



Alumni/Development Release Bulletin

August 2010

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About Release 91_8

This release includes a new, alternate Quick Entry method for gifts, pledges, and payments that uses a spreadsheet-style screen to quickly enter large batches of similar transactions, and a change in the way constituent giving levels are calculated and maintained. Giving level history is now maintained and displayed by year, and can be re-calculated at any time. There are also enhancements to enable the deletion of groups of constituents from appeals, and in some cases, to automatically record the solicitor entered with a gift or pledge to the Solicitor tab in Constituent Maintenance.

As always, please contact Senior Systems Product Support if you have any questions about these new and enhanced features!

New Quick Entry For Gifts and Pledges

A new, alternate method is now available to enter gift, pledge, and payment details using a spreadsheet style screen. This may be a more convenient way to enter gifts and pledges/payments when you have a large number of similar transactions. This Quick Entry function only includes the fields found on the first tab of the normal Gift Posting function, so if you have more complex transactions (such as those requiring the entry of additional soft credits or matchers), you will still want to use the standard entry methods, or you will want to further edit the transaction after completing Quick Entry. Also, if you want to enter a pledge and the payment for the first installment at the same time, you will need to use the standard entry method. Note that a single batch may contain transactions entered by either or both methods. Once you have completed a Quick Entry session, all transactions on the screen are added to the batch; any subsequent changes or corrections to a transaction must be made in the same manner as previously.


There are several options and features which allow you to quickly and easily search for the correct constituent, fund, or solicitor, customize the screen to speed data entry, and use gift or pledge posting options to set or change default values for selected fields. There is also a link to access the constituent record if you find you must make an address or other type of change to constituent data during the entry process.

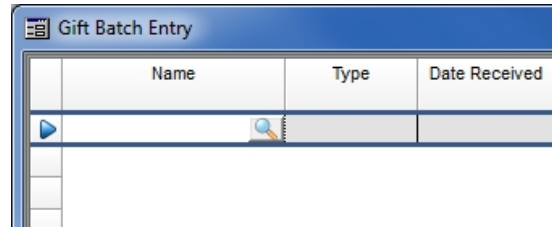
Each transaction is checked for validity as you enter each field, and a green check appears to the left of the row if all required fields are present and all data is valid. Transactions are not saved to the batch until you complete the Quick Entry session, and you cannot save any of the transactions on the screen unless all of them are valid and complete.


The screenshot shows the 'Gift Batch Entry' window. It features a table with columns for Name, Type, Date Received, Fiscal Year, Fiscal Month, Amount, and Fund Name. The table contains several rows of data, each with a green checkmark in the left margin. The last row, for 'Freddy A. Alger', has a red 'X' in the left margin and a dropdown menu set to 'Pledge'. To the right of the table is a 'Field Value' panel for the selected constituent, 'Freddy Alger', showing details like 'Former Student', '3722 Wooded Creek Mariborough, TX 752...', and '555-484-9077'. Below this panel are sections for 'Gift Default Values' (set to 'BANQUET EVENT GIFTS') and 'Pledge Default Values' (set to 'ANNUAL FUND PLEDGES'). At the bottom are 'OK', 'Cancel', and 'NUM' buttons.

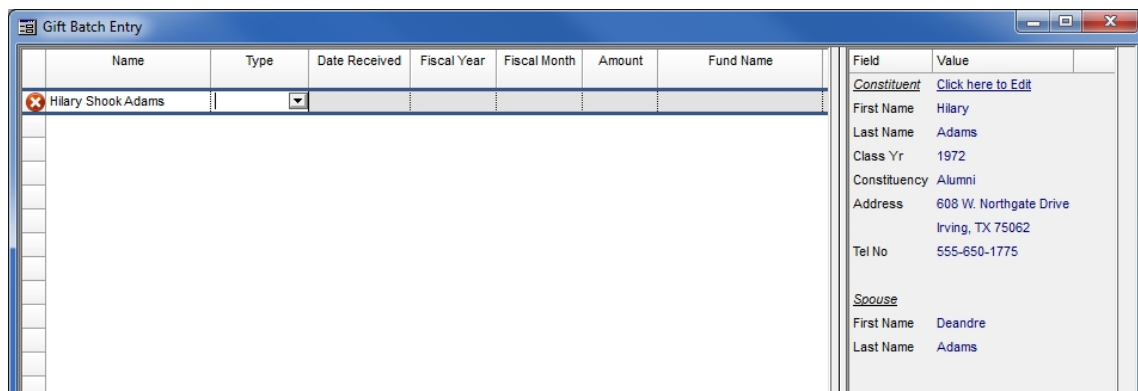
| Name | Type | Date Received | Fiscal Year | Fiscal Month | Amount | Fund Name |
|---------------------------|--------|---------------|-------------|--------------|--------|--------------|
| Burkett Stanley Ainsworth | Gift | 04-12-2010 | 2009 | February | 100.00 | Capital Misc |
| Gustafson Griswold Acker | Gift | 04-12-2010 | 2009 | February | 100.00 | Capital Misc |
| Shelby E. Alarcon | Gift | 04-12-2010 | 2009 | February | 100.00 | Capital Misc |
| Helena Adams | Gift | 04-12-2010 | 2009 | February | 100.00 | Capital Misc |
| Gregory Aponte | Gift | 04-12-2010 | 2009 | February | 100.00 | Capital Misc |
| Gaylord R. Whiteside | Pledge | 04-12-2010 | 2009 | February | 500.00 | Annual Fund |
| Carlene Lauren Adkins | Pledge | 04-12-2010 | 2009 | February | 125.00 | Annual Fund |
| Freddy A. Alger | Pledge | | | | | |

To enter gift, pledge or payment transactions using Quick Entry:



1. Click the  Gift Posting button or select **Giving > Posting** from the main menu in the Alumni/Development application.
2. Click on an existing batch to select it and then click **EDIT**, OR click **NEW** to start a new batch. Then click **QUICK ENTRY**. (See step 6 if you want to customize the fields displayed on the screen, or step 7 if you want to set default values prior to entering data.)





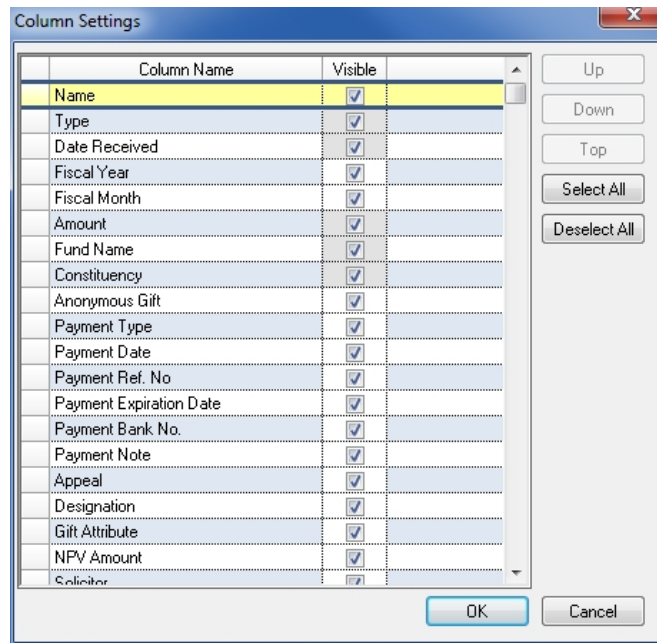
3. In the Name field for the first transaction, type all or part of the Constituent Name and press **TAB** or click the  Search icon to locate the correct constituent.
 - If there are multiple records that match the search criteria, a list is displayed so that you can select the correct one. Click on the record to select it and then click **SELECT** (or just double-click on the record) to complete the Name field.
 - If there is only one match for the search, the constituent Name is automatically filled in.
 - As you proceed to the next field to select the transaction type, some basic constituent details are displayed on the right side of the screen so you can confirm that you have the correct constituent and address. If you need to update any information in the constituent record, click the **Click Here To Edit** link to go to Constituent Maintenance for the constituent. After you close Constituent Maintenance, you will return to the Quick Entry screen.



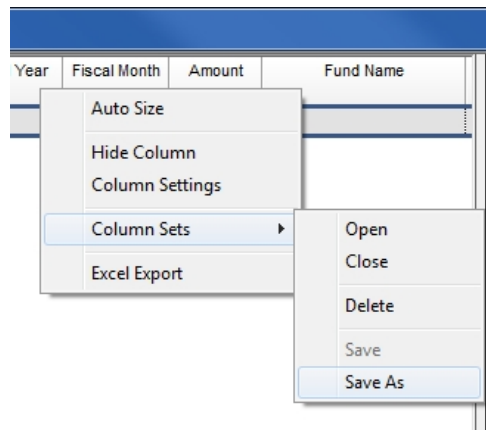
4. Select the Type of transaction from the dropdown in the second column and press TAB. If you select a gift or payment type of transaction for a constituent with outstanding pledges, you can then select the appropriate pledge to be credited, if applicable. After selecting the payment type, fields which are potentially applicable to the transaction will be enabled for the row, and fields that do not apply will be disabled (gray). Default values may be provided for fields if you are using posting options (see step 7 for more details).
5. You can use TAB to move between fields to enter, select, or edit the data. Note that the Fund and Solicitor fields allow you to enter partial data and search when necessary in the same manner as the Name field.

Until all required fields have been entered, the icon to the left of the row will show a  red x (you can hover the cursor over the icon to see any missing required fields). As soon as a transaction has all required fields, the icon changes to a  green check. Once you complete a transaction, you can tab to or click in the Name column for the next row to start a new one.

6. At any time, you can change the column layout on the screen to speed the data entry process, or export data:
 - **Re-size columns** by hovering the cursor over the separator between fields () in the title bar, and then clicking and dragging to the desired size OR by right-clicking in the column title and selecting **Auto Size**.
 - **Change the order of the columns** by hovering the cursor over the bottom of the title block for a field to be moved (), and then clicking and dragging the column to a new location.
 - **Hide individual columns** you don't need by right-clicking in the column title and selecting **Hide Column(s)**; right-click anywhere in the title bar and select **Show Hidden Columns > Show All** (or select an individual column) to re-display. (You can also remove columns that you don't use from the screen using the Settings button, as described in step 3 above.)
 - **Select and arrange all columns to display** on the screen by right-clicking anywhere in the title bar and selecting **Column Settings**. Then check or un-check the boxes to select only the columns you want to be visible (or click **SELECT ALL** or **DESELECT ALL**), and optionally change the sequence by clicking on a row to select it and then clicking **UP**, **DOWN**, or **TOP**. When everything is set the way you want, click **OK**.

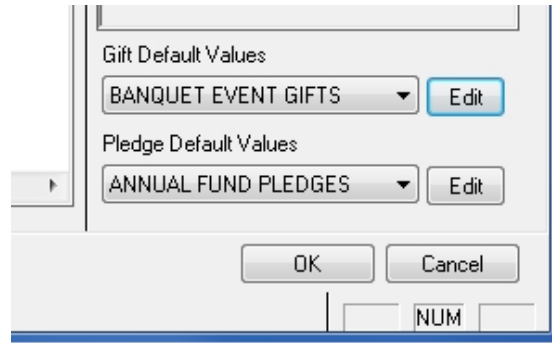


- **Save or use a saved column configuration (column set)** by right-clicking anywhere in the title bar and selecting **Column Sets**. To save the current configuration as a new column set, select **Save As**, type a name for it, and click **OK** (to re-save an existing column set, just click **SAVE**). To use a previously saved configuration, select **Open**, click on the column set name to select it, and click **OK**. You can return to the default configuration by selecting **Close**, and you can delete a column set by selecting **Delete**, clicking on the row to select it, and then clicking **DELETE**.



- Export the data table to an Excel file by right-clicking anywhere in the title bar and selecting **Excel Export**. Then enter a file name and click Save. When the process is complete, you can click **YES** to view the file in Excel, or **No** to continue.

7. At any time, you can select or change the set of default values (posting options) for new gift and/or pledge transactions using the dropdowns at the bottom right of the screen. If you want to maintain the list of posting options, click **EDIT** next to the type of values you want to work with.



- **To add a new set of default values**, click **NEW**. Enter a name for the posting options and then enter or select the value(s) in any fields for which you want to specify a default, and then click **OK**.

- **To edit an existing set of default values**, click on the row to select it and then click **EDIT**. Make any changes as needed, and then click **OK**.
- **To delete a set of default values**, click on the row to select it and then click **DELETE**, then **YES** to confirm.
- You can optionally select to use a different set of default values by checking the Current box for it, which will remove the check from any other box.

8. When you have completed the entry session, click **OK** to save all the transactions and exit. You will then return to the batch screen where you can proceed normally to edit or add more transactions, or to save or post the batch.

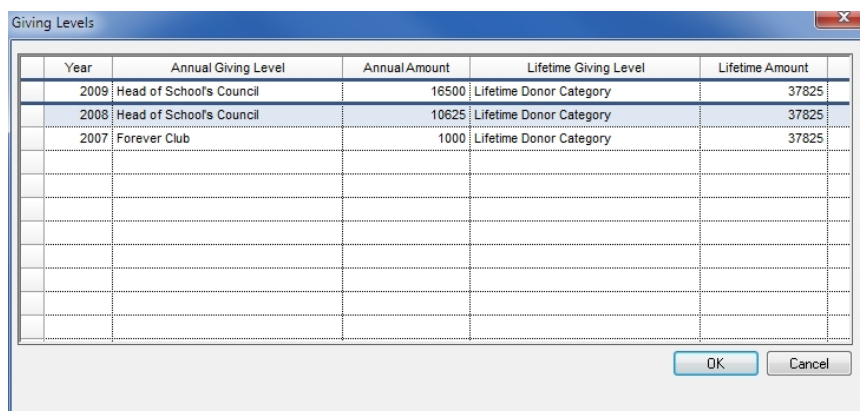
Note: If there are any invalid transactions on the Quick Entry screen, you must address them before you can exit and save all of the entered transactions. If you close the screen without saving, you will lose ALL transactions on the screen. In the event of an invalid transaction that you cannot address right away, you can remove it by deleting the contents of the Name field and pressing Tab. This will leave a blank line on the screen, but you will now be able to exit normally, all of the other transactions will be saved and added to the batch.

Enhancements to Giving Level Calculation and History

Several enhancements have been made to support the calculation and maintenance of constituent giving levels by fiscal year, for both current and past fiscal years. You can now recalculate giving levels for any past fiscal year at any time, alleviating the need to complete all gift entry prior to performing end-of-year processes.

Constituent Maintenance

In Constituent Maintenance, the Giving Levels screen (accessed via the **GIVING LEVELS** button on the Giving Summary tab) now shows the household giving levels in a table format, with a row for each year for which you have calculated them. You can still manually override a giving level by clicking in the giving level field and using the dropdown to select a new level.

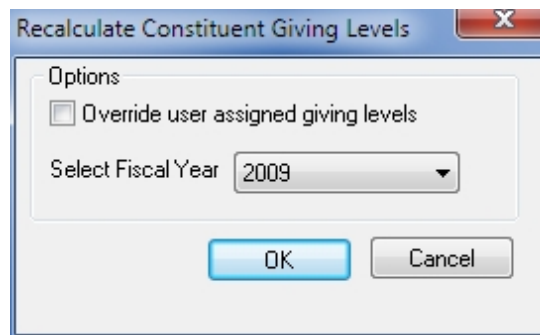


| Year | Annual Giving Level | Annual Amount | Lifetime Giving Level | Lifetime Amount |
|------|--------------------------|---------------|-------------------------|-----------------|
| 2009 | Head of School's Council | 16500 | Lifetime Donor Category | 37825 |
| 2008 | Head of School's Council | 10625 | Lifetime Donor Category | 37825 |
| 2007 | Forever Club | 1000 | Lifetime Donor Category | 37825 |
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Note: When you first update your database to the new version, no giving levels for prior fiscal years will be calculated or displayed. If you wish to display giving levels for prior years, you will need to recalculate giving levels for those years as described below. Current year giving levels are continually updated as appropriate via the gift posting process, but prior year giving levels are only updated when you choose to recalculate for that year.

Giving Level Recalculation

The Giving Level Recalculation function now has a dropdown to select the fiscal year for which to recalculate. If you wish to recalculate for multiple past years, you must perform this function separately for each fiscal year. As previously, you can specify whether or not to override manually-assigned giving levels for the selected fiscal year.



Note: Recalculations for past fiscal years are made based on the giving level definitions as currently set up in Giving Level Maintenance. If you had a different giving level structure in the past and you want that to be reflected in a past year calculation, you must first use Giving Level Maintenance to re-construct the prior giving levels, then return to the main menu and choose **Giving > Giving Level Recalculation** to run the re-calculation for that year (or run it multiple times to recalculate for multiple years), and finally return to Giving Level Maintenance to change the giving levels back to the current structure.

Giving Level Maintenance

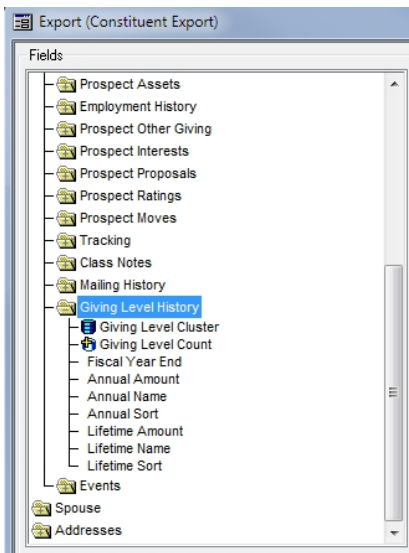
When you make changes in giving level maintenance, you will now be prompted as to whether you now want to recalculate giving levels based on the new data. Note that this recalculation affects the current year only. If you have made changes to the giving levels to re-construct the setup from a prior fiscal year, you will need to use the Recalculate Giving Levels function described above to accomplish that task.

Reports, Queries, and Data Export

Some changes have been made to reporting, queries and data exports to reflect the fact that there can now be multiple values for annual giving levels. There is also a new report to aid in the compilation of annual giving level lists.

IMPORTANT: Because the table structure for constituent giving level data has changed, your existing queries or exports which include constituent giving level criteria will no longer work correctly. Following database update, you will need to review these queries and exports to re-enter any of the selection criteria related to giving levels.

The new Giving Level History node for constituent queries and data exports allows you to select or define criteria for giving levels by fiscal year and/or the lifetime giving level:




The new Annual Giving Level List (**Reports > Giving Level Lists/Reports > Historical Giving Level Report**) displays constituents by giving level for a selected fiscal year. You can select whether or not to include the eligibility details for each giving level and/or constituent giving amounts, and you can set the sort order for the giving levels.

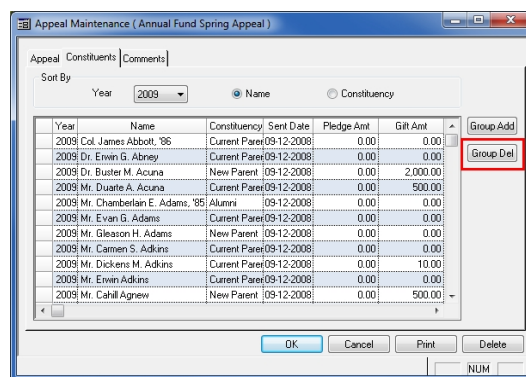
| <u>Annual Giving Level List for Fiscal Year Ending in 2009</u> | |
|--|-------------------------|
| <u>Level</u> | <u>Minimum Donation</u> |
| Founders | \$50,000 |
| <u>Donor Name</u> | <u>Amount</u> |
| Mr. and Mrs. Devon D. Blanchette | 100,000 |
| Mr. Guevara H. Burley and Ms. Catalina D. Barclay | 50,000 |
| Mr. Cormier Baxter Camacho | 50,000 |
| Mr. Darell J. Coffin and Mrs. Ladonna Barham | 50,000 |
| Mr. and Mrs. Connors A. Wooden | 50,000 |
| The Peak Society | \$25,000 |
| <u>Donor Name</u> | <u>Amount</u> |
| Mr. & Mrs. Cahill Barr | 25,000 |
| Mr. & Mrs. Darell S. Barr | 30,000 |
| Dr. & Mrs. Greenberg Akram Winstead | 25,000 |
| Head of School's Council | \$10,000 |
| <u>Donor Name</u> | <u>Amount</u> |
| Mr. & Mrs. Kirk Acker | 10,000 |
| Mr. and Mrs. Emery Applegate | 10,000 |
| Mr. Felix G. Barham and Ms. Samuels E. Booth | 20,000 |

Remove Groups From Appeals

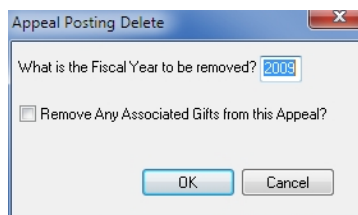
In Appeal Maintenance on the Constituents tab, you can now remove groups of constituents from an appeal in a similar manner to the Group Add function. You can use a new or existing query to select the group of constituents that you wish to delete from the appeal, and you can also select the Fiscal Year to delete and indicate whether or not to remove any associated gifts from the appeal.

To use this new function:

1. Select **Maintenance > Appeals** from the main menu in the Alumni/Development application.
2. Click to select the appeal you want to work with and then click the  Edit button. Then select the Constituents tab.



3. Click **GROUP DEL**, select or create the query to identify the group to be deleted, and click **OK**.



4. Change the Fiscal Year if necessary, and check the box if you want to remove any associated gifts from the appeal. Then click **OK**.
5. The system displays the number of constituents to be deleted for confirmation. Click **YES** to complete the process.

Solicitor Automation During Gift Entry

If you enter a solicitor for a gift or pledge during Gift Entry, the solicitor will automatically be added to the Solicitor tab for the constituent in Constituent Maintenance. This may increase productivity by removing the need for a separate step to enter solicitors in constituent records. When adding the new solicitor, the system uses the fiscal year and campaign from the gift or pledge entry. If there are multiple campaigns in the gift distribution, only the primary campaign is used. No Target Amount is included.

Note: This feature only works when there is no existing solicitor in the constituent record for the fiscal year/campaign combination, and only works before you save the gift or pledge entry. Any existing solicitor data for the fiscal year/campaign will not be changed, and no solicitors will be deleted by this feature. Any changes that you make to the gift or pledge record after saving will not result in changes to the constituent record, so you may still need to make manual entries or adjustments in these cases.