Fundraising Guide
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When you add transactions, such as donations, pledges, or recurring gifts to the database, you must specify how you plan to use the revenue received. For example, a constituent may request you use a donation for a specific purpose or perhaps the gift is in response to a solicitation used to raise funds for a specific cause.

You apply the funds that you raise to causes or purposes, called designations. Designations are the reasons your organization raises money and indicate how to use your donors’ gifts. You can create multiple types of designations to support your fundraising efforts. From Fundraising, you can create hierarchies of designations and manage the goals and use of these designations.

Full Circle View

You work with designations, donor challenges, hierarchies, and most all of your fundraising efforts in Fundraising. This section offers a full circle view of Fundraising and includes a description for each main area, such as Configuration.
Fundraising Configuration

Before you can manage fundraising information, we recommend you configure your benefits catalog. From Fundraising click Benefits catalog under Configuration.

The Benefits Catalog page displays all the available benefits offered by your organization. Benefits are gifts you give to constituents in return for a donation to your organization, such as a free shirt or coffee mug to thank them for the donation. You associate benefits with appeals in Marketing and Communications or transactions in Revenue. Some benefits may have a value equal to a percentage of the transaction amount. You can assign benefits a monetary or percentage value. When you add a revenue transaction and associate it with an appeal, the program automatically calculates the value of its benefits and deducts the value from the receipt amount. When you add a transaction, you can waive benefits or modify the receipt amount if needed. For more information, see Fundraising Configuration on page 8.

Designations and Hierarchies

You can create multiple types of designations to support your fundraising efforts. From Fundraising, you can create hierarchies of designations and manage the goals and use of these designations. For more information, see Fundraising on page 12.

Donor Challenges

A donor challenge is a fundraising tool to help increase support for a specific cause. A major donor or corporate sponsor can pledge a large sum to challenge the organization to raise a specific amount from other donors. A donor challenge can have an internal sponsor rather than an external one. For example, the president’s office can challenge the organization to raise an amount that the department will match. The program includes two types of donor challenges: “Match per gift” and “Lump sum match.” For more information, see Donor Challenges on page 27.

Fundraising Effectiveness Project

To measure and compare your organization’s fundraising gain and loss ratios year to year and against similar organizations, you can participate in the Association of Fundraising Professionals (AFP) annual Fundraising Effectiveness Project (FEP) survey. The survey collects consecutive annual data from many organizations throughout the United States. As a participant, your organization receives the annual report of compiled data from AFP, which you can use to help identify areas to improve and to help increase revenue. For more information, see Fundraising Effectiveness Project on page 39.

Fundraising Reports

You can track the effectiveness of your fundraising activities, as well as the performance of individual fundraisers. A variety of reports are available to help you measure your organization’s progress toward meeting specific goals. For more information, see Fundraising Reports on page 51.
Before you can manage fundraising information, we recommend you set up configuration options. From Fundraising, you can access these options under Configuration.

You use configuration options to set up Fundraising for your users. Use these options to manage the various elements necessary to organize and maintain your fundraising efforts.

Benefits Catalog

Benefits are gifts you give to constituents in return for a donation to your organization, such as a free shirt or coffee mug to thank them for the donation. You associate benefits with appeals in Marketing and Communications or transactions in Revenue. You can assign benefits a monetary or percentage value. Some benefits may have a value equal to a percentage of the transaction amount. When you add a revenue transaction and associate it with an appeal, the program automatically calculates the value of its benefits and deducts the value from the receipt amount. When you add a transaction, you can waive benefits or modify the receipt amount if needed.

The Benefits Catalog page displays all the available benefits offered by your organization. To access the Benefits Catalog page from Fundraising, click Benefits catalog under Configuration.

On the Benefits Catalog page, you can view the category, description, and value of each benefit. The Send benefit column indicates whether constituents receive the benefit when you commit a pledge or after the pledge is fully paid. To help find a specific benefit, you can filter the grid by criteria such as name and category. To filter the grid, on the action bar, select the criteria of the benefits to view and click Apply. To remove the filter, click Reset.

From the grid, you can add and manage benefits as necessary.
Add Benefits to the Catalog

From the Benefits Catalog page, you can add all benefits to associate with appeals and revenue transactions. When you receive revenue in response to an appeal, the program automatically determines which benefit applies to the transaction, based on the benefit levels you defined for the appeal, and deducts the monetary value of the benefit from the amount received.

> Add a benefit

1. From Fundraising, click Benefits catalog under Configuration. The Benefits Catalog page appears.
2. On the action bar, click Add. The Add a benefit screen appears.

3. Enter a unique name and description to help identify the benefit.
4. In the Value field, enter the value for the benefit, based on a monetary amount or a percentage of the revenue transaction amount.

From an appeal record, when you associate a benefit with an appeal, the value you enter when adding a benefit appears on the appeal record by default. From the General tab on the appeal record, you can edit the value on the benefit level as necessary. If you edit the value from the appeal, the new value applies only to the appeal; the original value remains on the benefit in the Benefits Catalog.

When you associate the benefit with an appeal and then add a revenue transaction associated with the appeal, the program automatically calculates and deducts the value of the benefit from the receipt amount of the transaction. When you add a revenue transaction, you can waive benefits or edit the receipt amount as necessary.

5. In the Category field, enter a category for the benefit.
Benefit categories, such as Apparel or Service, help define and organize the benefit.

**Tip:** You define benefit categories from the Code Tables page in *Administration.*

6. Under **Benefits on pledges,** select whether to send the benefit when the pledge is committed or fully paid.

To send the benefit immediately when the constituent makes the pledge, select "Committed." To send the benefit after the constituent pays the final installment of the pledge, select "Fully Paid."

With either option, the program generates a benefit expense distribution. When you select "Committed," the distribution is generated when the pledge is saved. When you select "Fully Paid," the distribution is generated once the pledge is paid in full.

7. On the Fulfillment tab, you can specify the vendor who will provide the benefit, such as the company who produces the T-shirts. You can also specify who the fulfillment vendor is. This is the company who will actually send the benefit to the constituent.

**Tip:** You can create vendor records from the Marketing and Communications page.

In the **Benefit ID** field, you can enter an identification number for the benefit.

In the **Cost** field, you can enter the amount it cost to produce the benefit.

8. Click **Save.** You return to the Benefits Catalog page.

**Edit a Benefit**

After you add a benefit, you can edit its information as necessary.

**Note:** When you edit the value of a benefit, the new value does not appear on instances of the benefit already associated with an appeal, membership, event, or revenue transaction. You must manually update those records to reflect the benefits changes.

To edit a benefit, from the Benefits Catalog page, click the double arrows next to a benefit to expand its row. On the action bar that appears, click **Edit.** The Edit benefit screen appears. Make any necessary changes and click **Save.**

**Benefit Search**

To associate a benefit with a record, such as an appeal or a revenue transaction, you can search for and select the benefit to use. On the Benefit Search screen, enter the criteria of the benefit to use, such as name and category, and click **Search.**

Under **Results,** the benefits that match the search criteria appear. Select the benefit to use and click **Select.**

**Note:** When the benefit does not appear under **Results,** click **Add** to add it to the Benefits Catalog.
Benefit Page
From the Benefits Catalog, you can click on a benefit to go to the Benefit page. The summary at the top displays information such as the benefit’s name, description, and value. On the Benefit page, you can also view and manage any benefit attributes as well as benefit fulfillment information. Benefit attributes are available only if the attribute category has been created in Administration.

Benefit Attributes
From the Attributes tab, you can add, edit, and delete benefit attributes. Benefit attributes are available only if the attribute category has been created in Code Tables in Administration.

Add or edit a benefit attribute

1. From Fundraising, click Benefits catalog under Configuration. The Benefits Catalog page appears.
2. Click a benefit to go to the Benefit page.
3. On the Attributes tab, click Add. The Add benefit attribute screen appears.

Tip: When you need to edit an attribute, click the double arrows beside the attribute to expand its row. From the action bar that appears, click Edit.

4. Select the category for the benefit attribute. Your system administrator configures the attribute categories in Administration.
5. In the Value field, select a value or description for the attribute.
6. Enter start and end dates for the attribute, when necessary.
7. In the Comment field, enter any additional information or comments about the attribute.
8. Click Save. You return to the Attributes tab.

Benefit Fulfillment Information
From the Benefit page, you can click the Fulfillment tab to view benefit fulfillment information. To access the Fulfillment tab on the Benefit page, from the Benefits Catalog page, click a benefit.
Designations are the reasons your organization raises money and indicate how to use your donors’ gifts. You can create multiple types of designations to support your fundraising efforts. From Fundraising, you can create hierarchies of designations and manage the goals and use of these designations.

**Note:** You create appeals, which are the means to reach out to constituents, separately from designations. You can associate appeals with designations to make revenue entry faster. When you enter an appeal on a revenue record, the available designations default to those associated with the appeal. You can also search for designations to select one not associated with the appeal. For more information about how to add and use appeals, see the Communications Guide.
Fundraising Hierarchies

A fundraising hierarchy is a visual representation of how you organize your fundraising designations. To manage hierarchies for your designations from Fundraising, click Fundraising hierarchies under Fundraising. The Fundraising Hierarchies page appears.

**Note:** Inactive designations in the hierarchy appear in italics. For more information about inactive designations, see Mark a Designation as Inactive on page 1.

On the Fundraising Hierarchies page, you can view the fundraising designations and hierarchies your organization uses. You can create hierarchies up to three levels deep. Revenue totals at each level of the hierarchy roll up and are included in the hierarchy’s Total designation toward a goal. After you establish your designations, you can associate revenue transactions with them. For information about the types of designations included in a hierarchy, see Designation Types on page 13.

**Tip:** To determine the effectiveness of your fundraising efforts, you can use a variety of Fundraising reports and KPIs to track performance. For information about Fundraising reports, see Fundraising Reports on page 51. For information about Fundraising KPIs, see the Reports and KPIs Guide or the KPIs section of the help file.

You can select whether to view inactive hierarchies in the list. To exclude inactive hierarchies, select Only show active designations and click Apply. To remove the filter, click Reset.

To access a designation record from the list, click the designation to open the record. For information about the items on the designation record, see Designation Record on page 16.

Designation Types

The program provides five standard types of designations.

**Total**

In a hierarchy, the top level designation must have a type of Total. The Total designation defines the sum of the revenue received toward all designations in the hierarchy. Each hierarchy has only one Total designation.

**Initiative**

In a hierarchy, the second level designation must have a type of Initiative. The Initiative designation defines how to apply the revenue received toward all designations in the hierarchy, such as Operating Costs or an Endowment. You can add multiple Initiatives to a Total designation.

**Fund**

In a hierarchy, a third level designation may have a type of Fund. You may select to use a Fund designation to identify the funds raised towards a specific goal or as a tribute. Examples of Fund designations include a Scholarship Fund or Memorial Fund. You can add multiple Funds to an Initiative designation.

**Project**
In a hierarchy, a third level designation may have a type of Project. You may select to use a Project designation to identify funds raised toward a one-time expense such as the construction of a building. You can add multiple Projects to an Initiative designation.

**Program**

In a hierarchy, the third level designation may have a type of Program. You may select to use a Program designation to identify funds raised toward an ongoing expense such as a research effort or series of instructional classes. You can add multiple Programs to an Initiative designation.

When you build designation hierarchies, you can use these types to help define how to apply revenue received toward a designation. For example, you can create a hierarchy where the Total designation includes a Capital Initiative, which uses revenue received toward a Memorial Fund, a Building Project, and a Research Program.

## Add Designations and Designation Hierarchies

You can add a designation to the hierarchy of a Total designation from the Designation Hierarchy page or the Hierarchy tab of the record of the parent designation. For example, you can add the Facilities Development Initiative to the Building Total to create a designation of Building Total / Facilities Development Initiative.

> **Add a designation or designation hierarchy**

1. From Fundraising, click **Fundraising hierarchies** under **Fundraising**. The Fundraising Hierarchies page appears.
2. To add a top level designation of a new hierarchy, on the grid action bar, click **Add**.

   To add a second or third-level designation to a hierarchy, click the double arrows next to a hierarchy to expand its row. On the action bar that appears, and click **Add**.

   The Add a designation screen appears. For a second or third-level designation, the names and lookup IDs of the parent designations appear to indicate the position of the new designation in the hierarchy.
3. In the **Type** field, select the type of designation to add. For information about the available types, see **Designation Types on page 13**.

4. Enter a unique name to help identify the designation.

5. In the **Public name** field, enter how to refer to the designation in reports and correspondence.

6. To help further identify the designation, in the **Description** field, enter a description of the designation or an explanation of when to apply revenue toward it.

7. In the **Category** field, select a category to help define the designation, such as Annual or Operating.

8. In the **Lookup ID** field, enter a unique ID to help quickly search for the designation. For a second- or third-level designation, the **Lookup ID preview** field displays how the lookup ID appears with the lookup IDs of the parent designations.

9. To enhance the reporting of the designation, select the report codes to associate with the designation.
You can track any type of information with report codes, such as different schools or departments, and filter reports based on them.

10. In the Start and End date fields, select the time period associated with the designation.

While constituents can give to the designation before or after these dates, you can use this information to track when designations were created and how many gifts were received after the designation ended.

**Tip:** To prevent constituents from giving to a designation, you must make it inactive. For information about how to make a designation inactive, see [Mark a Designation as Inactive](#) on page 1.

11. Click Save. You return to the Fundraising Hierarchies page.

**Fundraising Hierarchy Search**

Each Fundraising Hierarchy you have defined in the system appears on the Fundraising Hierarchy page. To save time locating hierarchies, we recommend you use the search filters located above the grid. For example, in the Search for field, you can enter a designation, designation lookup ID, or public name. You can also sort the grid by designation, lookup ID, public designation name, and type.

**Designation Record**

From the designation record, you can view and manage information about the designation. To access a designation record from the Fundraising Hierarchies page or the Hierarchy tab of a designation record, click the designation name.

At the top of the record, profile information about the designation appears, including lookup ID and start and end dates. From a designation record, you can view and manage the goals, hierarchy, and other information associated with the designation. To help you navigate through this information, the record contains multiple tabs.

Depending on your system role and security rights, you can perform additional tasks to manage information about the designation from its record.
Search for Designations

You can search for designations from the Fundraising page by clicking **Designation search** under **Fundraising**.

*Note:* You can also access the Designation Search screen from other records, such as a revenue transaction or an appeal, when you specify the designation.

In the **Search for** field, you can enter any portion of a lookup ID, designation, or public name to return valid results. For example, when you enter "Appeal," any lookup ID, designation, or public name in your database that contains the word "Appeal" appears in the search results.

Using the Advanced search options, you can also use **VSE category**, **Use code**, **Purpose type**, **Purpose category**, **Purpose site**, and **Report code 1** and **Report Code 2** fields to narrow your search. Keep in mind, the designation, public name and lookup ID fields in the advanced search options work differently than the single **Search for** field above. In order to return fewer results, these fields return results based on what your entry "begins with." For example, when you enter "Appeal" in the advanced search option **Public name** field, only those designations that begin with Appeal appear in the results.

Select the **Include inactive** checkbox to make designations marked as inactive appear in the search results. Click **Search** to locate the designations that meet your specified criteria.
All designations that satisfy your criteria appear in the search grid. Choose the designation you want and click **Select** to open it.

**Note:** You can use additional criteria such as **Revenue designation** and **VSE subcategory** to narrow your search. To add these additional search fields to the Designation Search screen, from **Administration**, click **Search list configuration** under **Data**. On the Search list configuration page, click **Configure search list fields**. The Search List Fields page appears where you can edit the search criteria for the Designation Search screen. For information about how to edit search list settings, see **Administration**.

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**Designation Record Tabs**

The following sections describe information and tasks for each tab on a purpose or designation record.

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**Goals**

Goals are the cornerstones that enable you to effectively analyze your progress. On the Goals tab of a designation, you can add and manage goals of the designation. When you have security rights, you can specify that a Key Performance Indicator (KPI) for the total amount raised toward a goal displays along with your goal information for a purpose.

From the Goals tab, you can create and manage KPIs to track the effectiveness of the designation toward a goal. To view the KPI for a goal, click the double arrows next to a goal to expand its row. KPI details display under the row. To hide the details, click the row again. For information about how to add and manage KPIs, see **Key Performance Indicators on page 19**.

**Tip:** When you click the double arrows next to a goal to expand its row, you can click **Go to KPI** from the action bar that appears.

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**Add Goals**

On the Goals tab of a designation, you can add multiple goals. For example, a school may be responsible to raise a specific amount of money for a designation that benefits an entire university. You can enter an overall goal and separate goals for the schools.

When you add a goal for a Total designation, the goal appears as an option when you add goals to the other designations in the designation hierarchy. For more information about hierarchies, see **Fundraising Hierarchies on page 13**.

1. From the designation record, click the Goals tab.
2. On the **Goals** action bar, click **Add**. The Add a goal screen appears.
3. Enter a unique name to help identify the goal on reports and other analyses. For a designation of Total type, this name appears as an option when you add goals to other designations in its hierarchy.

4. In the **Goal** field, enter the goal amount of revenue to raise with the designation. When you do not enter an amount, the goal is $0.00.

5. Enter the start and end dates of the period in which to raise the goal amount with the designation.

6. Click **Save**. You return to the Goals tab.

**Add a goal for an Initiative designation or a Fund, Project, or Program designation**

1. On the record of the designation, click the Goals tab.
2. Under **Goals**, click **Add**. The Add a goal screen appears.
3. Select which goal of the Total designation in the hierarchy to apply to the designation.
4. In the **Goal** field, enter the goal amount of revenue to raise with the designation. When you do not enter an amount, the goal is $0.00.
5. Click **Save**. You return to the Goals tab.

**Key Performance Indicators**

With Key Performance Indicators (KPIs), you can quickly check the performance of certain aspects of your fundraising efforts. When you associate a KPI with a defined goal on a fundraising purpose or designation, the KPI displays automatically in the **Details** view on the corresponding record’s Goals tab.

You can also create KPI instances such as “Total Revenue for a Purpose” or “Total Count for a Purpose” that can be viewed on a KPI dashboard rather than on the purpose itself. These KPIs enable you to filter on all aspects of your fundraising purposes so, for example, you can create a KPI to show the total amount raised for a purpose by a business unit or school, depending on the information you track in the **Report code** fields.

![Add a KPI](image)

You can create processes to specify how often a KPI will be updated with the latest information.
**Note:** When you build a KPI directly from a fundraising purpose or designation page, the program filters the available KPI instances to include only those used in that context. However, when you build a KPI from the KPI Instances page in Analysis, be sure to select a designation or purpose goal. For example, if you are configure a KPI for the Annual Fund, and this fundraising purpose is the root of a hierarchy, you would select a “Purpose goal” type so the KPI will appear in the Details view of the fundraising purpose page. In this case, if you chose a “Designation goal” type, the KPI would not appear on the fundraising purpose page, although it would be available on the KPI Dashboard.

> **Add a fundraising purpose KPI**

This procedure explains how to add a KPI for “Total Raised Towards a Fundraising Purpose Goal” to display on a purpose's Goals tab. When you create other fundraising purpose KPIs, the workflow is similar, but you select different criteria and the KPI may appear on the KPI Dashboard instead of the purpose.

In addition to the workflow outlined in this procedure, you can also add a KPI to a goal directly from the Goals tab of a fundraising purpose.

1. From a fundraising purpose, click **Manage KPIs** under **More information**. The KPI Instances page appears.
2. Click **Add**. The Select a KPI screen appears.
3. Under **Fundraising**, click **Goals**. Select **Total Raised Towards a Fundraising Purpose Goal** and click **OK**. This KPI will appear on the fundraising purpose Goals tab.
4. Click **OK**. The New KPI Instance screen appears.

5. On the General tab, enter a KPI name and description, and select a folder for the KPI.
6. On the Criteria tab, select a fundraising purpose for this KPI. The fundraising purpose from which you are creating the KPI is the default in the **Purpose** field. You can search for and select a different purpose.
7. In the **Goal** field, select the goal for which you want to create a KPI. Only goals defined for the selected purpose appear.
8. On the Preview tab, select today's date to see the current status of how much revenue has been raised.
9. Click the Goal tab.
10. The **Overall goal** defaults from the selected goal for which you are creating the KPI. In the corresponding field, select “High values are good.”

11. In the Good target and Satisfactory target fields, you can enter amounts or percentages to indicate warnings for under-performance when the KPI displays. The color bar displays the progress.

12. You can add milestones that contain dates and values to your goal.

13. On the History tab, select how you want to handle the history records generated with each instance update. You can select **Archive all values** to keep all instance values or **Archive only the last “X” values** to save only a select number of instance values. Your selection here determines how many values for the KPI instance the program saves and uses to create a trend graph when the KPI instance displays.

14. Click **Save**. You return to the fundraising purpose. Before you can view the actual KPI on the fundraising purpose, you must generate values for it.

> **Generate values for a Fundraising Goal KPI instance**

1. From the Goals tab of a fundraising purpose, select a goal for which you created a KPI and click **Update KPI value**. The Update KPI screen appears.

2. To view data based on the current date, select **Process once using current date**. This creates one history record relative to the current date.

   To enter specific date information, complete the following steps:

   a. Select **Back-date**. This creates several history records relative to the date determined by the interval provided, such as every 3 months or every 7 days. For example, back-dating a KPI between 1/1/2014 and 1/1/2015 with an interval of every 3 months creates four history records—one for each quarter.

   **Note:** Back-dating is typically used for new KPI instances, when trend information does not exist. After you create a KPI instance, you can update it by scheduling a business process. Each time the process runs, the values are updated to reflect the most recent data.

   b. In the **From** field, enter the start date from which you want to view data.

   c. In the **To** field, enter the end date to which you want to view data.
In the **Calculate value every** fields, select how often you want to take data snapshots. For example, if in the **From** and **To** fields, you select to view data for a year, in the **Calculate value every** fields, you can select to view information for every 3 months.

**Warning:** Back-dating a KPI erases any values that fall within the specified date range previously stored for the selected KPI instance.

3. Click **Start**. An updated version of the selected KPI instance appears.

When you click the double arrows next to the goal for which you created this KPI instance from the Goals tab, KPI details appear.

### Alternate Lookup IDs for Designations

When you add a designation, you specify a lookup ID. This primary lookup ID appears in the **Lookup ID** field on the designation record. From the Lookup IDs tab of a designation record, you can manually assign alternate lookup IDs to the record. For example, if you previously used a different system, you can assign the ID associated with the record in this system as an alternate lookup ID.

You can create as many alternate lookup IDs as necessary and use the IDs when you perform a designation search. For information about how to search for a designation, see **Search for Designations on page 17**.

**Add a lookup ID**

1. From the Lookup IDs tab on a designation record, click **Add**. The Add alternate lookup ID screen appears.
2. In the **Type** field, select the type of alternate lookup ID to add.
3. In the **Lookup ID** field, enter an alternate lookup ID.

**Note:** You can enter only one lookup ID for each type.

4. Click **Save**. You return to the designation record.

### Hierarchies

The Hierarchy tab appears on the record of a Total designation. Under **Fundraising hierarchy**, you can view the designations included in the hierarchy that support the Total designation.

To view only active designations in the hierarchy, click **Filter**, select **Only show active hierarchies**, and click **Apply**. To remove the filter, click **Reset**. To view additional information about a designation in the hierarchy, click the designation name. The designation record appears. For information about the items on this record, see **Designation Record on page 16**.

From this tab, you can add and manage designations on the hierarchy as necessary.
GL Mapping Tab

To successfully post transactions, you must set up GL Ledger information, such as accounts, transaction mappings, and segment mappings in Administration.

When you create segment mappings for items, such as appeals or events, the GL Mapping tab appears on the item's record. For example, once you select appeal as a segment in an account structure, when you view the appeal record, the GL Mapping tab appears. From the GL Mapping tab, you can view the segment value and edit the mapping if necessary.

**Note:** You create segment mappings in Administration. To access the Map Segment page, select an account system from the GL Ledger Setup page. From an account system page, click Define Segment Mappings.

To view and manage the GL Ledger mapping of an item, select the GL Mapping tab on the item’s record. Additional examples of items with potential segment mappings are: fundraising purposes, events, and membership levels.

**Note:** The GL Mapping tab does not appear on records that are used as segments in more than one account structure within the database.

When you apply a revenue transaction toward an item, such as a designation, the GL mapping information automatically appears as a default on the revenue record. From the revenue record’s GL Mapping tab, you can edit the segment mapping as necessary.

**Edit mapping**

1. On the record of an item such as a designation or appeal, select the GL Mapping tab.
2. Under GL mapping, click Edit. The Edit mapping screen appears.
3. Select a different segment value to associate with this item.
   
   When you edit a segment value from the Edit mapping screen, the value is automatically updated on the Map Segment page in Administration. To access the Map Segment page, click Define Segment Mappings on the GL Ledger Setup page of Administration.
4. Click Save. You return to the GL Mapping tab.

Designation Attributes

You can use attributes to store details about a designation when no field or tab exists for the information. Attributes help track the information that best meets your organization’s needs. For example, you may use attributes to record additional reporting codes. To view the attributes associated with a designation, select the Attributes tab.

**Note:** The Attributes tab appears only if your system administrator configured designation attributes in Administration.

For each designation attribute, you can view and manage the value, group, valid date range information, and comments entered about the attribute.
Add Designation Attributes

You can add attributes to store details about a designation when no field or tab exists for that information. For example, you may add an attribute to record additional reporting codes.

**Add a designation attribute**

1. From a designation record, select the Attributes tab.
2. Click Add. The Add designation attribute screen appears.
3. In the Category field, select the type of attribute to assign to the designation. Your organization sets up attribute categories in *Administration*.
4. In the Value field, enter or select the value of the attribute to assign to the designation.
5. If the attribute applies to the designation for a specific duration, select start and end dates for the attribute.
6. In the Comments field, enter any additional information about the attribute.
7. Click Save. You return to the Attributes tab.

Fundraising Purpose Attributes

You can use attributes to store details about a fundraising purpose when no field or tab exists for that information. Attributes help track the information that best meets your organization's needs. For example, you may use attributes to record the earnings amount or the number of shares of an endowment. To view the attributes associated with a fundraising purpose, select the Attributes tab.

*Note:* The Attributes tab appears only if your system administrator configured fundraising purpose attributes in *Administration*.

For each fundraising purpose attribute, you can view and manage the value, group, valid date range information, and comments entered about the attribute.

**Add attributes for a fundraising purpose**

1. From a fundraising purpose, select the Attributes tab.
2. Click Add. The Add fundraising purpose attribute screen appears.
3. In the Category field, select the type of attribute to assign to the fundraising purpose. Your organization sets up attribute categories in *Administration*.
4. In the Value field, enter or select the value of the attribute to assign to the fundraising purpose.
5. If the attribute applies to the fundraising purpose for a specific duration, select start and end dates for the attribute.
6. In the Comments field, enter any additional information about the attribute.
7. Click **Save**. You return to the Attributes tab.

## Gift Fees

Your organization may use a percentage of payment amounts received as a gift fee, for example, to cover operating costs. When your organization enables gift fees, the Gift Fees tab appears on the record of a fundraising purpose. To view and manage the gift fees applied to payments made toward the fundraising purpose, select this tab.

**Note:** In *Revenue*, you can enable default gift fees and determine the types of revenue to which these fees apply. You can manage default gift fees in *Revenue*.

Some fundraising purposes may require different fees than your organization’s default gift fees. Under **Gift fee option**, you can view whether the program applies gift fees to payments made toward the fundraising purpose and the type of payment applications to which the fees apply. You can select whether or not to apply gift fees to this purpose’s revenue and edit the applications to which the fees apply.

When gift fees are enabled, you can configure multiple gift fees based on the payment application amount. For example, you may charge a higher fee for larger payment transactions. Under **Gift fees**, you can view and manage the gift fees your organization applies to payments made toward the fundraising purpose.

### Edit Gift Fee Options for a Fundraising Purpose

From a fundraising purpose record, you can edit the gift fee options for payments made toward the purpose. You can select to not apply gift fees to these payments or apply the gift fees to only specific payment application types.

**Note:** You must enable default gift fees in *Revenue* for the Gift Fees tab to appear on a fundraising purpose.

> **Edit gift fee options**

1. From a fundraising purpose, select the Gift Fees tab.
2. On the **Gift fee options** action bar, click **Edit**. The Edit gift fee options screen appears.
3. Select whether to apply gift fees to payments made toward the fundraising purpose.
   - When you select **Yes**, select the types of payment applications to which fees apply.
4. Click **Save**. You return to the fundraising purpose record.

**Note:** To return gift fees to the default settings you defined in *Revenue*, click **Restore defaults** on the Gift Fees tab.
Restore Default Settings for Gift Fee Options

After you edit the gift fee options for a fundraising purpose, you can return the gift fees to the default settings you defined in Revenue.

*Note:* In Revenue, you can enable default gift fees and determine the types of revenue to which these fees apply. You can manage default gift fees in Revenue.

- **Restore the default gift fee options**
  1. From a fundraising purpose, select the Gift Fees tab.
  2. On the Gift fee option action bar, click Restore defaults. A confirmation message appears.
  3. Click Yes. You return to the fundraising purpose record.

Edit Gift Fees for a Fundraising Purpose

From a fundraising purpose record, you can edit the gift fees applied to payments made toward the selected purpose. You can determine the minimum amount to which the fee applies and the fee amount as a percent.

- **Edit gift fees**
  1. From a fundraising purpose, select the Gift Fees tab.
  2. On the Gift fees action bar, click Edit. The Edit gift fees screen appears.
  3. For each gift fee, enter the minimum amount of the payment for which to charge the fee and the percentage of the payment amount to apply to the fee. For example, if your organization applies 5% as a gift fee for each donation between $5 and $100, enter “$5.00” in the Minimum payment amount column and “5” in the Gift fee (%) column.
  4. Click Save. You return to the fundraising purpose record.
Donor Challenges

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A donor challenge is a fundraising tool to help increase support for a specific cause. A major donor or corporate sponsor can pledge a large sum to challenge the organization to raise a specific amount from other donors. A donor challenge can have an internal sponsor rather than an external one. For example, the president’s office can challenge the organization to raise an amount that the department
will match. The program includes two types of donor challenges: "Match per gift" and "Lump sum match."

With "Match per gift" challenges, the sponsor matches gifts multiple times during the course of the challenge. Donors receive recognition credit for the matching challenge funds, and you select the type of recognition credit to use. The matching funds go to the same designation as the gifts unless you specify otherwise in the designation mapping on the Designations tab of the donor challenge record. For individual donors to receive recognition credit for matching challenge funds, the challenge type must be "Match per gift."

With "Lump sum match" challenges, the sponsor pays a lump sum after the challenged amount is raised. Individual donors do receive recognition credit for the matching challenge funds. The matching funds go to the designations you select when you add the challenge.

Add Donor Challenges

Before you add a donor challenge, you must have basic information, such as the funding source and sponsor, start and end dates, and challenge type. The program includes two types of donor challenges: "Match per gift" and "Lump sum match."

Add a donor challenge

1. From Fundraising, click **Add a donor challenge.** The Add a donor challenge screen appears.

![Add a donor challenge screen]

2. Enter a name for the challenge.

3. In **Funding source,** select "Internal" or "External." For example, a challenge issued by a major donor would be external, whereas a challenge issued by an endowment at your organization would be internal.

4. In **Funding sponsor** for external funding sources, search for the sponsor.
In **Funding sponsor** for internal funding sources, select or enter the name of the sponsor. For internal funding sources, can add entries directly to this field.

5. Enter start and end dates for the challenge.

**Warning:** Donor challenges cannot be open-ended; you must specify start and end dates. After the challenge’s end date has passed, the challenge is considered inactive.

6. In **Pay pledges within**, specify when pledges payments must be paid to qualify for the challenge.

   Pledge payments for pledges associated with schedules outside the time frame are not eligible for the challenge.

7. Enter a description for the challenge.

8. In the **Type** field, select the type of donor challenge: "Match per gift" or "Lump sum match."

   With "Match per gift" challenges, the sponsor matches gifts multiple times during the course of the challenge. Donors receive recognition credit for the matching challenge funds, and you select the type of recognition credit to use. The matching funds go to the same designation as the gifts unless you specify otherwise in the designation mapping on the Designations tab of the donor challenge record. For individual donors to receive recognition credit for matching challenge funds, the challenge type must be "Match per gift."

   With "Lump sum match" challenges, the sponsor pays a lump sum after the challenged amount is raised. Individual donors do receive recognition credit for the matching challenge funds. The matching funds go to the designations you select when you add the challenge.

9. In the **Total funds** field, enter the total amount of the matching challenge funds.

10. In the **Matching portion** field, select whether to match the full gift amount or the tax-deductible portion only.

11. In the **Min gift amount** field, enter the minimum gift amount that receives a match. When the donor challenge matches any gift, no matter how small, leave this as zero.

12. In the **Max match per gift** field, enter the maximum gift that receives a match.

   For example, some challenges may limit how much to match for individual gifts, so gifts above the limit are matched at the maximum match amount.

   The program interprets "0" as blank. When there is no maximum, leave the field set as zero.

13. In the **Recognition credit** field, for "Match per gift" donor challenges, select the type of recognition credit to use when the donor gets credit for the matching challenge funds. For the individual donor to receive recognition credit for the challenge funds, the challenge type must be "Match per gift."

14. In the **Matching designation** field, for "Lump sum match" donor challenges, select the designations for the lump sum payment of the matching challenge funds.

15. You can include all payment types as eligible for the donor challenge, or you can exclude specific payment types, such as memberships.

16. Click **Save**. The Donor Challenge page appears.
Search for Donor Challenges

After you add donor challenges, you can search for them based on criteria such as name or type. From Fundraising, click Donor challenge search. On the Donor Challenge Search screen, enter criteria for the donor challenge and click Search. The donor challenges that meet your criteria appear. Choose the challenge and click Select. When necessary, you can add a donor challenge from this screen. Inactive challenges are ones with end dates in the past.

Donor Challenge Record

After you add a donor challenge, you can manage details, such as the criteria for eligible revenue. The summary view displays information about the funds that are encumbered. Funds are encumbered when they are eligible for the challenge. The summary view also displays the revenue approved as matches for the challenge, in addition to the available challenge funds remaining.

Edit Donor Challenge Details

When necessary, you can edit basic information about a donor challenge.

From a donor challenge record, select the Challenge Details tab and click Edit. The Edit donor challenge screen appears. Make any necessary changes and click Save. You return to the donor challenge record.

Note: After you add a challenge, you cannot change the challenge type.

Update Donor Challenge

On a donor challenge record, when you click Update donor challenge under Tasks, the program searches for any revenue that matches the challenge criteria encumber (or set aside) the funds. After the task runs, any qualified revenue appears on the Encumbered Funds tab. You can then approve the match for the encumbered funds. After you approve the match, the revenue moves to the Matched Funds tab.

Note: Qualified pledges are also encumbered. When the corresponding pledge payments are added, they are encumbered and can be approved and moved to the Matched Funds tab.

Typically, your organization sets up the Update donor challenge process to run automatically at regular intervals. Only when the challenge is close to being met would you need to run the process manually to check for revenue. For more information, see Update Donor Challenge Business Process on page 36.

Encumbered Funds

Revenue is considered encumbered when it meets the donor challenge criteria. The Encumbered Funds tab displays all revenue that is eligible for the donor challenge. Your organization should set up
the Update donor challenge business process to search for eligible revenue; however, you can add revenue to the list manually as well. For more information, see Update Donor Challenge Business Process on page 36.

**Note:** Qualified pledges can also be encumbered. When the corresponding pledge payments are added, they can be encumbered and can then be approved and moved to the Matched Funds tab.

You can manually encumber any revenue for the challenge. After you review the encumbered funds and approve the matches, the funds move to the Matched Funds tab.

From the Encumbered Funds tab, you can edit the match details for encumbered funds. You can also manually remove funds that you do not want to include in the challenge.

### Add Eligible Revenue to the Challenge

The Update donor challenge business process searches for eligible revenue, but you can also manually add any revenue to the Encumbered Funds tab. When you encumber revenue manually, you can override the donor challenge criteria.

Qualified pledges can also be encumbered. When the corresponding pledge payments are added, they can be encumbered and can then be approved and moved to the Matched Funds tab.

**Note:** For more information on the Update donor challenge business process, see Update Donor Challenge Business Process on page 36.

#### Encumber funds manually

1. On the Encumbered Funds tab of a donor challenge record, click Add, Gift. The Add gift screen appears.
2. In the Gift field, search for the revenue to add.
3. Click Save. The revenue appears on the Encumbered Funds tab.

The revenue is encumbered and included in the Encumbered funds field in the summary view.

### Add Reserved Funds

A constituent may ask to participate in a challenge, but without making a payment or signing a formal pledge agreement. In this case, you can add reserved funds as a placeholder for the constituent. The encumbered amount you enter for the constituent is counted in the Encumbered funds field in the summary view.

To add reserved funds, click Add, Reserved funds on the Encumbered Funds tab. Select the constituent and enter the amount to encumber.

**Note:** After you enter a pledge or the revenue you reserved for the challenge, you must manually delete the reserved funds. Challenge funds held in reserve are not available for other gifts until you remove the reserved funds.
Edit Eligible Encumbered Revenue

You can edit match details for eligible gifts on the Encumbered Funds tab of a donor challenge record. From the tab, click the double arrows next to a gift to expand its row. From the action bar that appears, click Edit. The Edit donor challenge match screen appears.

You can edit the encumbered amount, as well as the encumbered designation (Lump sum match) or Recognition credit (Match per gift). Edit the information as necessary and click Save. Changes to the encumbered amount are reflected in the Encumbered funds total in the summary view.

Approve Eligible Revenue

After funds are encumbered for a donor challenge, you must approve the matches for the funds to be officially counted, and for donor challenge claims to be entered. After you approve the eligible funds, the revenue moves to the Matched Funds tab.

Remove Eligible Encumbered Revenue

If you decide an encumbered gift should not be eligible for the challenge, you can manually remove it. For example, you may cultivate a major gift for several years, prior to a donor challenge. When you receive that major gift revenue, it might meet the criteria for the challenge, but you may want to manually remove it so it is not counted toward the challenge and doesn’t use the matched funds.

To remove encumbered funds, from the Encumbered Funds tab, click the double arrows next to a gift to expand its row. From the action bar, click Remove gift. The gift is removed and is no longer counted in the Encumbered funds field in the summary view. To view the gifts that you removed, change the filter on the Encumbered Funds tab to include "Removed" and click Apply. You can re-encumber the gift when necessary. For more information, see Re-encumber Revenue on page 32.

Re-encumber Revenue

When you remove revenue on the Encumbered Funds tab, you can re-encumber it. Change the filter on the Encumbered Funds tab to include "Removed" and click Apply. Click the double arrows next to the revenue to re-encumber to expand its row. From the action bar that appears, click Encumber gift. The revenue is re-added and is now counted in the Encumbered funds field in the summary view.

Matched Funds

The Matched Funds tab displays all revenue approved as matches for the donor challenge. For "Match per gift" challenges, when you approve a match, you can enter revenue from the external challenge sponsor as a donor challenge claim payment.
Remove Matched Funds

You can remove an approved match from the challenge unless you added a donor challenge claim payment for the match. On the Matched Funds tab, click the double arrows next to the revenue to expand its row. From the action bar that appears, click **Remove match**.

Designations for Donor Challenges

On the Designations tab for a donor challenge record, you select the designations that qualify for the donor challenge. Only revenue for those designations is considered eligible by the Update donor challenge process. However, you can manually add revenue to the challenge when it doesn’t meet the criteria.

For a "Match per gift" challenge, you also define the designation mappings for the matching funds on the Designations tab. You may want matching revenue to go to the same designation as the original revenue. However, you can map eligible revenue to different designations. For example, when the challenge’s sponsor wants the matching revenue to go to the "Memorial garden" designation, you can map the matching revenue to the "Memorial garden" designation. The donor might make a gift to the "Building fund" designation, but the challenge’s matching revenue goes to the "Memorial garden" designation.

For a "Lump sum match" challenge, you select the designation that receives the challenge’s matching revenue when you add the challenge. On the Designations tab, you select which designations are eligible for the challenge.

Associate Designations with Challenges

For donor challenges, you select which designations qualify or are eligible for the challenge. For "Match per gift" challenges, you must also select the designations to use for the challenge’s matching revenue. You can add designations to a challenge one at a time or use selections of designations.

- **Add a designation for a “Match per gift” challenge**
  1. From a donor challenge record, select the Designations tab.
  2. Click **Add, Designation**. The Add designation mapping screen appears.
  3. In the **Original gift designation** field, enter the designation which qualifies for the challenge. Revenue with this designation is eligible for the challenge.
  4. In the **Matching funds designation** field, enter the designation that receives the challenge’s matching revenue. When revenue from the challenge sponsor is entered through a donor challenge claim, it uses this designation.
  5. Click **Save**. You return to the Designations tab.

- **Edit a designation for a “Match per gift” challenge**
  1. From a donor challenge record, select the Designations tab.
2. Click the double arrows next to a designation to expand its row. From the action bar that appears, click Edit. The Edit designation mapping screen appears.

   **Note:** You cannot edit designations for "Lump sum match" challenges. When a designation no longer applies, you must delete it from the challenge.

3. In **Original gift designation**, the designation which qualifies for the challenge is displayed. Revenue with this designation is eligible for the challenge.

4. In **Matching funds designation**, enter the designation that receives the challenge’s matching revenue. When revenue from the challenge sponsor is entered through a donor challenge claim, it uses this designation.

5. Click **Save**. You return to the Designations tab.

### Add a designation for a “Lump sum match” challenge

1. From a donor challenge record, select the Designations tab.
2. Click **Add, Designation**. The Add an eligible designation screen appears.
3. In **Original gift designation**, enter the designation which qualifies for the challenge. Revenue with this designation is eligible for the challenge.

   **Note:** When you create "Lump sum match" challenges, you select the designation that receives the challenge’s matching revenue when you add the challenge. On the Designations tab, you simply specify the designations that qualify for the challenge.

4. Click **Save**. You return to the Designations tab.

## Add Selections of Designations

For donor challenges, you select which designations qualify or are eligible for the challenge. For "Match per gift" challenges, you must also select the designations to use for the challenge’s matching revenue. To handle large numbers of designations, you can add them by using selections of designations.

### Add a selection of designations for a “Match per gift” challenge

1. From a donor challenge, select the Designations tab.
2. Click **Add, Selection**. The Add designations screen appears.
3. Search for the selection of designations that qualify for the challenge.
4. In the **Default matching designation** field, enter the designation that receives the challenge’s matching revenue. When you enter revenue from the challenge sponsor through a donor challenge claim, it uses this designation.

5. Click **Save**. You return to the Designations tab.

### Add a selection of designations for a “Lump sum match” challenge

1. From a donor challenge record, select the Designations tab.
2. Click **Add, Selection**. The Add eligible designations screen appears.

3. Search for the selection of designations that quality for the challenge. Revenue with any of these designations is eligible for the challenge.

   **Note:** When you create "Lump sum match" challenges, you select the designation that receives the challenge’s matching revenue when you add the challenge. On the Designations tab, you simply specify the designations that qualify for the challenge.

4. Click **Save**. You return to the Designations tab.

### Memberships for Donor Challenges

The Memberships tab displays memberships, if any, which qualify for the donor challenge. Revenue associated with memberships are eligible and appear on the Encumbered Funds tab with the Update donor challenge process.

### Associate Memberships with Challenges

For donor challenges, you can specify which memberships qualify or are eligible for the challenge.

#### Associate a membership with a challenge

1. From a donor challenge record, select the Memberships tab.
2. Click **Add**. The Add membership mapping screen appears.
3. In the **Program** field, select the membership program.
   
   Revenue associated with the membership program is eligible for the challenge.
4. In the **Level** field, select a specific level of the membership program. In this case, revenue associated with the specific level of the membership program is eligible for the challenge.
5. In the **Matching funds designation** field, for a "match per gift" challenge, search for and select the designation that receives the challenge’s matching revenue. When revenue from the challenge sponsor is entered through a donor challenge claim, it uses this designation.
6. Click **Save**. You return to the Memberships tab.

#### Edit a membership for a “Match per gift” challenge

1. From a donor challenge record, select the Memberships tab.
2. Click the double arrows next to a membership to expand its row. From the action bar that appears, click **Edit**. The Edit membership mapping screen appears.

   The membership program and level which qualifies for the challenge are displayed. Revenue with for these programs and levels is eligible for the challenge.

   **Note:** You cannot edit memberships for "Lump sum match" challenges. When a membership no longer applies, you must delete it from the challenge.
3. In the **Matching funds designation** field, search for and select the designation that receives the challenge’s matching revenue. When revenue from the challenge sponsor is entered through a donor challenge claim, it uses this designation.

4. Click **Save**. You return to the Designations tab.

### Remove Memberships from Challenges

You can remove memberships from a donor challenge when revenue from the associated membership programs is no longer eligible for the challenge. From the Memberships tab, click the double arrows next to the membership program to expand its row. From the action bar that appears, click **Delete**. This removes the membership from the challenge, but does not delete it from the database. You can add a membership back when necessary.

### Update Donor Challenge Business Process

You can manually encumber revenue one transaction at a time for a donor challenge. You can also run a business process to automatically encumber revenue. When you run the Update donor challenge process, the program searches for revenue that meets the challenge criteria. The revenue appears on the Encumbered Funds tab of the challenge.

**Note:** Qualified pledges are also encumbered by the process. When the corresponding pledge payments are added, they are encumbered and can be approved and moved to the Matched Funds tab.

From the Update donor challenge processes page, you can access a process, add or edit a process, start a process, or delete a process.

### Add Update Donor Challenge Processes

When you add an Update donor challenge process, you select the donor challenges to include. The process automatically encumes revenue that meets the criteria of the donor challenges.

**Note:** Qualified pledges are also encumbered by the process. When the corresponding pledge payments are added, they are encumbered and can be approved and moved to the Matched Funds tab.

> **Add an Update donor challenge process**

1. From **Fundraising**, click **Update donor challenges**. The Update donor challenges page appears.

2. Click **Add**. The Add a donor challenge update process screen appears.

3. Enter a name for the process.

4. Select the group of donor challenges to include in the process. When the selection or query does not exist, you can add one from the Selection Search screen.
5. Click **Save**.

You can now run the Update donor challenge process to encumber revenue that meets the criteria of the donor challenges.

**Start Update Donor Challenge Processes**

When you add an Update donor challenge process, you select the donor challenges to include. The process automatically encumbers revenue that meets the criteria of the donor challenges. After you add a process, you can run the process to encumber revenue for the donor challenges.

**Note:** Qualified pledges are also encumbered by the process. When the corresponding pledge payments are added, they are encumbered and can be approved and moved to the Matched Funds tab.

From Fundraising, click **Update donor challenges**. The Update donor challenges page appears. Click the double arrows next to a process to expand its row. From the action bar that appears, click **Start process**. The process runs and the Update donor challenge process page appears.

**Note:** You can view a process and its history without running the process. From the Update donor challenges page, click the name of a process.

**Update Donor Challenge Process Status**

On the Recent Status tab, you view the details of the most recent instance of the Update donor challenge process. These details include the status; the start time, end time, and duration; the person who started the process; the name of the server; the total number of records processed; and how many records processed successfully and how many were exceptions.

**Update Donor Challenge Process History**

On the History tab, you view the history for each run of the Update donor challenge process. The details in the **History** grid include the status; the start time, end time, and duration; the person who started the process; and the name of the server. This information generates each time you run the process. Therefore, it is likely you have multiple rows of information in this grid. You can delete items from the history as needed.

**Update Donor Challenge Process Job Schedules**

Use job schedules to run a process automatically. When you create a job schedule, you specify the frequency and scheduled time of the occurrence. Using the job schedule and SQL Server, the program runs the process at the scheduled time and interval.

**Note:** This is typically completed by a system administrator at your organization.
Add Job Schedules

You can create a job schedule so the update donor challenge process can run at a specified interval, usually at night or during a time when the server is not as busy.

Create Job Screen

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job name</td>
<td>Enter a name for the job schedule.</td>
</tr>
<tr>
<td>Schedule type</td>
<td>Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever SQL Server Agent service starts; or whenever the computer is idle according to SQL Server Agent.</td>
</tr>
<tr>
<td>Enabled</td>
<td>By default, the scheduled process is active. To suspend the process, clear this checkbox.</td>
</tr>
<tr>
<td>One-time occurrence</td>
<td>For a process that runs just once, select the date and time to run it.</td>
</tr>
<tr>
<td>Frequency</td>
<td>For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field.</td>
</tr>
<tr>
<td></td>
<td>For a weekly process, select the day of the week to run it.</td>
</tr>
<tr>
<td></td>
<td>For a monthly process, select the day of the month to run it.</td>
</tr>
<tr>
<td>Daily frequency</td>
<td>For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.</td>
</tr>
<tr>
<td></td>
<td>To run a process once, select Occurs once at and enter the start time.</td>
</tr>
<tr>
<td></td>
<td>To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.</td>
</tr>
<tr>
<td>Start date</td>
<td>For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date.</td>
</tr>
</tbody>
</table>
Fundraising Effectiveness Project

To measure and compare your organization’s fundraising gain and loss ratios year to year and against similar organizations, you can participate in the Association of Fundraising Professionals (AFP) annual Fundraising Effectiveness Project (FEP) survey. The survey collects consecutive annual data from many organizations throughout the United States. As a participant, your organization receives the annual report of compiled data from AFP, which you can use to help identify areas to improve and to help increase revenue.

From Administration, you can create and run a submission process to compile the information required for the survey and submit it electronically to AFP. The process submits only statistics of your organization’s overall fundraising efforts, such as the number of new, repeat, and lapsed donors. The process does not submit personal or specific information about your constituents, and AFP retains your results in an anonymous format. For additional analysis, the process also submits your statistics to Blackbaud so you can examine your effectiveness at any time. After you create an FEP submit process, you can view and manage it from its status page.

Fundraising Effectiveness Project Process

To submit information to the Fundraising Effectiveness Project (FEP) survey, you create an FEP process. When you first add an FEP process, you enter information about your organization. The Association of Fundraising Professionals (AFP) uses this information to determine similar organizations to use for
comparison purposes. For accuracy, you can update information such as expenses and staff head count each year before you submit your fundraising data to AFP. To view and manage your organization’s FEP process, from Administration, click Fundraising Effectiveness Project. The Fundraising Effectiveness Project page appears.

On this page, the processes your organization uses to submit information to the FEP survey appears. To view information about a process, such as the date it was last run or the contact person associated with the process, click the double arrows next to a process to expand its row. Below the action bar, details of the process appear. To view additional information about a process, such as previous instances or job schedules, click the name of the process. The status page for the process appears.

**Tip:** For more information about the AFP as it relates to the FEP, refer to the [AFP web site](#).

#### Add an FEP process

1. From Administration, click Fundraising Effectiveness Project. The Fundraising Effectiveness Project page appears.

2. On the action bar, click Add. The Add a fundraising effectiveness project process screen appears.
3. Enter a unique name and description to help identify the process.

4. Under **Identification and contact information**, enter your organization's name. By default, the organization name configured for your database appears.

5. Enter the identification number for your organization, such as the IRS Employer Identification Number (EIN), Canadian CRA Registration Number, or Blackbaud site identification number.

6. Select the country and enter the Zip code for your organization.

7. Enter the name, phone number, and email address of the individual at your organization the AFP can contact with questions about your FEP data.

8. Under **Organizational and professional staff affiliations**, select the groups of which your organization is a member. To select an affiliation not listed, select **Other** and enter the name of the group.
9. Under **Other information**, enter the year your organization started its fundraising development program.

10. In the **Subsector or type of organization** field, select the category that best describes your organization.

11. Enter your organization's financial expenses and the number of full-time professional staff, support staff, consultants, and volunteer fundraisers at your organization for the second, later time period in the comparison.

**Note:** When you run the submit process, you define two time periods to compare, such as two consecutive years. The AFP uses this information to compare the period's expenses against your organization's expenses during previous periods and against similar organization during the same period.

**Tip:** Financial expenses may be pulled from your development office budget, audited financial information, IRS Form 990, or CRA Form T3010A.

12. Under **Comments**, enter any additional information to send to AFP.

13. Click **Save**. You return to the Fundraising Effectiveness Project page.

**Edit a Fundraising Effectiveness Project Submit Process**

Before you run a process to send information to the AFP for the FEP survey, you must edit the submit process to define the two time periods to include in the comparison, such as year-to-year. When you select the two periods, you can preview the results to submit to the survey, which includes information such as the number of new, recaptured, and lapsed donors.

**Warning:** For the most meaningful data, we recommend you update the fundraising expenses and staff head count numbers for the later period before you submit data to AFP.

**Edit an FEP submit process**

1. Access the status page of the FEP process to edit.

2. Under **Tasks**, click **Edit process**. The Edit a fundraising effectiveness project submit process screen appears.
3. Under **Previous period**, select the start and end dates of the earlier of the consecutive years. The duration cannot exceed one year.

4. Under **Current period**, select the start and end dates of the later of the consecutive years. The duration of cannot exceed one year, and the end date cannot exceed one year from the end date of the previous period.

5. To view the results and statistics to send to AFP, select the type of constituents to include in the results and click **Preview**. You can include all constituents or only individual or organization constituents.

6. Click **Save**. You return to the process status page.

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**Start a Fundraising Effectiveness Project Submit Process**

To send information to AFP for the FEP survey, you must run an FEP process. When you run a process, you can define the two time periods to include in the comparison, such as year-to-year, and select the type of constituents to include in the survey.

**Warning:** For the most meaningful data, we recommend you update the fundraising expenses and staff account numbers for the later period before you submit data to AFP.
Run a FEP submit process

1. From Administration, click Fundraising Effectiveness Project. The Fundraising Effectiveness Project page appears.

2. In the grid, click the double arrows next to a process to expand its row. From the action bar that appears, click Start process. The Run the fundraising effectiveness project submit process screen appears.

3. To view the results and statistics to send to AFP, define two time periods to compare, such as two consecutive years.

The AFP uses the financial expense information you specified (when adding a process) to compare the period's expenses against your organization's expenses during previous periods and against similar organization during the same period.

4. Select the type of constituents to include in the results, and click Preview. You can include all constituents or only individual or organization constituents.

Warning: When you click Send, you agree for Blackbaud to send data, on behalf of your organization, to AFP for the FEP survey. AFP retains this data in an anonymous format for trending and analysis purposes for the life of the FEP.

5. Click Send. The program electronically sends your information to AFP. You return to the Fundraising Effectiveness Project Submit Process List page.

Fundraising Effectiveness Project Process Status Page

When you add an FEP process, the program automatically creates a status page for the process. From the status page, you can view and manage the process. To access the status page, on the Fundraising Effectiveness Project Submit Process List page, click the name of the process you want to view.

From the status page, you can define the time periods to compare and submit information to the Association of Fundraising Professionals (AFP). Depending on your system role, you can also delete an FEP process from its status page.

You can also view information about the most recent instance of the process, its previous instances, and any job schedules created for the process. To help you navigate through the information, the status page includes multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.
History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a Status of "Did not finish." To filter the records that appear in the grid, click Filters. The Status field and Apply button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click Refresh.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history. To delete a status record, select it and and click Delete.

➤ Delete a status record from the History tab

1. On the History tab of the process status page, click the double arrows beside a status record and click Delete. A confirmation message appears.

   **Note:** You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the Status field, and click Apply. Only completed instances appear in the grid.

2. Click Yes. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click Refresh.
Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight.

*Note:* To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.
Create a job schedule

1. On the Job schedules tab of the process, click Add. The Create job screen appears.

2. In the Job name field, enter a name for the scheduled process.

3. By default, the schedule is active. To suspend it, clear the Enabled checkbox.

4. In the Schedule type field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever SQL Server Agent service starts; or whenever the computer is idle according to SQL Server Agent. Your selection determines which other fields are
enabled.

a. For a process that runs once, select the date and time to run it.

b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.

c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

5. Click **Save**. You return to the Job schedules tab.

### Edit Job Schedules

After you create a job schedule for a process, you can update it as necessary. For example, you can adjust its frequency. You cannot edit the package selected to create the job schedule. To edit a job, select it and click **Edit**.

> **Edit a job schedule**

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, refer to [Create Job Screen on page 48](#).

2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.

3. Click **Save**. You return to the Job schedules tab.

### Create Job Screen

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job name</strong></td>
<td>Enter a name for the job schedule.</td>
</tr>
<tr>
<td><strong>Schedule type</strong></td>
<td>Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever SQL Server Agent service starts; or whenever the computer is idle according to SQL Server Agent.</td>
</tr>
<tr>
<td><strong>Enabled</strong></td>
<td>By default, the scheduled process is active. To suspend the process, clear this checkbox.</td>
</tr>
</tbody>
</table>
#### Screen Item Description

<table>
<thead>
<tr>
<th>Screen Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-time occurrence</td>
<td>For a process that runs just once, select the date and time to run it.</td>
</tr>
<tr>
<td>Frequency</td>
<td>For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.</td>
</tr>
<tr>
<td>Daily frequency</td>
<td>For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.</td>
</tr>
<tr>
<td>Start date</td>
<td>For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date.</td>
</tr>
</tbody>
</table>

#### Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as any changes made to it outside the program. To delete a job schedule, select it and click **Delete**.

> **Delete a job schedule**

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

#### Fundraising Effectiveness Project Statistics

To measure and compare your organization’s fundraising gain and loss ratios year to year and against similar organizations, you can participate in the Association of Fundraising Professionals (AFP) annual Fundraising Effectiveness Project (FEP) survey. The survey collects consecutive annual data from many organizations. When you run the FEP submit process, the program compares the payment activity during the selected time periods, including donations and payments toward commitments such as pledges and recurring gifts, and breaks down the activity into gains and losses based on the giving behavior of the constituents associated with the revenue.

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>Category</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Recapture</td>
<td>Constituents with a payment transaction during the later period and prior to, but not during, the earlier period.</td>
</tr>
<tr>
<td>Same</td>
<td>Constituents with payment transactions during both periods, with an equal payment amount during each period.</td>
</tr>
<tr>
<td>Upgrade</td>
<td>Constituents with payment transactions during both periods, but with a larger payment amount during the later period than the earlier period.</td>
</tr>
<tr>
<td>Downgrade</td>
<td>Constituents with payment transactions during both periods, but with a larger payment amount during the earlier period than the later period.</td>
</tr>
<tr>
<td>Lapsed new</td>
<td>Constituents with a payment transaction during the earlier period, but not prior to the earlier period nor during the later period.</td>
</tr>
<tr>
<td>Lapsed repeat</td>
<td>Constituents with a payment transaction during and prior to the earlier period, but not during the later period.</td>
</tr>
</tbody>
</table>

**Tip:** From Revenue or Analysis, you can generate the Giving Dynamics report to view your constituents’ revenue activity, including payments and pledges, with the statistics similar to those used for the FEP. From Fundraising or Analysis, you can generate the FEP Benchmarking Comparison report to compare your annual performance against the averages of the FEP survey participants for the same year. For information about the Giving Dynamics report or FEP Benchmarking Comparison report, see the Reports and KPIs Guide.
Fundraising Reports

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From *Fundraising*, you can track the effectiveness of your fundraising activities, as well as the performance of individual fundraisers. A variety of reports are available to help you measure your organization’s progress toward meeting specific goals.

**Designation Progress Report**

The Designation Progress report shows progress toward a specific goal by total raised, percent of goal, how much has been received, new commitments, the total amount of planned gifts, and number of gifts. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges and grants, subtracted by how much has been written off for those pledges. The totals are broken down by designation under the parent purpose.

To run the report, open a fundraising designation and click **Designation progress** under **Reports**. On the report, you must specify a **Goal** against which you want to measure progress before you can run the report. When a selection exists that already includes the filters you want to use in the report, you can specify it in the **Selection** field. After you select a goal and any other filters, click **View Report**.
You can print the report or export it in several different formats.

**Fundraising Effectiveness Project (FEP) Benchmarking Comparison Report**

To measure and compare your organization’s fundraising gain and loss ratios year to year and against similar organizations, you can participate in the Association of Fundraising Professionals (AFP) annual Fundraising Effectiveness Project (FEP) survey. The survey collects consecutive annual data from many organizations throughout the United States. From *Administration*, your organization can create and run a process to compile and submit information to the AFP for the FEP survey. When you run the FEP submit process, the program compares the payment activity during two consecutive time periods, including donations and payments toward commitments such as pledges and recurring gifts, and breaks down the activity into gains and losses based on the giving behavior of the constituents associated with the revenue.

The FEP Benchmarking Comparison report shows your annual performance in comparison to the averages compiled by AFP from FEP survey participants for the same year. You can use this comparison to help identify areas to improve and to help increase revenue.
To run the FEP Benchmarking Comparison report, from Fundraising, click **FEP benchmarking comparison** under **Reports**. Select the year of the data to compare. In the **Subsector** field, select whether to view the averages of all verticals of FEP survey participants or only those related to a specific vertical such as Arts, Culture and Humanities or Mental Health and Crisis Intervention. After you select the criteria of the information to include, click **View Report**.

The report displays the constituent and revenue information your organization submitted to AFP for the selected year. For comparison, the report also displays the selected year's FEP averages and the variance between the two for the various FEP statistics.

On the second page of the report, you can view bar graphs of the statistics to quickly compare your organization's performance to the FEP averages.

You can print the report or export it in several different formats.

**Fundraising Hierarchy Progress Report**

The Fundraising Hierarchy Progress report shows progress of the designations in a hierarchy toward a specific goal. The report shows total raised, how much has been received, new commitments, the total amount of planned gifts, percent of goal, and number of gifts. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges, subtracted by how much has been written off for those pledges. The totals are broken down by designation.

*Note:* To prevent double-counting of pledges made and installments paid during the same time period, totals in the **Received** column do not include payments applied toward pledge installments.
To run the report, open a fundraising purpose and click **Fundraising hierarchy progress** under **Reports**. On the report, you must specify a goal against which you want to measure progress before you can run the report. After you select a goal, click **View Report**.

You can print the report or export it in several different formats.

**Fundraising Hierarchy Summary Report**

The Fundraising Hierarchy Summary report shows progress toward a specific goal, including total raised, how much has been received, new commitments, the total amount of planned gifts, variance between a goal amount and actual amount raised, and percent of goal. The total raised represents how much has already been received and how much exists as new commitments. New commitments include pledges, subtracted by how much has been written off for those pledges.
To run the report, open a fundraising purpose and click **Fundraising hierarchy summary** under **Reports**. On the report, you must specify a goal against which you want to measure progress before you can run the report. After you select a goal, click **View Report**. You can select different breakdowns, such as by quarter or year, to use for this report.

You can print the report or export it in several different formats.

**Solicitor Revenue Report**

The Solicitor Revenue report enables you to see the performance of a solicitor or a group of solicitors over a specified period of time. The report includes information such as the total amount raised, the number of donors, and the largest gift. You can also see the designations for the money raised.

To run the report, from the **Fundraising** page, click **Solicitor** under **Reports**.
You can print the report or export it in several different formats.