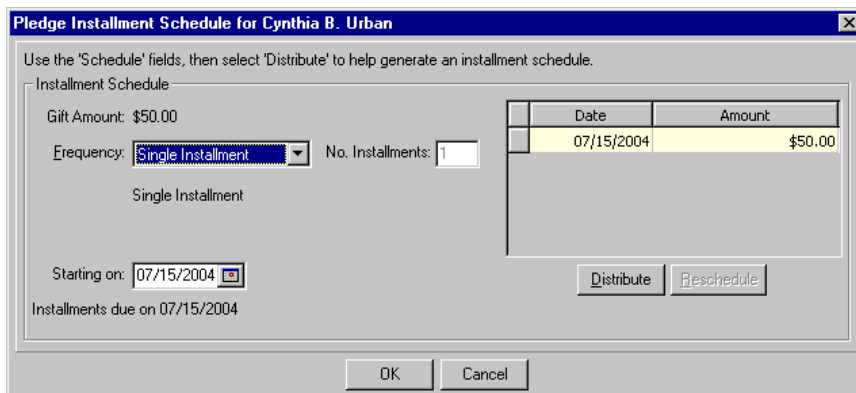
3. Click **OK**. You return to Data Entry screen.

Note: The grid on the New Sponsoring Pledge screen does not contain any information because Cynthia does not have a participant record for any event.

4. With your cursor in the row of the batch containing Cynthia's gift, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Event**, **Sponsoring Pledges**. The New Sponsoring Pledge screen appears.

5. Click **Load Registrations From**. The Open screen appears so you can search for Elizabeth Ashton in your database. When you find and select Elizabeth, her event information appears in the grid on the New Sponsoring Pledge screen.

Note: A donation can be linked to only one participant record. For example, you cannot link Cynthia's pledge to more than one participant record.

6. In the **Link?** column, mark the checkbox in the row containing Elizabeth's walk-a-thon information.

> **Warning**: Although you set up the link between Cynthia's gift and Elizabeth's participant record, the link between the gift and participant record is actually created when you commit the batch to the database.

7. Click **OK** to return to the Batch Data Entry screen.

8. Click **Save and Close**.

   To create a gift record in the database for Cynthia, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.

Paying an Existing Sponsoring Pledge

After you receive the actual gift for a sponsoring pledge, you need to create a gift record and apply it to the sponsoring pledge to reduce the balance. When you apply a payment toward a sponsoring pledge, the payment information updates on the Sponsoring Pledges tab of the participant record to which the pledge is linked.

This section explains three ways to pay an existing sponsoring pledge.

- You can pay a sponsoring pledge entered in the database by creating a new gift record from the Gifts page or the Gifts tab of the donor's constituent record. Then, you need to apply the gift record toward an existing sponsoring pledge in the database to reduce the balance of this pledge.

- You can pay a sponsoring pledge by adding a payment to a pledge currently entered in a gift batch. To use this method, the gift batch containing the sponsoring pledge must not yet be committed to the database.

- You can pay a sponsoring pledge by adding a gift record in a gift batch and applying the gift record toward an existing sponsoring pledge entered in the database to reduce the balance of the pledge.

▶ **Paying an existing sponsoring pledge from a gift record**

> *Scenario:* On 07/15/2004, you receive a check for $50 from Cynthia Urban to pay her sponsoring pledge for Elizabeth Ashton. To pay Cynthia's pledge, you need to create a gift record and apply it to Cynthia's pledge. To pay a sponsoring pledge, you must first add a sponsoring pledge to your database. This scenario uses the sponsoring pledge you set up in "Adding a sponsoring pledge from a gift record" on page 27

1. From Cynthia Urban's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.
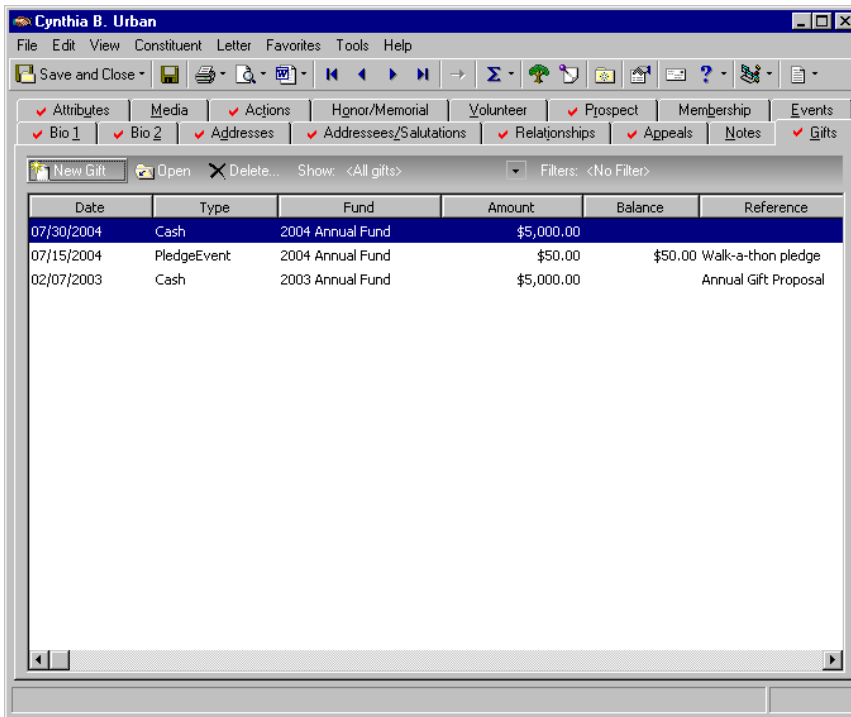
Note: If you do not receive a message, select **Gift**, **Apply to** from the menu bar. When the submenu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears.

2. On the action bar, click **New Gift**. The program displays a message.
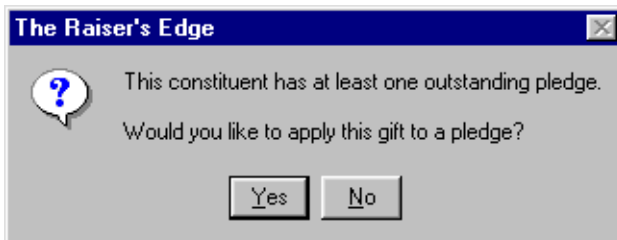
3. Click **Yes** to apply Cynthia's payment toward her existing pledge. The Apply Gift to Pledge(s) screen appears.
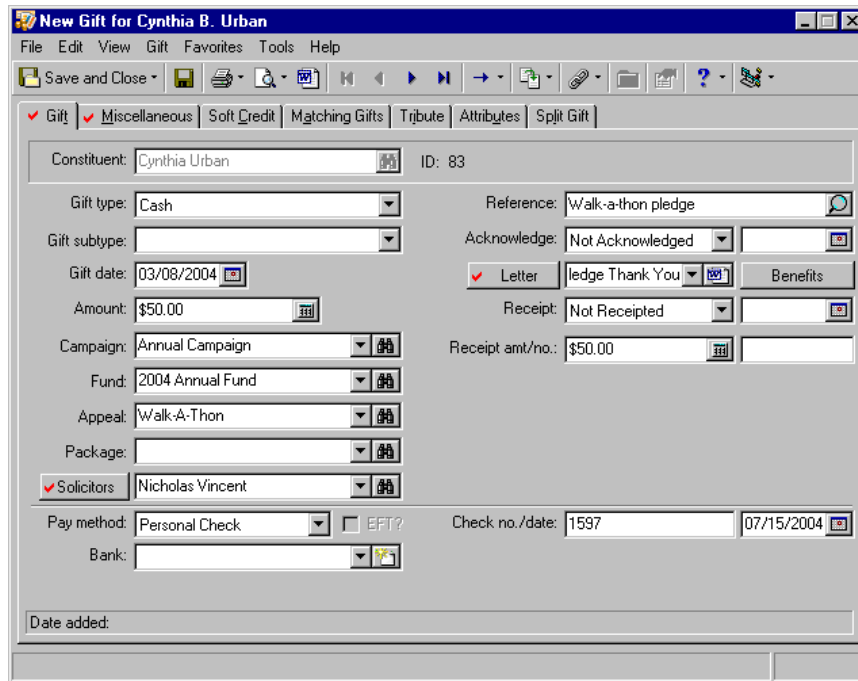

Because only one pledge gift record exists for Cynthia, information for applying the new gift to the pledge defaults automatically on the Apply Gift to Pledge(s) screen.

In the **Payment amount** field, $50 defaults. The checkbox is checked in the row containing Cynthia's pledge record information. Lastly, the program adds the **Payment amount** to the **Amount Applied** column for Cynthia's $50 pledge.

4. Click **OK**. You return to the Gift tab of Cynthia's gift record. The program defaults information from the pledge record to this gift record for the pledge installment.

5. In the **Gift date** field, enter the date 07/15/2004.

6. In the **Pay method** field, select "Personal Check". When you select Personal Check, the **Check no./date** fields appear to the right of the **Pay method** field.

7. In the **Check no./date** fields, enter the check number "1597" and the date 07/15/2004.

8. Click **Save and Close** on the toolbar. You return to the Gifts tab of Cynthia's constituent record. Cynthia's pledge payment is automatically added to the Sponsoring Pledges tab of her participant record.

9. Click **Save and Close**.

▶ **Paying a sponsoring pledge for a pledge entered in a gift batch**

You can use this procedure to add a payment to a pledge currently entered in a gift batch not yet committed to the database. If the pledge for which you want to add a payment already has a gift record in the database, see "Paying an existing sponsoring pledge from a gift record" on page 34 or "Paying an existing sponsoring pledge from a gift batch" on page 38 for more information.
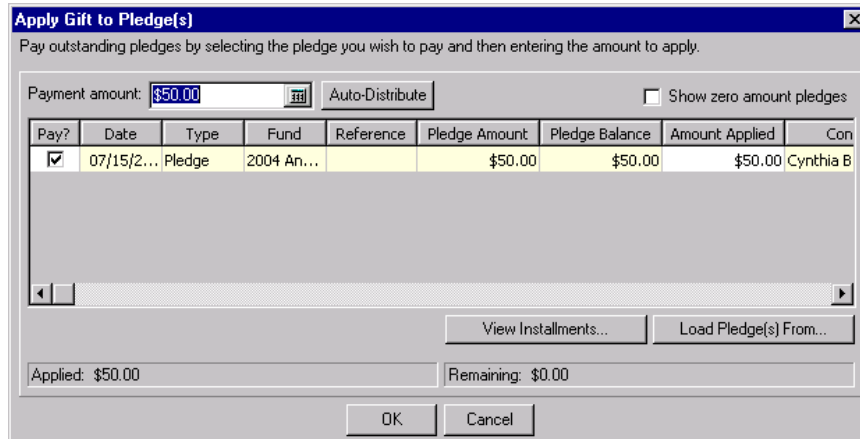
Scenario: On 07/15/2004, you receive a check for $50 from Cynthia Urban to pay her sponsoring pledge for Elizabeth Ashton. To pay Cynthia's pledge, you need to create a gift record and apply it to Cynthia's pledge. To pay a sponsoring pledge, you must first add a sponsoring pledge to your database. This scenario uses the sponsoring pledge you set up in "Adding a sponsoring pledge from a gift batch" on page 31.

1. Open the gift batch containing Cynthia Urban's pledge. For more information about opening a gift batch, see the Batch Entry of Gifts chapter of the *Batch Guide*.

Note: If the **Gift type** of the row selected in the Data Entry grid is not Pledge, the **Add payment to pledge** option is disabled.

2. With your cursor in the row of the batch containing Cynthia's pledge gift, select **Gift**, **Add payment to pledge** from the menu bar. The Pledge(s) Paid by this Gift screen appears.

Because only one pledge gift record exists for Cynthia, information for applying the new gift to the pledge defaults automatically on the Apply Gift to Pledge(s) screen.

In the **Payment amount** field, $50 defaults. The checkbox is checked in the row containing Cynthia's pledge record information. Lastly, the program adds the **Payment amount** to the **Amount Applied** column for Cynthia's $50 pledge.

3. Click **OK**. You return to the Batch Data Entry screen. A separate row is not added for the pledge payment.

4. To create gift records for Cynthia's pledge and pledge payment, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.

▶ **Paying an existing sponsoring pledge from a gift batch**

You can use this procedure to apply a pledge payment to a pledge already entered in the database. If the pledge for which you want to apply a payment is entered in a gift batch that is not yet committed to the database, see "Paying a sponsoring pledge for a pledge entered in a gift batch" on page 37 for more information.

> *Scenario:* On 07/15/2004, you receive a check for $50 from Cynthia Urban to pay her sponsoring pledge for Elizabeth. To pay Cynthia's pledge, you need to create a gift record and apply it to Cynthia's pledge. To pay a sponsoring pledge, you must first add a sponsoring pledge to your database. This scenario uses the sponsoring pledge you set up in "Adding a sponsoring pledge from a gift batch" on page 31.

Note: If you do not receive a message, select **Gift**, **Apply to** from the menu bar. When the submenu appears, select **Pledge**. The Apply Gift to Pledge(s) screen appears.

1. From a gift batch, enter "Cynthia Urban" in the **Constituent Name** column. For more information about opening a gift batch, see the *Batch Guide*. After you enter Cynthia's name in the **Constituent Name** column, a message appears.
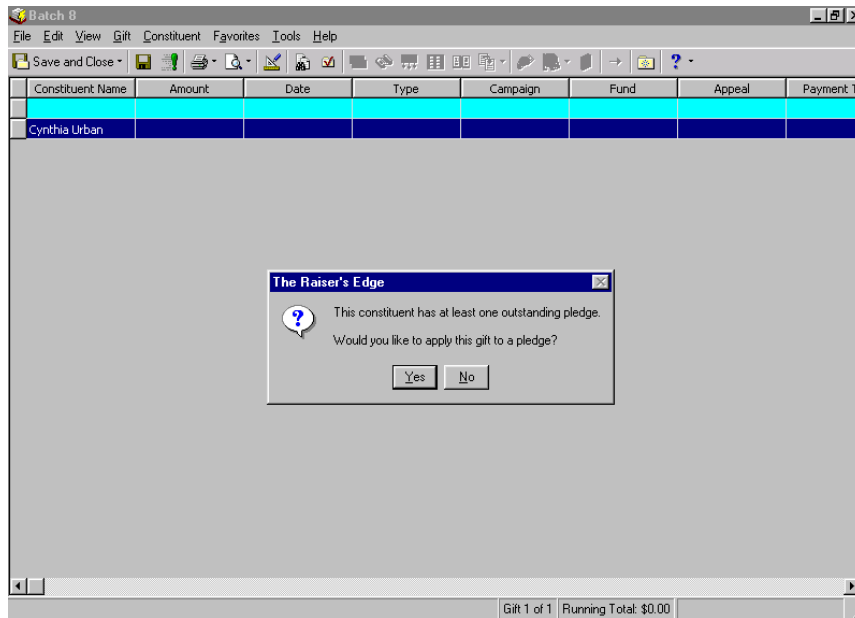

2. Click **Yes** to apply Cynthia's payment toward her existing pledge. The Apply Gift to Pledge(s) screen appears.

Because only one pledge gift record exists for Cynthia, information for applying the new gift to the pledge defaults automatically on the Apply Gift to Pledge(s) screen.

In the **Payment amount** field, $50 defaults. The checkbox is checked in the row containing Cynthia's pledge record information. Lastly, the program adds the **Payment amount** to the **Amount Applied** column for Cynthia's $50 pledge.

3. Click **OK**. You return to the Data Entry screen. The program defaults information from the pledge record to the row in the Data Entry grid for Cynthia's pledge payment.
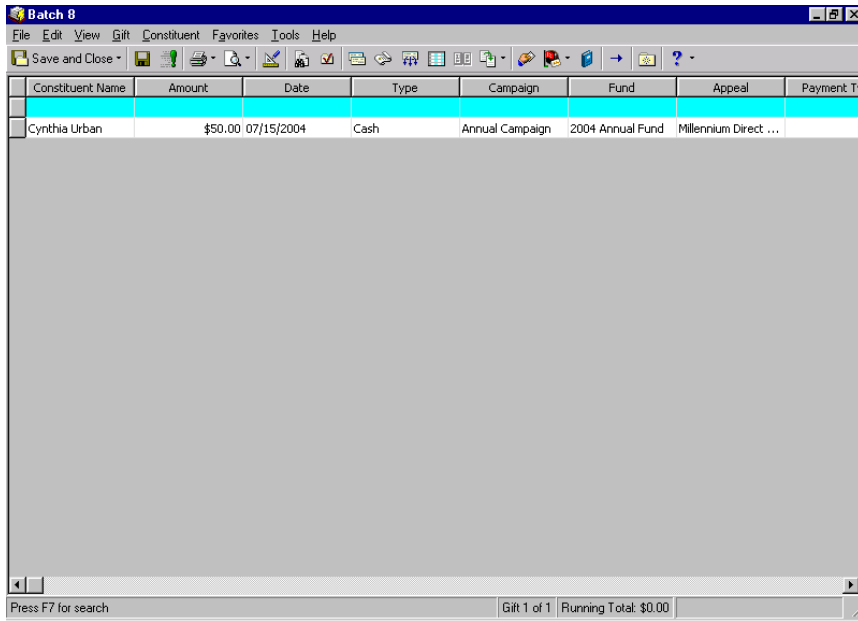
Warning: Although you applied Cynthia's pledge payment to her existing pledge, the link between the gift records is actually created when you commit the batch to the database.

4. Add any additional information, including the payment method and posting status, to Cynthia's row in the gift batch.

5. To create a gift record in the database for Cynthia, you need to commit this gift batch to the database. For more information about committing a gift batch, see the *Batch Guide*.

Breaking the Link between a Gift and an Event

On occasion, you may need to remove the link between a gift and participant record. For example, a constituent's pledge may have been designated as a sponsoring pledge in error. Also, the sponsoring pledge or donation could be linked to the wrong participant. When you break the link between a gift and participant record, the pledge gift record is not deleted from the database. This section explains how to break the link between a gift record and a participant record from a gift record and a gift batch.

▸ **Breaking a link between a gift and participant record from a gift record**

Although this procedure explains how to break the link between a sponsoring pledge and a participant record, you can use the same steps to break a link for registration fees and other donations.

> *Scenario:* Elizabeth Ashton calls to inform you she cannot participate in the walk-a-thon. She had to go out of town unexpectedly. However, Cynthia Urban has made a sponsoring pledge for Elizabeth. You call Cynthia and ask if she still wants to make a contribution to your organization even though Elizabeth is unable to participate in the walk-a-thon. Cynthia agrees to make her pledge as promised. Because Elizabeth is no longer participating in the walk-a-thon, you need to break the link between Cynthia's sponsoring pledge and Elizabeth's participant record. To break the link between a sponsoring pledge and a participant record, you must first add a sponsoring pledge. This scenario uses the sponsoring pledge you set up in "Adding a sponsoring pledge from a gift record" on page 27.

1. Open the gift record for Cynthia Urban's $50 pledge. For more information about opening a gift record, see the Gift Record chapter of the *Gift Records Guide*.

Note: If the **Sponsoring Pledges** menu option is disabled, verify "Pledge" is selected in the **Gift type** field on Cynthia's gift record.

2. To break the link between Cynthia's gift record and Elizabeth's participant record, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Event**, **Sponsoring Pledges**. The New Sponsoring Pledge screen appears.

3. In the **Link?** column, unmark the checkbox in the row containing Elizabeth's walk-a-thon information.

Warning: Even though you broke the link between Cynthia's sponsoring pledge and Elizabeth's participant record, Cynthia's gift record is not deleted from the database. For more information about deleting a gift, see the Gift Record chapter of the *Gift Records Guide*.

4. Click **OK**. You return to Cynthia's gift record.

5. Click **Save and Close** on the toolbar. Cynthia's gift record is no longer linked to Elizabeth's participant record for the walk-a-thon.

▶ **Breaking a link between a gift and participant record from a gift batch**

Although this procedure explains how to break the link between a sponsoring pledge and a participant record, you can use the same steps to break a link for registration fees and other donations. If you already committed the gift batch containing the gift for which you want to break the link, you need to open the gift record to break the link between the gift record and participant record. For more information, see "Breaking a link between a gift and participant record from a gift record" on page 41.

> *Scenario:* Elizabeth Ashton calls to inform you she cannot participate in the walk-a-thon. She had to go out of town unexpectedly. However, Cynthia Urban has made a sponsoring pledge for Elizabeth. You call Cynthia and ask if she still wants to make a contribution to your organization even though Elizabeth is unable to participate in the walk-a-thon. Cynthia agrees to make her pledge as promised. Because Elizabeth is no longer participating in the walk-a-thon, you need to break the link between Cynthia's sponsoring pledge and Elizabeth's participant record. To break the link between a sponsoring pledge and a participant record, you must first add a sponsoring pledge. This scenario uses the sponsoring pledge you set up in "Adding a sponsoring pledge from a gift batch" on page 31.

1. Open the gift batch for Cynthia Urban's $50 pledge. For more information about opening a gift batch, see the *Batch Guide*.

Note: If the **Sponsoring Pledges** menu option is disabled, verify "Pledge" is selected in the **Gift type** field for Cynthia's gift.

2. With your cursor in the row of the batch containing Cynthia's gift, select **Gift**, **Links** from the menu bar. When the submenu appears, select **Event**, **Sponsoring Pledges**. The New Sponsoring Pledge screen appears.

3. In the **Link?** column, unmark the checkbox in the row containing Elizabeth's walk-a-thon information.

4. Click **OK**. You return to the Batch Data Entry screen.

5. Click **Save and Close** on the toolbar. Cynthia's gift record is no longer linked to Elizabeth's participant record for the walk-a-thon.

   For more information about gift batches, see the *Batch Guide.*

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