Fundraising Pro

Procedure Guide, 1997

We aim to make our publications as useful and easy to read as possible. If you have any sugestions about how this manual may be improved please contact:

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1. Using this manual

Each section of the Procedure Guide has been arranged so that you can extract or photocopy it for use by another member of staff. The individual sections are identified in the small header text on each page.

The **Contents** page shows you the order in which information is presented in this guide.

All **menu option** titles and **field names** in this guide are shown in **bold**, to match the text you will see on screen.

Any field data displayed in the screen illustrations is for *example* only; you should not copy it.

The Quick Checklists are itemised with a ❑ - you might find it useful to photocopy these lists and tick off each completed routine, until you are confident that you know the software.

The alphabetical **Index** at the end of the guide refers you to all of the functions, features, and detailed descriptions of the software.

The symbols used in this guide are:

Stop - do not go any further without reading this paragraph.

Back up your data before going any further.

A report should be generated at this point.

37 Turn to the given page for further or linked information.

The following information is important - make sure you understand before you go any further.

This Procedural Guide explains system setup in detail, then illustrates and explains significant screens and provides an overview of the options available, along with suggested routines for specific purposes. The Guide only applies to users running Fundraising Pro under Windows95 and Windows NT4.0. Macintosh users will find that this guide is very useful since only cosmetic differences exist between Windows and Mac versions.

This Procedure Guide refers you to the separate User Guide where information would otherwise need to be duplicated. This User Guide is itself based on relevant extracts from the 4D manuals.

2. Introduction to Fundraising Pro

Fundraising Pro is an alumni and appeals database program, which is useful to many different types of organizations who are tracking members, former members or another constituency, with an eye to fundraising. The database consists of many tables which are automatically linked to facilitate easy access to crucial data. Report writes, graphing tools and import export menus exist to make the data available in many formants.

2.1 Features

The software enables you to:

- Keep detailed records about your supporters and maintain contact with them.
- Customise a wide range of alphanumeric, date, and value fields in the database, to suit your own requirements.
- Record donations. The British version make distinctions between covenant, gift aid, direct gifts, pledges, gifts in kind, legacies and foreign currency, and prepares appropriate tax forms. The US version can easily produce the appropriate form for the donor to fill out her or his tax deduction.
- British tax claimers can automatically find anomalies, then calculate and reclaim tax due on covenants and gift aid, on dates to suit your own organisation.
- Create sets of popup boxes or choice lists to ensure that critical data is entered accurately and in a standardised format.
- Import details from other database systems, for quick and accurate data transfer.
- Set up your own definitions of group events (such as annual dinners) and personal events (such as awards, or telephone conversations); link each supporter to the appropriate events and thereby build up detailed profiles.
- Use supporter profiles to target specific fundraising activity.
- Keep track of sponsors by recording and maintaining their preferences. You can earmark donations - either fully or partially - for a specific purpose.
- Set up relationships between supporters’ records so that you can quickly trace, for example, family links, or all supporters who are employees of a particular company, or hold membership of a particular society.

- Generate your own correspondence, forms and reports, either within the package or by exporting data to a word processor or spreadsheet.
- Produce detailed financial projections and reports, charts or graphs; standard layouts can be supplemented by your own customized reports.
- Track membership.

2.2 Data Protection Legislation

You should ensure that your registration under the Data Protection Act allows you to store and use the range of information which you plan to hold in your Fundraising databases.

2.3 Enhancements

If you need to report a possible fault, or request an additional feature to the software, the procedure guide, or the on-line help, please send the details to Stelias Computing Inc. who develop and maintain this product, or contact your reseller.

3. Installation, Database Files, Logging in and troubleshooting

3.1 Installation

The installation of Fundraising Pro is discussed in the “Quick Tour” manual. Here we will review what is actually installed. We assume that you have chosen the standard option to install in the C:\frp directory.

The installation consists of many files, but only a few of these are of importance.

3.1.1 Multi User Installation

This topic is largely covered in the documentation coming with ACI’s 4D Server. Follow the instructions to install a 4D Server, using TCP/IP.

When this server is set up, run 4D Customiser to tune memory settings. This is necessary for stability and performance of Fundraising Pro.

- ❑ Shutdown all 4D Clients and 4D Server software.
- ❑ Start 4D Customiser on each client (one at a time).
- ❑ Open 4D Client with 4D Customiser.
- ❑ Double click preferences
- ❑ Change the stack size to 512k (it is 64k by default)
- ❑ Change the kernel memory to 15 blocks of 512k
- ❑ Change the cache size to 6000kb.
- ❑ Close the preferences windows
- ❑ Quit and Save from 4D Customiser

Now repeat this on the server, to adjust the server settings:

- ❑ Shutdown all 4D Clients and 4D Server software.
- ❑ Start 4D Customiser on each client (one at a time).
- ❑ Open 4D Server with 4D Customiser.
- ❑ Double click preferences
- ❑ Change the stack size to 512k (it is 64k by default)
- ❑ Change the kernel memory to 15 blocks of 512k
- ❑ Change the cache size to 4096k on a small server (16MB) or to 10240k on a larger server with 32MB or more.

If you receive messages indicating that the software is out of memory, do the following:

- ❑ Inform your supplier, indicating where in the program you received the message.
- ❑ Start 4D Customiser on each client (one at a time).
- ❑ Open 4D Client with 4D Customiser.
- ❑ Double click preferences
- ❑ Increase the stack size by 256k

If the server displays an out of memory message, increase its stack size.

3.1.2 Data Files

Data files must have an extension ".4dd". If you charity is called "Whalesaver" and appropiate name for your data file might be "Whalesaver.4dd".

Several demonstration data files are installed in the C:\frp\sample data folder, where you can also find an Emptydata.4dd. This is the starting point for a new database.

After exploring the demonstration data files:

- ❑ Copy the emptydata.4dd to Whalesaver.4dd
- ❑ Place Whalesaver.4dd in the C:\frp\frpXXXs folder where XXX is the version number of your product.

Make sure to make frequent backups of Whalesaver.4dd. This is the file that contains your entries in the database. Also before engaging in operations which change large amounts of data (such as tax runs, imports, applying formulas) back up the data file.

3.1.3 The program files

The program files for version XXX are located in the directory

- \frp\frpXXXs for **single user versions**
- \frp\frpXXXm for **multi user installations**

In single user installations you can find a copy of the executable program and start it by clicking frpXXX.exe. Multi-user installations cannot be started without 4D Server.

Note that it is recommended that the data file to be kept in the same folder. Don't throw this folder away.

3.1.4 Other files.

A variety of other directories are created under C:\frp. These are for example:

- Sample data: contains empty and demonstration data files
- Reports: the recommended folder for Quick Reports
- Merges: the recommended place to store Mail merge letters and data files
- Documentation: online copies of the documentation are stored here.

3.2 Logging in and selecting your database

The following steps describe how you “link” Fundraising Pro to a particular data file. You will need to establish this link for example when:

1. You create your organization’s data file
2. You want to browse one of the demonstration files
3. You have moved the data file to a new location and you want to re-open it.
4. You have compacted your database, or rebuilt it from tags for maintenance or trouble shooting.

After establishing the “link” Fundraising Pro will open the same data file when fired up again.

- ❑ **Single user installations**: Launch Fundraising Pro (FRP) from the Start menu in the Programs, Fundraising Pro program group.
- ❑ When presented with the Login screen, select **Administrator. DO NOT PRESS OK yet.**
- ❑ Hold down the **Alt Key**
- ❑ Now press **OK** with the mouse.
- ❑ In the file dialog which appears, select the data file (demodata.4dd, whalesavers.4dd).

You may now be presented with the license screen where you can enter your key if you have not already done so.

- ❑ **In a multi-user set up**, on the **server workstation** launch **4D Server** from the Start Menu.
- ❑ In the file open dialog box select C:\frp\frpXXX.4db. **Do not press OK yet.** Here XXX is the version number of your product.
- ❑ Hold down the **Alt-key** when pressing OK

- ❑ In the next file open dialog select the data file (demodata.4dd, whalesavers.4dd)
- ❑ If your networking is set up correctly, you can now access the database you selected by starting **4D Client** from a client workstation.
- ❑ **On the client workstation**: log in as administrator. You may have to fill out a license form if you have not already done so.

In the future when you start up Fundraising Pro, it should select the correct database file for you. You need not press the **Alt-key** which shortens the process of starting up.

3.3 Keeping your data file healthy

Fundraising Pro constantly adds data to your data file. But it also removes temporary data and creates “holes”. If your computer crashes in the middle of operations, your data file may incur a corruption. It is best to keep the wholes to a minimum and we recommend you **Compact** your database frequently (e.g. once a month, or every week on an intensively used database).

To compact your data base:

- ❑ Quit Fundraising Pro.
- ❑ Back up your data file
- ❑ Start 4D Tools from the Start menu
- ❑ In the Open File dialog select the file: C:\frp\frpXXXs\frpXXX.4db file. **Do not press OK yet.**
- ❑ Hold down the **Alt-key** and click OK.
- ❑ Select your data file.
- ❑ Chose compact from the Utilities menu.
- ❑ Select a sensible name for the new datafile.

This process will create a new data file, which you must open as described in the previous section.

3.4 Troubleshooting

3.4.1 My database behaves strangely: menus or data are not correct

Index tables in your database can go out of sync due to crashes of software. As a result Fundraising Pro can behave very strangely: menu items do not perform their tasks normally or searches give the wrong results.

If your data base is corrupted or if Fundraising Pro starts behaving in a strange way, likely the problem can be fixed easily. Follow the following steps to resolve your problems:

- ❑ Compact your data file as described in the previous section
- ❑ Open Fundraising Pro with the new compacted data file. In some cases the problems will have disappeared, if not proceed.
- ❑ Quit Fundraising Pro.
- ❑ Open the compacted data base with 4D Tools as described in the previous section
- ❑ Chose repair from the Utilities menu and select “Rebuild from tags”. This process might take a significant amount of time and will create a new data file.
- ❑ Open Fundraising Pro with the data file which was rebuild from tags. It might take a long time for the program to open. In most cases the problems will be gone.
- ❑ If the problems have not disappeared you must go back to a healthy backup file.

3.4.2 A Window is stuck under the toolbar

If a Window, such as the clipboard or a data form has become stuck under the toolbar, the following will allow you to move the window.

- ❑ Click in the window which is stuck with the left mouse button
- ❑ Press Alt
- ❑ Press the left arrow key
- ❑ Press the right arrow key
- ❑ Press the down arrow key – this will show you a menu
- ❑ Press the down arrow once more
- ❑ Hit return
- ❑ Hold down the down arrow key to move the window down
- ❑ Hit return or click when the window title bar is fully visible

3.5 Upgrading Fundraising Pro

First duplicate the existing data file, and put it in your backup databases folder.

1. **Save password information:**
   - ❑ Open the existing version as **administrator**.
   - ❑ Open the database and go to **Edit Passwords**.
   - ❑ Open **Save Groups**, and save your user information to a disk.
   - ❑ Under the **Help** menu, select **About Fundraising Pro** and note what data file you are using.
   - ❑ Close the existing database.
2. **Install the new version**
   - ❑ Use the floppies, CD Rom or downloaded install file and double click the setup program. Install all options. Note down the version number shown by the installer.
   - ❑ The installation has created a new directory, for example, C:\frp\frp344. Your current version might be installed in a directory like C:\frp\frp340, which has a lower version number.
   - ❑ **Copy (DON'T MOVE)** your data file (which you noted down above) into C:\frp\frp344. Name the copy **WWF344.4dd** if your charity can be abbreviated as WWF.
3. **Link data file to the new version:**
   - ❑ **Single User Installation:**
     - ❑ Double click **frp344.exe** in the C:\frp\frp344 folder (or use the start menu)
     - ❑ When the password dialog appears, select administrator, and hold down the **Alt** key while pressing **OK.**
     - ❑ Select the WWF344.4dd data file. Opening may take considerable time for large databases.
   - ❑ **Multi-user installation:**
     - ❑ Activate 4D Server
     - ❑ In the file dialog select the structure file C:\frp\frp344\frp344.4db **hold down Alt while clicking OK.**
     - ❑ Select the C:\frp\frp344.4dd data file
     - ❑ Go to a client workstation, and log in as **administrator**, without password.
4. Load the password information
   - ❑ Choose **Edit Passwords** from the **File** menu and select **Load Groups.**

Your new data base should be ready for use.

4. Overview and initial planning

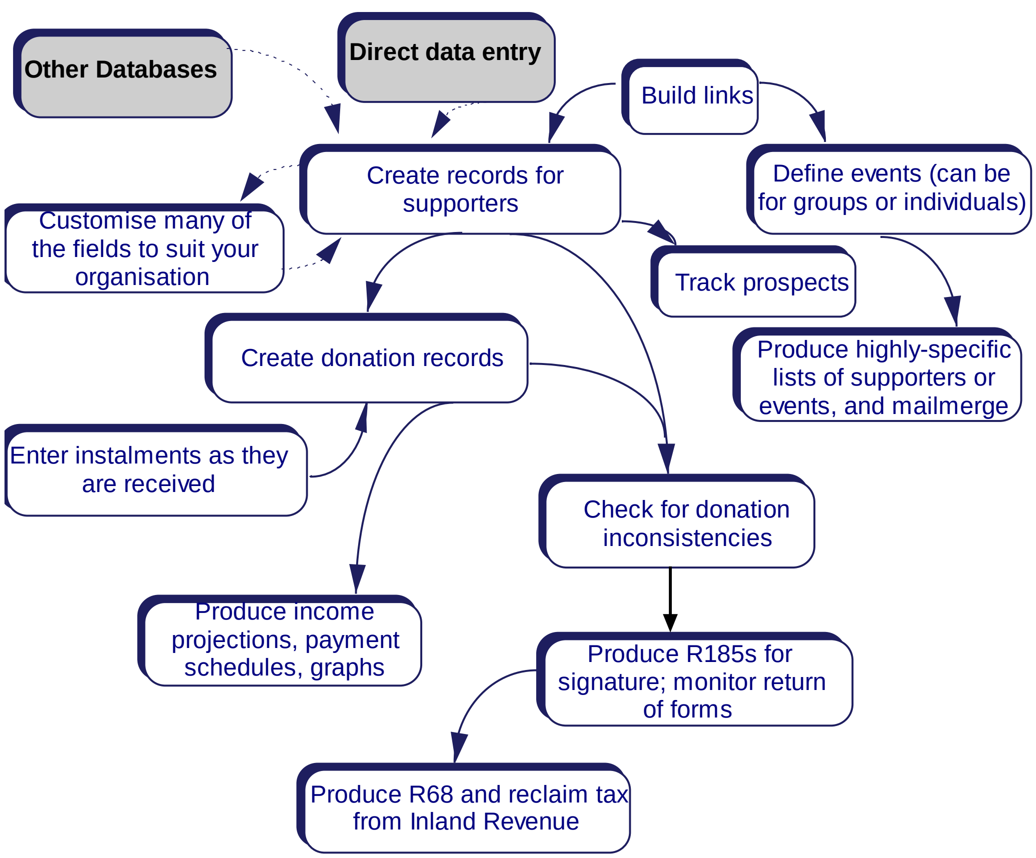
Fundraising Pro is a very flexible and customizable set of linked tables in a single database file. You will find that Fundraising Pro enables you to navigate seamlessly from groups of people to their corresponding groups of donations or transactions.

You need to decide what you want to store, where you want to store it, and how you want to retrieve it. With careful preliminary planning you will be able to organize your data in a way that provides lasting value, in the face of an ever growing amount of contacts in your database. The section on organizing your constituency data will give you a feel for what to consider.

In addition, there is system data to be set up. Tax rates need to be defined, popup lists and fields names should be entered, and for security you want to assign passwords to your users. We cover such system setup in the second section. Importing data is another important issue that is at the system level.

4.1 Organisation of constituency data

A flow diagram of what you can achieve with Fundraising Pro is drawn below.



4.1.1 Important tables

The **people table** stores contacts personal information This will include name and address information but also a range of details such as career milestones, memberships of societies, distinctions and other customisable detail. Related information such as events recording contacts with them, and group events in which they participated can be recorded from the people table in related tables, for convenience. Similarly can enter or retrieve a supporter's donations and their transactions through the people database.

The **donations table** stores details of supporters' *intentions* (promises, or pledges) to give financial support. Actual *receipts* are stored in the transactions database. Each promise is given a gift number, which is the link between a supporter, a donation and an eventual transaction. The separation between *intention* and *receipt of payment* enables you to record covenants, and to keep track of the difference between installments already received, and installments due in the future.

The **transactions table** stores the actual receipts - of money or gifts. Tax claims, financial reports and projections are all based on data contained here. Transactions are linked back to the donations data table via the gift number.

The **events table** contains two kinds of event detail:

- **Group events** cover events like a summer ball, or sponsored swim, or attendance at meeting, or waterfall contacting where and event is linked to multiple people. Whenever a supporter is linked to a particular group event, the actual act of linking is stored in an **event log table**, so that you can later look at an event and all the supporters who have been linked to it.
- **Individual events** cover such events as a knighthood, or a telephone contact, or a career move, or the birth of a daughter. All such events are linked with a supporter's record, so that you build up a profile not only of his/her responses to your fundraising (group) attempts, but also an ongoing record of his/her (individual) personal achievements and progress. A supporter's record can contain any number of individual events. All events automatically have a date attached.

You can also group selections of people or donations together by **Codes** and the **Code Log** and **Code log don** tables, link these codes to donations or people. Codes are independent of event codes.

You can isolate fundraising for specific events within the donations table using **earmarks.** Supporters may just send money, and your trustees decide how it is to be spent. However, you can define **earmarks**, which are funds within the appeal which supporters can target as their special interest. For example, a supporter may earmark 60% of their donations for your Library fund, 20% for your Sponsored Silence fund, and the rest for the pot.

Or a donor could earmark 100% for the Chess tournament. Earmarks are attached when you enter a donation's details.
The tax information created in the database is vital to your accounting department. All important tax transactions are stored in the **Tax Records table**. Actions such as claiming tax, requesting a form, logging its return, and so on, are stored there. You can revisit old tax claims and reproduce old forms. You can also undo changes, if necessary.
A simple **task** table is implemented for **project management**. Tasks can be freestanding reminders, or linked to people records, and can be allocated to a particular user for action.

4.1.2 Relations between the tables

You can have records for people or organisations in the **people table** regardless of whether they send money - a prospective donor, for example, who has not actually sent anything yet; or a volunteer who doesn't give anything but time. Organizations or an employer may play only indirect roles, such as providing matching gifts, but should also be entered in the **people** table. When relationships exist among constituents, these can be recorded and provide access from employers to employees and vice versa.
Every **donation** needs to be linked to a supporter in the people table whom we call the donor. However, the supporter record may be a record under the name of **Anonymous**.
Similarly every **transaction** you receive and record in the transactions file must point to a donation. There can be many transactions per gift, for example for covenants, just like a person can make more than a single donation.
In the same spirit, an **individual event** must point to a contact in the people table, and an **earmark** for a destination must have a corresponding gift in the donation table.
Finally, **tax records** will points to donations.

All these relationships are called **many to one relationships**, indicating for example that many gifts can belong to one donor.

A second type of relationship is more involved but also very important. It arises for example in the case of events. You plan your events independently of attendance, for example you establish that on a certain date you will hold a ball, and enter this in the **events** table. As time goes by, more and more people promise to attend the ball, and for each of these and **event log** record is created, which links the event (the ball) to the person in the **people** table. One speaks of a **many to many relationship** here between the people and the events table: this expresses the fact that there can be many events for a single person and many people attending a

single event. The event log is an intermediary table establishing the relationship between a particular person and event.
Fundraising Pro uses such many to many relationships for events and **codes**. To link codes to people there is the **code log** table and to link codes to donations there is a **code log don** intermediary table.

Some tables are pretty independent of others. For example, the fields table stands by itself, and so do the letters and reports (although they are related to people on the fly during merges etc.).

4.1.3 Customizing fields in the people table

The people table is special in that it has a large number of fields which are not allocated to specific data. Phone numbers, addresses etc. are allocated, but almost 100 fields are for you to allocate.
It is in these customizable fields that you can reflect the special features of the constituency of your non-profit organisation. During the development of Fundraising Pro it became clear that having the flexibility was a key to providing and adequate database more many types of organizations.
When allocating these fields pay careful attention to the following points.

It is vital that you organise your data carefully. Please read the following points:

- Data in the people table can be stored in many different ways, to suit your needs. Storage of data in the other tables is less customisable and maintained by the system.
- Some of the data fields are of a fixed size and will change in predictable ways. For example: dates of joining/leaving, income estimates, or the supporter's old school House.
- Many supporter attributes can be defined by Yes/No answers (such as questions of membership, privacy, and so on) and can therefore be recorded by check-boxes rather than text.
- Some fields will contain data which will be used later to group similar supporters for mail shots or other targeted fundraising. For example: supporter types, address zones, membership of other societies, professions. Others examples will be relevant to your own organisation. Fields which are to be used frequently for sorting and searching may be *indexed* (29) for speed.
- In conjunctions with the personalized fields, to ensure that you enter certain information in exactly the same way you should set up popup lists (22) wherever the information has a consistent format. This will greatly help to search and sort such information. Existing Mentor users will be familiar with the Lookup Codes used already throughout the Mentor suite; Fundraising Pro's popup lists fulfill exactly the same

function. You can choose up to twelve data fields which would benefit from standard popup lists, and create those lists to suit your own organisation.

- ❑ Don't use name and address fields but for storing names (of an individual, company, or society) and addresses. If you add any other information you will encounter problems when printing labels and letters using macros.
- ❑ Use a single format (without words) for telephone numbers, suitable for automatic dialing. Use an alphanumeric-type field, not numeric, if you are storing telephone numbers in a customisable field.
- ❑ Customisable text-type fields can hold a large amount of information, and are useful for storing descriptions and memos. However searches on these fields can be extremely slow (again depending on your hardware), and you may decide not to store information in these fields which you may later need to search.
- ❑ Store accumulating personal information such as career moves, family changes, and so on, as a series of personal event codes rather than as uncontrolled text notes in random places on the supporter's record. This ensures a regulated buildup of data, which might later be useful for sorting.

4.1.4 Location of information

The majority of information stored in the database is entered through either the People forms and its subforms, or the Donations forms and its subforms. It is very likely that you will be defining and generating your own reports, to customise the way in which you want to extract and display information from the database. You are able to use Fundraising Pro's Quick Report option to produce such reports, as well as 4D Write for full page reports.

To define your own reports, you will need to know the fieldname and tablename used within the Fundraising software. All the field names and locations are listed on page at the end of this chapter.

Bear in mind that when you have renamed some of the customisable fields you will need to use each field's original system name in report layouts, sorts and searches. This will change in a later release.

4.2 System setup

To get your system off the ground, think thoroughly about its use and future. Then complete the following setup routines:

- User and Group Security
- System Parameters (tax rates, address of your organisation etc.)
    - Customised Fields 📖31

- Popup Codes 22
- Relationships **Error! Bookmark not defined.**

4.2.1 User and group security

(**File** menu)

Security setup can only be carried out within the **Administrator** privilege level. The users, groups and passwords defined here are used in the login screen - 44 - and determine the level of access available to each user.

Define groups

Default groups are already established on the software. You should not create new groups.

Add a new user

- ❑ Select the **Edit Passwords** menu from the **File** menu, then choose the **New User** item from **Passwords**.
- ❑ Enter the new user's details
- ❑ Leave the **start-up procedure** field blank.
- ❑ **Save** the screen.

Add the user to a group

- ❑ To add this user to a group, point the mouse at the appropriate user name, hold down the left button, and drag the user name to the group where this user is to be a member. Then let go.

Assign passwords to users

- ❑ Select **Edit Passwords** from the **File** menu,
- ❑ Select (double-click) the user,
- ❑ Key in their password and click the **Close** button on the window.

Backup your password and user data by selecting **Save Groups** from the **Edit Passwords \ Passwords** menu. Store the data in a file called **c:\frp\pwd.4ug**. You will be able to save time later by importing this data into a future version of Fundraising Pro.

Setting passwords is a vital protection of your data, particularly on a networked computer. Change your passwords frequently, and make sure they are not easy to guess.

If you do not set passwords, or if you have copies of Fundraising Pro software on your system in which passwords were not set, then the program allows **administrator** access to any user without asking for a password. This means that your data may be at risk. Always install passwords, right away, and do not keep unprotected FRP copies around.

4.2.2 System Settings

(**File** Menu or **Data** menu)

These parameters can only be edited when you are logged on ad **administrator**. To access the working screens from the **File** menu, open the **Open Database** menu and double-click the single row of system data. Double clicking allows you to amend data.

To access the same screens from the **Data** menu, select **System File**.

This action opens a screen containing two tabcards:

Settings tabcard

The name of the charity cannot be changed without invalidating your licence key. Contact Stelias or your reseller if you wish to change the name of your charity.

- ❑ Enter or change your charity's address,
- ❑ Now enter a list of tax rates into the database. Enter a tax rate for any period in which transactions are promised, or due. The system uses the current tax rate as the basis for future projections, so give an extended last date of validity which will encompass your projections for the final tax rate, the one currently in effect. Make sure all dates are entered correctly and that the periods are adjacent.

Date-stamps triggered by your actions

The change of an address, and the **contact date**, are stamped automatically in their own date fields, i.e. changing an address changes the address last changed date, and similarly for contact date. But you can set up to two further date-stamp triggers. For example, you might create a custom box which is ticked the first time a supporter gives money - this could be date-stamped using one of these triggers. Date-stamps can be assigned to any field within the people file, so you will probably have to leave these trigger checkboxes blank until you have defined your customised fields.

- ❑ When you are ready, click the checkbox on and select the field which is to trigger the date.

Popup Lists tabcard

During your fundraising campaigns you will want to select records based on various criteria - all supporters who live in Gloucestershire, for example, or all architects, or which payments were made by cheque and which by direct debit.

To ensure that all search targets do indeed appear in your selections you must ensure that data entry is consistent throughout the system. Do this by setting up lists which are used whenever the contents of a particular field is used for searches, and when it contains information in a consistent format. These popup lists can contain complete words, or abbreviations, or acronyms - whichever suit your needs.

This screen is where you define a popup list and assign it to a field. You can attach up to twelve popup lists to the people file. Each popup list can contain thousands of items, but you should restrict the list to a manageable size.

It is very likely that you will want to create popup lists for the following fields:

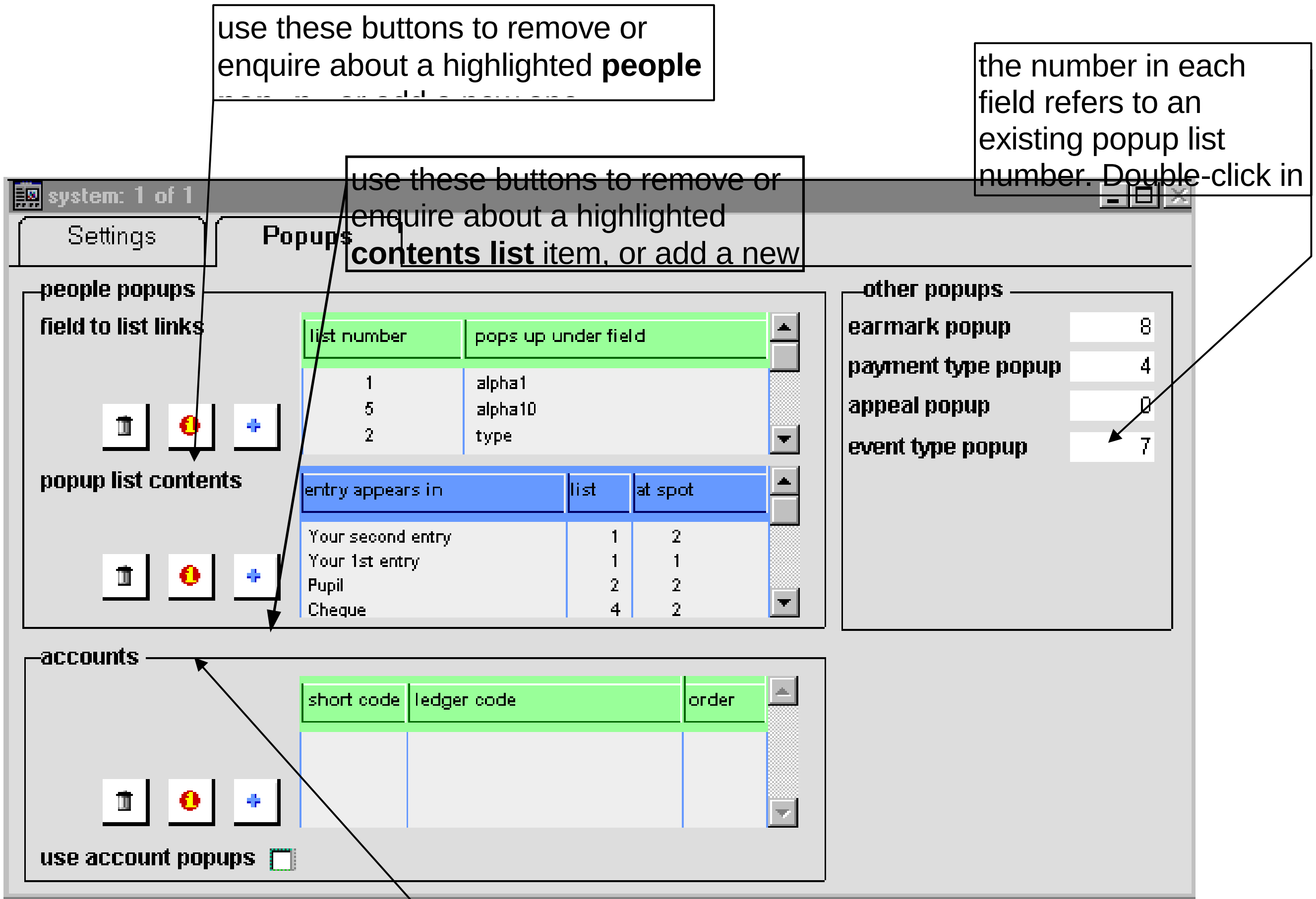
type (of supporter)	for example: **Individual** or **Company** - additional but less permanent definitions such as **trustee**, or **sponsor**, or **OMA member**, or **prospect**, can be recorded in customisable checkbox fields
sex	**M**, **F** or blank is best
degrees or distinctions	If your institution awards degrees or distinctions, and you want to enter these in custom fields, standard popup sets would be sensible
occupation	you *could* copy the Mentor Core Database Occupation lookup codes here, for continuity

Depending on the geographical scale of your membership, you may also find it useful to define popup lists for **nationality**, **counties**, **countries**, and a code of **local** can be useful if you want to invite supporters to in-school events. **Mailzones** has a pre-defined list prescribed by the Royal Mail. Other fields can have popups to suit your use of the system.

Wait until you have settled on your customised fields (📖31) before completing all your popup lists.

Popup lists can easily be moved from one field to another.

The popup tabcard screen is divided into four areas, and displays details of any popups which have been defined so far:



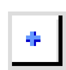
Linking a new popup list to a people-related field

❑ Check which lists (coded 1 to 12) are already in use by scrolling through the **field to list links** in the **people popups** area.

you will only need to create account popups when a later release of FRP

❑ Click the **field-to-list-links**  button to open a window in which you specify the list number and the associated field name where the list should appear.

❑ Save this data.

❑ Click on the **popup-list-contents**'  button, which opens a window, where you...

❑ Select from the displayed numbers the number of the list which you now want to use;

  ❑ Key in the individual elements which are going to form the list (for example: Glos, Avon, W Yorks, for a counties popup list).

  ❑ Specify the position in the list for each element (see the warning below)

  ❑ Save each element as you enter it.

When you build your popup list you must assign a position to each item, to determine the order in which the items appear when they pop up. You can put the most common code at the top of the list, making it quick and easy to invoke.

However, once you have defined a list you cannot maintain an alphabetical order by inserting another item. If this might be a problem, you should leave two or three blank rows between your position numbers, when creating this particular popup, so that you can go back later and insert another one. Start by positioning items in positions 10, 20, 30, 40 and so on, and fill in the intermediate positions later. Blank positions are not displayed so the popup list looks complete. You will be able to print out and import popup lists in a later release.

To find out what is in a pop-up list, scroll through the **popup list contents** window and find entries against the relevant list number. Note that list items are not necessarily grouped in order, or together.

Popups for earmarks, payment types, appeals and event types:

In addition to the people-related popups, you may want to define the following system lists:

earmarks	codes used to identify different funds or spending areas within an appeal - the Tennis Court repair fund, for example, or an ongoing Library fund. Earmarks can be directly attached to group events, or can be independent of them. rmarks must be assigned to each donation to which it applies; you cannot globally indicate that every donation from this particular supporter always goes to this earmark.
Payment types	codes which identify the different ways in which supporters send in their money - you will need to include a payment type for non-monetary gifts
appeals	leave this popup set blank until a later release
event types	define the *type* of event which you will be setting up. For example: dinner, phone call, party, conference. Define your own codes to suit your own needs

To define popups for these four factors:

- Find a spare number in the list of 12 (as described above)
- Key that number into the empty field next to the name of the factor
- Click the button in the **popup-list-contents** area
- Build the popup list as described above.

The popups which you create for earmarks, payment types, appeals and event types do not become available until you have closed and reopened the database. Other people-file popups are available immediately.

4.2.3 Defining Custom Field Names

(**Data** menu)

Having decided on the information you want to store about your supporters, and about the events which you run or anticipate running, you now need to see which of this information can be stored in the pre-defined data fields.

The remaining information will almost certainly fit into one of the many customisable fields (31) which are scattered throughout the people data entry screens.

Re-read the section on organising your database (**Error! Bookmark not defined.**) before you start defining fields.

4.2.4 Customising Field Names

There are two types of **Field Names** in this database. Some standard fields, such as **surname**, **address**, and so on, already have field names assigned to them. Other fields just have system names, at this stage, and they are there for you to use as you wish (like the **Ref** fields in the Mentor Core Database).

Standard Named Fields

The fields already named when you first start using FRP are listed in the Reports section of this Procedure Guide - **Error! Bookmark not defined.**. You cannot change these names, and should not deviate from their standard purpose, since the *functionality* of the field will not change. For example, the postcode field is used in address formatting, and should not be used to store a region code.

Customisable fields

However, a large number of non-standard fields are designed to have their system-names changed to suit your own requirements. The system names give no clue as to the field’s use, so when you decide to use a customisable field you should rename it so that other users know what to enter in that field.

The customisable fields, and their various locations, are shown in the table which starts on page 31.

Be aware of the location of the fields on the forms, since this obviously constrains their function to a certain extent. For example, **alpha11** appears in the **Quick Entry** screen and the **Alternative Address** screen, and is an obvious candidate if you need to record a supporter’s mobile phone number, since ‘mobile’ is not a named telephone-type field. **Alpha11** allows 20 characters (alpha and number), which should be enough for a mobile phone number.

Once you have decided, at least for now, which fields need to be brought into use for your database, you will use the **Fields** option on the Data menu to make your changes:

Change a fieldname, and flag it for indexing:

- ❑ Find the system name for the field you want to customise,
- ❑ Key in your new name,
- ❑ Specify whether or not you want the field to be indexed.

☝ If you want later to be able to search on this field, it *may* be indexed if experiments show that indexing dramatically increases the search speed - this depends very much on your hardware. However, index files occupy space and you should consult Stelias or your reseller if you have any doubts. You will probably want to index several of the important customizable fields in your database, if you have created these fields.

☝ Indexes occupy space on your hard disk. The increased size of an index datafile may also slow down backups, and perhaps repetitive data entry. If speed becomes a problem during searches, check through the **Fields** option and remove Index flags from those fields which are not used during any of your search routines.

* **Date1** and **Date2** are already linked to the trigger facility which can be set up in the system setting screen - 🕮**Error! Bookmark not defined.** - so they should be reserved for this activity.

Once the fieldnames are settled, you can create your own sets of popup codes to standardise the data entered in fields where accuracy is crucial - 🕮22.

You may find the worksheet in the appendix a handy way of deciding on your custom fields.

4.3 Appendix: custom fields worksheet.

The following lists show the field names and table locations which you can safely use to create your own reports by extracting information from the database. The list is in alphabetical order of Table name.

Using these tables to identify standard field names, and devise popups:

☝ The field size given in the following tables is the *maximum.* When deciding the style of any popup codes which you may be defining, you can create shorter codes if you prefer. All codes can contain letters, or numbers, or a combination, but they should not contain any gaps or punctuation marks.

Screen location(s):

- **AA** = Alternative Address
- **FD** = Full Details
- **OV** = Overview
- **QE** = Quick Entry
- **DC** = Donor and Custom Output layout on Database opening screen
- **SL** = Standard List layout on Database opening screen
- **PI** = As column-heading on Payments Info layout of Donations opening screen

Field types and sizes:

- **alphanum** =any mixture of alphabet or number characters (no spaces)
- **integer** = whole number up to 9999999999
- **test** = checkbox
- **float** = currency £0,000,000.00
- **text** = free form text, or note

Use the right-hand column to pencil in your ideas for customisation

Orig Field	Type& length	FD	OV	QE	AA	DC	SL	PI	Custom name (with example)
alpha 1	alphanum 12								Honours
alpha 2	alphanum 12								school House
alpha 3	alphanum 12								marital status
alpha 4	alphanum 12								
alpha 5	alphanum 12								
alpha 6	alphanum 12								
alpha 7	alphanum 20								Mentor Pupil Code
alpha 8	alphanum 20								(Girls/Boys/Junior)
alpha 9	alphanum 20								
alpha 10	alphanum 20								*mobile/pager*
alpha 11	alphanum 20								*mobile/pager*
alpha 12	alphanum 20								
alpha 13	alphanum 40								

Orig Field	Type& length	F D	O V	Q E	A A	D C	S L	PI	Custom name (with example)
alpha 14	alphanum 40								
alpha 15	alphanum 80								
anon	checkbox								anonymous donation
date1	TRIGGER date*								datestamp an action -
date2	TRIGGER date*								see System setup screen
date3	date								School entry date
date4	date								School leaving date
date5	date								
date6	date								
date7	date								Renewal date
float1	£0.00 currency								Salary
float2	£0.00 currency								
float3	£0.00 currency								
int1	whole numbers								
int2	whole numbers								
int3	whole numbers								
int4	whole numbers								
int5	whole numbers								
int6	whole numbers								
int7	whole numbers								
int8	whole numbers								
test1	checkbox								

Orig Field	Type& length	F D	O V	Q E	A A	D C	S L	PI	Custom name (with example)
test2	checkbox								Old Members’ Assoc
test3	checkbox								Newsletter
test4	checkbox								Magazine
test5	checkbox								
test6	checkbox								
test7	checkbox								
test8	checkbox								
test9	checkbox								
test10	checkbox								
test11	checkbox								
test12	checkbox								
test13	checkbox								
test14	checkbox								Don’t mail
test15	checkbox								Pass Details
text1	scrollable notes								Family data from Core
text2	scrollable notes								General Interests
text3	scrollable notes								
text4	scrollable notes								Previous school
text5	scrollable notes								Subsequent school/univ
text6	scrollable notes								
text7	scrollable notes								
text8	scrollable notes								
text9	scrollable notes								
text10	scrollable notes								
text11	scrollable notes								

4.4 Tables of fields

This section contains a large number of tables which describe the field structure of the database. Use this for reference.

4.4.1 Donation fields

Field name	Description
latest_tax_date	date on which tax was last claimed for this gift
allocated	what percentage of donation is allocated to an earmark
appeal	to which charity or appeal does this donation belong. Taxes will be per appeal.
Type	Is this a gift aid, covenant, company covenant etc.
method_paym	How are you receiving money?
first_pay_date	when is the first payment of this gift expected.
end_date	number of years of the gift (duration) after the first payment date
frequency	how often is a payment expected
total_amount	total pre-tax amount of gift
accumul_amount	how much has been accumulated (this is updated by the update accumulated menu or by double clicking a gift)
installment	how much is expected per payment
annual_amount	how much comes in per year
tax_form_mailed	has an R185 or R190 been mailed to donor
tax_form_receiv	has the R185 or R190 been returned to your office
company_uptodat	not used
num_latest_clai	how many payments were included in the latest claim of tax
type_of_anomaly	what is wrong with thid donation?
anomalous	is something wrong with this gift? (yes/no)
value	what is the value. Could be foreign currency, equipment, land, need not be monetary
final_pay_date	when is the final payment due on this gift.
comments	yours to supply
wishes_reminder	to be used to notify donor that payments are due shortly
record_number	This links the donation to a record in the people file to indicate who is the donor.
Duration_yrs	For how many years will this donation last
gift_date	When was the donation made
conseq_no	How many tax claims have been made so far
cov_form_rec	Has the covenant form been received. Normally not needed but if donors do not supply it, here is the place to keep track.
entry_date	When was it entered into the db. Set automatically.
credit card no	which card was used.

credit card typ	what type of card
mail_taxform	used internally by the tax routines.
dt_ltst_cl_pmt	date of the latest claimed payment. Which was the last payment on which we reclaimed the tax.
active	Is the donation still active for tax purposes
tax_form_needed	used internally
expiry	expiration date of credit card used to make gift
amt_latest_clai	how much was claimed in the latest tax claim.
first_claim	Is the first claim on the gift imminent?
gift_number	Unique number for every gift to link to transactions, tax records and code log don
gross value	value of gift after tax.
group_gift	was this made on behalf of a group?
account_no	bank account from which money will be deposited.
account_name	name of account holder
sort_code	sort code of bank from which moneys are to be received
bank_name	name of bank
bank_address	address of bank
truptodate	this indicates if the expected payment dates on the transaction record will be accurate. If not these will be automatically re-computed during tax runs.
inc acct	name of account into which payments should go
tax acct	name of account into which tax reclaimed should go
inc ledger	ledger for payments received
tax ledger	ledger for tax received.

4.4.2 People file (customizable fields in previous appendix)

Field name	Usage
record_number	unique number for every record
surname	
postname	
initials	
salutation	used as header for letters
forenames	
pref_forename	preferred forename
birth_date	
sex	
type	describes the type contact is this: company, parent pupil etc.
creation_date	this date is set at the date of entry into the database
nationality	
comments	
occup_code	occupation code

add1	
add2	
add3	
town	
county	
country	
postal_code	enter UK postal code with a single space in the middle to ensure mail-sort with Mail-code Pro works correctly
phone_1	
phone_2	
fax	
email	
alt_add1	
alt_add2	
alt_add3	
alt_town	
alt_county	
alt_country	
alt_postal_code	
alt_phone_1	
alt_phone_2	
alt_fax	
alt_email	
referred_by	you could mention the name of the referral here
last_contact_da	when was last contact made with this constituent
last_add_update	when was address last updated. This field is set automatically.
is_donor	is this contact a donor. Set automatically.
donation_tot	total of donations made by this contact.
anonymous	does this contact wish to be treated anonymously
title	
prev_surname	
mail_zone	use the precise Royal Mail mailzone here, as indicated in the popup list.
area_desc	you can enter your own area descriptor here, eg. north, south, foreign
alt_mail_zone	mail zone for alternate address.
alt_area_desc	
sortcode	this is a composition of surname, prefixes and initials, exactly like in the BT phone book. This is the default sort order for people views.

4.4.3 Codes - Code Log - Code Log Don and Events - Event Log tables

These small tables are all of a relatively simple type and are collected in the following table

Table	Field	Description
codes	code	short mnenonic for the code
	description	text field description for a code
	summary	30 character summary
code log	code	links a codes entry to this code log entry
	record_num ber	links a people entry to this code log entry
code log don	code	link of the codes records for this donation code log
	gift_number	link to this gift number.
events	event_code	short mnemonic
	summary	summary 30 chars for event
	type	type of event as specified by pop-up lists
	creation date	when was this event created?
	content	long description of event
	who	who entered it?
	Individual	is this an event that applies to a single individual or to a group
event log	event_code	links an events record to this logging entry
	record_num ber	links a people record to this logging entry
	date	when was this particular instance logged
	order	in what order should is show in included lists

5. Working with Fundraising Pro

For the most part, Fundraising Pro is a standard Windows and Macintosh program. However, some features are specific to Fundraising Pro, and you should make a mental note of the following sections.

5.1 Logging on

When you launch FRP, you see the login screen. This is where you select the appropriate level of access for what you want to do:

Designer	This is the highest level of access, reserved for the programmer, and may not be visible at all.
Administrator	The administrator has access to all of the menu options, including setup features, preferred layouts, field indexing, passwords. This level will only normally be available to your System Manager and Dolphin staff.
Office Head	The Office Head has access to the full range of information on the people database, and can edit transactions.
Finance User	The Finance user has access to the special financial functions, such as running the Taxes options, as well as complete access to the people and donations databases.
Accounts User	This user can enter and edit transactions, but not the donation details or tax data.
Other User	This level of access allows the user to look at basic details on people and events, but not to change or enter any details.

- ❑ Highlight the appropriate **User Type** with a single click,
- ❑ Key in your password,
- ❑ Click **OK** if you now want to use the data set which you were using before,
- ❑ OR
- ❑ Click **Alt**+**OK** if you want to select a different data file (the file dialog box will list your files; double-click the one you want to work on).

Once you are past the login screen, you are committed to using only the default database. If you need to change to another database you must repeat the login routine.

5.1.1 Administrators

Administrators are the only users with permission to:

1. Delete large groups of records,
2. Import records
3. Edit the system or fields tables
4. Apply formulas.
5. Swap fields
6. Do anything other users can do

A difference between the Administrator is that they should use the **File** menu, and select **Open Database** to get to a control panel.

5.1.2 Finance Users

Fundraising Pro **Control Panel** screen

- ❑ The **Finance** menu is active when the control panel shows and can be used for **Taxation operations.** Other users (apart from administrator) do not have permission to run finances.
- ❑ Click the **Open Database** button to display the full Donations list.

5.1.3 Office Head

As Finance User, but gets the full People list instead of Donations. This is the common log in level.

5.1.4 Accounts User

Takes you straight to the Transactions file. This is useful for accounts staff who do not wish to be exposed to the full menus

5.1.5 Inquiries only

You may want to allow other members of staff to look at the data stored within Fundraising Pro, but not be able to edit or change it in any way.

You can offer this facility by ensuring that such members of staff log on as **other user** in the opening screen. Passwords should protect the higher levels of access. You will have to set up **other user** with a password which can be circulated to appropriate staff.

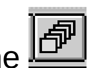
Takes you straight to the People database, for inquiries only. No access is given to donation information.

5.2 Moving from screen to screen and entering data

The working screens in Fundraising Pro are very dynamic. From your opening lists (of people or donations) you can quickly open a screen full of details simply by double-clicking one of the items on the list.

You can also hop between people and donations very quickly by highlighting (for example) a few supporters on the people list then clicking the donations button on the toolbar. You will immediately be presented with the donations details for just those selected supporters. This is automatic relational search. Again, you will double-click one of the donations to open the details screen.
Click the Cancel button, or key **Esc**, to close the form canceling the changes. You will always come back to the original lists by hitting Escape a few times, so you can use this to climb in and out of the different data tables. It is easier to do than describe!

When moving from one table to another, using the data menu or the toolbar buttons, the selections which you will see on screen depend on what was highlighted when you set off. So if you had highlighted just one supporter in the people list before clicking the donations button, only that supporter's details would be displayed.

You can list all records by clicking the  button.

Mouse action

Double-clicking the left mouse button opens the detail form when in a list - for example: double-click a name in the database list to open that supporter's record card.
Single-click to highlight a record in a list.
Shift+click and **Control+click** work in the normal Windows way when you want to highlight a consecutive group of records, or highlight a number of non-consecutive records.

Keyboard options

The **Ctrl-a** hotkeys, and **Alt-a** menu option launchers followed by keying underlined letters, work in the standard Windows way.
The keyboard equivalents of other commonly-needed FRP actions are:
Abandon a screen **Esc**
Save a modified record or accept a dialog: **Enter** (the number-pad **Enter** key, not the main keyboard **Return** key)

Working screen size

The active screen does not occupy the whole of your monitor's available window.

Do not resize the screens. You may see some buttons and the screen does not refresh properly. This restriction may be fixed in a later release of 4D.

Multiple screens

Fundraising Pro automatically closes the current screen when you open a new option, so you do not have to **Close** a screen before opening another one. Only one screen is ever open at any one time, with the exception of some sub-screens, which may be superimposed on the main screen.

Add new records or pop-ups

Click the Plus-sign button if you want to add a new record to any table in the database, i.e. add a contact or add a donation, or add a pop-up, and so on. You have to click it before you add a new record. When pressed you will be presented with an empty form to enter details.

Quit a screen

Esc or

To abandon a screen without making any changes, use the **Esc** key to back out, or the **Cancel** button on the Toolbar.

Enter numbers

You must use the number keys along the top of the main keyboard; the number pad which is normally invoked by the NumLock key is not accessible in this release.

Entering dates

FRP will accept and process accurately post-2000 dates. When entering a date, you should normally just need to enter the actual date as a continuous string - 300497 - rather than entering 30/04/97.

Enter text

You can use all the normal Windows features when entering text into a data field - copy, cut, paste all work, if you need them.

But the system does not support your keying **Page Down** to move the cursor to the end of the record.

Be careful of hidden spaces. If you have accidentally keyed or imported a space at the end of a name then that space becomes part of the saved name. If you *know* that you have a supporter called **Dolphin** but cannot find it using a surname search, try putting the wildcard in your search criterion and ask for **Dolphin@.** If the record is found, it means that you have saved the surname plus a space.

Further information about entering and modifying data is available in the associated User Guide.

Move within a data field

Use the **Home** key to move to the start of the field, and **End** to move to the end.

Move down the screen

Use the **Tab** key to move down the screen, from one field to the next.
Use **Shitf - Tab** to move back up the screen, from one field to the previous.
If the system fills a field for you, you can **Tab** to next field, accepting it, or replace the contents by typing your own text.

Validation

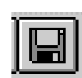
You will be warned if you have keyed in a text string or number which is not acceptable to the system, or if you have failed to complete a mandatory field. But you should consider using pop-up codes in crucial data fields.

In the current version it is important that you take warnings seriously and correct the information as suggested in the warning messages. If you dismiss the warning your data may be saved in the wrong format.

Use pop-up lists

If, during completion of a record, a pop-up code set has been linked to the active field - 22 - the system automatically displays that code set when you move the cursor to that field. You will normally click one pop-up code to insert it in the field.
Move through the popup list either by keying **Down-arrow or Up-arrow** or by keying the first letter of the word you want to use.
You can use the **Esc** key to close the popup box without selecting any code and then key in non-standard text. But this would defeat the purpose of standard codes, and should only be done in well-understood circumstances.

Save data



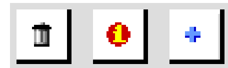
The **Save** button lives along the top of the screen, with the other Toolbar buttons. If the system seems to be ignoring you, it is probably waiting for you to click the **Save** button.
If you are working without the Toolbar, you can instead use the **Enter** key to save data. This key is normally in the far right-hand corner of the keyboard, next to the number pad, and need only be used when you have finished a screenful of edits or additions.

Delete records and codes

You will see the **Delete button** icon on various screens.

Double-click a single record and key the **Delete** button to delete the record. The administrator can delete the list of highlighted records in any table. Do not do this without very good reason. If you drag a record, or a code, or an event, to the dustbin it is gone for good! You will be warned if an about-to-be-deleted supporter's record contains outstanding financial obligations.

Edit buttons



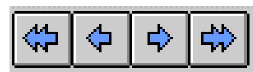
This three-button group appears on many FRP screens. They can be invoked once you have highlighted a screen element (see page 24 for an illustration of such a screen).

The dustbin will **delete** whatever is highlighted.

The **i** will pop up a window which shows all the available information about the highlighted element, and allow you to edit the detail.

The **+** allows you to **Add** a new element of the highlighted kind.

Navigation arrows



In any full form screen, if these arrow buttons are available you can use them to scroll through your (people, donation, and so on) records. The buttons will move you, respectively, to the very first record, to the previous record, to the next record, or to the last record.

5.3 Working with input form

This section explains some of the more complex, or crucial screens, and fields whose purpose may not be immediately obvious. They appear in the order in which you would normally use the software during the course of the financial year.

Quick Entry screen

access by double clicking people records

This is where you record non-financial details about each supporter.

Most of this screen is self-explanatory. Use the **Tab** key to move down the screen (📖51). Specific fields are explained below:

- ❑ If a **popup list** appears when you move to a field, double-click what you want (📖51).
- ❑ The **record no** field automatically displays the next available number, generated by the system.
- ❑ The **type** field is designed to store the type of supporter. You may have defined a popup list if your supporter types are varied.
- ❑ When entering **UK post codes**, you *must* put **a single space** between the Outgoing Postcode (the first half) and the Incoming Postcode (the second half) if you want to use Mailsort.
- ❑ The **last contacted** field is filled automatically by the system when you have assigned an individual event code. You can use the last contact date as a parameter in the **Quick Search** option (📖113).

- The **last address** field date could be filled automatically by the system if you specify this as one of the trigger dates (📖21).
- From this screen, you can access the **Alternative Address** subscreen (📖54), the **Add Donation** subscreen (📖55), the **Add Event** subscreen (📖57) or the **Further Fields** subscreen (📖58).
- You can also click on the current screen type field (top right-hand corner) to access the **Overview** (📖58), **Events-Codes** (📖59), **Correspondence** (📖59), or **Mailmerge** (📖105) subscreens.

Alternative Address screen

This is where you can record an alternative address for a supporter. Much of the detail is the same as in the **Quick Entry** screen (📖53) and should be completed in the same way.

Use the ⅄ key to move down the screen (📖51). Specific fields are explained below:

- If a **popup list** appears when you move to a field, double-click what you want (📖51).

Add Donation screen

access via **Data** menu
or **Donations** button
or **People** button

This is where you enter the *intent* to donate, and record bank and future payment details. The actual contents of the screen will depend on which **input** layout is selected in the opening Donations list screen.

The Donations toolbar button offers the **input** layout of **master**, which contains three tabcards:

input layout	appearance
Entry	gift number and donation details, plus fields for entering earmarks, comments, ledger accounts, codes. Tags a donation with a code and credit card details
Trans	enables you to enter the actual receipt of the donation as well as edit such detail information
Tax	contains a window which displays tax details

input layout	appearance
Entry	details entered in the Donation screen are repeated

	here, plus fields for entering credit card details
Entry (buttons)	this small screen contains the scroll (53) and edit (52) buttons, for fast entry of a batch of receipts
Fully editable	similar to Entry (buttons), with the addition of ledger account codes, and expanded tax data for instalment entry.

Entry tabcard:

Most of this screen is self-explanatory. Use the key to move down the screen (51). Specific fields are explained below:

- If a **popup list** appears when you move to a field, single-click what you want (51).
- The **gift number** is automatically generated by the system. Note that this number identifies a *promise* to pay or give - the actual receipt is entered in the Transactions option, as a bank transaction.
- The **date of gift** field will give you an error message if you enter a payment date greater than the 28th and instalment payments are to be direct-debited.
- The tax form checkboxes will be empty if the gift enables a tax claim, so that you can complete them later. Otherwise the checkboxes are ticked, which can be ignored.
- The **bank account** referred to in this screen is the supporter's.
- Save (52) the details when you have finished.

Add Event screen

People List & Full Screen forms

This is where you add an event to a supporter's record. You can also create, edit or delete individual event codes here.

Most of this screen is self-explanatory. Use the key to move down the screen (51). Specific fields are explained below:

- **Create a new individual event code:**
- Click on the button to add the details which will make up a new event code;
- Enter the new code (check that new codes meet any existing design standards which are applied by your organization).

- ❑ Use the **description** field to give a fuller explanation of the event. Your text can scroll beyond the visible window. This description is only ever used in this screen, but can be printed in reports. Use the **summary** field (max 25 characters) to record a brief description.
- ❑ Click on the button to display the complete details of an existing code if you need to check it out.
- ❑ Click on the **Delete** button to remove events highlighted in the list.

Further Fields screen

This is where you record fuller details about your supporters and examine *all* personal data.

Most of this screen is self-explanatory. Use the **Tab** key to move down the screen (51). Specific fields are explained below:

- ❑ If a **popup list** appears when you move to a field, double-click what you want (51).

Overview screen

People table

This is where you view general event and donation information.

Most of this screen is self-explanatory. Use the **Tab** key to move down the screen (51).

Events-Codes screen

People Table

This is where you view the codes and details of events which have been assigned to a particular supporter.

Most of this screen is self-explanatory. Use the key to move down the screen (51). Specific fields are explained below:

- ❑ If a **popup list** appears when you move to a field, double-click what you want (51).

Correspondence screen

Access via the people file in a full form view

This option is only of use when you have 4D Write. It allows you to instantaneously write a mail merge letter to an individual or group.

5.4 Menus and the toolbar

This menu is displayed when you log in to Fundraising Pro:

File Edit Data Record Selection Search Finance Special Help

Here is a diagram which shows the menus sub-menus. All of the options are described in the appropriate Quick Reference Checklist or the Other Options section of this Procedure Guide, and all options appear in the Index. If a menu option is not available to you, it will be grayed out. Some of the menu options are also accessible through a Toolbar (🕮65).

File➢	Open Database
	Close Database
	Change Access
	Edit Passwords
	Printer Setup
	New Data Window (not all versions)
	Import Data
	Export Data
	Quit

Edit➢	Undo
	Cut
	Copy
	Paste
	Clear
	Select All
	Show Clipboard

Data➢	People
	Donations
	Tasks
	Letters
	Transactions
	Tax Records

	Codes
	Events
	Earmarks
	Code Log
	Code Log Don
	Relations
	Event Log
	System File
	Fields
	Relationships

Record➢	Add Record
	Find Or Add
	Enter Related
	Delete Selection
	Graph
	Quick Report
	Print Layout
	Labels
	Mailmerge
	Apply Formula
	Search By Formula

Selection➢	Code Search
	Assign Code
	Remove Code
	Memorise Selection
	Add to Memorised
	Omit from Memorised
	Swap Current and Memorised
	Show All
	Show Selection
	Event Search
	Add Event
	Remove Event

Search➢	Search All
	Search Selection

	Repeated Search
	Quick Search
	Repeated Quick Search
	Find Donation By Name
	Search Related
	Search Editor
	Sort
	Mailsort

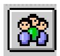
Finance➢	Entry By Code
	Entry By Name
	Print Journal
	Check Pledges
	Check Covenants
	Check Gift Aids
	Check Selected Covenants
	Process R185
	Gift Aid Tax
	Covenant Tax
	Update Pledges
	Graph Income
	Print Actual Income
	Export Transactions

Special➢	Toolbar
	Save Default View
	Swap Addresses
	phONEday
	Update Donation Info
	Update Accumulated Amount
	User Mode
	Design Interface
	License

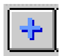
Help➢	Contents
	Search for Help On...
	How to Use Help...
	About Fundraising Pro

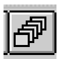
The menus are described in detail in a later chapter.

The **Toolbar** buttons have the following functions. You can toggle this toolbar on and off using the **Toolbar** option on the Special menu.

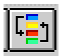
 Open the **people** file

 Open the **donations** file

 **Add** (this button is context-sensitive, so it will mean Add a Record in the People database, add an Event code in the Event option, and so on)

 Display the **whole list** of database records

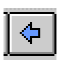
 Enable a **quick search** for a record on screen

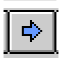
 Specify a **sort order** for the records on screen

 **Delete**: in a full page screen, delete the record on the screen. In an included list, delete the highlighted record.

 **Print** a special report

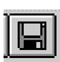
 **Move** to the first record in the visible selection (whatever table you are working in)

 **Move** back one record

 **Move** forward one record

 **Move** to the last record in the visible selection

 **Cancel** close the screen and don not save the changes just made.

 **Save** the current details to the system

6. Entering and grouping data

Clearly entering data and grouping it for appropriate purposes is one of your main tasks. We cover the details in this section.

6.1 Adding a new contact

To display the list of supporter records in your database, you should

- ❑ Click the button on the Toolbar
- ❑ OR
- ❑ Select the **People** option from the Data menu.

The screen you are offered next will depend on the default displayed in the main people database screen.

The blue **Output** field tells you the form in which you are currently listing at the data. You can change it by clicking on the field.

The blue **Input** field tells you what layout you will open next. The options will be **Quick Entry** (53), **Further Address** (54), **Details** (58), **Overview** (58), **Events-Codes** (59), **Correspondence** (59), and **Mailmerge** (105). You will normally use the **Quick Entry** screen, unless you regularly need to enter more than one address for your supporters, in which case you should use the **Further Address** screen.

- ❑ Click on the **Plus** button in the Toolbar, or select **Add Record** from the Record menu.
- ❑ Complete as many fields in this first screen, drop to **Further Fields** (58) to complete your customised fields,
- ❑ If appropriate, set up a **Relationship** with another supporter.
- ❑ Save (52)the details when you have completed your entries.

6.2 Setting up Group Events and their codes

Your fundraising activities may include events such as a Summer Ball, or Founders' Dinner, or an Emergency Roof Repair drive. They may also include more events such as a Sponsored Swim for a selected group of contacts, or an old-rugby-players Dinner.

You can keep track of how active your supporters are in supporting your efforts by setting up Group Event codes. Once set up, you can then add the event to the supporter's record.

- ❑ From the Data menu, select the **Events** option.
- ❑ From the Record menu, select **Add Record**
- ❑ Enter a **code for the event** (maximum of 12 characters), content, and summary (maximally 25);
- ❑ Select the **type** from the pop-up list (see 22);
- ❑ Tab past the system-generated **creation date**, or overwrite it;
- ❑ Enter your FRP user name in the **who** field if this is appropriate
- ❑ Save (52) the details.

Annual events, such as a summer ball or a Halloween party should be set up as separate events, with separate codes, because each event setup includes a date.

Use the **Event Search** option on the Selection menu to display existing event codes on screen.

6.3 Adding Events

6.3.1 Adding Personal Events to a supporter's record:

- ❑ Select the **person** to whom the event will apply;
- ❑ Open their **Quick Entry** screen and click the **Add Event** button (or their **Overview** screen, or their **Events-Codes** screen);
- ❑ Specify that this is an **individual event;**
- ❑ Select the **event type** from the popup list (22);
- ❑ Enter a **note** to expand the description of the event (for example, if the event type is **phone call** then you could note brief details about the contents of the call) - these notes can be printed out using **Quick Report Writer** (104).
- ❑ Save (52) these details.

6.3.2 Add a group of supporters to a Group Event:

- ❑ Select(**Error! Bookmark not defined.**) the group of people to be included;
- ❑ From the Selection menu, open the **Add Event** option;

- ❑ Select the **event** code;
- ❑ Click the **Assign** button.

Use the **Event Log** option to see when the event log was created, and which records have been assigned to each event.

Individual Events relate directly to individual supporters, and record such activities as telephone calls, or a career history including degrees and promotions. Individual events are only assigned from within a supporter's record. From either the **Overview** screen (58), or the **Events/Codes** form (59), you can add, edit or remove event codes (57).

6.4 Selections of Records

Selection has a whole menu of options. Some select temporarily, others enable you to build a series of more permanent selection criteria which will make your day-to day operation of the database fast and accurate.

The **current selection** is the set of records which you see on the screen. The **highlighted records** are those that you have selected with the mouse. Finally there is a **memorized selections,** a selection which can be exchanged with the current selection, and which is remembered by the database.

These temporary selections change often and are influenced by the many actions you perform on the database, they are not a permanent grouping of records. For **permanent grouping** use one of the following:

- Assign a **code** to the highlighted selection
- Assign a **group event** to the highlighted selection
- Apply a **relation** to the records

6.4.1 Making a highlighted selection

The following allow you to highlight a group of records and make them the current selection and vice versa.

Once you have a highlighted selection, the rest of the databases will follow suit. For example, if you have highlighted 5 supporters then click the **Donations** button, only donations (if any) made by those 5 people will be displayed.

1. **Highlight all records:**
   - ❑ Click **Select All** from the Edit menu.
2. **Highlight a number of records for selection:**
   - ❑ Highlight the first record in the database list

- Hold down **Ctrl** and click the mouse on another (non-adjacent) name to build up a non-consecutive list OR
- Move down to the last person to be selected and hold down **Shift** and click the mouse to highlight all the records in between.

3. **To show the records which are highlighted** and make them the current selection:
   - Then click **Show Selection** on the Selection menu to organise the on-screen display to contain just those records.
4. **Revert to all records**:
   - Click **Show All** on the Selection menu**.**
5. **Deselect a record and leave none highlighted**
   - Hold down **Ctrl** and click left mouse button**.**

6.4.2 Navigation with selections

With highlighted selections one can rapidly find related data. For example given a selection of people on the screen which is highlighted, moving to the donations table will show these people:

1. **Look at one supporter's donations**:
   - Highlight the person on the database list
   - Click the **Donations** button on the Toolbar.
2. **To find Codes, Events or Relationships belonging to a group of people:**
   - Highlight the people
   - Move to the Codes, Events or Relations table.

6.5 Adding a donation

Donations must always be attached to a supporting contact record. Anonymous donations should be attached to a default "anonymous" supporter record.

There are two halves to the process of recording a donation. The first stage attaches the promise of, or fact of, a donation to the supporter's record. The second stage uses the financial menu options to record the actual receipt of the donation, or an installment.

- Open the supporter's **Quick Entry** screen
- Click the **Add Donation** button
- Enter the donation details in this subscreen (55).
- Leave the appeal field blank.
- **date of gift, date of first payment, frequency, type of gift and installment** are mandatory fields. Others are optional. The database

tries to enforce these, but you can enter wrong gifts at the moment, though not without ignoring a serious warning.

Apart from entering crucial data, it is important to realize that the British tax system requires you to gather forms for your donations from the donors:

- Gift aids require an R190 and covenants an R185 after one year of payments.R185. The gift aid forms should be in your possession when you enter the gift aid, so the boxes are ticked "yes" by default. For covenants the handling of forms is discussed in the section R185 handling.
- If this is the case, click the appropriate checkbox to tell the system that the form relating to this particular gift has been received. The database will request the forms automatically and indicate that they have been requested.
- If your supporter has specified that all or part of this donation is to be earmarked, enter the earmark details now in the earmark window area:
  - Click that area's button
  - Select the earmark code from the pop-up list
  - Enter the percentage of this donation which is to be assigned to the earmark.
  - Repeat the earmarking if the donation is to be split.

6.6 Adding transactions

At some point, you will want to record the fact that you have actually received the money which was earlier entered as promised. Confirmation will be in the form of cheques, or cash, or credit entries on your bank statement. Sometimes the money will accompany the donation promise: an unsolicited cheque means that you can enter the donation promise *and* the transaction at the same time. At other times, the money will follow much later, usually in regular instalments over a number of years.

Is in the wrong place. Gift aids are donations not transactions.

When entering **gift aid**:

- Do not confuse the date of the gift with the actual payment date;
- Enter the total in the instalment field.
- The database will automatically fill in "annually" for the frequency. This is done to indicate that a gift aid makes a single payment in the year it is made.

If you make a mistake, either cancel the record (65) or move back up the window (51) and overtype the field with the correct details

6.6.1 Entering batches of receipts:

If you are entering payments which have been made straight into your bank account, check the references shown on your statement - the **Gift Number** ought to be part of the reference, to aid quick entry of moneys received.

If you already know the **Gift Number**, or the **Name** of the donor:

- From the Data menu, open the **Transactions** option
- OR
- From the Finance menu, select **Entry by Code** if you know the gift number, or **Entry by Name** if you know the donor's name.
- Enter the details of the donation.
- Save (52) the screen.

If you are entering a batch of donations the system does not update each one as it is entered, for performance reasons. So, you must

- Run the **Update Donation** routine from the Special menu
- Then run **Update Accumulated** amount

If you are offered a further blank data window when you have finished, click the Cancel button to close it.

6.6.2 Entering an individual receipt

- Highlight the person from the People screen
- Click the **Donations** button from the Toolbar - this gives you a list of all the existing donations for that person
- Select **Full Detail** screen from the **Input** field
- Double-click the relevant **Donation** to open the **Full Detail** screen.
- Click the  button just below Transactions to open the transactions detail entry screen;
- Enter the details;
- Save (52) the screen.

Alternatively: double click the person, using the “Overview” form. Highlight the relevant donation in the included list. Click **i**. Now click **+** just below the transactions.

On a regular basis, to suit your own procedures, print a Journal of transactions for the period. The following assumes a monthly report:

- ❑ Select **Show All** from the Selection menu
- ❑ Open the **Search Selection** option and, against the **transaction date**, key in a selection statement which identifies the *starting date* for the report. For example, if you want the report to start with transactions entered between 1st and 30th April 1997, your selection statement would be **>31/03/97** (greater than 31st March)
- ❑ Now repeat this to enter a selection statement which defines the end of the range **<02/05/97** (meaning less than 1st May)
- ❑ Having set the start and end dates, select the **Print Journal** option from the Finance menu.

Again, this should not be in the transactions section but in the gift section.

Retrieve details of a Donation

You may need later to record the fact that the donation’s associated R190 or R185 has now been received. Or you may have another reason for wanting to retrieve a donation’s details.

- ❑ Use the most appropriate of the above routines to open the **Donation** screen;
- ❑ Highlight the donation whose details you want to investigate or update;
- ❑ Click the button to expand the details.
- ❑ Make any necessary changes, and Save the details.

6.7 Define and set up relationships

You can link parents and children, or married partners, or employers and employees, or clubs and members, or members of your board of trustees, through the relationship link in Fundraising Pro.

This is useful if you want to select supporters who are also members of another local charity, for example, or if you want to personalise telephone conversations by referring to other members of the family.

First you have to define the relationship pairs. Then you select the pairings and apply the relationship code.

Defining relationships

- ❑ Select the **Relationships** option on the Data menu
- ❑ Key in the text which describes the first half of the relationship
- ❑ Key in the text which describes the second half of the relationship

- ❑ Save (52) the details.

Applying relationships (Parent/Child is the worked example here)

Relationships can only be built between existing records. Do ensure that you have records for both "halves" of the relationship before you start.

- ❑ Click the button to display all records in the people database;
- ❑ Find and highlight the record of the Parent;
- ❑ From the Selection menu, select **Memorize Selection** and confirm that you know you have only selected one record;
- ❑ Scroll through the database list and highlight the Child;
- ❑ From the Record menu, select the **Enter Related** option;
- ❑ Select **child** from the list of available relationships.

6.7.1 Viewing relationships (family or group)

- ❑ Highlight a supporter's record (or an employing company's record);
- ❑ Open the **Relations** option from the Data menu;
- ❑ Scroll through the displayed records.

At *any* record you can open the **Relations** option again and track *that* supporter's relations.

7. Finances with Fundraising Pro

In this chapter we discuss the financial aspects of Fundraising Pro

7.1 Switching to computer taxes

The database can produce tax returns for gift aid and covenant donations. To produce such returns there are two issues to be considered:

1. Donations and bank transactions entered from their first payment onwards into Fundraising Pro.
2. Importing existing donations on which tax has been claimed already and continuing to claim with Fundraising Pro

The first case is easy: just follow the check lists for donations in this manual and enter transactions according to the check lists. When the donations are ready to be taxed the database will produce the right forms.

Taking over existing donations in Fundraising Pro is more work. Before the first tax run of the database can be used, it is necessary to manually make sure that the records which are held in your books are transferred to the donation and transaction files.

Of course this is done with the target that the database knows exactly what has been claimed already so that it will not claim things which have already been claimed by your accountant.

Checklist for setting up existing covenant donations for computer taxes:

1. You must start by entering all the donors and the donations that you want to process, into the database. Start dates, end dates, installments, and so on, must all be entered. Mark the donation active if tax is still to be claimed for it. To do this follow the instructions for entering gifts on page...Next you will need at least one full year of bank transactions before the date of your first computer tax return to be entered in the database. If the database has bank information that does not go a full year back it will think that payment are missing and you will not be able to claim tax. You must also correctly mark the bank transactions as claimed when they have been. Forgetting this will cause errors. The transactions are entered most easily as follows:
   - Make a list of the donations you entered in 1) and their gift numbers
   - Go to the transactions table (DATA-> Transactions) and add records by selecting the fully editable form (finance user or administrator access only).
   - After entering the gift number and pressing tab the name and installment will pop up and can be verified against your list. Enter the correct date and tick the claimed box if appropriate.
   - You will find it handy to make a report of payments sorted by gift number and date.

2. Go back to the donations list. Use the master layout and enter data on the tax tab card. You need to enter the following fields:

- Fill out the boxes forms sent and received. This applies to R185 forms. Sent should be ticked if you have requested the donor to fll out an R185 (after receiving one year's worth of payments). Received must be ticked if the donor has returned the form to you after signing.
- The first claim box: tick if the first claim on the donation still has to be made
- The date of the latest payment claimed box, must be set to the correct date. You can find this among the transactions you have just entered. For a first claim, when the tax forms received box is already ticked, set this field to a date just before (say 5 days before) the first payment arrived, or will arrive
- The number in the latest claim (how many transactions made up the claim) is not important, nor is the amount of the latest claim.
- The latest tax date, must be set to the date when tax was most recently claimed for the donation. You find this on your tax returns.

Checklist for switching to computer taxes for existing gift aid donations:
1. Enter the gift aids on which tax still has to be claimed.
2. Enter payments (these should be received with the gift aid form).

Taxes should automatically be right when due.

Once you have entered all the initial setup information, you can start to use Fundraising Pro on a daily basis.

7.2 Producing Tax claims

The options for checking and claiming tax refunds from the Inland Revenue are all contained in the Finance menu, which has highly restricted access.

❑ Log in as **Finance User.** You will probably run most of the options from the Control Panel, without opening the database. However, when details need to be adjusted in donations the database will need to be opened.

The options on the Finance menu enable you to:

- Record incoming payments 📖75
- Record forms which have been requested 📖74
- Record their receipt when returned to your organization 📖78
- Check donations for inconsistencies just pull the menu item "Test covenants/gift aids/pledges". Covered below.
- Prepare returns for the Inland Revenue; covered below.

From the Finance menu, one works through the following options:

- Gift aids: 84
  - Check Gift Aids.
  - Gift Aid Tax
- Covenants 89
  - Check Covenants
  - Process R185
  - Covenant Tax*x*
- Check Pledges

7.3 Processing Gift Aid taxes

FRP takes account of the fact that the tax rate which applies to gift aid and company covenants is dependent on the date of receipt of the payment, or the expected day of receipt as applicable. See the tax rate setup list.

❑ Covenants and gift aid tax refunds can only be claimed when you have received confirmation from the supporter that tax has actually been paid to the Inland Revenue, in the form of an R190 or R185 form. If the R190 form has already been received, the appropriate checkbox in the **donations** screen should have been ticked.

You need to log on as **finance user** to access the Finance menu options.

Make sure that your Transactions entries are up to date.

Make sure that no-one else is using Fundraising Pro.

The routines in this checklist modify a large number of records. Make a backup now, in case you make a mistake.

- Decide the date on which you want to claim your tax refunds. You may make up to 4 claims per year on a quarterly basis. The end of the financial year for the Inland revenue and for your organisation are two natural choices.
- Run the **Check Gift Aid** option from the Finance menu, entering your chosen date. This routine then:

  - Finds anomalies or errors in the gift aids.:
    - If there is a problem with a gift aid it will determine if the payment amount is incorrect, if the date of payment is right (in particular it will tell you if the payment date was received before the date of the gift in which case you cannot claim tax. It will also check that only one payment was made.

- If something is wrong the anomalous tick box will be checked, and an expalanation (in text form appears in the anomaly box).

Correct anomalies: For this you open the database and use the master form to access donation details. The anomaly is printed as text and gives and indication what might be wrong.

Wrong number of payments

- ❑ This can happen in two cases:
  1. The payment is missing. Contact the donor.
  2. There is more than one payment. Try to convince your donor to make out a second gift aid for the date of that payment to cover that accidental payment. Create new gift aid donations with new gift number for every payment received, as recorded in the transaction file. It is irrelevant whether the bank actually uses these codes or not. There must be precisely one payment and one bank code for every gift aid. Un-tick Tax form boxes for the new gift aid donations until you have the forms.
- ❑ Use Master View for Donations to clear the anomaly box.

Wrong amount has been paid

- ❑ This usually involves writing to the supporter;
- ❑ Use **Master View** to reset the anomaly after the gift has been modified;
- ❑ Make sure that the R190 is for the correct amount.

Payment date is wrong

- ❑ Remember that the system allows a 30-day margin;
- ❑ Do not correct dates in the transaction database unless they are really wrong (you can find the payment date from the bank statement);
- ❑ Correct the first pay date on the donation form, and click the re-compute button, to recalculate totals etc. Use the re-compute button on the Master form (Marion look at those forms in the data base!)
- ❑ Clear the anomaly Use the mouse to de-select the box.
- ❑ If the date is badly wrong, request a new R190 to avoid trouble with the Inland Revenue.

Now repeat the **Check Gift Aid** routines. Usually most anomalies can be helped away easily and a few stay.

Now run **Gift Aid Tax** to prepare your tax return

- Finds Gift Aids for which the R190 has not been requested, and print request letters;
- Finds Gift Aids for which the R190 has been requested, but not returned.
- Identifies those payments which have arrived accurately before the date of the tax return;

- Prints out a list of the claims so that you can attach the R190s to the tax return;
- Prints out an R68a gift aid insert;
- Flags all those donations for which tax has now been claimed with correct tax dates etc.;
- Marks those donations as inactive.
- Marks the transactions as claimed.

❑ Send off the completed R68 GA insert and any associated R190s. Together with your R68

Leave donations with missing forms, or anomalies, until the next tax claim.

On the whole if anything goes wrong during the tax processing, NOTHING will be recorded in the database and you can start afresh.
All actions the tax routines take are recorded in the tax records table. Investigating this table will show you what has been done for any donation to date.

You can investigate tax claim and reprint tax claims:

❑ Open the **Tax Records** option from the Data menu;

❑ Search for all records with the date and time of the tax claim, and the **ga tax claim** as their action;

❑ Click on the Printer button on the Toolbar, or select Print on Layout from the record menu;

❑ Select the R68 layout for printing..

This routine can be used to re-print; if you have lost your old copy if your printer jammed during your tax return etc.

To Undo taxation:

❑ Look in the tax records table using the **Data** menu to see what was done on the date of the return you wish to undo;

❑ On the main Donations control screen, change the inactive flags back to active for all donations on which tax should have been claimed but was not.

❑ Find all transactions that were claimed and mark them as not claimed in the transaction table.

This will enable these donations can be picked up in the next tax claim.

7.4 Process covenant tax

FRP takes account of the fact that the tax rate which applies to covenants is dependent on the due date or date received of the payment.(This is a subtle difference between company and personal covenants)

Covenants and gift aid tax refunds can only be claimed when you have received confirmation from the supporter that tax has actually been paid to the Inland Revenue.

- ❑ If the R185 form has already been received, the appropriate checkbox in the **Add a Donation** screen should have been ticked *for each donation for which the R185 has been returned*. You should also make a copy of the R185.

You need to log on as **finance user** to access the Finance menu options.

Make sure that your Transactions entries are up to date.

Make sure that no-one else is using Fundraising Pro.

The routines in this checklist modify a large number of records. Make a backup now, in case you make a mistake and ran the taxation for the wrong date or something like it.

- ❑ Decide the date on which you want to claim your tax refunds;
- ❑ Run the **Check Covenants** option from the Finance menu, entering your chosen date. This routine then:
- ❑ Runs the **Process R185** routine from the **Finance** menu and mail out the R185s to the supporters concerned.
- ❑ Contact those supporters who do not return their R185s. A list is produced by the **R185** menu item:
  - ❑ Go to the tax records table. Search and highlight all the records related to the R185 mailing on the selected date.
  - ❑ Move to the people table.
  - ❑ Do a mail merge and label print for this selection of people
- ❑ Use **Check Covenants** from the **Finance** menu to check for anomalies and remove as many (see below) as you can.
  - ❑ Having run the **Check** option, find the incorrect covenants by doing a search where
  - ❑ type contains covenant
  - ❑ active is true
  - ❑ anomalous is true

- ❑ Correct the anomalies as far as you can

- ❑ Run **Check Covenants** to check that you have fixed the anomalies - this routine will only work on the selection of donations visible on the screen.
- ❑ Run the **Covenant Tax** option from the Finance menu
  - ❑ Request R185s for company covenants (which have to be attached to each tax return) - a list is produced automatically with the tax run.
  - ❑ When the company R185s have been received, attach them to the return and send it to the Inland Revenue
- ❑ Check for anomalies regularly by running **Check all Covenants** and the **Check Covenants** options, on appropriately-selected covenants, from the Tax menu.

7.4.1 Overview of the covenant tax processing

Before doing taxes and forms you must run a Test covenants menu item. This checks all your donations which are active for numerous problems such as missing payments, wrong amounts, wrong dates, overpayment etc and prints a report which enables you to take action. It also marks gifts are anomalous and excludes them from tax claims to ensure you only claim on fully valid covenants, not of problematic ones.
It goes through all transactions associated with a covenant and finds out if all the amounts in the (transactions) equal the (donation) instalment. Otherwise anomaly wrong payment is noted.
The data base then checks if the dates on which payments were received are right. If not, they are reported as such.
Test if the number of payments between (donations) tax*last*clmd and tex*date is correct, and if they arrived on the correct datesIt will **not** check this for covenants on which no R185 has been received . If anything is wrong the anomaly reads wrong date or amount of payments. .
Overpayments are detected and reported as such.

Dealing with the R185s

Remember: R185's should be filled out and signed by donors after one year of payments has been received for a covenant.
From the control panel the Finance user can claim R185 forms. First Run a covenant check, then pull process R185 from the Finance menu.
First the database finds out which covenants need to be processed because a first annual amount has been received. It then prints a list of the gifts for which the R185 should be requested and prints the forms. After it prints this, it sets the filed "tax form sent" to True, since it assumes that R185s have been mailed

When R185's come back to your office, you must manually tick the box "Form Rcvd" for each applicable donation. Clicking this box sets the date of the latest payment claimed field to a date before the first payment arrived. This is for internal reasons.

In the tax run Fundraising Pro only considers donations for which the tax form was received by the development office, which is a fact to be recorded in the database when the R185 is returned by the donor to the office.

A side effect of R185 processing is that you are notified of any R185 forms which have not been returned to your office. You should contact the donors.

Which covenants are processed for taxation?

Of course they should be active and not anomalous. During the tax processing a list of donations is produced with first claim is true, and form received is true. meaning that the Inland Revenue has not yet received the R185 but the form is available in the office. It is to be attached to the first return. When this is done the DB marks the box first claim false, so that next time the claim is made without an R185 attached to the return. (Except for company covenants which are handled separately)

7.4.2 Understanding anomalies - general

Anomalies in covenants which are not active are not checked.

It is possible for more than one anomaly to occur in a covenant.

Make sure that foreign donations are not covenants - they should be pledges.

Do not forget to correct data in the transaction database if anything is wrong with the payments there.

- Look at the donation
- Find the problem
- Correct the data in donations or in transactions.
- De-select the anomalous box in the Donation form
- Test the donation again for anomalies

7.4.3 Correcting anomalies

Wrong amount	**payments are for the wrong amount** see the gift aid section.
Wrong amount or wrong number of payments	**wrong amount of money received in a given period** You may not be able to solve this type of problem without contacting the supporter, and your covenant may remain anomalous for a little while. ❑ Check the amounts and dates on the payments. ❑ If the amounts are wrong, clear it up ❑ If payments are missing, try to recover them ❑ This code can also occur if the payments arrive considerably off the expected date. ❑ In that case change the dates on the transactions screen to make the date acceptable to the system! ❑ After clearing the problem, de-select the anomaly box in the donations screen and wipe out the code Any tax not claimed in the current run is not forgotten; the system will pick it up next time.
Covenant	**payment continued after the final date**

overpaying

- ❑ Create a new donation, with a new bank code
- ❑ Make sure that the transactions which are overpayments are given the new bank code
- ❑ Remove the anomaly from the original donation. This should now be ready for tax processing
- ❑ Ask the supporter to fill out a new covenant form and give new start dates and amounts and final dates for the “new” donation.
- ❑ When this has been received, mark the donation active, and this will become a valid new covenant.
- ❑ Sometimes your donor will want his money back, or will want to stop the overpayments immediately, in which case you will be left with a single gift on which you probably cannot claim tax.

8. Guide to the menus

8.1 File menu

Open Database

File menu

This brings you to the data from the control panel or from a splash screen. The administrator must use this menu to get to the data when first logging on.

Close Database

File menu

This menu item closes the data windows and brings you back to the control panel.

The **finance user must use this menu** when she wishes to run taxation routines (which are only accessible from the control panel) after having edited the donation details.

Change Access

File menu

This routine enables you to change your type of access to Fundraising Pro (from administrator to finance, for example) without logging out and in again. You will need to know the appropriate passwords to do this.

Printer Setup

File menu

This is a standard Windows menu item which allows configuration of the printer.

You can set paper sizes and preview on screen options. The details of this menu vary with your printer.

New Data Window

File menu

This menu option may or may not be present in your version. It opens further scrolling lists allowing access to the details in the tables. This can be very handy to use when a phone call comes in and you do not with to disturb carefully created selections.

Export Data

File menu

Use this option whenever you need to export data to anything other than a mail-merge letter; spreadsheets and word processors, for example, or to other files or archive media.

- ❑ If you have already saved a particular set of selected fields as an export template, click the **Load** button to activate the template.
- ❑ Select the table you want to export *from*.
- ❑ Select the fields to be exported using the **Append** button. If you forget fields you can remove and insert them. The other buttons work in the same way as in the Sort screen (111).
- ❑ For any highlighted field, select a filter if you want to translate or transpose data during the export routine; for example: the
    - ❑ **mm/dd>dd/mm** translator would transpose month and day.
- ❑ Also, when exporting text fields which contain carriage returns (multiple lines of an address, for example) use a translator on the field to translate the <CR> character to another character and thereby prevent it being confused with record separators.
- ❑ Specify your delimiters as ASCII Character **9** (Tab) for End of Field, and ASCII Charcter **13** (Carriage Return) as End of Record.
- ❑ Tick the checkbox if you need to include the field names themselves to be exported as a **header** row (to a spreadsheet, for example).
- ❑ *Tick* the **Add linefeed** checkbox if exporting to a Windows application, since the linefeed is expected by Windows applications. Windows applications have a carriage return and a linefeed character before a new line starts. Macintosh computers have only a carriage return and Unix computers only a line feed character.
- ❑ You can **Save** your selection parameters as a template, so that you can use it again whenever you need to.
- ❑ **Export** the exported data file as *filename*.TXT.

Import Data

File menu

Make a backup before importing data into any existing files. With this operation you make large scale modifications to the database.

You can import data to update any of the fields which form part of a supporter's record, including your own customised fields, in very much the same way as described in the **Export Data** routine.

- ❑ When you have completed your configuration, click **Import**, select the file from which to read, and click **OK**.
- ❑ You can use templates as in exports.

Quit

File menu

When you quit the software, remember that the layouts which you have been using this time will be not be offered as a default next time, unless you pull the menu item, **Save default views**.

8.2 The Edit menu

Edit menu

Edit menu

The Edit menu offers the standard Windows™ utilities.

Undo, **cut**, **copy**, **paste** allow for quick text editing.

Select All selects all of whatever you are working within at the moment (people, or donations, or a subset of those). This can be very useful to select all records listed on the screen.

Show Clipboard displays your most recent **cut** or **copy**.

8.3 The Data menu

The data menu allows for navigation from one table to another. Here we discuss the navigation to some tables which have not yet been discussed extensively.

Tasks - Set up Reminders

Data menu

You can use the Tasks option on the Data menu to set up reminders for yourself or someone else.

- ❑ Click the button to add a new task;
- ❑ Select an action type (the popup box will be customizable in a future version)
- ❑ Leave the **letter id** field blank, unless you wish to link this to a 4D Write letter.
- ❑ Leave the **record_number** blank unless you wish to link the task to a person.

- In the **who** field, key in the FRP login name (office head, for example), to ensure that on startup outstanding tasks are listed in the control panel.
- Key in a summary (max 25 characters) and description.

Letters

Data menu

The Letters option on the Data menu is only used in conjunction with 4D Write. You can enter letters like you enter records in other tables.
The letters are usable from the letter menu itself and also from the **MailMerge** and **Correspondence** views in the people table.
You can save a lot of time familiarizing yourself with 4D Write as a mailmerge tool.

Codes

Data menu

Codes are used as a way to group records which have something in common, so that you can select those records from the whole database and work just on them.

This can be a very powerful feature. For example, you may soon know which people like barbecues, and which like chamber music - and they may not be mutually exclusive! If you group similar supporters in one Code, you can select them later and invite just them to the next barbecue. This is more flexible, and less cumbersome, than just assigning the barbecue event code to all the people invited - some of them won't turn up, and your target audience is diffused.

Codes can be applied to Donation records as well as People records. The same codes are used, but the code log is separate.
The Codes option enables you to list, print or modify existing codes, as well as adding new ones.
Assigning a new code:

- Select the **Codes** option from the Data menu;
- Enter your new Code (maximum of 6 characters);
- Key in a summary (max 25), and a description (scrollable text), both of which will be used in the popup window invoked when you click the button to investigate this code from anywhere else in the system.
- Save (52) the details.

Or:

- Highlight some people or donations
- Select “**Assign Code**” from the **Selection** menu
- Type the new code in the entry box.
- When prompted add the summary and details.

Retrieve a Code list and search for records with that code:

- From the Data menu, open the **Codes** option;
- Highlight the Code you want to retrieve;
- Then from the Data menu, select the **People** option (or click the People button on the Toolbar);
- Only those people who have the code the Code will be displayed.

or

- From the Search menu, select the **Codes Search** option;
- Select the list you want to retrieve;
- Only those people who match the Code will be displayed.

You can display selected Donations in the same way.

8.3.1 Tricks with codes:

1. When searching for a code you can use wildcards
2. It can be very powerful to use related codes for example:

tag a group of people with the code invite. When responses come in change the codes on the se people to one of the following:

- invited (for declined)
- invetea (accepted)
- inviteaws (accepted with spouse)
- inviteawf (accepted with family)

Searching with wild cards let’s you retrieve all invite@ codes, or just the accepted: invitea@

Code Log Don	**Data** menu

Code Log and Code Log Don contain pairs of record numbers and code to register that a code is linked to a certain record.

8.4 The Record Menu

Find or Add	**Record** menu

Quick find which adds a record if not found. For large volume phone answering work for example.

Delete Selection

Record menu

To delete records from the database there are two options:

- Delete them one by one, by double clicking and using the trash can button
- Delete a group of records in one blow. You must go in as administrator. Highlight the records (in any table) you wish to delete. Then use this menu item. (Administrator only). This can be used to delete large amounts of records. Use with care

Quick Report

Record menu

You can use this option to design your own report layouts. It is similar in layout to packages like Crystal reports, but fully integrated with Fundraising Pro. Detailed information on using this option is contained in the User Guide which accompanies this software. All visible records will appear in the report.

Print Layout

Record menu

Certain reports are difficult to make. For examples an R68 tax form does many calculations. Such pre-formatted reports are accessible through the **Print layout** menu.

Most notably you can print:

- transactions as in a journal from the transactions table
- tax records of all sorts from the Tax Records table
- By searching for tax records associated with specific donations on a certain date, you can reprint old tax returns etc.
- In donations some overviews of income can be reported.

People has a few reports too. All visible records will appear in the report.

Labels

Record menu

Prints labels for all visible records. Detailed information on using this option is contained in the User Guide which accompanies this software.

Mailmerge

Record menu

A tutorial introduction to this menu is in the quick tour of Fundraising Pro manual.

This is where you export the records to be involved in a merged letter. Remember, selections can be built by highlighting, searching, or using the code or event searches. Finally selections can be built by first highlighting records in another table and then moving to the desired table (see the selection menu discussion).

❑ Select **Mailmerge** from the Record menu.

Then open your Word Processor and work the merge from within it.

This method only exports the following pre-determined fields from the FRP database to your word processor: **postname, salutation, pref_forename add1, add2, add3, town, county, country, postal code.**

If you are using Microsoft Word, and you experience difficulty reaching the exported data, then you *must confirm the conversion* when opening the data source with the mail merge tool. This option appears at the moment that you select the file to which you exported for your mail merge. (this may involve changing some of your Word Tools Option defaults) and open the document as a text file.

A more flexible mailmerge can be achieved by exporting more fields:

- Select the records as before;
- Use the **Export Data** option (97) to identify the fields whose contents are to be merged.
- In the word processor, identify the export file as your data source for the merged letter.

Apply Formula

Record menu

You should only use this option if you are familiar with the 4D programming language. Detailed information on using this option is contained in the User Guide which accompanies this software.

With this option you can change large amounts of records in a programmable way.

Search by Formula

Record menu

This allows you to search for a range of records which contain a particular, know, formula. Detailed information on using this option is contained in the User Guide which accompanies this software.

8.4.1 Reports and enquiries

Here is an alphabetical list, and contents description, of all the standard report titles available from the various menus:

You can also use the Quick Report Writer (104) option on the **Record** menu to design your own report layouts.

On pages **Error! Bookmark not defined.** onwards, you will find a list of field names and tables which will enable you to define customised reports.

8.5 The Selection menu

Swap Current and Memorised

Swap current and memorized

Selection menu

Event Search

Selection menu

Find all records with a certain group event.

8.5.1 The selection menu

Add Event

See page 108.

Add to Memorised

If you are currently working with a selection of records and you realise that you need to add more:

- ❑ **Memorise** (see below) the current selection;
- ❑ On the displayed list, find and highlight those you want to add;
- ❑ Click the **Add to Memorised** option on the Selection menu.
- ❑ To see the amended selection, use the **Swap** (see below) option
- ❑ See also **Omit** below.

Assign Code

Sometimes you want to be able to group records permanently, rather than the temporary grouping which is available through the **Memorise** (see below) option. Records which are part of such a Code grouping retain that code so that you can identify the records later, and repeatably.

The codes themselves are defined in the **Codes** (101) option of the Data menu.

- ❑ Select the records which you want to be part of such a group
- ❑ Open the Assign Code option from the Selection menu
- ❑ Select the Code which is to be assigned to this group

When working within such a Code selection, you can temporarily restrict your selection even further, using the **Memorise** options.

This is not the same as a selection template of the kind Mentor users are familiar with. It is more like a Saved List, and includes specific *records*, rather than specific *selection criteria*. Such lists can be useful, but will not include matching records added to the database since the Code was originally applied.

Use the **Code Log** option to see when the code log was created, and which records have been assigned to each code.

Code Search

Enables you to retrieve those records which have been grouped under a particular Code template (see **Assign** above).

Event Search

This allows to search for records which have specific events attached.

Memorise Selection

Use this option to keep a selected set of records temporarily available, so that you can swap (see **Swap** below) between the full set of records, and this subset. The selected set of records is only memorised until you quite FRP, or until you select and memorise another set of records.

Omit from Memorised

If you are currently working with a selection of records and you realise that you need to remove some:

- ❑ **Select All** to highlight the whole subset;
- ❑ Find and highlight those you want to remove;
- ❑ Click the **Omit from Memorised** option on the Selection menu.
- ❑ To see the reamended list, select the **Swap** option (see below).

See also **Add** above.

Remove Code

Enables you to remove Codes which have been defined under the **Assign** (see above) option.

Remove Event

This acts like Remove Code.

Show All

This option cancels any selection which you may have imposed on the database records, and makes the whole set available again. The top left-hand text will change to remind you that you are again working with the full set of records.

Show Selection

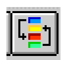
When you have identified (either by highlighting, or using a selection template) the records which you want to work on, click **Show Selection** to restrict your on-screen display to just those records. The text at the top of the screen will change to remind you that you are working on just a few of the available records.

Swap Current and Memorised

This option enables you to swap between the full set of database records, and a subset which has been temporarily memorised (see **Memorise** above).

See the associated User Guide for further details.

Sort Records

The sort button  allows you to specify the order in which you want your current records (people, donations, or whatever) to be displayed. The **Sort** option on the Search menu allows you to build a nested set of sort criteria. For example, you could sort first by postcode, then within each postcode area sort by surname.
See the associated User Guide for full details.

A brief summary

- ❑ In the left-hand window, highlight the field which is to be your broadest area of sorting (postcode, in the above example)
- ❑ Click **Append** to move it to the righthand window
- ❑ Continue to append fields, in reducing order of priority
- ❑ You can **Save** this sort order so that you can **Load** it later.

Insert a new sort field in the middle of your list of fields:

- ❑ Highlight the new field in the left-hand window;
- ❑ Position the cursor in the right-hand box on the field above which your new field is to be inserted, then click **Insert**

Remove a sort field

- ❑ Highlight the field in the right-hand window and click Remove.

Reverse the sort order for one or more elements

- ❑ If you use **Down** or **Up** to specify ascending or descending order, notice that the Down Up buttons apply to each field in the list.

8.6 The Search menu

Search All

Search menu

Search all brings up a form for searching, or brings up the search editor. Details of using these can be found in the user guide under the chapters of Search Editor and Search by Layout.

Search Selection

Search menu

This performs the search in the visible selection (the current selection) of records. It refines the selection and does not search the whole database.

Repeated Search

Search menu

This option offers you a short cut to building a sub-set of dissimilar records. Instead of having to save, memorise and add each record to the selection, it offers you the find box immediately, until you have finished selecting. Press the **Cancel** button (or hit Esc) when you no longer wish to search for more records.

Quick Search

Search menu

The Quick Search button (a magnifying glass on the toolbar) enables quick searches based on **record number**, **surname**, **initials** or **last contacted**.

- ❑ For example, if you key DOLPHIN in the surname field, the system will display all the DOLPHINs on the screen.
- ❑ You can just type the first few letters for a partial search.
- ❑ Or you can use the < (smaller than) or > (greater than) key followed by a partial name, to restrict the selection to all surnames (before) or (after) that name.
- ❑ Or use an @ as a wildcard and find all supporters whose name starts with APPLE, by entering APPLE@ in the surname field.
- ❑ Click the GO button to start the search.

Searches are not case sensitive.

More complicated searches can be carried out using other options from the Search menu.

Repeated Quick Search

Search menu

This menu item allows you to find a sequence of records. Continue to type names, record numbers which you wish to select until you have entered them all. Then click “Cancel’ and the selection will appear.

Search Related

Search menu

Search related allows one to find records related to the highlighted selection. For example, highlight some donations, then choose Search Related and find the Matched gifts.

Search Editor

Search menu

This powerful option allows you to create search templates rather than lists of actual records. Your selection criteria can contain fields from different data files. The field-manipulation buttons work in exactly the same way as in the Sort screen (📖111).

- ❑ Click the buttons to display in turn all the fields from the different tables in the system. You can also hold the mouse down between the arrows for about 1 sec. Then a list of tables will appear.
- ❑ Build up your selection criteria, gradually narrowing them down (for example, Male ... under 35 ... living in GL7 1LT)

Search Editor is not case sensitive.

Detailed information on using this option is contained in the User Guide which accompanies this software.

Check Pledges

Finance menu

Pledges are periodic payments made to a charity, which are not eligible for tax claims. The Check Pledge menu verifies that payments are being received and that payment is not continued beyond the last payment date of the pledge.

Check Selected Covenants

Finance menu

This checks just those covenants in the current selection in the donations file. This can be useful after fixing a few errors, to avoid a long running operation.

Process R185

Finance menu

This routine:

- ❑ searches the database for covenants where the R185 has not yet been received from the supporter;
- ❑ prints out customised R185s (acceptable to the Inland Revenue) containing the supporter's personal and covenant details;
- ❑ generates a tick in the **requested** checkbox on each donation record;
- ❑ prints out labels so that you can post the R185s to your supporters, for their signatures;
- ❑ prints out a list of R185s outstanding from the last run.

Gift Aid Tax

Finance menu

This prepares the Gift Aid insert of the R68a form. It also verifies the receipt of R190 forms connected with gifts.

Update Pledges

Finance menu

This menu updates the amounts received from pledges.

Graph Income

Finance menu

This menu allows to graph projected income based on the selection of donations visible on the screen. An example is described in the Quick Tour of Fundraising Pro

Print Actual Income

Finance menu

This menu item produces a journal of transactions selected. It is mostly run after entering a batch of transactions, to keep journals up to date.

Export Transactions

Finance menu

This menu item exports the current selection of transactions with their ledger information to a text file. This can be read by most accounting programs.

8.7 The Special menu

Save Default View

Special menu

This saves the forms you have selected for viewing details and lists as the defaults to be used next time you start up the database.

Swap Addresses

Special menu

This swaps the first and second address in the selection. Use this with care.

PhONEday

Special menu

This can change old phone numbers to new ones using the British Phone day conversion rules.

Update Accumulated Amount

Special menu

This updates the accumulated amounts in the donations records. After entering transactions it is a good idea to run this menu.

Swap Fields

Special menu

This option allows you to swap the contents of two fields in your people table. This can be handy if you have feel that information in alpha2 should be in alpha5 and vice versa for example. You should not attempt to do this without first discussing the consequences with your Project Leader.

User Mode

Special menu

On multi-user installations this menu item can activate the 4D User environment for the Administrator. This offers further features which are covered by the 4D Documentation coming with 4D Server.

Design Interface

Special menu

This is for use during Fundraising Pro development, and this menu option cannot be enabled by users of Fundraising Pro

Licence

Special menu

This menu item allows you to enter a new license key. Make sure to have the name of your charity and the key handy, as they appear on the license document.

8.8 The Help Menu

Help menu

Help menu

Use the **About** option to check the version of the software you are currently using. This shows which database file you are using and which version of the software is running.

9. Index

Filename:	frpppg3.16.doc
Directory:	E:\frp\documentation\pg
Template:	E:\Peter\template\Normal.dot
Title:	Fundraising Pro
Subject:	
Author:	Peter Braam
Keywords:	
Comments:	
Creation Date:	08/30/97 11:49 AM
Change Number:	34
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