FUNDimensions®

User Manual

"Your FUNDimensions documentation is the best I have seen and is a model that others ought to follow."

Rudy Wrench, Consultant for Meals On Wheels in Calgary, Alberta, Canada

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Preface

This manual is suggested reading for people new to FUNDimensions. An approach to balancing benefits of reading to your time and memory limitations is to skim the manual, focusing *not* on the *how,* but on *what* the software can do for you. As you do this, you might take notes on specific ways to implement the software in your organization. Several blank sheets of paper appear at the back of this manual for this purpose.

Return to the manual later when you need specific instructions for one of the features you identified while skimming, or when you see something in the software that suggests study. You can use the index or table of contents to help you find instructions for the command, window or process of interest.

This manual is organized into these sections:

- Appendix 1 provides design strategy and guidelines for configuration of your database.
- Chapter 1 provides a description of the software components: windows, menus, etc.
- Chapters 2 – 6, Chapter 8 and Appendix 2 provide task-oriented information, e.g. how to enter a gift, look up a donor history, print a report, etc.
- Chapters 9 – 11 provide reference information for each menu item.
- Chapter 7 provides a reference guide for reports, with sample print-outs and descriptions.

The terms *donor* and *donor record* are used throughout this manual and software to include prospects as well as actual donors. You may enter any person or organization as a donor record; a variety of functions are provided for differentiating actual donors from prospects and other types of entities.

The term *gift records* means either a donation or pledge record. A *gift module* refers to any of the modules for the above records. In some contexts, these terms also include memberships and the membership module.

Menu names and menu commands appear in the format Menu>Menu Item. For example, File>Quit is an instruction to choose the Quit command from the File menu.

Tables appearing without a bottom rule are continued on the next page.

The Category, Type, Volunteer, Campaign, Method and Fund field labels may be changed through preferences available to the Administrator, so references to them in this manual may not match what you see when you look at your database. To find out how they have been assigned, check your Find menu. It is partitioned by divider lines; in the third section are the labels which correlate to Category, Type, Volunteer, Campaign, Method and Fund, in that order from top to bottom. For more information, see “Setup” on page 268.

Session refers to the interval between launching FUNDimensions and quitting the program. A new session is also created when the current user is changed by use of the Change Login command in the File menu.

References to the COMMAND key on Macs appear throughout this manual. This key is labeled with an Apple logo or propeller symbol and is located to one side or both sides of the space bar. Like the CONTROL and ALT keys on Windows and the OPTION key on Mac, the COMMAND key is always used by holding it down while another key is typed. In the PDF version of this document, you can click on the page numbers, table references, or figure references to jump to that page, table or diagram. This works for the table of contents, index, and all cross references. If you click a URL, the appropriate internet software is launched and the web page opened, pre-addressed email created, or download started. FUNDimensions has a facility to easily download the PDF version of the user manual or view the FAQ on demand; see "About FUNDimensions" on page 29.

Table P.1 FUNDimensions Documentation & Online Resources

Document or Resource	Where to Find It	Contents
Updated User Manual	Printed manual is included with every license purchased at no extra charge. Electronic version at web site http://www.fundimensions.com/downloads for no charge, or can be purchased separately in printed form.	The user manual is updated to reflect changes and new features in new version of the software, concurrently with all releases.
Version Upgrade Guides	Electronic version at web site http://www.fundimensions.com/downloads for no charge, or hard copy is mailed with upgrade purchase.	Description of, and instructions for new features in major upgrades. Designed for experienced users to make learning and leveraging the new features of upgrades fast and easy.
Tour of FUNDimensions	web site: http://www.fundimensions.com/tour	Separate tours are available for: Basic Architecture, Donor Input Window, Searches, Sorting, Reports, and Administration & Preferences. Both online and PDF versions are available.
Single-User Installation Guides	Sent in printed form when FUNDimensions is purchased. Also available from the web site: http://www.fundimensions.com/downloads	Separate guides for Mac and Windows.Includes system requirements, creating and setting up a new data file, how to install upgrades, and a list of installed items.
Client-Server Installation Guides	Included in the Client-Server Administration Guide (see below).	Information for installing the client-server version of FUNDimensions. Separate documents for Macintosh Client, Macintosh Server, Windows Client, and Windows server.
Client-Server Troubleshooting	Included in the Client-Server Administration Guide (see below). Also available from the web site: http://www.fundimensions.com/downloads	Several common error messages and other problems explained and solved.
Using 4D Tools	Included in the Client-Server Administration Guide (see below). Also included in the 4D Tools folder. 4D Tools is installed with the server software with FUNDimensions client-server edition, or may be downloaded from the web site: http://www.fundimensions.com/downloads	Using 4D Tools to repair, compact and sort your Fundimensions data file. See the Troubleshooting FAQ at http://www.fundimensions.com/FAQs for more information.
Client-Server Administration Guide	Includes all Client-Server Installation Guides, Client-Server Troubleshooting, and Using 4D Tools referenced above. Also includes the Backup & Restore Guide for the Client-Server edition.	
FAQs and Technical Articles	http://www.fundimensions.com/FAQs	Frequently asked questions on a variety of topics and articles in tutorial format for specific capabilities and features. Articles are available on web site or as PDFs.
Email Announcement List	By request to info@fundimensions.com.	Customer list for all upgrades, announcements, and technical bulletins (please inform us of changes to your email and contact information). Public list for major version upgrade announcements only.
Other	Check the folder where FUNDimensions is installed for Read Me and pdf files. Also check the FUNDimensions web site home page for regular news, tips and update information.	

Introduction

FUNDimensions is a database program designed to support activities that generate donations, pledges and memberships. It provides a comprehensive, workflow-oriented tool for these activities that is:

- reliable and robust
- easy to learn and maintain
- automated for routine tasks, reducing the tedium associated with database management and good record-keeping
- effective in managing your data and distilling useful fundraising information
- a powerful tool for analyzing and comparing efficiency of fundraising programs
- a key tool for making good fundraising decisions

The development of FUNDimensions was in response to a survey of Macintosh® fundraising applications for a local nonprofit in 1994. The results were discouraging, finding only software that was badly out-of-date, difficult to master, inflexible in accommodating different needs, and very expensive. We decided to design a program that would answer these shortcomings and provide new features not found in competing packages. Now FUNDimensions is a leader in fundraising software for Macintosh, with the same high quality and value for Windows 2000®, Windows XP® and Windows Vista®.

System Requirements

Version 7.0 of FUNDimensions is available for Mac OS X, and Windows. For requirements, see http://www.fundimensions.com/general_info/requirements.html, or the Installation Guide for your platform. Below is a summary of minimum requirements for the Single-User Edition; please see the Client-Server Installation and Administration Guide for requirements and recommendations for the Client-Server Edition.

Macintosh Requirements

- G3 processor minimum, with at least 256 MB RAM. Compatible with Intel Macs.
- Mac OS X 10.3.9 or higher.
- A display with at least 1024 x 768 resolution.

Windows Requirements (for Single-User Edition)

- Pentium II processor minimum, with at least 256 MB RAM.
- Windows 2000, Windows XP or Windows Vista.
- A display with at least 1024 x 768 resolution.
- FUNDimensions is compatible with Citrix Meta Frame and Windows Terminal Server for remote access. However, Windows Terminal Server is *not* suitable to use for installation.

CHAPTER

1 Objects

This chapter introduces nomenclature and basic software elements (various windows, modules, etc.) as they appear in the software and this manual. Other chapters provide comprehensive instructions on working with these objects.

Records & Fields

Records and fields are common database terms that describe how information is organized and presented. Records are a representation of a donor or gift (donation, membership, pledge, or pledge payment), while fields in the record describe something about the donor or gift. For example, you might have a donor (or prospective donor) named John Doe. Information about Mr. Doe is stored in a distinct, separate record just for him, called a “donor record”. Within that record, his last name would be stored in a Last Name field, his first name in a First Name field, his home phone in another field, etc. The modules mentioned below are groupings of entities of the same type.

Modules

Records of different types are stored in separate modules, so you choose a module according to the kind of information you want to store, edit or retrieve. A module is selected by choosing it from the File menu or by clicking one of the module's windows to bring it to the front. You can always tell what module you are in by reading the text in the active window’s title bar. Windows do not need to be closed before opening another module.

- **Donor module.** This module contains the contact and personal information about you donors and other persons or organizations associated with your organization. You can include vendors and other non-fundraising entities in this module.
- **Donation module.** This module contains records of each donation. Every donation is associated with a donor in the Donor module.

- **Membership module.** This module contains records of each membership. A separate record exists for each dues transaction. Every membership is associated with a donor in the Donor module.
- **Pledge module.** This module contains records of each pledge. Every pledge is associated with a donor in the Donor module.
- **Pledge Payment module.** This module contains records of each pledge payment. Each pledge payment is linked with a donor in the Donor module and a pledge in the Pledge module.
- **Keyword module.** This module contains words or short phrases that are associated with donors. These keywords may be used to identify groups of donors who share common characteristics, such as receiving a mailing, attending a fundraising event, responding to solicitations, or who have distinct demographic characteristics you wish to track.
- **Relationship module.** This module contains named groups with links to donors and prospects. This may be used to track, browse, query and report on relationships and affiliations between your donors and prospects.

  Within the software and this manual, the groups are termed relationships and may be of any type; a household, company, organization, political entity, graduating class, board of directors, etc.

  The donors and prospects making up a group are known as *constituents*. A donor or prospect in your database may be a constituent of any number of relationships, and a relationship may have any number of constituents.

  The use of *member* and *membership* in this context is avoided because those terms are applied in documentation of FUNDimensions' membership module.

Windows

Each module in FUNDimensions can display two kinds of windows, which may be open singly or together:

- List Views function to allow viewing and manipulation of records as a group.
- Input Windows permit data entry and editing of a record's information, one record at a time.

The first time you select a module from the File menu, the List View window for that module appears. From a List View, *you double click the mouse in any row to open the Input Window for that module.* The Donation, Membership, Pledge and Note Input Windows can also be opened from within the Donor Input Window, and the Pledge Payment Input Window can be opened from within the Pledge Input Window, as explained below. Finally, a specific donation, pledge or membership input window can be opened by clicking areas of the Information Palette (Figure 1.26, "Palette for donor record, example #1" on page 31), and a List View window may be opened by clicking buttons on the Dashboard (Figure 1.33, "Dashboard Buttons and Menus" on page 35).

FundImensions usually restricts operation to one window of each type open at a time, e.g. you might have one instance of a Donor Input Windows, and one instance of a Donation Input Window, and one instance of a Membership Input Window open all at the same time. If you then attempted to open a different donor, donation, or membership record, that record would replace the previous one rather than opening a second instance of the Input Window. This aids in controlling the number of windows open on your screen and conserves system resources. (Any changes you made to the record being replaced will *always* be saved automatically: no prompt or dialog for saving is displayed.)

In the event you wish to force a second instance of an input window, perhaps to compare two records of the same type side-by-side, you can use a menu command or keyboard shortcut to accomplish this. See “Open in Second Window” on page 289.

When you open a List View or Input Window, it stays open until you close it. If you open another window without closing the first, the new window opens in front of the previous window and becomes the new active window. The active window is the only window where you can enter information and execute commands.

You can bring any window in the back up to the front, making it the active window, by clicking anywhere on that window. List Views are closed by clicking the close box at the upper left, or by typing CONTROL–W (Windows) or COMMAND–W (Mac), or by choosing the Close command from the File menu (except for the Donor List View, which may not be closed). They may be moved by dragging their title bars. Input Windows can be closed in the same way as List Views and with the Cancel or Save buttons located in the button bar near the bottom of the window.

List Views use the title bar area of the window to display the module name, the number of records currently in the list, and the number of records in that module. Input Windows use the title bar area to display the module name and the name of the donor. The name is taken from the donor record, so changing it there changes it for all gift and note records associated with that donor. In decreasing order of preference, FundImensions will use the contents of the Label Line 1, Label Line 2, Last Name and Company fields in the donor record for displaying the name information in Input Windows.

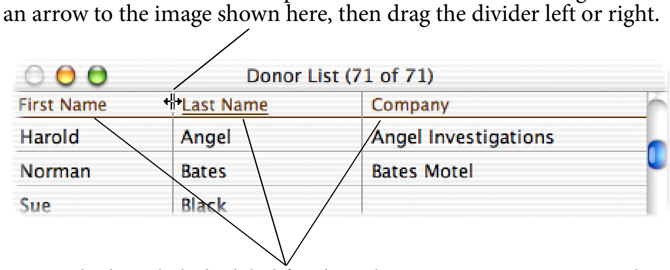
Most Input Windows are accompanied by an Information Palette, a small floating window that provides current, helpful information about the donor or gift your are viewing in the Input Window. See “Information Palette” on page 30 for more information.

List Views and Input Windows each operate within their own “thread”, or mini-program. This means that they can perform tasks independently and simultaneously. For example, you could start a lengthy query (or sort, report, export, etc.) in the Donor List View, then switch to the Donor Input Window and create new records there, while the query was in progress in the other window. There is no theoretical limit to the number of simultaneous tasks that may be performed.

Throughout the program, List Views offer you an environment for performing actions involving groups of records. For example, to print labels or produce a report for a group of records, you use an appropriate menu command while a List View window is active. The command will reference the records currently in the list, producing a report or labels only for those records; the records currently in the list define the "universe" for the command. Through searches and other methods (including direct, manual inclusion and exclusion of records though commands in the Records menu), you can change which records are in the list, and thereby control which records appear in the report, get a label printed, or have some other action performed on them. (These records are known in this manual as the *current selection*; see for "Selecting Records" on page 55 more information.) At any time, you can restore all records to a List View with Records>Show All.

List Views allow for changing the width of column, and for sorting columns. These actions are performed by dragging or clicking in the upper area of the list view, as described in the illustration below. Although the illustration shows the Donor List View, these techniques also work in the list views for the donation, membership, pledge and pledge payment modules:

To move the column divider, place the cursor so that it changes from an arrow to the image shown here, then drag the divider left or right.



To sort the list, click the label for the column. To sort in reverse order, hold down the shift key while clicking the label. You may also sort lists using the Sort command in the Records menu: see "Sort" on page 290.

Figure 1.1 Adjusting Column Widths and Sorting by Column in List Views

Tip: FUNDimensions saves the size, position, column widths and sort order of windows when you quit the software (except in read-only and demo modes). If windows draw incorrectly, you see blank areas where records should appear, or if you would like to restore a window to the default size and arrangement, hold down the ALT key on Windows, or OPTION key on Mac as you open the window. For the Donor List View, hold down the key during the splash screen at startup.

Donor List View

This window displays donor records in rows, with name, company, address or phone numbers displayed in columns.

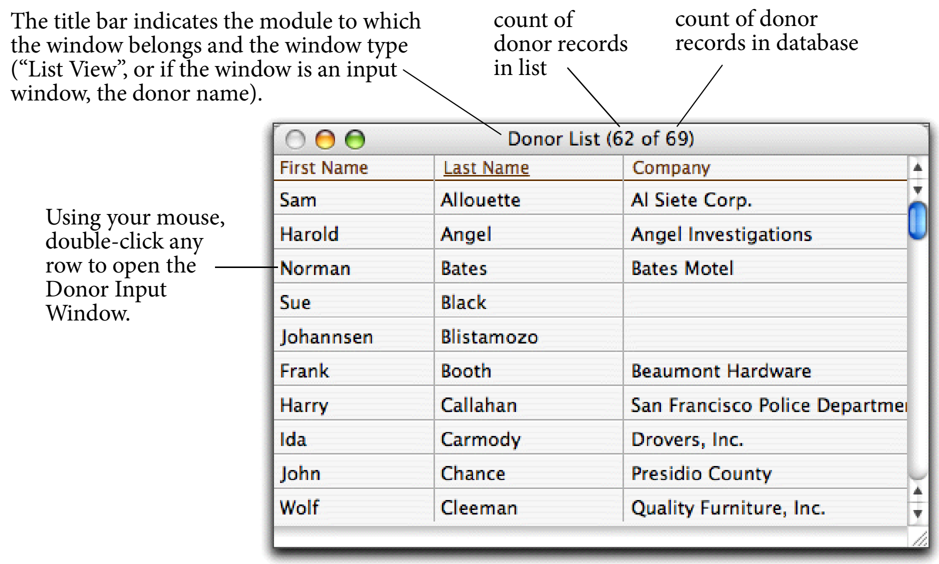


Figure 1.2 Donor List View

There are five alternative window formats for the Donor List View. One choice switches the order of the first name and last name columns. Three other choices add a column for displaying the full address of each donor, or two columns for display of both the address and the home and work phone numbers. See page 264 for more information on selecting a window format.

To see more detail for a donor, double click on their row. This will display the Donor Input Window for that donor, as described next.

Donor Input Window

This window is used to display, enter or edit complete information about one donor at a time. You reach this window by double clicking a row in the Donor List View described in the previous section. The Donor Input Window has seven panes:

- The Contact pane and stores the contact information for a donor. This includes address, phone and email data. Items in this pane may be edited directly or modified by choosing a different address/phone number set from the Address pane.
- The Classification pane offers several methods for classifying and grouping your donors and prospects.
- The Gift pane shows all of a donor's gift records in scrolling areas, and has buttons to create new gifts.
- The Graph pane offers a way to observe trends and patterns in donor gifts.

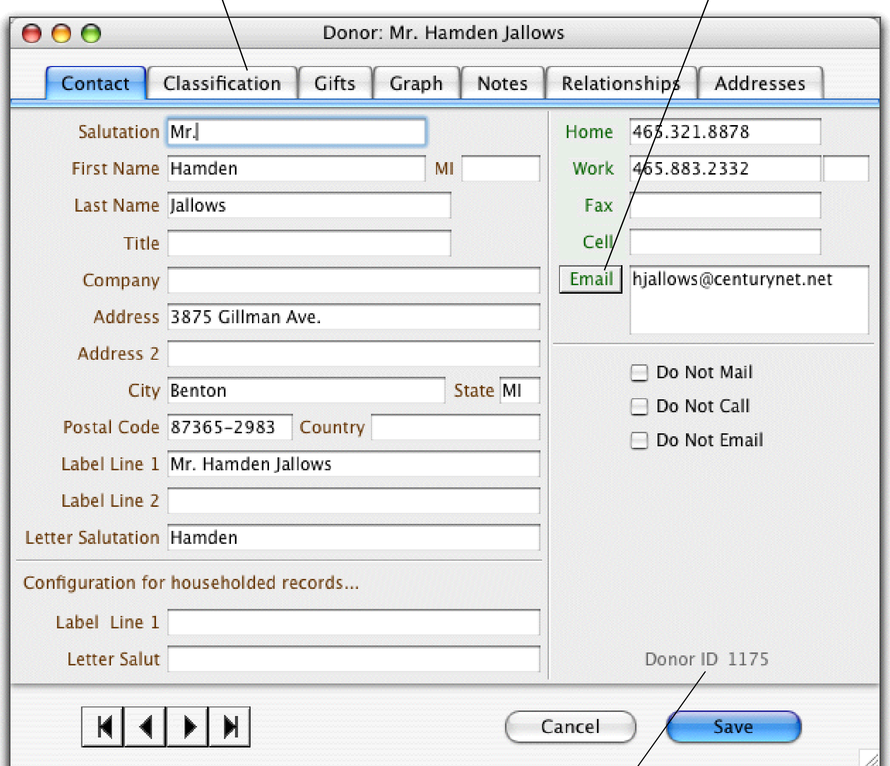
- The Notes pane is where note records can be created and accessed. These may contain both text and pictures.
- The Relationship pane provides tools for relating donors and prospects to each other in named groups.
- The Addresses pane stores up to three different sets of addresses, phone numbers, company names, custom label text, and custom letter salutations for each donor, and select the address to use for printing, exporting and for display in the Contact pane.

Panes can be changed by clicking the tabs along the top of the window. When double clicking a row in the Donor List View, you can force the Donor Input Window to open to the Contact pane by holding down the ALT key (Windows) or CONTROL key (Mac) as you double-click. Otherwise, the window opens to the last pane you viewed.

The remainder of this section illustrates and describes each of these panes, beginning with the first pane:

Click to move to other panes in any window with tabs, or type the left or right arrow keys while holding down the CONTROL and ALT keys (Windows) or COMMAND and OPTION keys (Mac).

Click this field label to open a new email with the donor's address filled in.



The Donor ID is generated by FUNDimensions when a new donor record is created and is unique for every donor record.

Figure 1.3 Donor Input Window, Contact pane

In this diagram of the Contact pane, the fields near the lower left of the window, labeled “Label L1”, ”Label L2”, and “Letter Sal” contain the text for labels and exports to mail merge (L1 refers to line 1, Letter Sal refers to letter salutation). They let you create custom labels and letters that read independently of the actual record names.

The Configuration for householded records area enables records with the same address to be combined into a single mailing, in a process known as householding. You only need to fill this field in when you know you have several records at the same address, and you want the option of combining them into one mailing. If that is the case, you use the Label Line 1 field to store the salutation you want to appear on the mailing label and inside address; use the Letter Sal field for the salutation you want to appear after “Dear” in your merge letter. For more information, see “Householding” on page 139.

Phone numbers are stored in the fields at the upper right of the window. Enter them without formatting characters; FundDimensions will format the numbers for you. The shorter field beside the Work phone number is provided for an extension. You can also specify a default area code to be added automatically when you enter a telephone number: see “New Donor Records” on page 263

To store additional phone numbers, use the Address window pane described later in this section.

Clicking the Email field label opens an new email message in your email software. The new message will have the donor’s email address(es) already filled in. When entering multiple emails, type a return between each one. You can type in a total of 80 characters maximum.

The checkboxes are for controlling which donors will get your mailing, emails and phone calls. (For additional information on these fields, see “Do Not Mail, Do Not Email, Do Not Call Checkboxes” on page 57.) When Do Not Mail is checked the donor is excluded from exports and mailing labels made from the donor module, but this flag is ignored for exports and labels made from gift modules (see “Do Not Mail Flag in Exports & Label Printing” on page 139 for more information). You can alter these rules by changing settings in Preferences (see “Export/Labels” on page 265 for more information).

The Do Not Call checkbox is a reminder for donors who do not want to receive phone calls. If the Do Not Call checkbox in on, the auto-dial feature mentioned below is disabled.

The Do Not Email checkbox blocks the donor’s email address from appearing in the results of the “Clipboard-Email Address to” menu command described on page 359, and it prevents the email address from appearing in exports made with the “Export” menu command (page 344). This is the command usually used to produce mass e-mailings from FundDimensions, so this checkbox will work to keep the donor out of these e-mailings. You can still maintain a donor’s email address in the Email field, even if the Do Not Email checkbox is on; in this case, the address will be grayed-out, but will still be editable.

Clicking the next tab presents the Classification pane, as shown here:

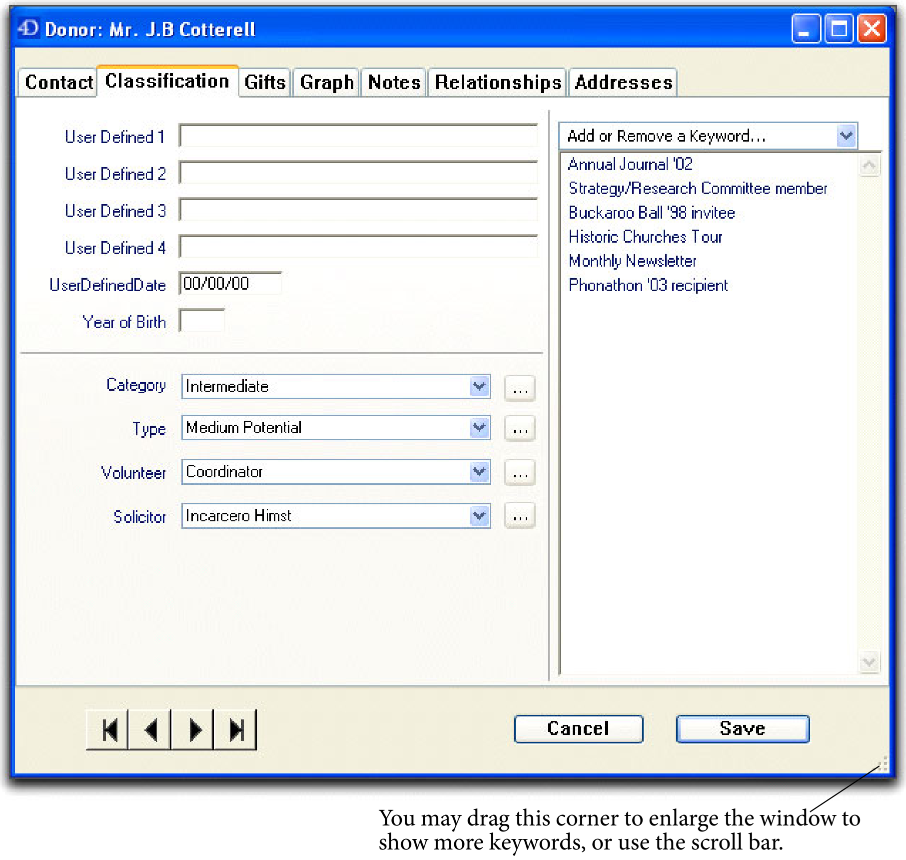


Figure 1.4 Donor Input Window, Classification pane

The Classification pane has ten fields and a list of keywords to categorize and group donor records.

Keywords are a flexible way to classify your donors. To add or remove keywords, click on the Keywords popup menu above the list. Several other methods exist to assign or remove keywords: see “Assigning Keywords” on page 62 for more information.

The fields labeled User-Defined 1-4, UserDefinedDate, Category, Type and Volunteer can be configured with field labels of your choosing (see “Setup” on page 268).

The User-Defined 1, User-Defined 2, Category, Type, Volunteer and Solicitor field can have a default values, i.e., values that are automatically entered when a new record is created (see “New Donor Records” on page 263).

In the Gift pane shown below, you can browse or create donation, membership, and pledge records for the donor. Summary information for the gifts viewed in this pane is available in the Information Palette and with Output>Record Statistics. To view the detailed information for any of the gifts shown in this window, double click directly on the listing. This will open the Input Window for the gift. The three New buttons create new donations, memberships, and pledge records.

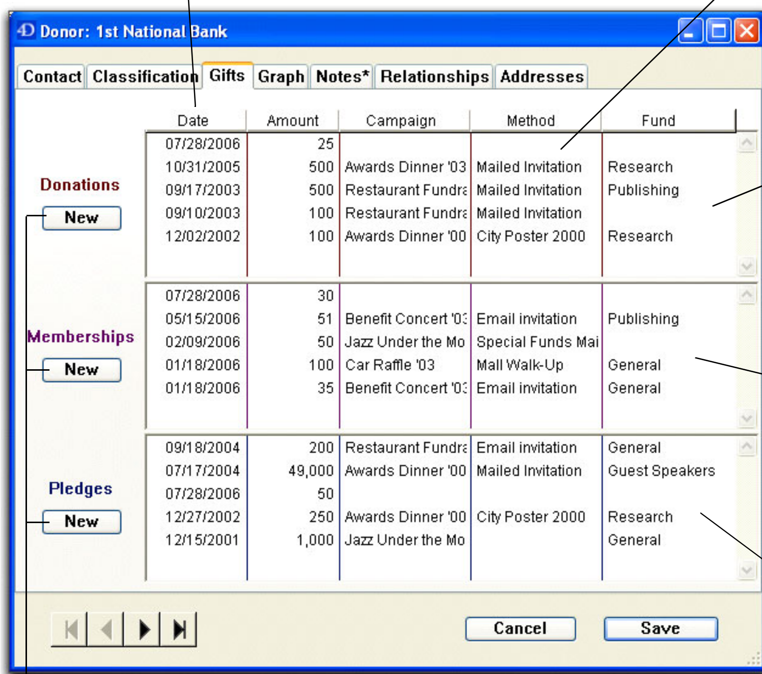
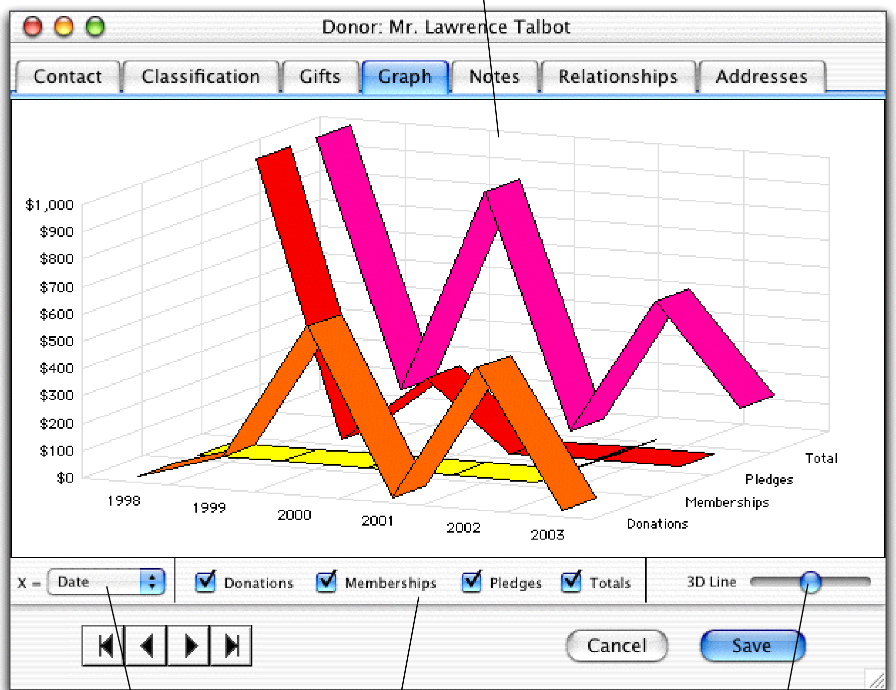


Figure 1.5 Donor Input Window, Gift pane

An indication appears in the Information Palette if any pledges exist for the donor with outstanding balances. Its purpose is to help you apply payments when you do not know whether they are donations, membership dues or pledges, by informing you that a pledge with a balance is present for the donor. The indication is in the form of the word “bal” in parentheses in the lower left quadrant of the palette; see Figure 1.28.

When you click the Graph tab, a chart is constructed and displayed from the donors gift history. This is an example:

To use this or any FUNDimensions graph in other software, use copy and paste: click on the graph, do Edit>Copy, then switch to the other software and do Edit>Paste.



Use this popup to chart history (Date), or giving by campaign, method or fund.

Control which gift types are charted and whether a separate series is included for totals (donations+memberships+pledges) with these checkboxes.

Move this slider to change the chart type between several 3D and 2D options.

Figure 1.6 Donor Input Window, Graph pane

The graph axes automatically scale to an appropriate range; the gift amount axis scales from zero to a rounded value based on the largest value for the donor, while the date axis scales to years, quarters or months depending on the length of time between the first and last gifts.

The popup menu in the lower left corner allows for plotting by date or by one of the gift list fields (usually labeled Campaign, Method and Fund, but editable by users with administrator access). This capability will help you understand what interests and motivates individual donors, by displaying their gift history plotted by the activities that generated the gifts (campaign and method), and the purpose (fund) for which it was given.

FUNDimensions displays a message in the chart area if the chart type is inappropriate for the context, e.g. line and area charts cannot be made for donors with only one gift.

Labels in the chart may display vertically to prevent overlap. To convert the display to an easier-to-read horizontal format, enlarge the window width and/or height by dragging the lower right corner, then refresh the display by changing the chart type with the slider control.

When Show Tips is turned on in Preferences and a column or spike chart type is selected with the slider, moving the pointer over a graph element displays the time period and amount for that element. You may need to click on the chart before this appears.

Graphs can be printed using the Print Donor or Print List items in the Output menu; "Donor Detail Report" on page 155 has more information.

To use a chart in another software application, click anywhere on the chart to select it, then choose Copy from the Edit menu. Switch to the other program and paste. If the paste does not work, it is because the destination software cannot accept the graphic format of the clipboard.

Prior to copying, a graph may be resized. This will usually produce better results than re-sizing the graph after pasting. To resize a graph, click to select it. Small black rectangles appear around the graph; these are called handles. Drag any handle to resize; if you hold the shift key down, the re-sizing is proportional. Two methods exist to enlarge the graph: by dragging the entire item almost off-screen, then enlarging into the empty screen area, or by dragging the lower right corner of the window, which automatically re-sizes the graph to fit.

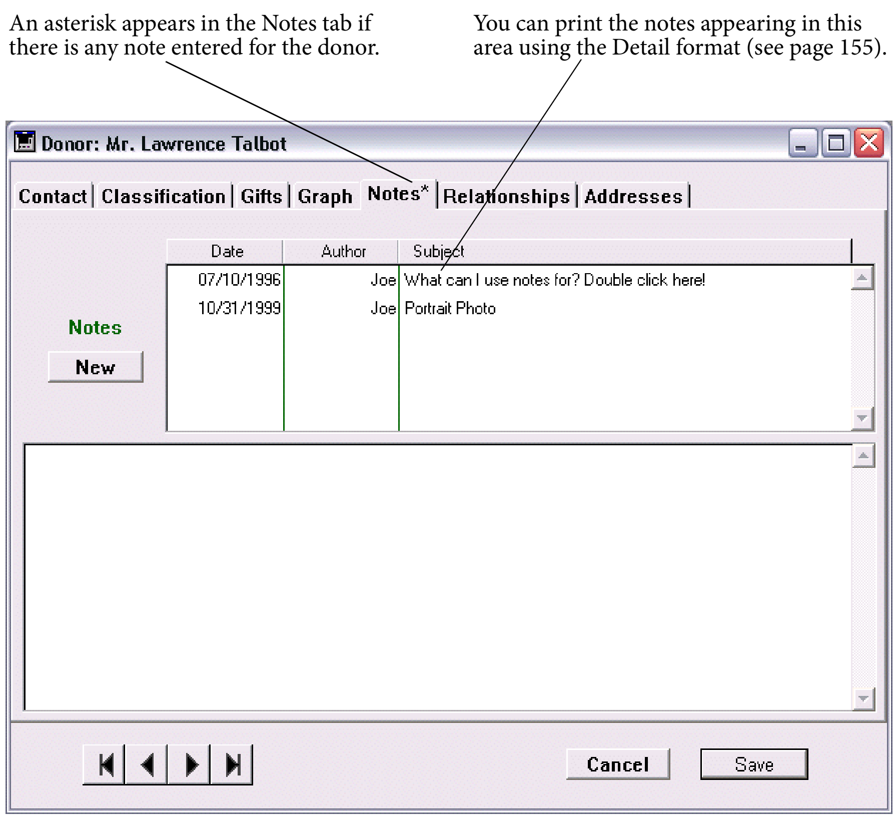


Figure 1.7 Donor Input Window, Note pane

The Note pane, depicted above, offers two ways to associate text with a donor. One way is to use the field in the lower half of the window, and type or paste text there. The other method is to use the New button to create note attachments. These are entered in their own, separate window. While this method requires a few more steps to create or read a note, it allows notes to be segmented and organized into separate subjects, authors and dates. In the current version of FUNDimensions, using note attachments is the only way to create notes that will print from standard reports (see "Donor Detail Report" on page 155). If you plan to have note information appear in custom reports, put this information in the lower field rather than in note attachments.

Dragging the lower right corner of the window will enlarge the lower note field for easier viewing and entry of large notes.

The Relationship pane provides you with tools to track social, family and business connections between the donors and prospects in your database, aimed at allowing superior pattern recognition as a way of making the relationship data more informative for you. This is an example of the pane:

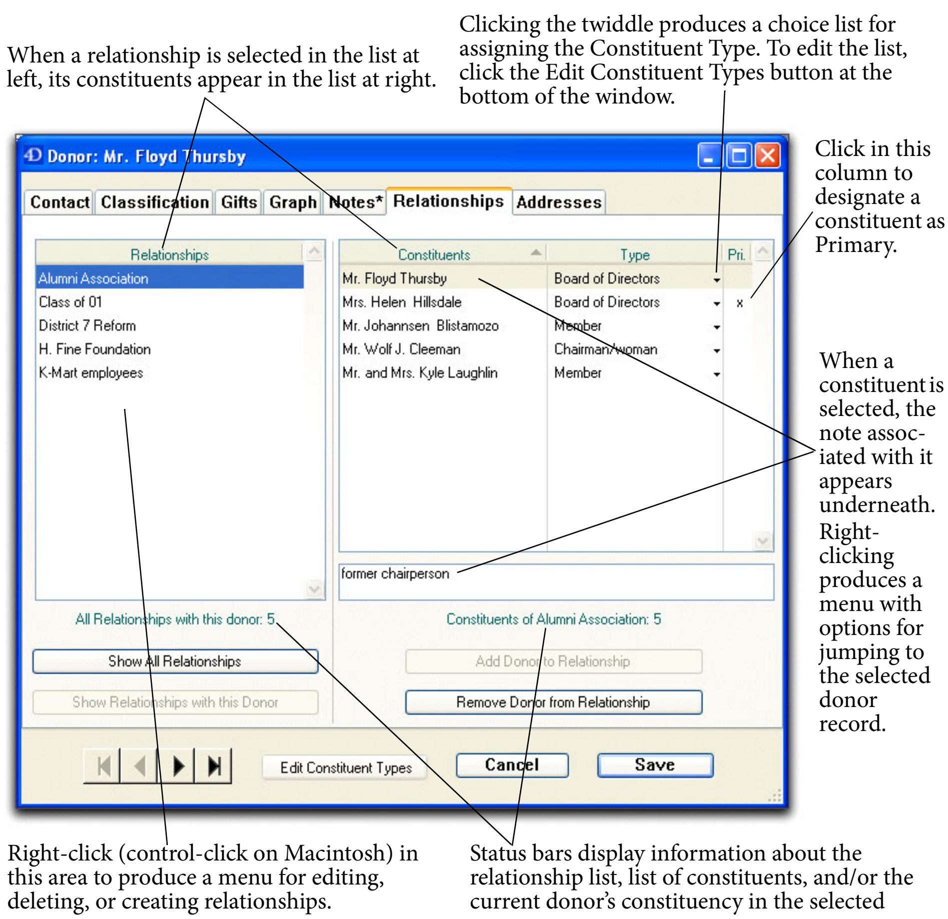


Figure 1.8 Donor Input Window, Relationships pane

Relationships records appear in the column on the left side of this pane. You can create, edit and delete relationship records in the Relationship module, or take advantage of shortcuts available through contextual menus to do these tasks without leaving the Relationship pane of the Donor Input Window. (See call-out in figure above, and “Creating Relationship Records” on page 91.) You can also navigate to any donor listed in the Constituent List, by a right-click on Windows or CONTROL-click on Macintosh on the constituent name. (See “Navigating From the Constituent List” on page 93.)

The Relationships list is sorted alphabetically. Clicking the Show All Relationships or Show relationships With This Donor buttons with the ALT key (Windows) or OPTION key (Mac) down results in a reverse-sorted relationships list.

For specific instructions on using this pane, see “Adding Donors to Relationships” on page 67.

An example of the Address pane is shown below. A complete set of address, phone and custom label/letter salutation information is displayed in this window for each of the three addresses that may be assigned to a donor. You may create a new address, edit an address and assign an address to be used in current displays, printing, and exports. When you create a second or third address, the Label and Letter Salutation fields are copied automatically from the Contact pane to save typing, but you may edit these as you like. If you would like the current address copied into the new address as a starting point for creating the new address, hold down the ALT key (Windows) or the CONTROL key (Macintosh) when clicking the second or third address button. The radio buttons are used to select the address you want to assign to this donor for current printing and export purposes, and for display on the Contact pane. When you select an address this way and click the Save button in the button bar, the assignment is made. The address assignment is also made if you use any of the arrow buttons on the button bar to navigate to another donor, or if you click a tab to move to another pane of the Donor Input Window.

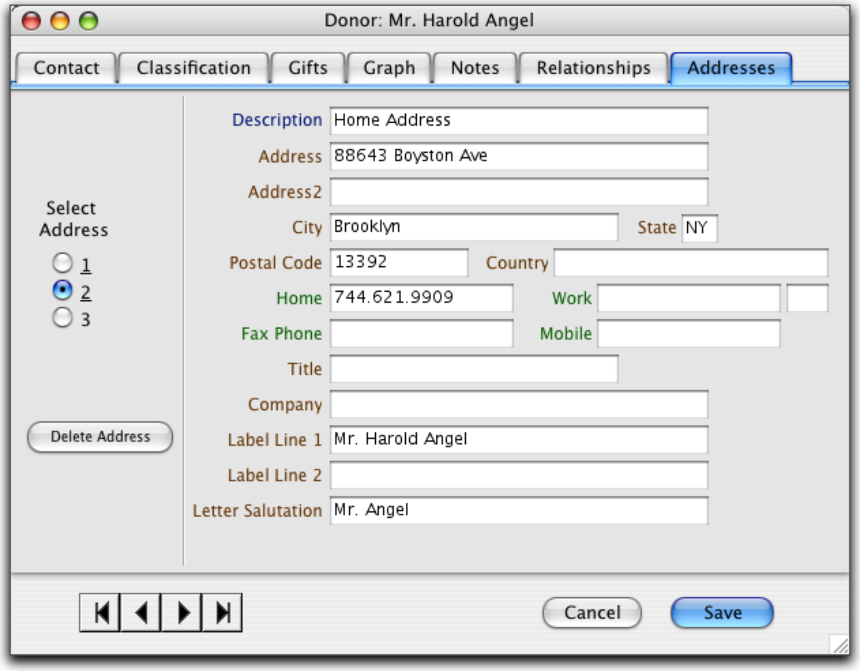


Figure 1.9 Donor Input Window, Address pane

Donation List View

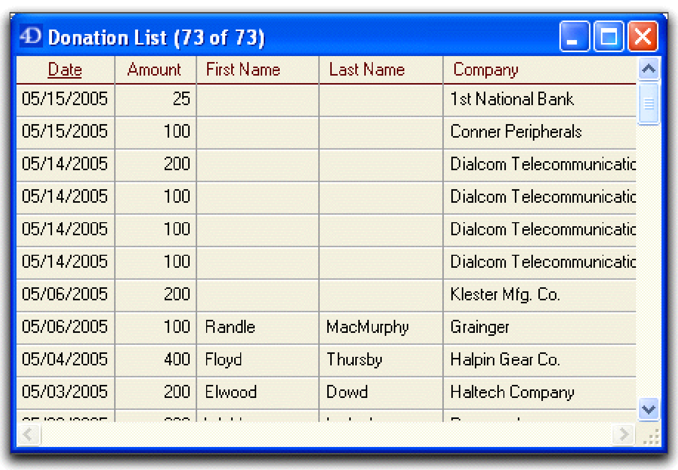


Figure 1.10 Donation List View

Donations are shown in a column format in this window. Each row represents a single donation record. To display this window, choose File>Donations.

Menu commands available from this window support searches, reports, exports, label printing, and mass changes to donation records. You can change which records appear in this list using techniques described in “Selecting Records” on page 55.

Double click any row to view the record in the Input Window, where you can view all the information for that record. The following page shows an example of the Donation Input Window that appears when you double click a row in this window.

Donation Input Window

These buttons display a list picker, where you can select an item to be the value for the adjacent field, and where you can edit the choices in the list.

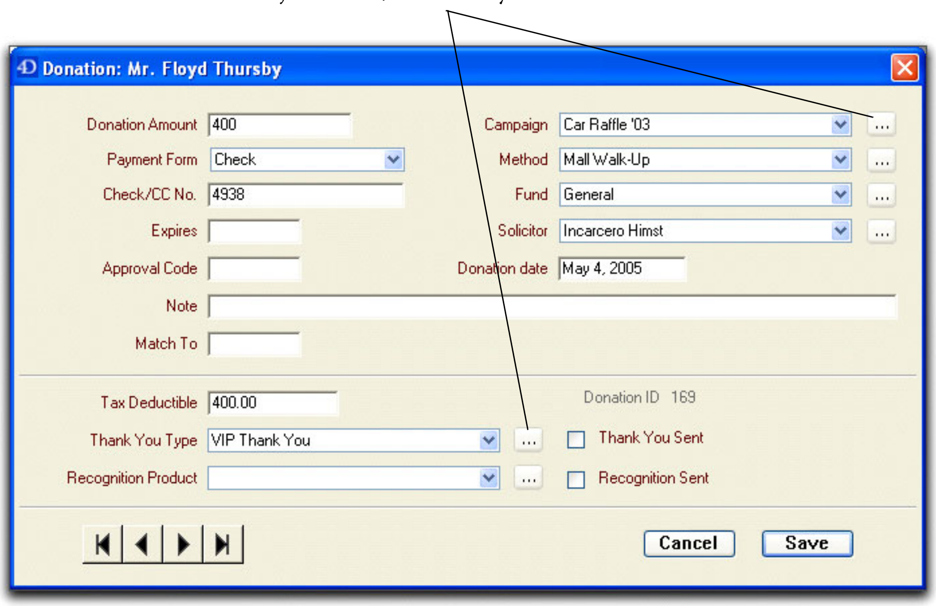


Figure 1.11 Donation Input Window

This window is where you enter new donations or view the details of existing donations. The fields for Campaign, Method and Fund in the upper right of the window allow you to track what activities generated the gift, and if it was earmarked for a specific purpose. The Thank You Type field allows you to select a specific thank you note template to be used for this gift; when you export for thank you letters, you can create a separate export file for each template, and print separate sets of labels. This makes it easy to send different letters for different gift amounts, purposes, campaigns, etc. Similarly, the Recognition Product field lets you designate a product to acknowledge a gift, and generate separate mailing labels for each product.

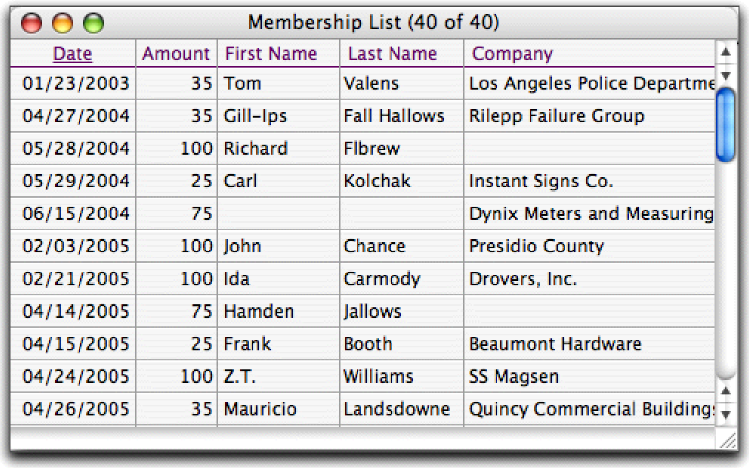
To display this window, do one of the following:

- Double click a row in the Donation List View (previous page).
- Double click a row in the donations listed in the Gift pane of the Donor Input Window, or click the New button in that pane (Figure 1.5).
- Click an area of the Information Palette for the Donor Input Window that refers to a Last Gift or Largest Gift (Figure 1.26).

- Right-click (CONTROL-click on Macintosh) on a row in the Donor List View, and choose Add Membership from the contextual menu (Figure 3.19, “Contextual Menu in Donor List View” on page 94).

See “Creating Donations” on page 74 for more information on filling in this windows.

Membership List View



Membership List (40 of 40)

Date	Amount	First Name	Last Name	Company
01/23/2003	35	Tom	Valens	Los Angeles Police Departme
04/27/2004	35	Gill-Ips	Fall Hallows	Rilepp Failure Group
05/28/2004	100	Richard	Flbrew	
05/29/2004	25	Carl	Kolchak	Instant Signs Co.
06/15/2004	75			Dynix Meters and Measuring
02/03/2005	100	John	Chance	Presidio County
02/21/2005	100	Ida	Carmody	Drovers, Inc.
04/14/2005	75	Hamden	Jallows	
04/15/2005	25	Frank	Booth	Beaumont Hardware
04/24/2005	100	Z.T.	Williams	SS Magsen
04/26/2005	35	Mauricio	Landsdowne	Quincy Commercial Building

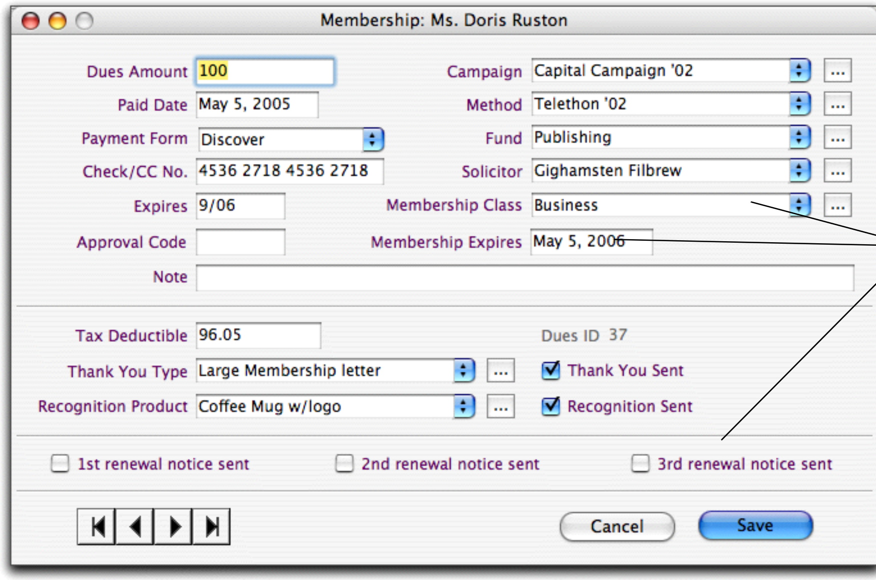
Figure 1.12 Membership List View

This window displays membership records in a column format. To display this window, choose File>Memberships.

Menu commands available from this window support searches, reports, exports, label printing, and mass changes to membership records. You can change which records appear in this list using techniques described in “Selecting Records” on page 55.

When you double-click a row in this window, the Membership Input Window appears; an example appears on the next page.

Membership Input Window



This window is identical to the Donation Input Window shown previously, except for the addition of fields for membership expiration, membership class and renewal notice tracking.

Figure 1.13 Membership Input Window

In this window you enter new memberships, and edit or view the records of existing memberships. See “Creating Memberships” on page 78 for more information about filling in one of these windows.

To display this window, do one of the following:

- Double click a row in the Membership List View (previous page).
- In the Gift pane of the Donor Input Window, double click a row in the memberships listed, or click the New button (Figure 1.5).
- Click the area of the Information Palette for the Donor Input Window that refers to membership status (Figure 1.26).
- Right-click (CONTROL-click on Macintosh) on a row in the Donor List View, and choose Add Membership from the contextual menu (Figure 3.19, “Contextual Menu in Donor List View” on page 94).

Items discussed for the Donation Input Window (page 15) also apply to this window. These items include the Campaign, Method, Fund, Thank You Type, Recognition Type and ID fields.

Pledge List View

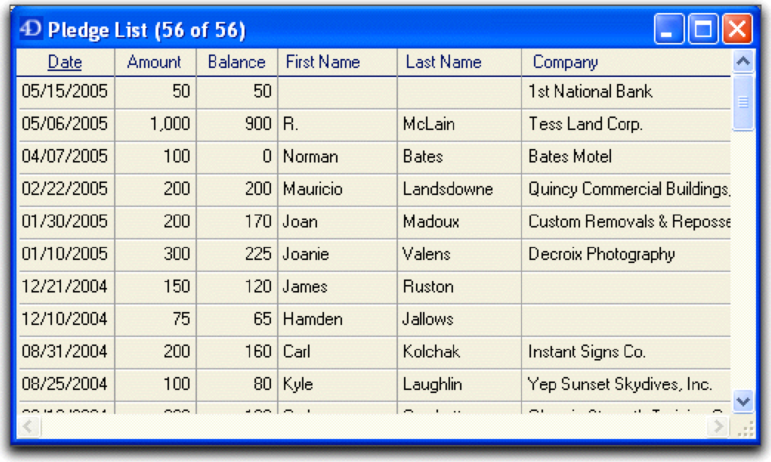


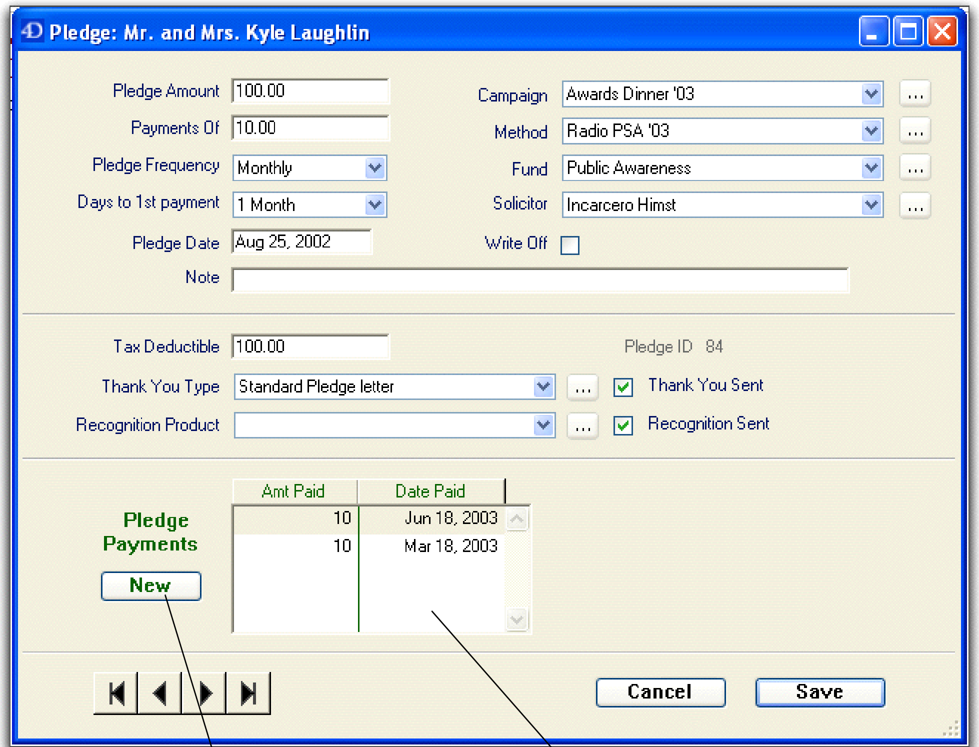
Figure 1.14 Pledge List View

Pledges are displayed in a column format in this window. To display this window, choose File>Pledges.

Menu commands available from this window support searches, reports, exports, label printing, and mass changes to pledge records. You can change which records appear in this list using techniques described in “Selecting Records” on page 55.

When you double click a row in this window, the Pledge Input Window appears. An example of that window appears on the following page.

Pledge Input Window



Click on the button to create a new pledge payment.

This is a list of pledge payments associated with this pledge. Double click any line to view that payment in its input window.

Figure 1.15 Pledge Input Window

In this window, you enter new pledges, edit and view the records of existing pledges and create or open related pledge payment records. To display this window, do one of the following:

- ♦ Double click a row in the Pledge List View (previous page).
- ♦ In the Gift pane of the Donor Input Window, double click a row in the pledges listed, or click the New button (Figure 1.5).
- ♦ Click an area of the Information Palette for the Donor Input Window that refers to a Last Gift or Largest Gift (Figure 1.26).
- ♦ Right-click (CONTROL-click on Macintosh) on a row in the Donor List View, and choose Add Pledge from the contextual menu (Figure 3.19, “Contextual Menu in Donor List View” on page 94).

Use the New button i9n this window to create a new pledge payment record. A new payment Input Window will be opened with the correct default information (payment amount, date, etc.) already entered.

This window is resizeable to display additional pledge payments in the scrolling area. To resize the window, you click and drag the lower right corner. The window can be resized vertically but not horizontally.

See “Creating Pledges” on page 82 for more information about filling in one of these windows.

Items discussed for the Donation Input Window (page 15) also apply to this window. These items include the Campaign, Method, Fund, Thank You Type, Recognition Type and ID fields.

Pledge Payment List View

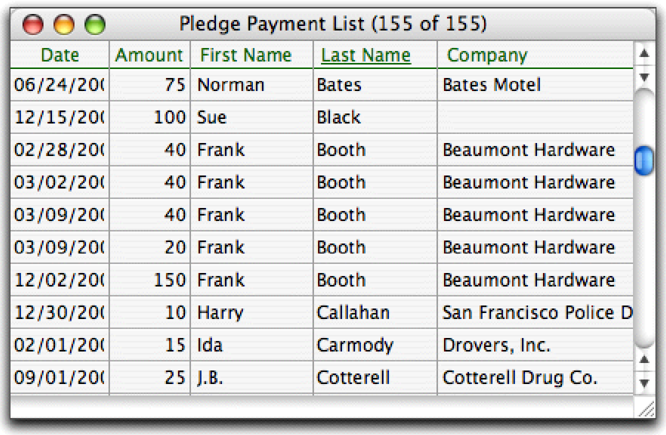


Figure 1.16 Pledge Payment List View

This window shows pledge payments in a column format. To display this window, choose File>Pledge Payments.

Menu commands available from this window support queries, reports, exports and label printing. You can change which records appear in this list using techniques described in “Selecting Records” on page 55.

The following diagram shows an example of the Pledge Payment Input Window that appears when you double click one of the rows in this window.

Pledge Payment Input Window

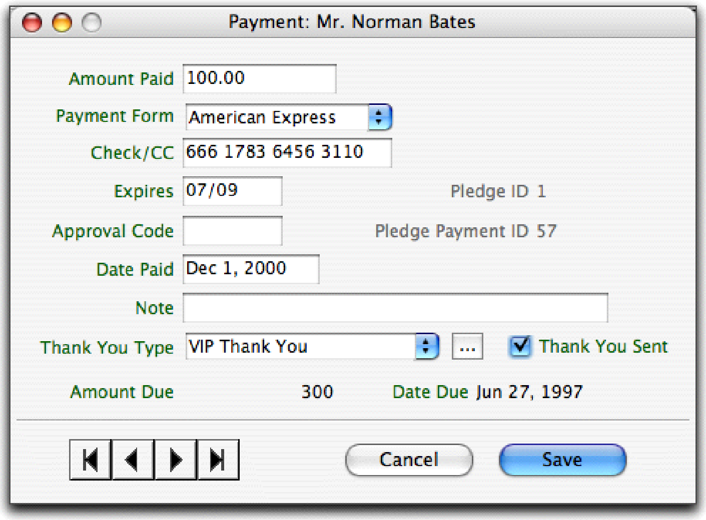


Figure 1.17 Pledge Payment Input Window

This window is for recording new pledge payments. You also use this window to view or edit an existing payment. To display this window, do one on the following:

- Double click a row in the Pledge Payment List View.
- In the Pledge Input Window, double click a payment or click the New button.
- Right-click (CONTROL-click on Macintosh) on a row in the Donor List View, and choose Add Pledge Payment from the contextual menu (Figure 3.19, “Contextual Menu in Donor List View” on page 94).

The amount due and date due are calculated and displayed in this window when the payment record is created, and saved with the rest of the record. It will not change to reflect current due dates or due amounts if the record is opened later.

See “Creating Pledge Payments” on page 87 for more information on filling in one of these windows.

Keyword List View

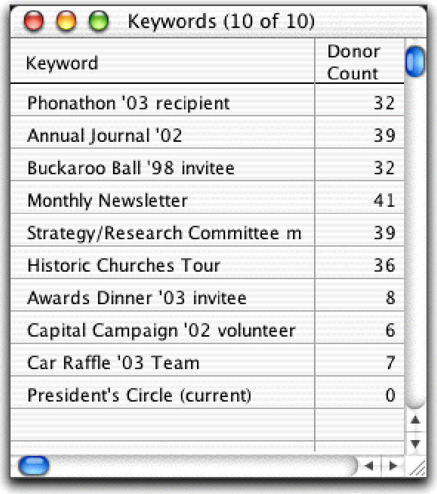


Figure 1.18 Keyword List View

This window lists all the keywords you have entered into the database. Each row represents a Keyword record. To display this window, choose File>Keywords. To sort this list, click the Keywords label at the top of the keywords column, or do Records menu>Sort. To reverse the sort order, hold down the SHIFT key before clicking the Keyword label, or the ALT key (Windows) or OPTION key (Mac) before choosing Records menu>Sort.

The Donor Count column displays the number of donor records assigned to the keyword in that row. This can aid you in deleting unused keywords and profiling your donor list. For in-depth analysis and reporting on keywords, consider the "Gifts by Donor Attribute" report, described on page 190.

For information on the uses and applications of keywords, see "More About Keywords" on page 374. For instructions on applying keywords to donor records, see "Assigning Keywords" on page 62.

You can re-assign donor records from one keyword to another, edit or delete keywords and propagate the changes to the donor records, and other mass-change operations.

The next diagram shows an example of the Keyword Input Window, which appears when you double click a row in this list view or do Records>New while the Keyword List View is the active window.

Keyword Input Window

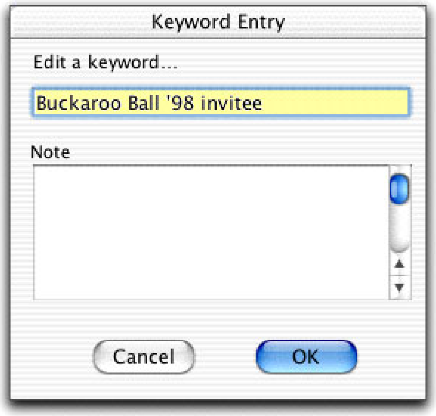


Figure 1.19 Keyword Input Window

You enter or edit keywords in this window. To display this window, double click a row in the Keyword List View.

Editing a keyword here will change it in donor records that have the keyword.

Keywords are not assigned to donors in this window; these assignments are made in the Donors module (see “Assigning Keywords” on page 62 and “Assigning Keywords” on page 62 for information on assigning and removing keywords from donors).

Relationship List View

Figure 1.20 Relationship List View

This window lists all the relationships you have entered into the database. Each row represents a relationship record. To display this window, choose File>Relationships. To sort this list, click the Relationships label at the top of the relationships column, or do Records menu>Sort. To reverse the sort order, hold down the SHIFT key before clicking the Relationships label, or the ALT key (Windows) or OPTION key (Mac) before choosing Records menu>Sort.

For information on the uses and applications of relationships, see "Designing Your Database" on page 371. For instructions on adding and removing donor records to relationships and browsing relationships and constituents, see "Adding Donors to Relationships" on page 67.

The next diagram shows an example of the Relationship Input Window, which appears when you double click a row in this list view or do Records>New while the Relationship List View is the active window.

Relationship Input Window

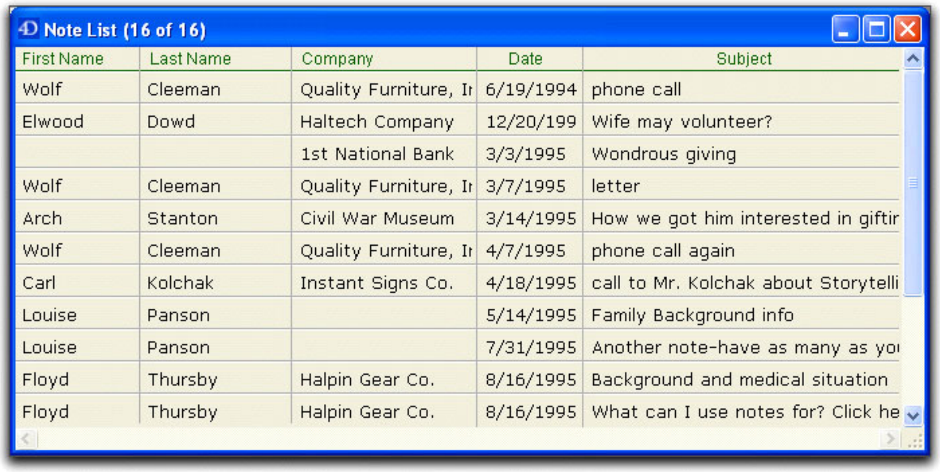
Figure 1.21 Relationship Input Window

You enter or edit relationships in this window. To display this window, double click a row in the Relationship List View, or do Records>New while the Relationship List View is the active window

Editing a relationship name in this window automatically propagates the change to all donor assigned to the relationship.

Relationships are not assigned to donors in this window; these assignments are made in the Donors module. See "Adding Donors to Relationships" on page 67 and "Assign Other" on page 299 for information on assigning and removing donors from relationships.

Note List View


Note List (16 of 16)

First Name	Last Name	Company	Date	Subject
Wolf	Cleeman	Quality Furniture, Ir	6/19/1994	phone call
Elwood	Dowd	Haltech Company	12/20/199	Wife may volunteer?
		1st National Bank	3/3/1995	Wondrous giving
Wolf	Cleeman	Quality Furniture, Ir	3/7/1995	letter
Arch	Stanton	Civil War Museum	3/14/1995	How we got him interested in giftir
Wolf	Cleeman	Quality Furniture, Ir	4/7/1995	phone call again
Carl	Kolchak	Instant Signs Co.	4/18/1995	call to Mr. Kolchak about Storytelli
Louise	Panson		5/14/1995	Family Background info
Louise	Panson		7/31/1995	Another note-have as many as yo
Floyd	Thursby	Halpin Gear Co.	8/16/1995	Background and medical situation
Floyd	Thursby	Halpin Gear Co.	8/16/1995	What can I use notes for? Click he

Figure 1.22 Note List View

This window lists all the notes you have entered into the database. Each row represents a note record. To display this window, choose File>Notes. To sort this list, click the labels at the top of the columns, or do Records menu>Sort. To reverse the sort order, hold down the SHIFT key before clicking a column label.

In contrast to donations, pledges, memberships, notes do not have to be associated with a donor-although they can be. This permits you to create task and to-do lists or other documents that may not relate to a specific donor. The Note List View lets you work with all notes, whether linked to a donor or not. From this window you can search, sort, export and print any selection of notes.

The next diagram shows an example of the Note Input Window, which appears when you double click a row in this list view or do Records>New Note while the Note List View is the active window.

Note Input Window

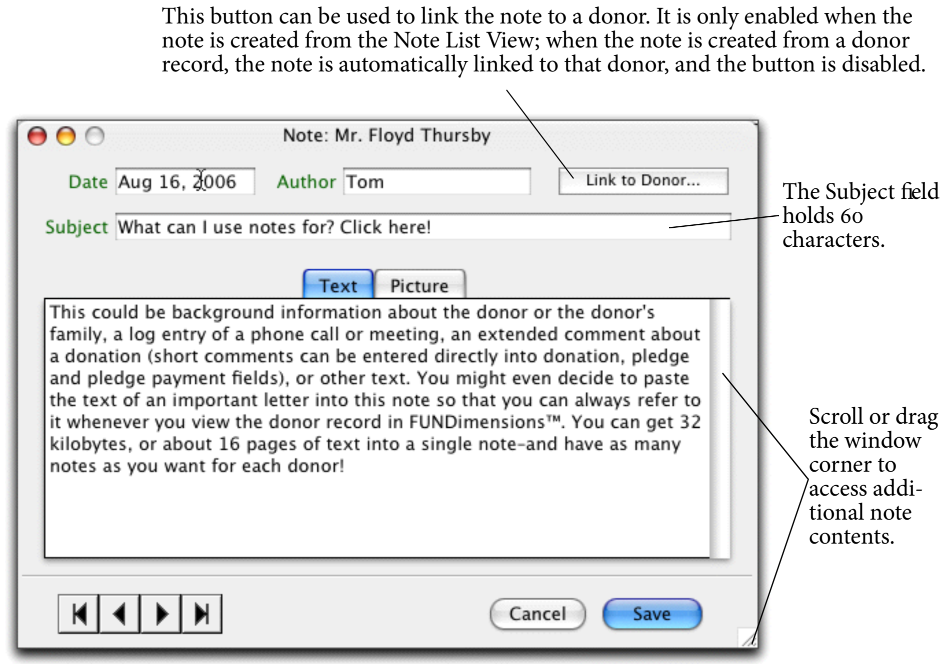


Figure 1.23 Note Input Window, text pane

You can have as many notes as you want attached to each donor, using this window to enter or view each one.

To create a note, follow the instruction in "Adding Notes" on page 66.

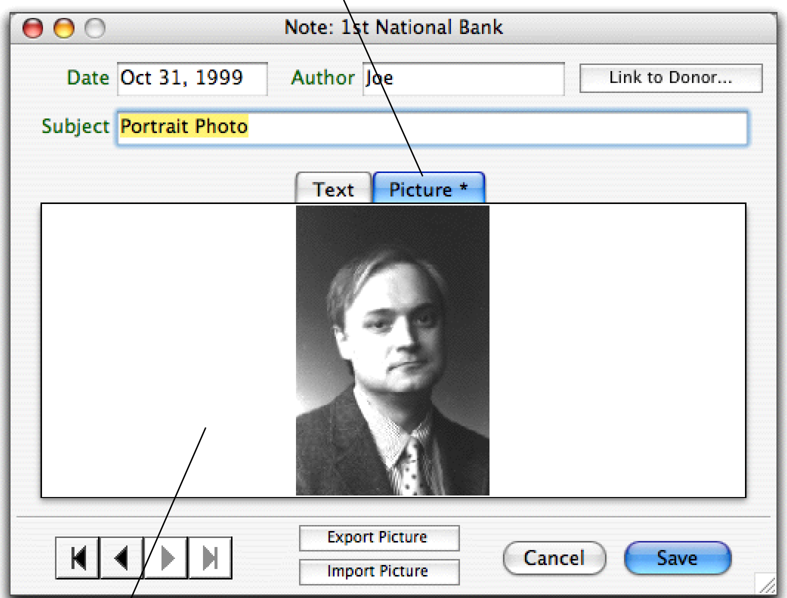
To display an existing note, double-click a row in the Note List View (previous page) or click the Notes tab of the Donor Input Window, then double click on the note in the scrolling area of the Notes pane (Figure 1.7)

The date field at the upper left corner of the window is automatically filled in with the current date when you create the note, but may be edited. If security is turned on in the program, the Author field is filled in with the User name used to log in from the Password dialog.

You can type directly into the Notes field, or paste text from the clipboard. This allows you to move text from a word processor or other software into a note record for storage with a specific donor. Each note can store one picture and up to 32 kilobytes of text (about 16 pages).

In addition, a picture can be stored in each note by pasting from the clipboard, or using the Import Picture button:

The absence of an asterisk on this tab indicates there is no picture associated with this note.



Click in this area and do Edit>Paste, or use the Import Picture button to load a graphic file from disk.

Figure 1.24 Note Input Window, picture pane

This window is resizeable to display additional text in the scrolling area. When viewing a picture, resizing the window enlarges or reduces the display of the picture, without affecting its stored resolution. Clicking and dragging the lower right corner will resize the window.

To get a picture out of FUNDimensions, do either of the following:

- Click in the picture area. It will highlight; do Edit>Copy to get the picture to the clipboard.
- Alternately, click the Export Picture button to invoke a standard Save dialog, where you can create a graphics file on disk.

An asterisk is displayed in the Picture tab to indicate a picture is placed there, so you do not have to click the tab to find out. For more on working with notes, see “Adding Notes” on page 66.

When running under Microsoft Windows, FUNDimensions requires that Quicktime be installed to work with most graphic file formats. Quicktime is free software available from Apple, Inc. by visiting http://www.apple.com/quicktime/download. See the FUNDimensions Windows Installation Guide or Client-Server Administration Guide for more information.

About FUNDimensions

This window is opened by choosing the About FUNDimensions… item from the Help menu (on Windows) or the FUNDimensions menu (on Mac OS X). It displays the location and name of the data file you are currently using (except in client-server edition), the amount of free memory available to the application, the user name and access privileges for the current log-on, and the version number you are using.

It also displays the technical support phone number, and several buttons, as shown and described in the text below:

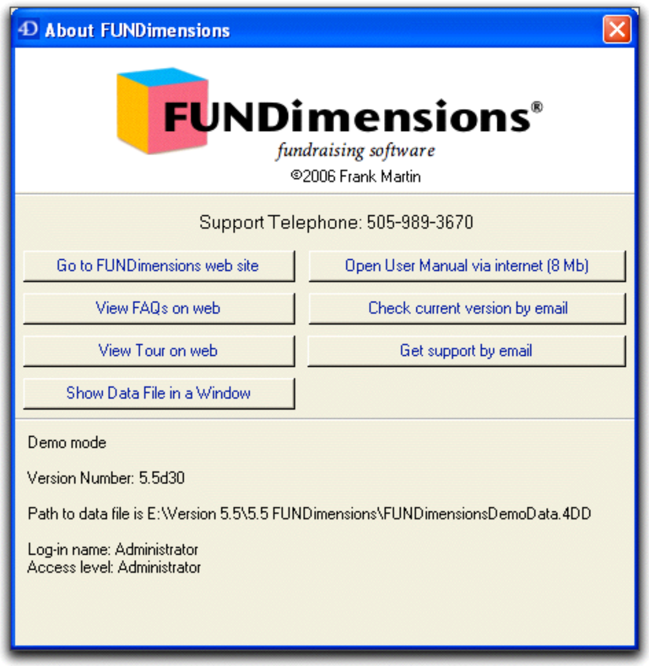


Figure 1.25 About Fundimensions window

- **Go to Fundimensions web site.** This opens your browser and connects to the main page of the FUNDimensions web site (http://www.fundimensions.com).
- **View FAQs on web.** This opens the FAQ (frequently-asked questions) page on the web site (http://www.fundimensions.com/FAQs).
- **View Tour on web.** This open the Tour Directory page on the web site (http://www.fundimensions.com/tour). Tours are offered for many aspects of the software, and this is a good way to get an overview of the software capabilities. You can take the tours online, or download the various tours as PDFs for offline viewing and printing.
- **Open User Manual via internet.** This will invoke your web browser to download the latest PDF version of this manual (http://www.fundimensions.com/User%20Manual.pdf). You will need Adobe Reader® to open the file: it is free from Adobe at http://www.adobe.com. There are some advantages of the PDF version of

the manual over the printed manual: it is always updated for the latest version of the software, and contains the latest revisions and corrections; it can be quickly searched for a word or phrase; and cross-references, URLS, and entries in the table of contents and index are hyperlinked to take you directly to the referenced page when clicked.

You can also download the user manual with related installation guides and other documentation by visiting the download library on the web site (http://www.fundimensions.com/downloads).

- **Get support by email.** Creates a pre-addressed email message with basic facts about your computing environment which may assist us in supporting you. When requesting technical support by email, please use this button to create the email whenever possible.
- **Check current version by email.** This link generates an email message which triggers an automated response when sent. The response will include the version number you are currently using, the latest version available, and information on obtaining the upgrade. The response may contain a link directing you to a list of changes in recent upgrades, to help you determine whether upgrading is desirable.
- **Show Data File in a Window.** This opens the folder containing your data file in an operating system window. This is the same file described in Path to data File, in the lower area of the window. Use this to assist you in performing manual backups or in identifying the current data file when you have multiple data files on your computer.

For a complete listing of on- and off-line FUNDimensions resources, see Table P.1, "Fundimensions Documentation & Online Resources" on page xi.

Floating Windows

Floating windows display summary information in small windows that "float" in a layer above other windows. They are miniature reports presented automatically by FUNDimensions to cue you to facts which may be important to your understanding or decision-making. Occasionally, floating windows also display confirmation messages; for example, after performing an export, FUNDimensions will display a message in a floating window containing the number of records exported and a count of records not exported because the Do Not Mail checkbox was turned on for the donor. These confirmation messages do not interrupt your work and close themselves after a short time, or they may be closed with the close button in the window.

Information Palette

The Information Palette displays summary information while viewing a record in an Input Window. The information content is designed to alleviate problems of inadequate perspective that can result from viewing a single record without also viewing the related records and provides key statistics based on those other records, so that you are better informed when it comes to a specific donor's history. The palette is a small window that appears whenever an Input Window is opened or brought to the front. This applies only to the Donors, Donations, Memberships and Pledges modules; no palette will appear for Pledge Payment, Relationship or Keyword Input Windows.

You can close the palette with a checkbox in the Preferences dialog. The palette will automatically hide itself when a List View is brought forward, and reappear when an Input Window is active.

In addition to displaying information, the palette has invisible buttons that can open records. To use this feature, just click the quadrant of the palette that refers to the record you want to view. The buttons work only in the Donors module. If the palette indicates there are multiple last gifts (2 or more gifts made on the same date) or multiple largest gifts (2 or more gifts of the same amount), the corresponding button is disabled because there is no way for the software to know which record to open in this situation. In this instance, use the Gift pane of the Donor Input Window (Figure 1.5) to open the records.

The exact contents of the palette will vary depending on which module you are using, and which record is displayed. This is the palette as it might appear when viewing a specific donor record:

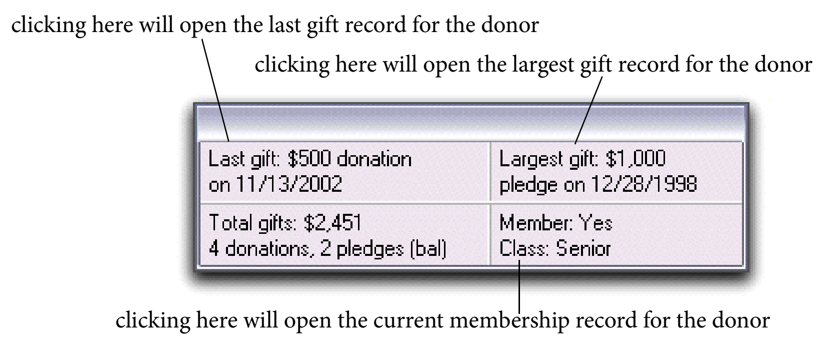


Figure 1.26 Palette for donor record, example #1

The palette gathers information from all the related gift records for the donor, counts the gifts, calculates a gift sum and analyzes the gift records to ascertain the last gift. Doing this manually would require considerable effort and time; the palette does it for you instantly and effortlessly. But what happens if there are no gifts? The palette summarizes that for you in a way that can be grasped in the quickest of glances:

Figure 1.27 Palette for donor record, example #2

You can capture the information in this palette by choosing Output>Clipboard—Profile to (see page 359 for more information).

The palette adjusts its readout to add facts about the donor. For example, the palette below is indicating that the donor has an outstanding balance in their pledge. This is to aid you in applying a gift when its nature is not known.

Figure 1.28 Palette for donor record, example #3

The palette illustrated below is for a membership record. In this instance, the palette found other membership records for the same person, and has distilled relevant information about those records to display important facts—in this case, that the person is still a member, even though the record you are viewing now is for an expired membership:

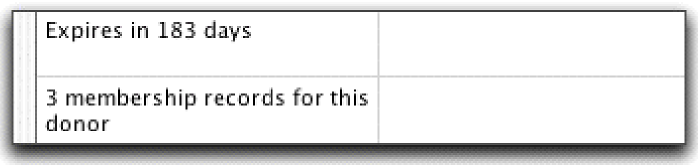


Figure 1.29 Palette for Membership record

This is a palette for a typical donation record. The palette has gathered information about other donations made by the same donor, and related them as a percentage of the currently displayed donation:

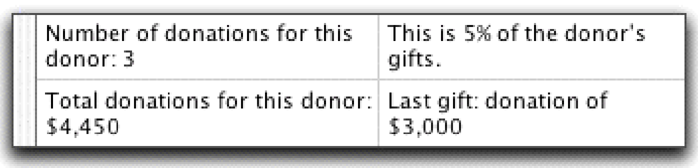


Figure 1.30 Palette for Donation record

Finally, the palette displayed below for Pledges includes:

- pledge status
- number of payments made (unless the pledge status is new)
- number of payments remaining (unless the pledge status is fulfilled or written-off)
- balance amount
- overdue amount
- due date, or the “due since” date if the pledge is overdue.

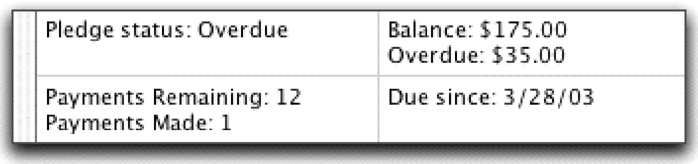


Figure 1.31 Palette for Pledge record

See “Creating Pledges” on page 82 for explanation and formula for the values that appear in the palette for pledge records.

When viewing gift records, *you may copy palette contents to the clipboard*, so that you can place it into other software where it may be printed, included in reports, etc. See “Clipboard-Gift Record to” on page 360.

Dashboard

The Dashboard window helps to keep you up-to-date on your current fundraising and inform you about items that may need urgent attention. It also serves as a convenient starting point for producing thank you notes, membership renewal notices, and pledge fulfillment letters.

The Dashboard window automatically updates according to a time interval that you set. To minimize the impact on your screen space, the dashboard will resize itself to the smallest possible size consistent with the information to be displayed. For example, if there are currently no memberships about to expire, the window may shrink to eliminate those columns. It will expand itself later when one or more memberships are nearing expiration.

You can display the Dashboard by choosing Output>Show Dashboard, or configure it to open when the software starts up. Information in the Dashboard refreshes itself automatically at an interval you set in Preferences, between 10 and 120 minutes inclusive. To force an immediate refresh, close the Dashboard by clicking the Close button on the window, then re-open it by doing Output>Show Dashboard.

The Dashboard window is shown in the next three figures.

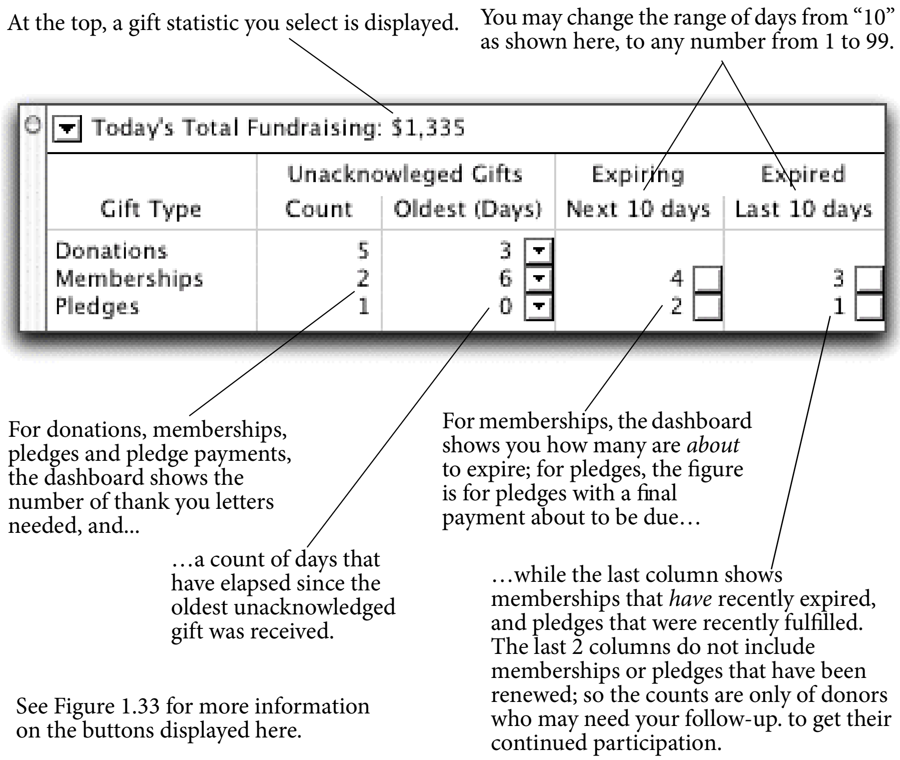
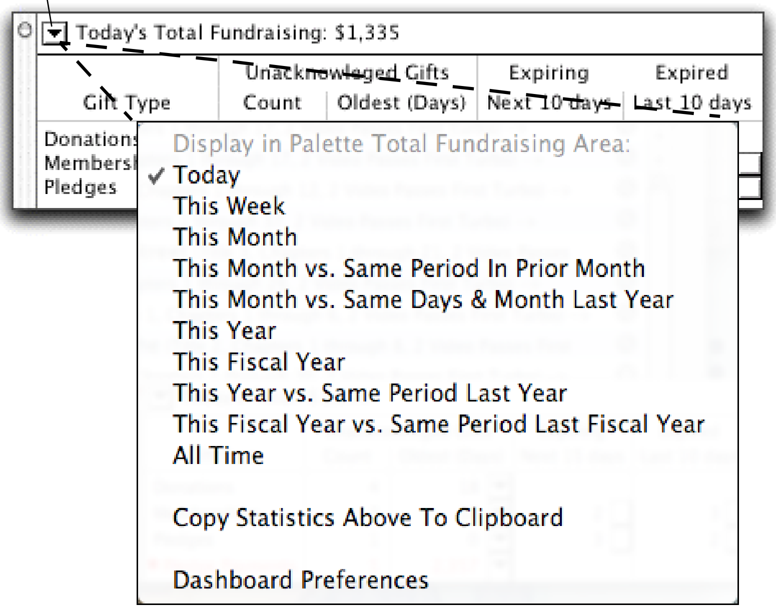


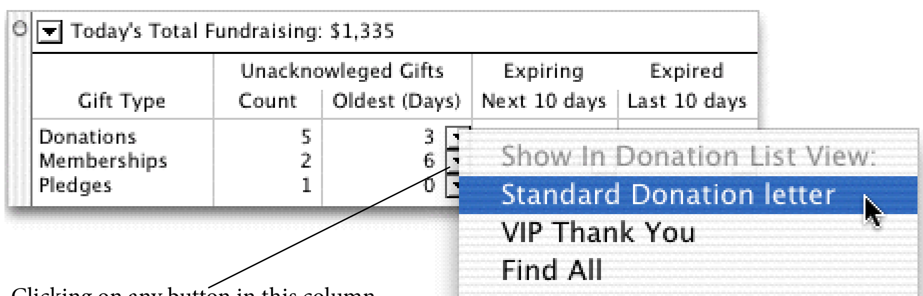
Figure 1.32 Dashboard Layout

You can click on the small, square buttons in the dashboard to display the records in a List View or to display various strategic fundraising totals. The

The various buttons on the dashboard are described below:

Clicking on this button displays a menu of choices for which statistics to display on the Dashboard.





Clicking on any button in this column displays a menu listing the types of Thank You letters specified for your unacknowledged gifts. Select a Thank You Type from the menu to open the List View window and show you the records. You are then ready to print labels and perform an export for mail merge.

Clicking on any button in these columns displays the records about to expire (left column) or recently expired (right column). *Only* memberships and pledges that have not been renewed are displayed. Unlike the buttons above, these do not display a menu when clicked; they directly open List Views.

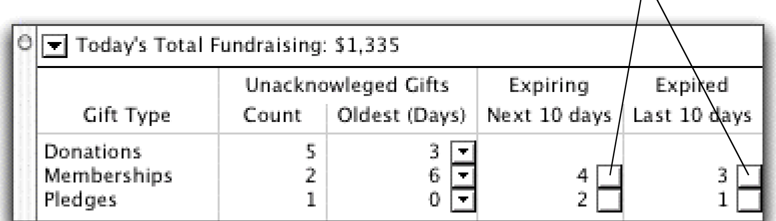


Figure 1.33 Dashboard Buttons and Menus

When the age of the oldest unacknowledged gift reaches a threshold set by you, the dashboard row containing that gift is highlighted by receiving a bullet and a red color. To set this threshold, choose Dashboard Preferences from the pull-down menu indicated.

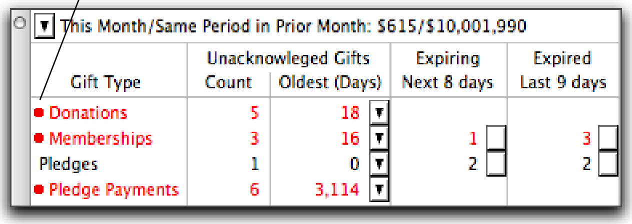


Figure 1.34 Dashboard with Highlighted (bulleted and red) Items

The Dashboard adjusts itself to take up a minimum space on your screen, and offers other window management:

- ♦ When there are no thank you letters needed, or expiring or expired terms for a gift type, that row is removed and the window height is reduced by a corresponding amount. The row will be reinstated if there is relevant data to display.
- ♦ When there are no expiring or expired terms, the 2 rightmost columns are hidden and the window width is reduced by a corresponding amount.
- ♦ If you do not want to display information for a specific gift type (Donations, Memberships, Pledge or Pledge Payments), it can be suppressed, and the Dashboard height reduced by a corresponding amount.
- ♦ If you do not want to display expiring or expired terms, you can choose to hide them, and reduce window width by a corresponding amount.
- ♦ The Dashboard window can be dragged to your preferred location; and it will reappear in the same spot when you start up the program next time (except in Demo or Read-Only mode).
- ♦ You can choose to display the window when the program is launched, or display it manually by choosing Output>Dashboard. The window may be closed with it's close button, or by choosing Output menu > Hide Dashboard.

Configurations mentioned above are performed by:

- ♦ On Windows, choosing File menu > Preferences>General tab.
- ♦ On Mac, choosing Fundimensions menu > Preferences>General tab.

For more information on configuring the Dashboard, see "General Preferences" on page 261.

Buttons

Buttons appear in FUNDimensions to perform various operations such as saving a record, canceling changes, creating new records, and for copying information displayed on your screen to the clipboard for placement into other software. In some cases, the Information Palette window contains invisible buttons that allow you to open certain of the records referenced by the palette. See the previous Information Palette section for more on these special buttons.

Most input windows contain a row of buttons along the bottom. These allow you to save or cancel changes made to a record, and navigate from one record to another.

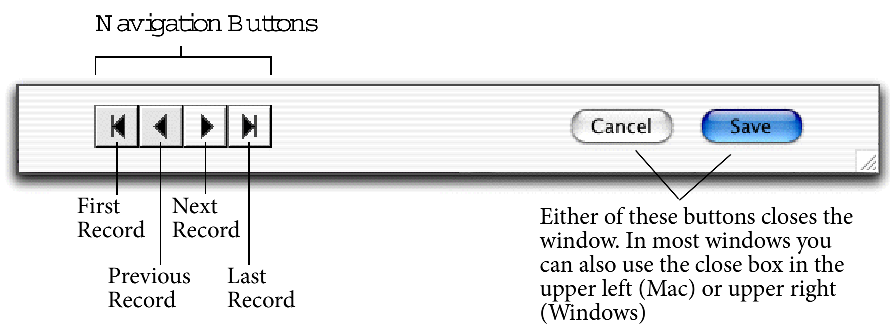


Figure 1.35 Button Bar in Input Windows

- **Navigation buttons**. The four buttons in the Navigation button group are First Record, Previous Record, Next Record and Last Record (from left to right). If you enter the input window from a list view, the records you can access with these buttons will be limited to those records in the list. If you enter the input window from another input window, as you would when selecting a record from a scrolling area in the Donor Input Window or Pledge Input Window, the buttons will navigate among the records associated with that donor or pledge. If changes were made to a record prior to using a navigation button, those changes are saved, just as if you had clicked the Save button. *Keyboard shortcuts:* On Windows, CONTROL-left arrow for Previous Record, CONTROL-right arrow for Next Record. On Mac, COMMAND-left arrow for Previous Record, COMMAND-right arrow for Next Record.
- **Cancel** button. This button means "throw any changes away and return to the previous version, then close the window". If no changes were made, the window just closes. *Keyboard shortcut:* press ESCAPE (ESC on some keyboards).
- **Save** button. This button means "this record is OK as it is–save it to the hard disk and close the window". *Keyboard shortcut:* ENTER or RETURN key, except for the Notes Input Window, where the RETURN key places carriage returns in the note.

Menus

Menus contain most of the commands in FUNDimensions, which allow you to view, enter, modify or retrieve the information in your database. Usually, there are five menus present, but some of the items in those menus may be disabled (aka grayed out or dimmed) depending on the specific context; only commands that can operate in a specific situation will be available.

If you want to execute a command with a menu item and that item is disabled, it means you are in the wrong module or window to use that command.

A special menu structure is presented for the Report Editor and Chart Editor, containing commands specific to those environments.

This manual contains a separate chapter devoted to each primary menu, which include reference material and screenshots. Refer to the table of contents for page numbers.

CHAPTER

2

Basic Operation

Starting Up FUNDimensions

To launch FUNDimensions single-user edition, do this:

1 *On Windows:* On your desktop, double-click on the FUNDimensions shortcut (a 3-color cube). Alternately, in the Start menu at the lower left of your screen, choose Programs: FUNDimensions.exe, or double click the item "FUNDimensions.exe" in the folder where you installed the software. *On Macintosh:* double click the file on your hard drive named "FUNDimensions".

If password security is off, this is all you need to do: you may skip to step 3 (FUNDimensions installs with security off). If password security is on, the password dialog appears as shown below.

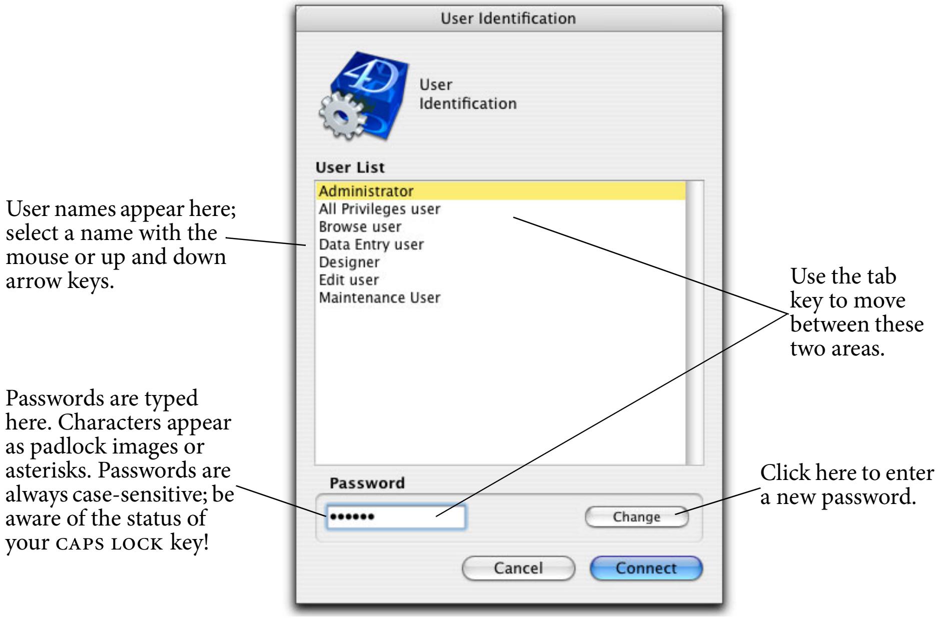


Figure 2.1 Password dialog

2 Select your user name (assigned by the Administrator) and type in your password. Click CONNECT.

3 The splash screen appears. A thermometer appears displaying the progress of startup. The splash screen closes by itself.

4 The Donor List View appears.

Quitting FUNDimensions

To end your FUNDimensions session, choose Quit from the File menu (under Mac OS X, the Quit command is in the FUNDimensions menu). If Input Windows are open with unsaved changes or new records, they are saved automatically.

On Windows, you can quit by clicking on the “x” in the upper-right of the main application window.

Creating a New Data File

FUNDimensions stores your data in a a file on disk, referred to in this manual as the data file. All data you enter is stored in this file, except for passwords, user names and access privileges; therefore this file should be backed up and every precaution taken to ensure against its loss; see “Backing Up Your Data” on page 243. The application itself is named “FUNDimensions”; this program “opens” the data file in the same sense that a word processor opens a document you created.

To create a new, empty data file, hold down the ALT key (Windows) or the OPTION key (Mac) as the program starts up. If security is turned on, you must enter your password first, then hold down the ALT key (Windows) or the OPTION key (Mac) to create a new data file. In either case, you will see the standard Save dialog where you can name the new data file and save it to your hard drive. See “Naming the Database” below for tips on choosing the name for your database.

You may have as many data files as you want; generally, you have one data file for each organization that you manage with FUNDimensions. You cannot conduct a single search or make a single report that includes more than one data file, so it is usual *not* to keep data in multiple data files, unless you are using FUNDimensions to manage more than one organization.

To select from among multiple data files, do one of the following:

- If FUNDimensions is *not* already running, hold down the ALT key (Windows) or the OPTION key (Mac) when starting the software to select the file to open for that session: see “Opening a Data File, Normal Mode” below.
- If FUNDimensions is already running, choose File>Open Data File and select the data file you want to open.

If you would like to create a data file that shares some attributes of a data file you already have, you can use your operating system to duplicate the existing data file, then delete records as necessary in the duplicate file.This might be useful if you wanted the new data file to have similar choice lists or donor records of an existing file. Duplicating a file in with your operating system is a basic file management task that is documented in the online help for your computer.

Naming the Database

On Windows: the data file must have a suffix of.4DD. Unless the option to display file name suffixes is turned on for the window displaying your data file, you cannot see the 3 letter suffix from the Windows desktop. This does not mean the file is named incorrectly. To display file name suffixes, open the folder containing your

FUNDimensions data file and choose View>Options from the menu, then configure your Windows options as follows:

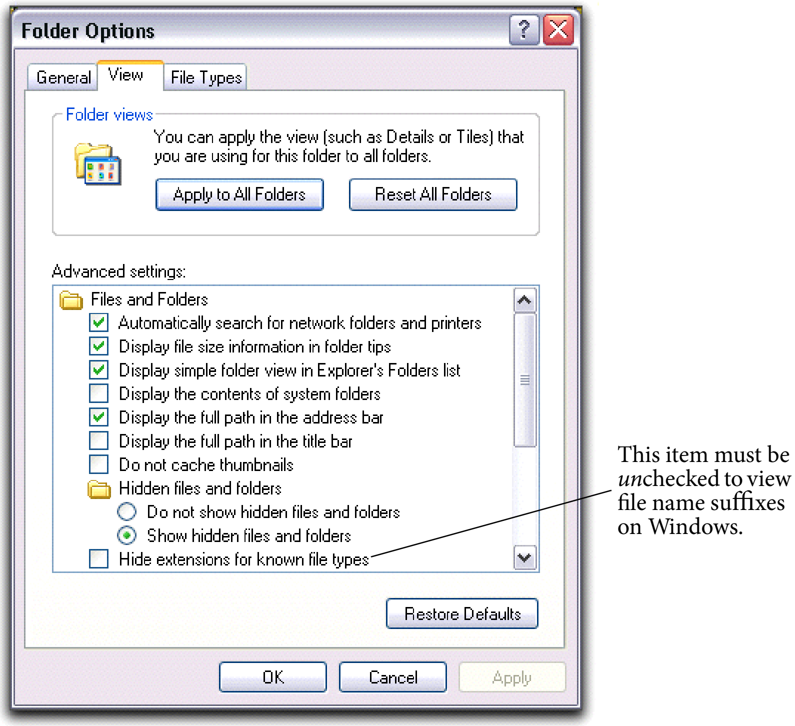


Figure 2.2 Folder Options dialog (View pane) in Microsoft Windows XP®

Windows users should generally avoid renaming files or folders installed with FUNDimensions.

On Mac os x: name your data file "FUNDimensions.data". If this file is kept in the same folder with the FUNDimensions program, it will be opened automatically when you start up the software. If you name or locate the data file in any other way, FUNDimensions will prompt you for a data file each time it is launched.

Opening a Data File, Normal Mode

You can select a data file to open while FUNDimensions is starting up, or after the program has launched.

- At startup, hold the ALT key (Windows) or the OPTION key (Mac) down immediately after launching the software to produce an Open Data File dialog window. Use this window to navigate to the folder containing your data file, then select the file and click the Open button.
- After the program is launched, choose File>Open Data File. Use the window that appears to navigate to the folder containing your data file, then select the file and click the Open button. This option is available for the Single-User edition only; client-server users must select a data file at startup on the server.

Under Windows and Mac OS 9, the last data file opened is remembered by the software and is reopened the next time the software is launched, unless you use the ALT (Windows) or OPTION (Macintosh) key. Renaming or moving the data file or any of its enclosing folders will defeat this memory, forcing FUNDimensions to ask you to locate the data file the next time it is launched.

In the Normal Mode, all functions are available in the software, except for items restricted by your password access level. This is in contrast to the Read Only mode, described below.

There is a display of the currently-open file name and path name of data file in the About box. You can view this information by selecting About FUNDimensions… from the Help Menu (Windows) or the Apple menu (Mac) when FUNDimensions is the frontmost application on your computer. Click anywhere in the dialog to close it. If you keep more than one data file on your computer, this is useful to ensure you are working in the correct one.

Demo users: Demo versions will only work with the sample data file installed with the demo. The file labeled "FUNDimensions.4DD" (Windows) or "FUNDimensions.data-demo" (Mac) contains the actual sample data you will use to try out the software.

Hint: On Windows, you can launch FUNDimensions from the Start>Program menu. On Macintosh, you may place an alias of the program file in the Apple menu items folder on your Macintosh ®. This folder is located inside the System Folder. Then you can launch FUNDimensions by selecting the alias in the Apple menu. Typing a space at the beginning of the alias' name will cause it to sort upward on your Apple menu for even easier access.

Opening a Data File, Read–Only Mode

Read-only mode permits any data file to be opened on any Mac or Windows computer, without the need to purchase another copy of the program, and without a hardware key being attached to the computer. In read-only mode, you cannot make any changes to the data file-you can't edit, add or delete records. There are also limitations with respect to sorting (page 292) and reports, i.e. reports under the Print List and List Statistics commands will be available; other reports, exports, report editors, label printing, etc. will be disabled in read-only mode. Built-in backup capabilities are disabled in Read-Only mode.

To prepare to open a data file in read-only mode, do this:

- ♦ Copy the data file from the host computer to the computer you want to use in read-only. You may use removable disks, network transfer, email attachment, or any other standard technique for copying files.
- ♦ Install the FUNDimensions software. You may download the "Demo/Updater" from the web site for this purpose. You need the same version as was last used to open the data file in Normal mode; if this is not the version offered on the web site, please inquire of technical support for information for availability of older versions.

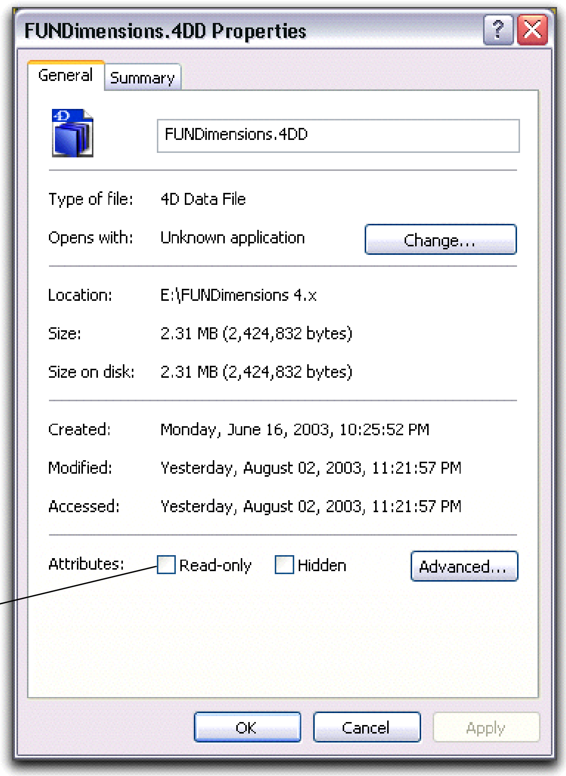
To open a data file in read-only mode, you need to first lock the data file using capabilities of your operating system.

To lock a data file on Windows, do this:

1 Locate the data file. This file will have a suffix of ".4DD". There is also a companion file with a suffix of ".4DR".

2 Select the ".4DD" data file by clicking once on it. The file highlights.

3 Right-click on the data file and select Properties from the menu. A window like this one appears:



Check the box for Read-only.

Figure 2.3 Setting the Read-Only property in Windows

4 Click in the box labeled Read Only, click Apply, then click OK.

5 Open your data file in FUNDimensions using the procedure in "Opening a Data File, Normal Mode" above.

To lock the data file on Macintosh, do this:

6 Identify the data file. It may have any name assigned to it. Your data file may consist of a single file (older databases), or of two files suffixed with .4DD and .4DR: if you have two files, you only need to perform this operation for the file suffixed with .4DD. Select the file by clicking once it. The files become highlighted.

7 On Mac OS X, choose Show Info from the File menu.

8 Click in the box labeled Locked, as shown below:

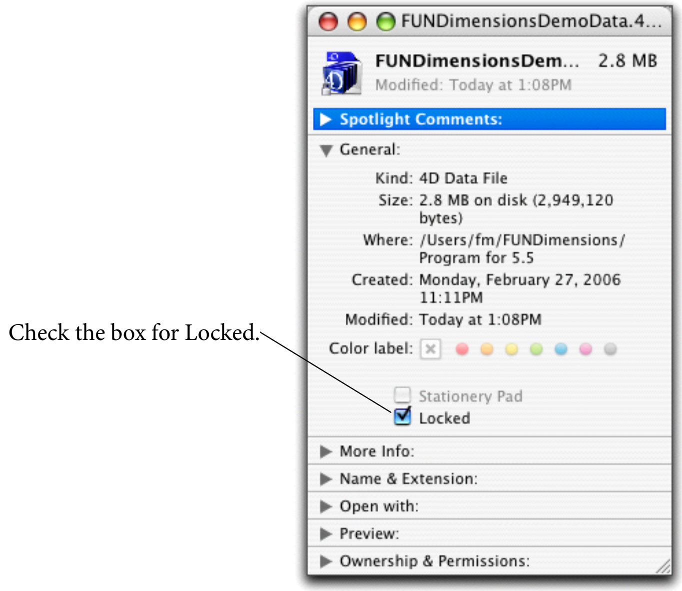


Figure 2.4 Setting the Locked Attribute on Macintosh

9 Close the Get Info window and open the data file using the instructions in "Opening a Data File, Normal Mode" above.

When a file is locked according to these instructions, FUNDimensions detects this when it opens the file and puts itself in Read-Only mode. Some buttons and menu items that would be available in the normal mode will be disabled in read-only mode. If you need to use these items, you must attach a hardware key and driver software, following the instructions in the Installation Guide.

Cross-Platform Deployment of Read-Only Databases

If you need to open a data file from a Macintosh in Read-Only mode on a Windows computer, or vice versa, your data file must be in the two-piece format, with one piece having the .4dd suffix and the other piece having the .4dr suffix. Newer databases will have this format, whether created on Mac or on Windows, but older databases created on Macintosh may need to be split using the 4D Transporter utility program. Once split, the data file can be used on either Mac or Windows without further processing. Please inquire with technical support for availability of this software. It is free of charge by internet download.

Password Security in Read-Only Mode

Password security can be used to limit access to gifts, notes and printing in Read-Only mode, the same as they can be used in Normal mode.

Administrators may wish to create user accounts specifically for use with Read-Only mode: if this is done, a log-in must be performed once in Normal mode with the user account before it is used in Read-Only mode. This must be done to create a preferences record for the user account, which is necessary for operation, but which cannot be created in a read-only data file. If a log-in is not performed once in Normal mode with the user account, an error will occur and the user will not be able to log-in to that account in Read-Only mode.

CHAPTER

3 Data Entry

FUNDimensions has 8 types of record that you can create. Use the table below to locate the record type you need to create, and the page number for instructions.

Table 3.1 Table of Record Types

Record	Use For…	Comment	Page*
Donor Record	Stores information about a person, company or other organization; examples include name, address, phone number.	Every gift record below must be associated with a donor record.	56
Donation Record	Stores information about a one-time gift; includes most in-kind gifts. Examples of this information include gift amount, and date, and fundraising campaign that motivated the donor to make the gift.	Most of the fields in this record type also appear in other gift record types.	74
Membership Record	Stores information about a gift with expiring privileges (e.g., free newsletter or discounted admission), such as dues amount, expiration date, and membership level.		78
Pledge Record	Stores information about a gift expected to be made in one or more installments over time; includes the payment schedule and information about whether the payments are on time, overdue, etc.	Individual payments for the pledge are recorded as pledge payments (see next table row).	82
Pledge Payment Record	Stores information about a gift made to fulfill a pledge.	See comment above.	87
Keyword Record	Stores a word or phrase describing an attribute of a donor. Donor records can be assigned any number of keywords.	An event that was attended, a mailing you sent, or any demographic or donor interest you want to track.	90, 62
Relationship Record	Stores the name of a group of people. Donor records can be assigned to any number of relationships.	A family, company, club, committee or other group of people.	91, 67
Event Record	Special fundraising events (parties, competitions, etc.), or regular calendar items	Seating management, ticket printing and mailing, event gift tracking	212
Note Record	Stores text and pictures associated with a donor.	Contact log, background, etc.	66

*See also the index under topics such as Donors, Donations, Memberships, Notes, Gifts, etc.

Data Entry Overview

You can change or add information to your database through Input Windows, where you enter text or use choice lists to alter the contents of fields. Default values are implemented in most input windows to reduce typing and errors. FUNDimensions also offers commands for editing the information in groups of records that you select in the Donor List View, to save you from the tedium of repetitive entry in Input Windows.

For a general review of Input Windows, see "Windows" on page 2.

Navigating Fields

When entering new data or editing existing data, you may move from field to field by pressing the TAB key or using the mouse to click inside the field you want to edit. Once a field is selected, the left and right arrow keys will move the insertion point within the field. If a new window titled "List" opens up when you enter the field with the mouse or TAB key, you will use a choice list to enter the data instead of typing in the data; see "Choice List Data Entry" on page 50.

The TAB key moves to the next field; SHIFT-TAB moves you back to the previous field.

Fields are labeled by the kind of information they should contain. For example, the Donor Input Window has fields labeled "First Name", "Last Name" and "Address".

Field Formatting

Some fields will accept entry of only limited kinds of information, or are programmed with error-correcting features. When you use these fields, FUNDimensions will reject what you type if it is the wrong kind of data, change what it thinks is wrong, or offer a list of items from which you must make a selection. For example:

- Dollar amount fields will accept only numbers. If you type punctuation or alphabetic characters, they will be ignored.
- Various fields will only accept choices you make from a list. These choice lists enforce a controlled vocabulary for completing certain fields, making it possible to perform reliable searches and reports (see "Choice List Data Entry" on page 50).
- Date fields require entry in the Month/Day/Year format (may vary for non-US systems). See "Date Entry" on page 49.
- When entering or editing salutations, names, company names, and city names, error-correcting functions work to reduce mistakes. The first letter of a name, and letters following a space, comma or hyphen are capitalized, while other letters will be made lowercase. Numbers, leading and trailing spaces, and punctuation except for periods will be stripped. You can turn off error correction temporarily using the procedure described in "Error Correction" on page 60.
- Some fields are not enterable or editable. These display values calculated internally by FUNDimensions, and include the Amount Due field in a Pledge Payment Input Window, and the ID numbers that appear in gray text in Input Windows.

- The Postal Code field will accept only letters (for overseas addresses), numbers, spaces and hyphens. Letters will be converted to uppercase. These formatting rules will be applied to the Postal Code field:
    - If you type nine numbers and no letters, FUNDimensions automatically places a hyphen after the fifth number, for the American 5+4 format.
    - If you type six numbers or letters, FUNDimensions automatically places a space after the 3rd character, for the standard Canadian format.
    - If you type just 5 numbers, no formatting is performed.
    - If you type 10 numbers with no letters, FUNDimensions alerts you that there are too many numbers. You may ignore the alert if you wish, and the 10 digits will be accepted.
- To set a default Postal Code for new donor records, see “New Donor Records” on page 263.

Some fields are mandatory. This means that if these fields are not filled in you will not be able to save the record or quit the program. FUNDimensions will inform you which field needs attention and move the cursor there if you attempt to save records without the mandatory fields.

Date Entry

Basic date entry in FUNDimensions is of the form MM/DD/YY for United States systems, i.e. “03/03/03” for March 3rd, 2003. For most non-US systems, use DD/MM/YY. “MM” means a two-digit month, “DD” a two-digit day, and “YY” a two-digit year. It also works to type a four-digit year.

Several shortcuts exist to aid you in typing in a date. To use these shortcuts, put your insertion point in a date field, type the shortcut, then press the TAB key or click outside the field:

- When you omit the year from a date, FUNDimensions will insert the current year. So when you are typing any date for the current year, *you can omit the year.*
- When you omit the month, the software inserts the current month, so when you are typing any date in the current month, *you can omit the month and year.*
- When you type a **+**, the date is increased by one day.
- When you type a **-**, the date is decreased by one day.
- When you type a **t**, **t**oday’s date is inserted.
- When you type an **m**, the first day of the current **m**onth and year is inserted.
- When you type an **h**, the last day of the current mont**h** and year is inserted.
- When you type a **y**, the first day of the current **y**ear (January 1) is inserted.
- When you type an **r**, the last day of the current yea**r** (December 31) is inserted.

Date entry can be in the following forms:

Table 3.2 Date Entry Formats

	Format	Example
USA Date Formats	MM/DD/YY/	You type “030404” for March 4th, 2004.
	MM/DD/YYYY	You type “03042004” for March 4th, 2004 or “03041904” for March 4th, 1904.
	MM/DD	You type “03/04” for March 4th, (current year).
	DD/MM/YY	You type “040304” for March 4th, 2004.
International Date Formats	DD/MM/YY	You type “040304” for March 4th, 2004.
	DD/MM/YYYY	You type “04032004” for March 4th, 2004 or “04031904” for March 4th, 1904.
	DD/MM	You type “04/03” for March 4th, (current year).
	DD	You type “04” for (current month) 4th, (current year).

Any character except for the shortcut keys can be used as a separator, or you may omit the separator entirely, i.e. “030303”, “03 03 03”, “03i03u03”, and “03/03/03”are all formatted as March 3rd, 2003.

When you see 00/00/00, it means the date entered was not a valid date, or that no date has been entered yet. For example, you type 02/30/05 (February 30th, 2005) in a date field. When you press the TAB key, FUNDimensions shows 00/00/00 to indicate that date does not exist.

A shortcut also exists in search windows when a data range must be specified. To specify a date range of one day, enter the date in the first field (From:), then tab to the next field and press the DELETE or BACKSPACE key. This empties the second (To:) date field. FUNDimensions will interpret this to mean you wanted the second field to be the same date as the first.

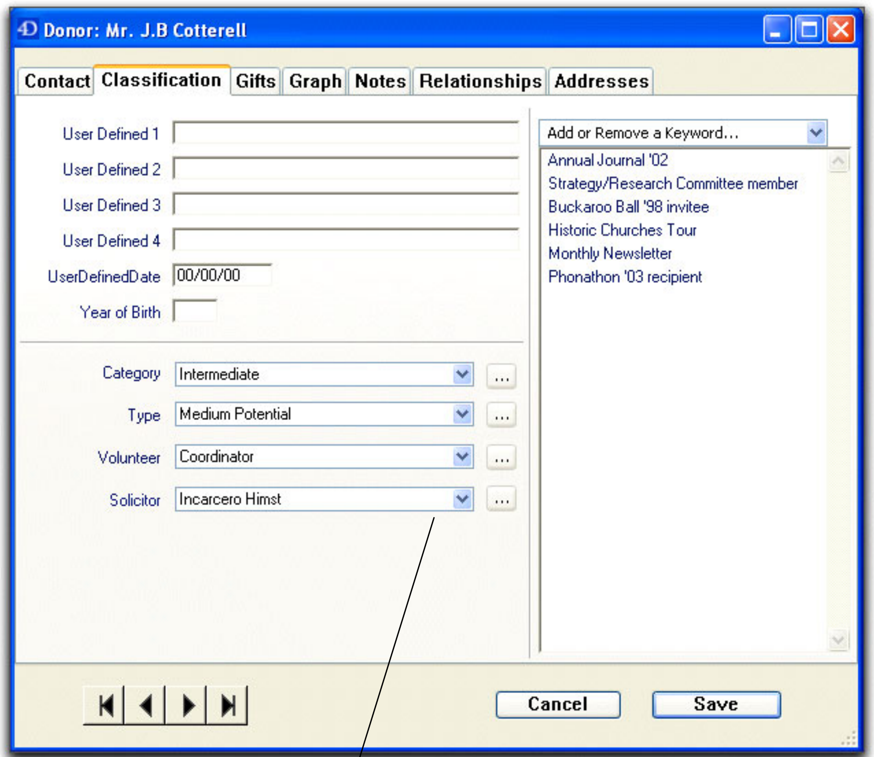
Dates are stored internally with a 4-digit year. A pivot year is used to determine whether a 2-digit year you enter is interpreted as being of this century or the previous century. The pivot year is 1990; when you enter a 2-digit year in the range of 90-99, the previous century is assumed, i.e. 95 is interpreted as 1995. All other 2-digit years are interpreted to be of this century, i.e. 84 is interpreted as 2084. You can always override these interpretations by typing in a 4-digit year.

Choice List Data Entry

Some fields are restricted in the values they can have by a choice list. This creates a controlled vocabulary for the attributes of donors and gifts, so that they can be searched and reported upon easily and reliably. To illustrate, gifts given in the 2006 Annual Fund Drive all get designated with “2006 Annual Fund Drive”; it will not be possible for some gifts to get entered with “Annual Fund Drive 2006” or “AFD06”, so when you want to list all the records given for that campaign, only one search is necessary, and when reporting on campaigns, a single subtotal will provide the correct amount for the 2006 Annual Fund Drive. For more information about the use and design of choice lists, see “Designing Your Database” on page 371.

Fields with *different* names have separate, independent choice lists, e.g. the Campaign and Fund fields have different lists. Fields with the *same* name share a common choice list, e.g. the Payment Form fields in Donation, Membership and Pledge Payment records all share the same choice list.

You can identify which fields work with choice lists by the button labeled with an arrow at the right side of the field:



Choice list fields (four) in the Donor Input Window.

Figure 3.1 Choice List fields example

Fields associated with choice lists can accept only *one item* from choice lists. (For an important exception, see "Assigning Keywords" on page 62). There are three ways to assign a value from the choice list to a field: tab or click in the field, then:

- ♦ Click on the arrow button at the right of the field, or type the down arrow key to produce a list:

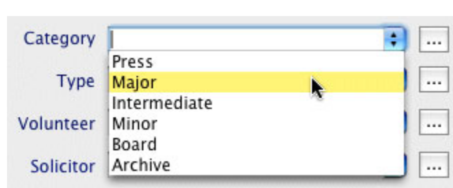


Figure 3.2 Choice List

Use your mouse or arrow keys to select an item. If using the arrow keys to select an item, type the RETURN key to accept the selection.

- Instead of selecting from a list, just type the first several letters of the choice list item. FUNDimensions finds the first match in the list and completes the field for you. This is fastest if you know which choice list item you want to assign, and so don't need to browse the list.
- Click the button right of the field labeled with an ellipsis (…). This produces a window where you can select from the list. Use your mouse or the up and down arrow keys to select an item, then click the Select button or hit your RETURN key to complete the procedure:

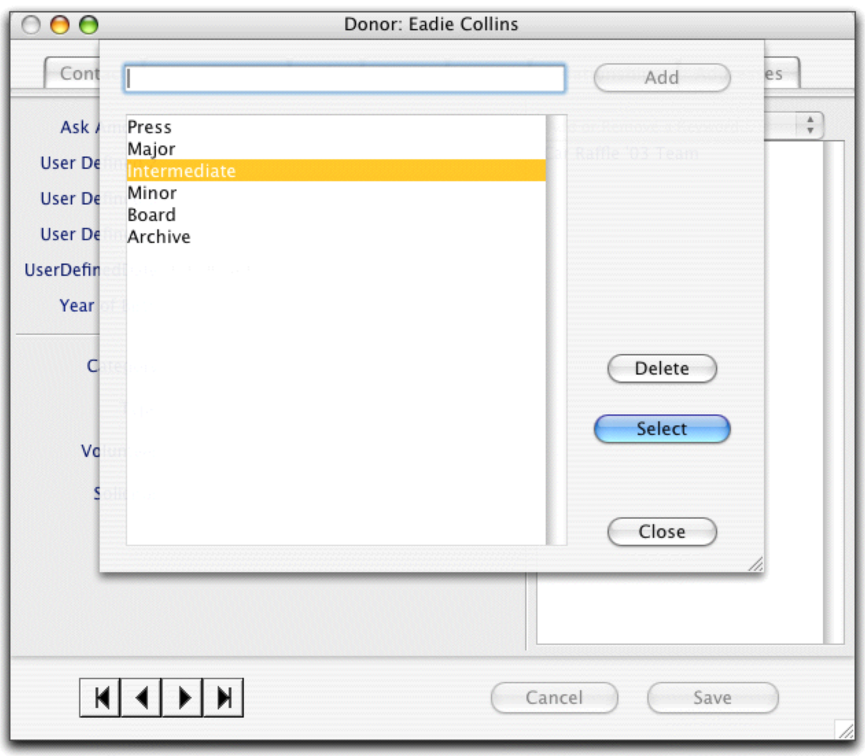


Figure 3.3 Choice List entry by dialog window

To leave a choice list field empty, just tab or click out of the field. If the field contains an entry you want to remove, first use your DELETE key to empty the field. The administrator can establish that certain choice list fields must have an entry in new gift records, otherwise they cannot be saved: see "Setup" on page 268.

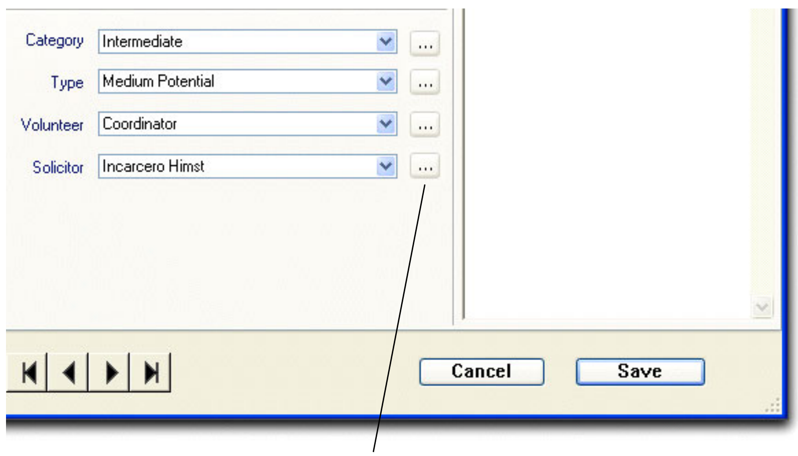
Choice List Editing

You can determine which items appear in choice lists by adding and deleting items. When password security is turned on, the administrator and users at the All Privileges level can edit choice lists, and the administrator may configure the database to also allow users at the Maintenance and Edit levels to edit choice lists: see "Access" on page 270.

Items deleted from choice lists do *not* get deleted from the records that have that item already saved in them. This design (which is in contrast to keywords, where editing *does* propagate to records with the keyword) allows you to keep choice lists short by deleting items that are obsolete for your current purposes. Keeping choice lists to a minimum number of items makes selecting the right item faster and less error-prone. (It is possible to change large numbers of records that have an choice list item assigned to them to another value in a single step, without editing each record manually: see "Editing a Group of Records" on page 55 and "Assign Other" on page 299.)

To edit a choice list, follow this procedure:

1 In any input window displaying the field associated with the choice list, click a List Edit button*. This is denoted by an ellipsis ("):



List Edit buttons (4) in the Donor Input Window.
These also appear in gift input windows.

Figure 3.4 List Edit button example

2 The List edit window appears, as shown in Figure 3.3 on page 52.

3 Type a new entry at the top of the window and click the Add button, or select an item to delete and click the Delete button. Choice list items are limited to 35 characters in length.

4 Conclude by clicking the Select button to place the selected item in the field, or click the Close button to leave the current field entry intact.

You cannot directly edit an item. To accomplish this, delete the item, then use the Add button create a new one.

* An exception is the Payment Forms choice list, which requires access to the Setup pane of the Administrator window (by File>Administrator; see "Setup" on page 268). Use the Edit Payment Forms button there, then follow the directions on this page to edit the list, except that the Select button does not apply and will not be available in this instance.

Choice List Editing-Constituent Types

Unlike editing other choice lists, editing the choice list for constituent types is initiated by clicking the arrow as if to select an item, then choosing "Edit This List" from the scrolling list:

Click on any arrow next to a constituent type to get an option to edit the list.

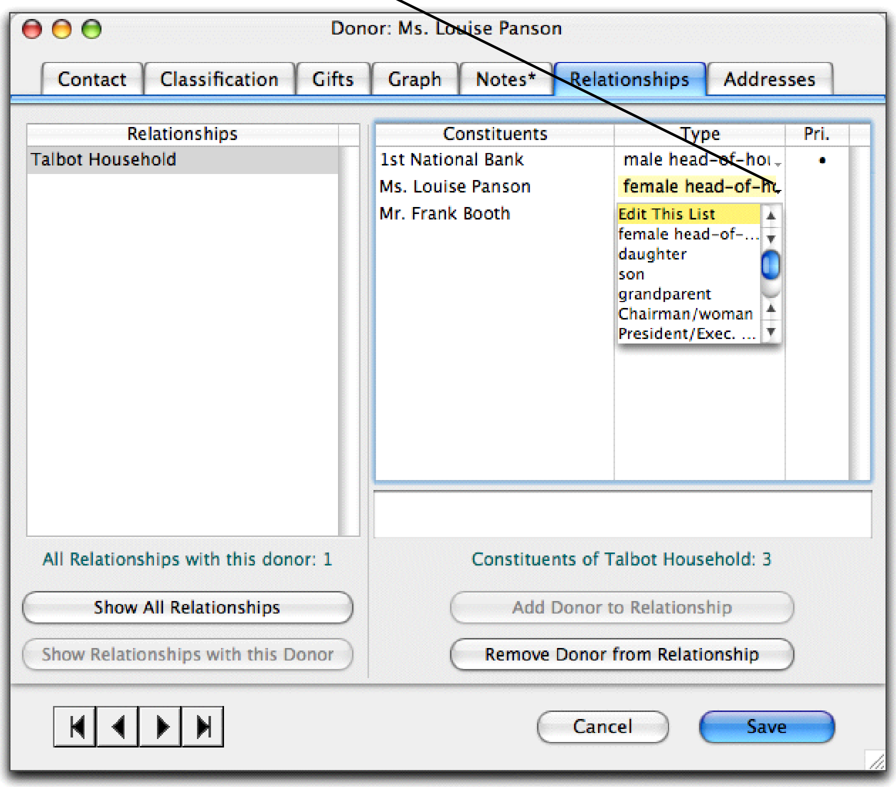


Figure 3.5 Editing the Constituent Type List

Choosing "Edit This List" generates the list editing window as shown in Figure 3.3, "Choice List entry by dialog window" on page 52.

Selecting Records

The records contained in a List View window, or the single record displayed in an Input Window, are said to be the *current selection*. Menu commands are applied only to the current selection. This allows you to perform operations which affect some records while not affecting others—for example, printing out a report for a specific group of records while excluding others.

By doing Records>Show All, you direct FUNDimensions to make all records for a module the current selection. A selection is generated by performing a search; records found by a search appear in the List View and become the current selection. There are several other ways that a selection can be generated by the software, including searches and the Load Set menu command.

There are methods you can use to manually specify records to include or exclude from the current selection in a List View. You begin this by using one or more of these tech-niques to specify the records to include or exclude:

- To specify a single record, click in the row.
- To specify multiple, discontiguous records, hold down the CONTROL key (Windows) or the COMMAND key (Mac) while clicking once on rows you want to select.
- To specify multiple, contiguous records, click on the first or last record in the series, then depress the SHIFT key and click the record at the other end of the series. The records you click and the records between them become highlighted.

With any of the techniques above, you will observe the records becoming highlighted to show that they have been selected. Then you use commands in the Records menu to either remove the highlighted records (Records>Hide Highlighted) or remove the non-highlighted records from the current selection (Records>Show Highlighted).

You can always create precisely the selection of records you want, using some combination of searches and manual techniques. See page 103 for more information on generating selections.

Editing a Group of Records

In the Donors module, you can edit an entire group of records in one step by choosing the Assign Keyword or Assign Other commands from the Records menu. A dialog box will appear in which you can make a selection and apply it to the current selection (see section above). If you need to assign or remove a keyword or an item from a choice list to a group of donor records, this technique will save time and reduce the possibility of errors. Refer to “Assign or Remove Keyword” on page 299 and “Assign Other” on page 299 for more information on using these commands.

Creating Donor Records

To create a new donor, do this:

1 Enter the Donors module if you are not already there (File>Donors). You may create a new record from either the List View or Input Window of this module.

2 Select New Donor from the Records menu, or right-click (CONTROL-click on Macintosh) on any record in the Donor List View and choose New from the contextual menu. (The keyboard shortcut is CONTROL-N on Windows, COMMAND-N on Macintosh®) The Contact pane of the Donor Input Window will appear with the default fields already filled in and the Salutation field selected. For more about default values, see "Default Values" on page 60 and "New Donor Records" on page 263.

3 Enter data in the fields of the donor record. Use the TAB key or mouse to move to the next field, repeating the process until the information for the donor has been entered. Use tabs at the top of the window to move to other pages of the record. If you have a question about how to fill in a specific field, you can look up more information about that field in the "Donor Record Fields" on page 72.

4 Click the Save button to save the record and close the window, or click the Cancel button to reject the new record.

These steps assume you do not have any donation, pledge or note records or alternate addresses to create for the new donor. You can add any of these items after creating the donor record and before performing step 4 above. Refer to these sections for specific information:

- To add a donation, see "Creating Donations" on page 74.
- To add a membership, see "Creating Memberships" on page 78.
- To add a pledge, see "Creating Pledges" on page 82.
- To add a pledge payment (to a pledge), see "Creating Pledge Payments" on page 87.
- To add a note, see "Adding Notes" on page 66.
- To add the donor to a relationship, see "Adding Donors to Relationships" on page 67.
- To add a keyword, see "Assigning Keywords" on page 62.
- To add a second or third address, see "Adding Addresses" on page 69.

Warning: **Do not enter names and addresses in all-capital letters**, because this causes mail merge letters to have the recipient header appear that way. This usually looks bad and is typographically incorrect. If you want your mailing labels to appear in all-caps, use the appropriate checkbox in the Label dialog; see page 354. It is recommended that you have the **caps lock key o**ff at all times when using FUNDimensions.

In addition to the manual procedures described here, you can create donor records by importing data from other sources, such as mailing lists and other databases. See "Import" on page 276 for more information.

The Duplicate command in the Records menu also creates a new donor record. You must be in the Donor Input Window to use this command, which will "clone" the current donor record, with certain exceptions. See "Duplicate" on page 289 for more information.

Do Not Mail, Do Not Email, Do Not Call Checkboxes

If you check **Do Not Mail**, exporting and label printing will be blocked for that donor record without any further action on your part, with an exception: the Do Not Mail box is ignored when exports are done from the Donations, Memberships, Pledge or Pledge payment modules. This is so that thank you letters, which are usually sent by exporting from those modules, will always be sent.You have the option to override this behavior of the software; see "Do Not Mail Flag in Exports & Label Printing" on page 139 for more information.

The **Do Not Email** and the **Do Not Call** checkboxes do *not* prohibit data entry or editing in the phone number or email fields, but text in those fields will be in grey instead of black.

The **Do Not Email** checkbox will prevent an address in the Email field from appearing in exports or clipboards created using the "Clipboard-Email Address to" menu command (Clipboard-Email Address to is described on page 359). In exports, the "Suppressed" will appear if there is an entry in the email field of the donor record, but the Do Not Email checkbox is tuned on.

The **Do Not Call** checkbox will prevent any of the Home, Work, Fax or Cell phone numbers from appearing in exports or in clipboards created with the "Clipboard-Street Address to" menu command. (The Clipboard-Street Address to command is described on page 357.) In exports, "Suppressed" will appear if there is a phone number entered in the record, but the Do Not Call checkbox is turned on.

Label Line 1, Label Line 2 and Letter Salutation Fields

The **Label Line 1**, **Label Line 2** and **Letter Salutation** fields appear in FUNDimensions' exports for mail merge. You can use these items to set the recipient address (aka outside address) in letters, and to furnish the recipient name after "Dear". This provides flexibility to set this text, which the donor will see, in a way that is independent of the actual name and address information in the donor record, which you will see, use for searches, print in reports, and so forth.

In addition, the **Label Line 1** and **Label Line 2** fields are used when printing mailing labels. See "Layout for Built-In Label Templates" on page 353 for a diagram of how this works.

To provide the flexibility of these fields without the overhead of entering name data twice, FUNDimensions can complete them for you. The following rules are applied when you are creating a new donor record:

♦ When you leave the Last Name field by clicking or tabbing, FUNDimensions completes the **Label Line 1** field with the contents of the Salutation, First name and Last name fields. These three fields are joined together with spaces between them.

♦ Also when you leave the Last Name field of a new donor record by clicking or tabbing, FUNDimensions may complete the **Letter Salutation field**. The contents of the Letter Salutation field is usually placed after "Dear" in mail merge letters. The Letter Salutation field is completed according to the contents of the donor record's Salutation field and settings in Preferences as shown below (produced by File>Preferences, then clicking the New Donor Records tab):

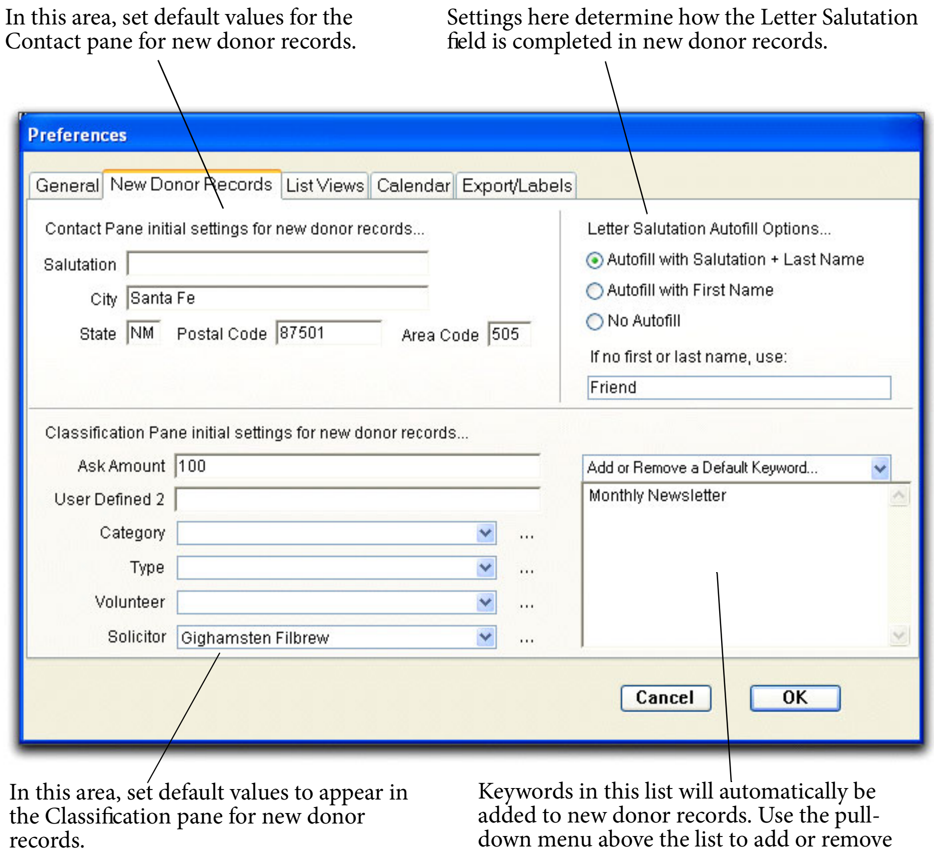


Figure 3.6 Entering initial settings for new donor records in Preferences

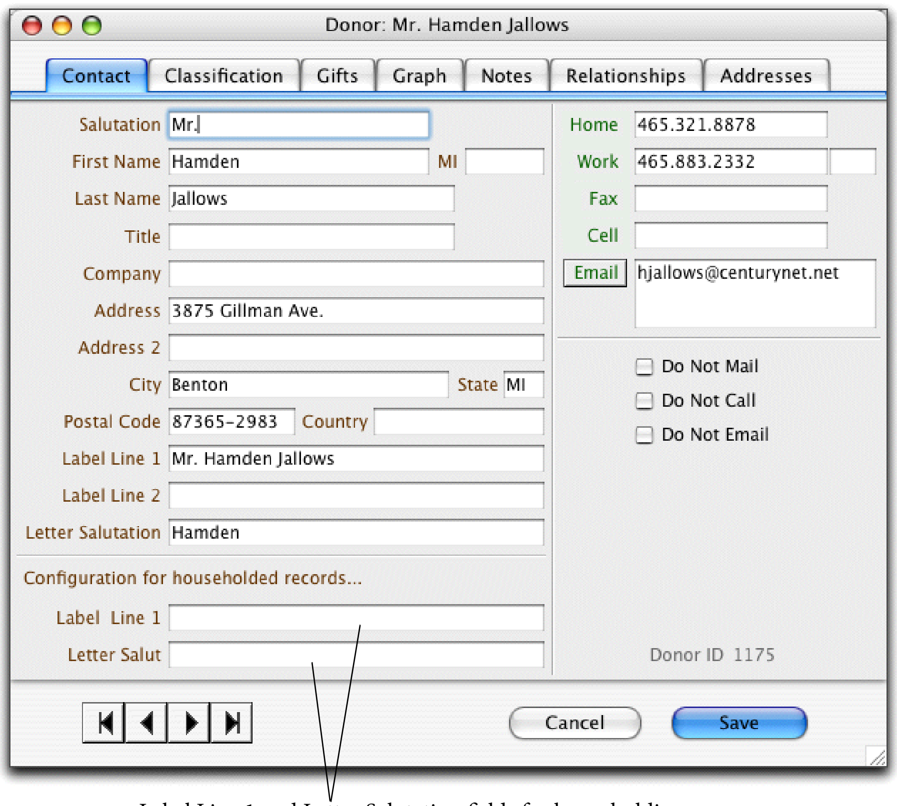
- If **No Autofill** is turned on in Preferences, the Letter Salutation field is left blank.
- If **Autofill with Salutation + Last Name** is turned on in Preferences, and the Salutation field is *not* empty, the Salutation and Last Name fields are copied to the Letter Salutation field, with a space between them. If the Salutation field is empty, the First Name field is copied instead. In a new database, **Autofill with Salutation + Last Name** is turned on by default.
- If **Autofill with First Name** is turned on, the First Name field is copied to the Letter Salutation field. This results in a less formal style of letter.
- If no first or last name, use lets you specify what will be placed in the Letter Salutation field when only a company name is entered in a new donor record. This will default to "Sir/Madame"; a typical alternative would be "Friends".

- In a new donor record, when you leave the Company field by tabbing or clicking, FUNDimensions copies the contents of the Company field into the **Label Line 2** field. (If the Company field is empty, the Label Line field will be empty too. This will *not* cause labels printed from FUNDimensions to have a blank line.)

If necessary, you can edit the **Label Line 1**, **Label Line 2** and **Letter Salutation** to customize your labels and exports.

Householding Fields

The Label Line 1 and Letter Salutation fields under "Configuration for householded records" are used when designating that records with the same address be combined into a single piece of mail:



Label Line 1 and Letter Salutation fields for householding.

Figure 3.7 Householding Fields (Contacts pane of Donor Input Window)

For more information on householding, see "Householding" on page 139.

Default Values

Salutation, city, state, postal code, area code, and some fields on the Classification pane can have default values when you create a new record. To use this feature, enter the defaults you want in the New Donor Record pane of the Preferences window, as shown above in “Entering initial settings for new donor records in Preferences” on page 58, and click OK. The next time you create a new donor record, the values will appear there.

Also in the New Donor Records pane, you can set keywords to be placed as defaults into a new donor record. You select default keywords using the same method used to add keywords to donor records, described on page 64.

Tip: Since these preferences are stored separately for each user when password security is on, users who perform data entry for different regions can have different city, state, postal code and area code defaults to reflect their assigned regions. By creating two or more user names for the same user, that user can maintain several sets of donor record defaults and switch between them when entering batches of records from several specific regions. This can save time and reduce errors by reducing repetitive data entry. To switch preferences, the user chooses File>Login as… to log in as a different user. For information on creating additional user names, see “Adding a User” on page 237.

Error Correction

During entry in the salutation, first and last names, title, company, address, address line 2, city and postal code fields, error checking and correction is performed by FundDimensions. Leading and trailing spaces and punctuation are stripped, except trailing periods. The first letter of each word is capitalized unless it is “and” or “or”. This usually makes it possible to enter the data in a new donor record without using the SHIFT key to generate uppercase letters, which can speed data entry for many typists.

Additional error correction is performed on the salutation field, by automatically adding a period after common salutations. You can type “mr” and error correction will change it to “Mr.”, or type “mr and mrs” and it is changed to “Mr. and Mrs.” This can help you enter records faster. If you do type periods, additional ones will not be added.

Corrections are performed only *after you leave the fields* by tabbing or clicking into another field.

To manually override error correction, click the label of the field you are working in, as shown in this diagram:

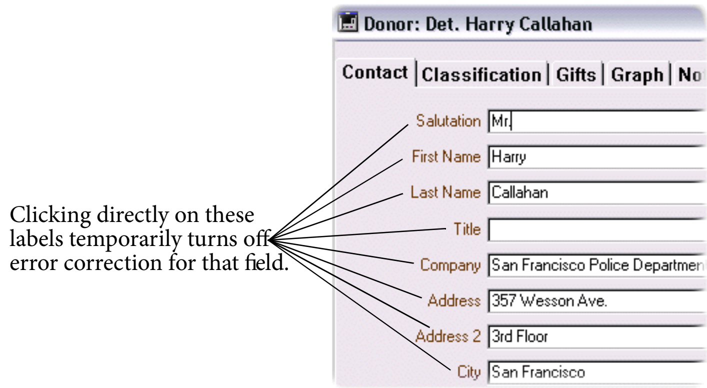


Figure 3.8 Disabling error correction in the Donor Input Window

The label will highlight briefly to confirm that the error correction is turned off (for that field only). It will turn itself back on as soon as you open another record.

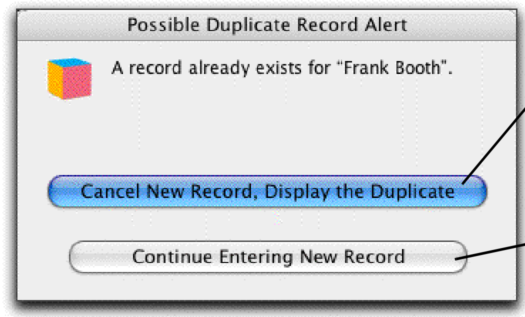
When entering information in the phone fields only numbers, periods, dashes and parentheses are accepted. However, after leaving the field the software will strip all non-numeric characters and format the phone number using an internal algorithm. Therefore, to speed your typing, don't type anything except numbers in a phone number field; let the software add periods between appropriate sections of the phone number. (If periods do not appear, it means there are an irregular number of digits—check the number for errors.) The phone extension field will accept all characters.

Duplicate Detection

FundDimensions helps to protect you from entering the same record more than once, by checking certain information as you enter it in a new record, against records already in the database. The following fields are checked as you tab or click in another field after typing in them:

- **Last Name**: the check is performed for other records with the same combination of the first and last names.
- **Company**: the check is performed for other records with the same company name.
- **Postal Code**: the check is performed for other records with the same combination of Address Line 1 and Postal Code.
- **Email**: the check is performed for other records with the same email address.

The checks are performed only during data entry in new, unsaved records. The checks are performed automatically and in the background, so you will not see any indication that a search is performed, unless a potential duplicate is found.When a possible duplicate is located by the search, a dialog appears offering you a choice of ignoring the warning and proceeding with data entry, or you may view the possible duplicate(s) in a the Donor List View.



Clicking this button stops entry of the new record, and displays the possible duplicate record. Use this option to inspect the records identified as possible duplicates. Typing the Enter or Return key activates this button.

Clicking this button ignores the warning and lets you continue entering data in the new record. Use this option if you are sure that the records identified as possible duplicates are not, in fact, duplicates.

If you elect to view the possible duplicate(s) (by clicking the top button), the new record is canceled and the duplicate is shown in the Donor Input Window if there is only one possible duplicate, or in the Donor List View if there is more than one possible duplicate.

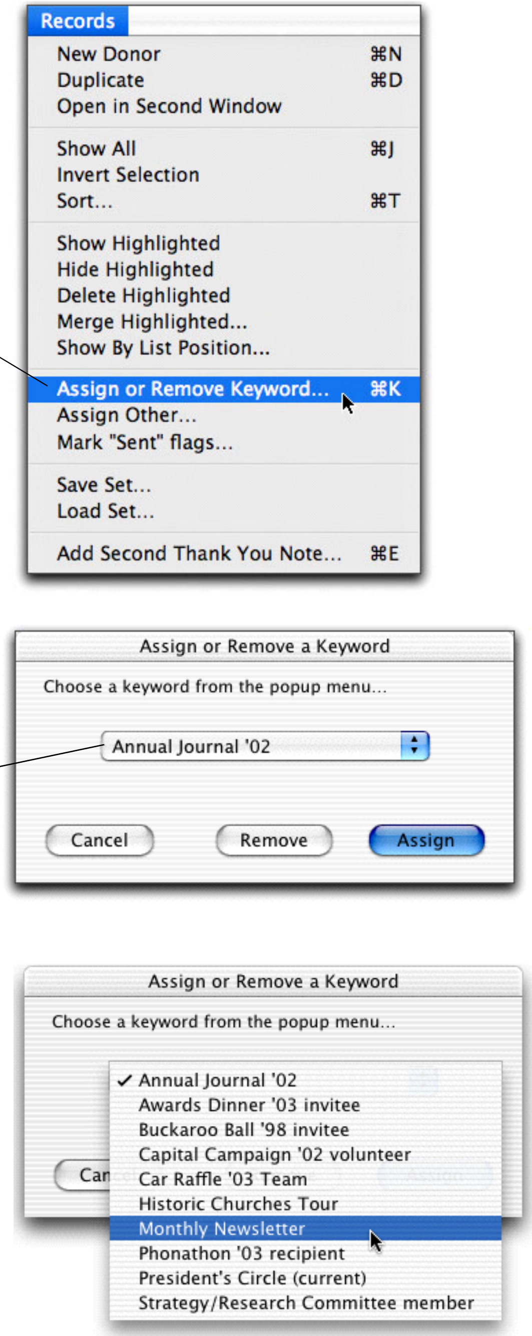
You can also run duplicate checks on records that are already saved, using the Duplicates search. This offers some additional attributes to test for detecting duplicates, and is especially useful after importing records from another source, since importing records bypasses the duplicate detection described here. See "Duplicates" on page 320 for more information.

Assigning Keywords

For information on when to use keywords, see "More About Keywords" on page 374. For more information on the Assign or Remove menu command, see "Assign or Remove Keyword" on page 299.

You can assign keywords to a donor using any of 4 methods:

♦ Method 1: From any pane of the Donor Input Window, follow these steps:



3 Choose the menu item "Assign or Remove Keyword".

3 This dialog appears. Click and hold the mouse button on the popup menu to display the keywords list.

3 Choose a keyword from the list, release the mouse button and click the Assign button to attach the keyword to the donor record, or click Remove to delete the keyword from the donor record.

Figure 3.9 Assigning a Keyword

♦ Method 2: From the Donor List View, follow the directions for Method 1 above. With this method, *the keyword you select will be assigned or removed from all the records currently in the List View.*

- Method 3: In the Classification pane of the Donor Input Window, click on the popup menu labeled Keywords. From the menu, choose the keyword you want to add or remove:

Click on this popup menu to display a list of keywords similar to the one shown. On Windows, you can tab into the list, and use the down arrow key to select an item.

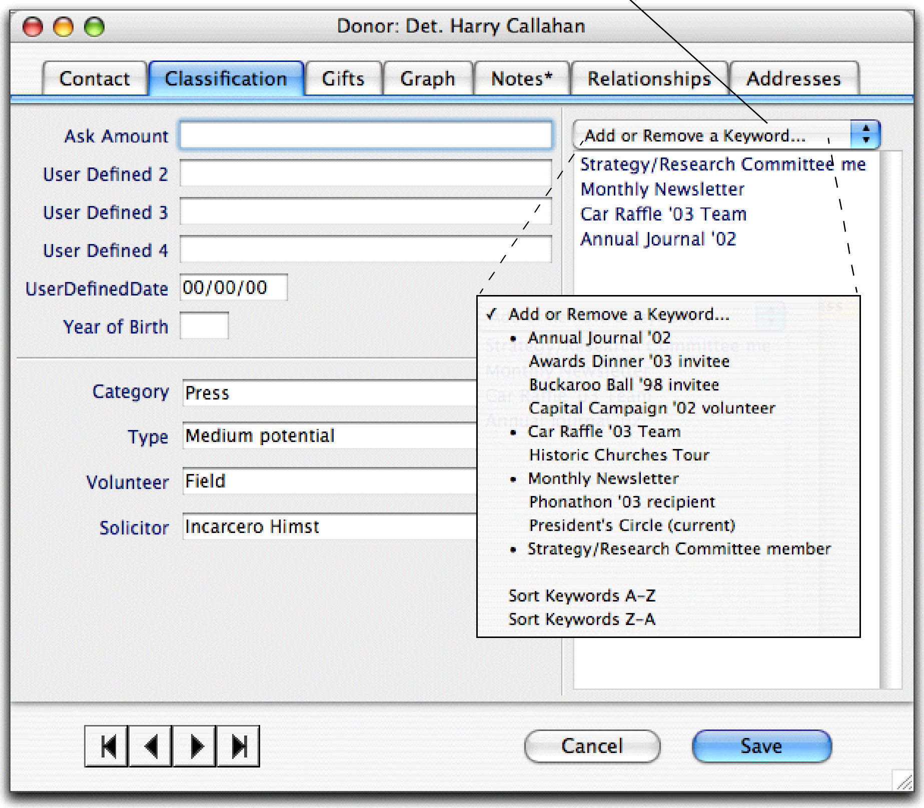
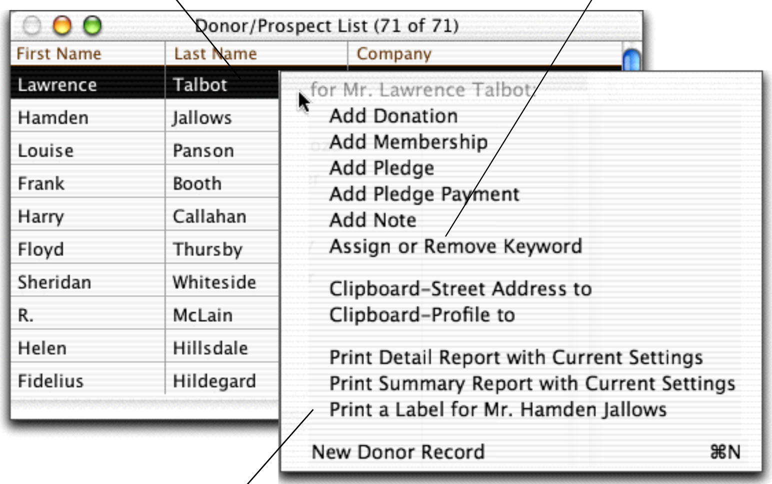


Figure 3.10 Adding or removing a keyword from the Donor Input Window, Classification pane

- Method 4: Right-click (control-click on Macintosh) on any donor in the Donor List View. A contextual menu appears: choose Add or Remove a Keyword:

Right-click (control-click on Macintosh) on a donor, then choose Add or Remove Keyword from the menu.



This is known as a "contextual menu" because contents of the menu vary depending on what window or object you right- or control- click on.

Figure 3.11 Adding or removing a keyword from the Donor List View via contextual menu

You get the same dialog shown in Figure 3.9 above. This will add or remove the keyword only for the donor record you right- or CONTROL-clicked on.

Refer to "Creating Keywords" on page 90 for information on creating, editing and deleting keywords from the popup menu.

Adding Notes

Each donor may have an unlimited number of notes associated with it. You may also create notes that are not associated with any donor. Each note consists of author, date and subject fields as well as the note text and a picture.

There are four ways to create a note:

- Click the New button in the Notes pane of the Donor Input Window:

Click the New button to create a new note for the donor.

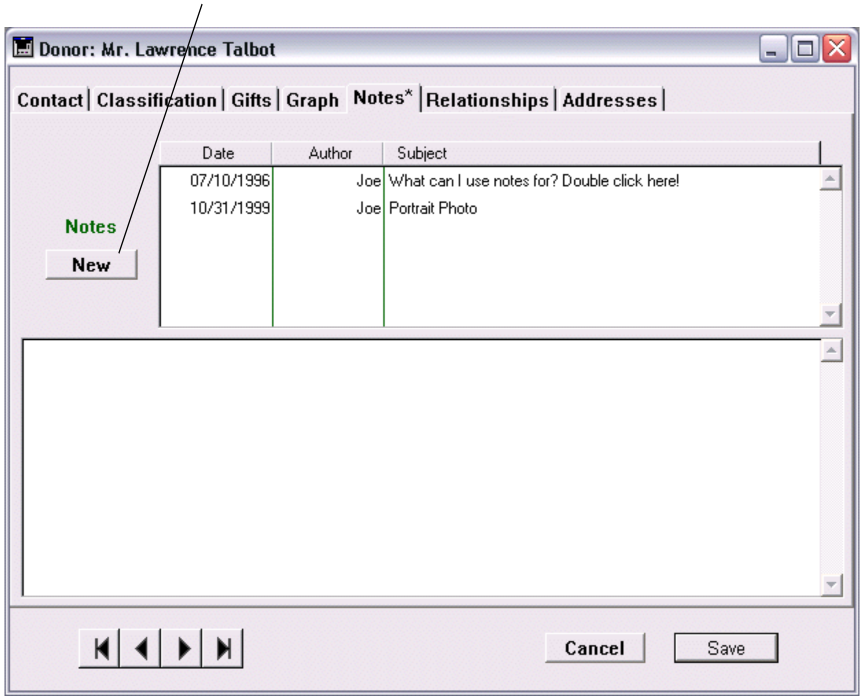


Figure 3.12 Creating a New Note

- You may also use the contextual menu as shown in Figure 3.11 to create a new note; this allows you to create a note without first opening the Donor Input Window for the donor. To use this technique, locate the donor record to receive the note in the Donor List View, then right-click (CONTROL-click on Macintosh) and choose Add Note from the contextual menu.
- Working from the Note Input Window or the Note List View (File>Notes; see “Note List View” on page 26), you can do Records>New Note. This is the only way to create a note that is *not* linked to a donor; however, notes created in this way may be linked to a donor if you wish. An unlinked note is listed only in the Notes List View; it will not appears in the Notes tab of any Donor record. To link the note to a donor, click the Link to Donor button in the Note Input Window before saving the note. This displays a list for choosing a donor.

With any of the techniques above, the Note Input Window appears as shown in “Note List View” on page 26. The upper section of this window contains fields for the note author, date, and subject. Author and date are filled in automatically by FUNDimensions based on the user name under which the log on was made and the current date as set on your computer. *Hint*: if the note is very short, place all of it in the subject field and leave the note field empty. Then you can read the note from the Donor Input Window, without opening the Note Input window.

The lower portion of this window contains the actual note, which may be up to 32 kilobytes of text (approximately 18 pages, or 32,000 characters). Text from other programs may be pasted in via the clipboard; this enables you to keep copies of letters written in word processors here. You may also store a picture in a note by clicking the Picture tab and pasting the picture from the clipboard, or using the Import Picture button to locate a file on disk.

The administrator can block access to notes for users at most privilege levels. If your access is blocked, you receive a message informing you when you attempt to create or open a note attachment. The lower note area is available to all users and cannot be blocked.

Adding Donors to Relationships

Before adding a donor record to a relationship, you must first create the relationship following the instructions in "Creating Relationships" on page 91. Once the relationship has been created, follow these instructions to include a donor in a relationship:

1 Choose File>Donors. Perform a query to locate the donor record you want to add, or locate it by browsing. Open the Donor Input Window by double-clicking the correct row in the List View.

2 Click the Relationships tab.

3 If it is not disabled, click the Show All Relationships button.

4 Browse the relationships list to locate the relationship that should receive the donor as a constituent. Click it once to highlight it. *Note:* the list is sorted in ascending alphabetical order; to toggle the sort order, click on the label "Relationships" at the top of the list.

5 Click the Add Donor to Relationship button. If the button is disabled, check the status bar underneath the constituent list; the donor will already be a constituent of that relationship.

6 Optional: to enter a constituent type, click the Type column next to the constituent name. A choice list appears. Double-click the type you want to assign in the choice list, or click it once, then click the OK button. If you need to edit the choice list, use the Modify button. See "Choice List Data Entry" on page 50 for more information. For advice on the use of constituent type, see "Designing Your Database" on page 371.

7 Optional: to designate the donor as a primary constituent, click in the Primary column at that donor's row. A bullet (Mac) or "x" (Windows) appears in the row. Any other donor designated as primary will be unmarked, since only one donor may be a primary constituent in each relationship.

8 Optional: to add a comment or note to a the constituent record, tab or click in the field underneath the constituent list. Text there of up to 125 characters will be saved automatically.

As you use this browser, you will observe that one or more of the four buttons in this window are frequently disabled. This is because the button would be redundant or inapplicable in the specific context. For example:

- ♦ If the current donor already belongs to the selected relationship, the button labeled Add Donor to Relationship is disabled.
- ♦ If all relationships are displayed in the Relationships list, the button labeled Show All Relationships is disabled.
- ♦ If no constituent is selected, the button labeled Remove Donor from Relationship is disabled.
- ♦ If the current donor is not a constituent of any relationships, the button labeled Show Relationships with this Donor is disabled.

To aid you in understanding relationships and their constituents, and to reduce the need to scan lists for a specific name, the status bars underneath the relationship and constituent lists distill relevant information and present it to you. Other features that may improve or speed up your work in this browser include:

- ♦ Changing the name of a relationship will propagate the change to all constituent entries.
- ♦ Changing the name of a donor in their donor record will propagate these changes to all their constituent entries. FUNDimensions displays the constituent name using the following rules:
  - ❑ If there is an entry in the record's Label Line 1 field, that name is displayed.
  - ❑ If the above field is empty, Fundimensions uses the entry in Label Line 2.
  - ❑ If both of the above fields are empty, FUNDimensions uses the concatenation of the Salutation and Last Name fields.
  - ❑ If the Label Line 1, Label Line 2 and last name fields are empty, FUNDimensions uses the Company field.
- ♦ In the Client-Server edition, it is possible that another user makes modifications to the Relationships List, by adding or deleting relationships, or editing the name of a relationship (per "Creating Relationships" on page 91). If you are viewing the Relationship pane of the Donor Input Window while they make these changes, you will not see their changes until you do one of the following:
  - ❑ click the Show Relationships With This Donor button (shown on page 12), or
  - ❑ click the Show All Relationships button (also shown on page 12), or
  - ❑ click on another window then click on the Donor Input Window to bring it back to the front, or
  - ❑ close the Donor Input Window and open it again, or
  - ❑ quit and relaunch the client program.

Adding Addresses

Each donor can be associated with up to three sets of address, title, company, phone and label/letter salutations. One of these sets is always assigned to be the current address, and this is the set that will be used by FUNDimensions for all display and output purposes, including printing, exporting and screen display in the Donor List View and the Contact pane of the Donor Input Window.

If the donor has only *changed* their address or phone number, simply edit the information in the Contact pane.

To enter an alternate address for a donor, follow these steps (refer to Figure 3.13 below):

1 Click the Addresses tab of the Donor Input Window.

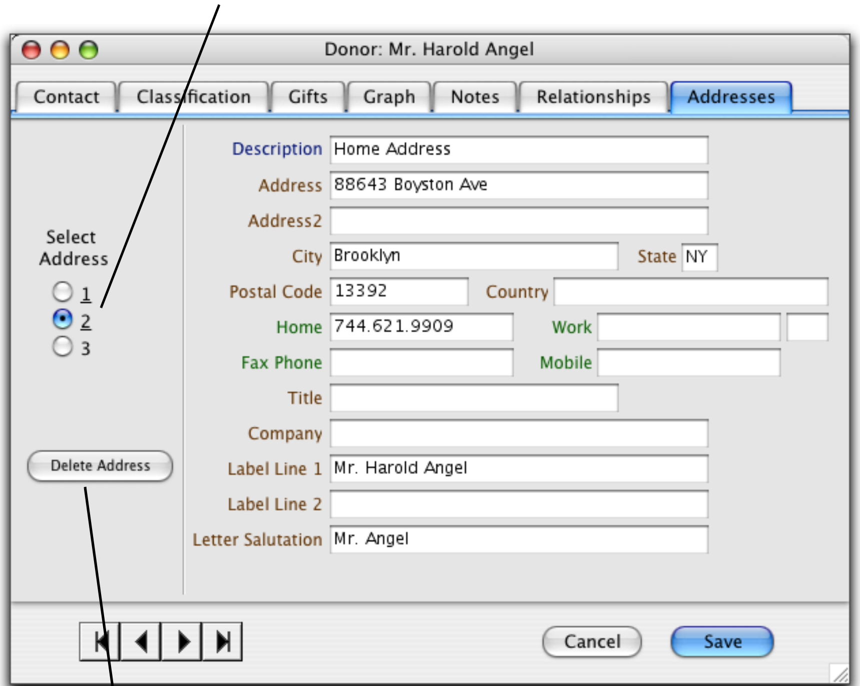
2 You will see the current address for the donor displayed and the radio button labeled 1 will be selected. Choose either of the other radio buttons, and you will notice the address fields become blank. *Shortcut:* When creating a new address, hold down the ALT key on Windows or the CONTROL key on Macintosh while clicking a radio button to copy the current address (the one showing in the Contact pane) to the new address. *Keyboard shortcut:* On Macintosh, select a radio button by typing OPTION-1, OPTION-2, or OPTION-3, instead of using the mouse.

3 Type in the address information as you want it, tabbing from field to field or using the mouse. *Note:* The Label Line 1, Label Line 2, and Letter Salutation fields are filled in automatically, just as they are when you create a new donor record in the Contact pane. These fields can still be edited, allowing for up to three completely different mailing configurations to be stored for a donor.

Select an address to use for a donor by opening the Donor Input Window, clicking the Addresses tab and using the radio buttons to choose the address you want assigned. Clicking the Save button, using the navigation buttons to move to a new record, or changing pages with the tabs will make the assignment. To change the address assignment for a group of donor records, see “Assign Other” on page 299.

When you click one of the Select Address radio buttons (the buttons labeled 1, 2 and 3), FUNDimensions immediately creates an address record for that number and saves it, even if you leave the address empty. Every address that is used in this way has an underline under its number, as shown below:

Underlined numbers indicate address slots that are used, even if the address information in the slot is blank. In this example, Addresses 1 and 2 are used, while Address 3 is unused.



Use the Delete Address button to remove an empty or unneeded address. When you do this, the underline for that address slot is removed. You cannot delete address 1.

Figure 3.13 Address pane, Donor Input Window

Use the Delete Address button as described in the figure above to delete empty or unused addresses. Doing so ensures that switching batches of address assignments using the Assign Other command works as expected, and does not switch to blank addresses in error.

This page intentionally blank.

The following table summarizes data entry in the fields of the Contact and Classification tabs of the Donor Input Window. Fields appear in the same order as the tab key moves the insertion point or focus.

Table 3.3 Donor Record Fields

Field Name	Method of Entry*	Required?	Default Available?†	Error Correction ‡	Comment
Salutation	type	no	yes	yes	"Mr.", "Ms.", etc.Software takes care of capitalization and adding periods in standard salutations.
First Name	type	no	no	yes	36 character maximum.
MI (Middle Initial)	type	no	no	yes	Don't type a period after the initial. 1 character maximum. Auto-capitalized.
Last Name	type	yes (or company)	no	yes	40 character maximum.
Title	type	no	no	yes	45 character maximum.
Company	type	yes (or last name)	no	yes	60 character maximum.
Address	type	no	no	yes	60 character maximum.
Address 2	type	no	no	yes	60 character maximum.
City	type	no	yes	yes	45 character maximum.
State	type	no	yes	yes	2 character maximum.
Postal Code	type	no	yes	yes	10 character maximum.
Country	type	no	no	no	20 character maximum.
Label Line 1	type	no	yes (auto-fill)	no	See "Label Line 1, Label Line 2 and Letter Salutation Fields" on page 57.
Label Line 2	type	no	yes (auto-fill)	no	See "Label Line 1, Label Line 2 and Letter Salutation Fields" on page 57.
Letter Salutation	type	no	yes (auto-fill)	no	See "Label Line 1, Label Line 2 and Letter Salutation Fields" on page 57.
Household Label Line 1	type	no	no	no	Used when records with the same address are combined into a single mailing; see Figure 3.7 and "Householding" on page 139. 60 character maximum.
Household Letter Salutation	type	no	no	no	Used when records with the same address are combined into a single mailing; see Figure 3.7 and "Householding" on page 139. 60 character maximum.
Home/Work/ Fax/Cell	type	no	no	no	Type numeric characters only. Do not type hyphens, parenthesis, etc. The number will be formatted upon leaving the field by tab or mouse click. 19 character maximum.

For screenshots displaying the fields listed in this table, see Figure 1.3 and Figure 1.4.
* See "Choice List Data Entry" on page 50 for information on using choice lists.
† See "Label Line 1, Label Line 2 and Letter Salutation Fields" on page 57 and "Default Values" on page 60.
‡ See "Error Correction" on page 60. 1st character is automatically converted to uppercase.

Table 3.3 Donor Record Fields

Field Name	Method of Entry*	Required?	Default Available?†	Error Correction ‡	Comment
Email	type	no	no	no	52 character maximum.
Do Not Mail	checkbox	NA	NA	NA	See description on page 57.
Do Not Call	checkbox	NA	NA	NA	Grays-out the contents of phone fields but does not prohibit editing. See description on page 57.
Do Not Email	checkbox	NA	NA	NA	Grays-out the Email field contents but does not prohibit editing. See page 57.
Donor ID	internally assigned	NA	NA	NA	This field is not modifiable, but you can highlight the number and copy it to the clipboard.
User-Defined 1	type	no	yes	no	80 character maximum.
User-Defined 2	type	no	yes	no	"
User-Defined 3	type		no	no	"
User-Defined 4	type	no	no	no	"
User-Defined Date	type	no	no	no	Format set by operating system (usually mm/dd/yy in USA).
Year of Birth	type	no	no	no	4 digit numeric year, e.g. “2002”.
Category	choice list	no	yes	no	35 character maximum.
Type	choice list	no	yes	no	"
Volunteer	choice list	no	yes	no	"
Solicitor	choice list	no	yes	no	"
Keywords	dialog	no	no	no	35 character maximum per keyword. Unlimited number of keywords may be assigned to each donor.

For screenshots displaying the fields listed in this table, see Figure 1.3 and Figure 1.4.
* See “Choice List Data Entry” on page 50 for information on using choice lists.
† See “Label Line 1, Label Line 2 and Letter Salutation Fields” on page 57 and “Default Values” on page 60.
‡ See “Error Correction” on page 60. 1st character is automatically converted to uppercase.

Creating Donations

To create a new donation record, do this:

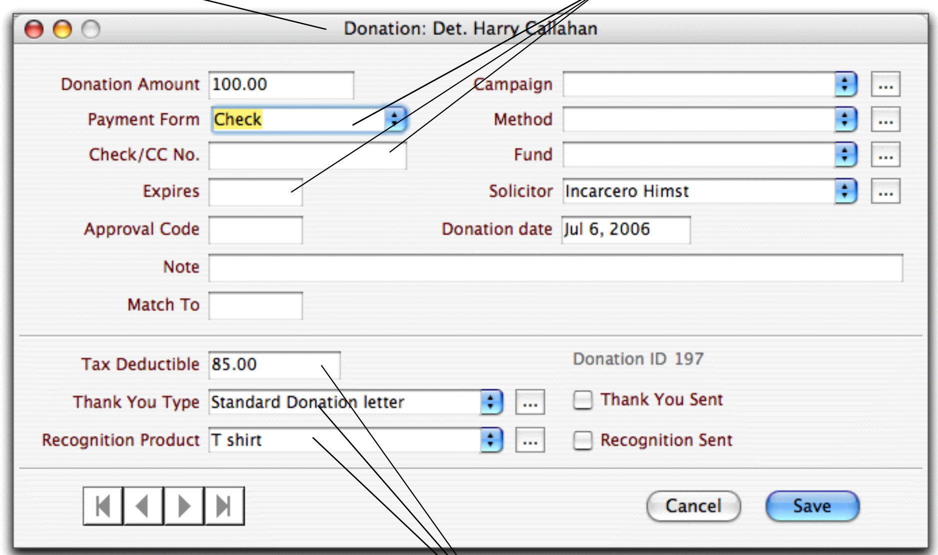
1. Find out if the donor record already exists:
   1. Perform a search for the donor (“Finding a Donor” on page 104), or
   2. browse the Donor List View for their name (see “Sort” on page 290).
2. If the donor record exists, create the gift record in either of 2 ways:
   1. Double-click the donor record in the Donor List View. This opens the Donor Input Window for the donor: click the Gift tab, then click the button underneath the Donations label. (For a screen-shot, see “Donor Input Window, Gift pane” on page 9.)
   2. Right-click (CONTROL-click on Macintosh) on the donor record in the Donor List View, and choose Add Donation from the contextual menu. See “Contextual Menu in Donor List View” on page 94. (This method is faster than #1 above, since it does not require opening the Donor Input Window.)

   Skip to step 4.
3. If the donor record does not exist, create it following the instructions in “Creating Donor Records” on page 56. While you have the new donor record open, click the Gifts tab, then click the button underneath the Donations label. (For a screen-shot of this pane, see “Donor Input Window, Gift pane” on page 9.)

4 The Donation Input Window will appear. Confirm the donor name in the window title bar:

Confirm the donor name here.

If there is a previous donation for this donor, and if it was made by credit c
FUNDimensions copies the credit card information into the new donation.



These fields will be filled in for you when you leave the amount field, if a default is set in the Administrator dialog. See “Donation, Membership, Pledge and Payment Map” on page 272. You can also edit them manually.

Figure 3.14 Donation Input Window (new)

5 Complete the donation record by entering information in each field as directed in the table below, then click Save.

6 If you created the gift from the Gift pane of the Donor Input Window (per steps 2.1 or 3 above), you will be returned to the Donor Input Window where you can see your new gift record in the scrolling area for donations. To review or edit the record, double click on it in the scrolling list in the Donor Input Window.

You can also create new donation records by cloning an existing donation record. See “Advanced Data Entry: Cloning Records” on page 95 for more information.

The Donation ID number displayed in this window may be used to reference a specific donation. The ID number:

- is unique for each donation
- is automatically generated when a record is created
- cannot be edited
- is never re-used, even if a record is deleted.

The next table lists all fields in donation records and details about each one, in the same order that the TAB key will move you through them:

Table 3.4 Donation Record Fields

Field Name	Method of Entry†	Required?	Default Available?	Comment
Amount	type	yes	no	Type a decimal value only if needed.
Payment Form	choice list	yes	if donor's previous donation was by credit card, the new donation copies credit card info, otherwise defaults to Check	35 characters maximum.
Check/CC No.	type	yes, unless Payment Form is "Check" and the mandatory attribute is off in Administrator Preferences	see above	Spaces added after every 4 digits when you tab out of field; if a credit card, checked for correct number of digits when the donation record is saved.
Expires	type	yes if Payment Form is a credit card	see above	Checked for current card when donation is saved; type only 3 or 4 numbers (do not type a slash).
Approval Code	type	no	no	For use with credit cards; any combination of letters and numbers up to 8 characters.
Campaign**	choice list	no	no	Track campaign that generated gift; 35 characters maximum.
Method**	choice list	no	no	Track sub-campaign or specific communication (event, mailing, ad, etc.) that generated gift; 35 characters maximum.
Fund**	choice list	no	no	Track designated purpose for gift, or selected item from your chart of accounts; 35 characters maximum.
Solicitor	choice list	no	yes, from Solicitor entry in donor record	35 characters maximum.
Donation Date	type	yes	yes, current date from computer's clock	MM/DD/YY format; can also enter 4 digit year.
Note	type	no	no	Up to 80 characters.
Match To	type	no	no	Use to record Donation ID of matching gift; see entry in this table for Donation ID.
Tax Deductible	type	yes	yes, from Donation Map*; can be linked to value of Recognition Product	Minimum amount is zero, maximum amount is gift amount.
Thank You Type	choice list	no	yes, from Donation Map in Administration window*	To assign thank you template to be used for this gift; 35 characters maximum.

For screenshots displaying the fields listed in this table, see Figure 3.14 and Figure 1.11.

† See "Choice List Data Entry" on page 50 for information on using choice lists.

‡ You can check these boxes all at once for a list of donations; see "Mark Sent Flags" on page 303.
* See "Donation, Membership, Pledge and Payment Map" on page 272.
**The Campaign, Method and Fund labels may be changed through the Administrator dialog, so they may not match the names in this table. See page ix.

Table 3.4 Donation Record Fields

Field Name	Method of Entry†	Required?	Default Available?	Comment
Recognition Product	choice list	no	yes, from Donation Map in Administration window*	To assign recognition product to be sent for this gift; 35 characters maximum.
Thank You Sent‡	checkbox	no	no	To track which gifts have been acknowledged by letter.
Recognition Sent‡	checkbox	no	no	To track which gifts have been acknowledged by Recognition Product.
Donation ID	internally assigned	NA	NA	This field is not modifiable, but you can highlight the number and copy it to the clipboard.

For screenshots displaying the fields listed in this table, see Figure 3.14 and Figure 1.11.

† See “Choice List Data Entry” on page 50 for information on using choice lists.

‡ You can check these boxes all at once for a list of donations; see “Mark Sent Flags” on page 303.
* See “Donation, Membership, Pledge and Payment Map” on page 272.
**The Campaign, Method and Fund labels may be changed through the Administrator dialog, so they may not match the names in this table. See page ix.

Creating Memberships

To create a new membership record, do this:

1 Find out if the donor record already exists:

   1 Perform a search for the donor (“Finding a Donor” on page 104), or

   2 browse the Donor List View for their name (see “Sort” on page 290).

2 If the donor record exists, create the gift record in either of 2 ways:

   1 Double-click the donor record in the Donor List View. This opens the Donor Input Window for the donor: click the Gift tab, then click the button underneath the Memberships label. (For a screen-shot, see “Donor Input Window, Gift pane” on page 9.)

   2 Right-click (CONTROL-click on Macintosh) on the donor record in the Donor List View, and choose Add Membership from the contextual menu. See “Contextual Menu in Donor List View” on page 94. (This is faster method than the technique in 1, since it does not require opening the Donor Input Window.)

   Skip to step 4.

3 If the donor record does not exist, create it following the instructions in “Creating Donor Records” on page 56. While you still have the new donor record open, click the Gifts tab, then click the button underneath the Memberships label. (For a screen-shot of this pane, see “Donor Input Window, Gift pane” on page 9.)

4 The Membership Input Window will appear. Confirm the donor name in the window title bar:

Confirm the donor name here.

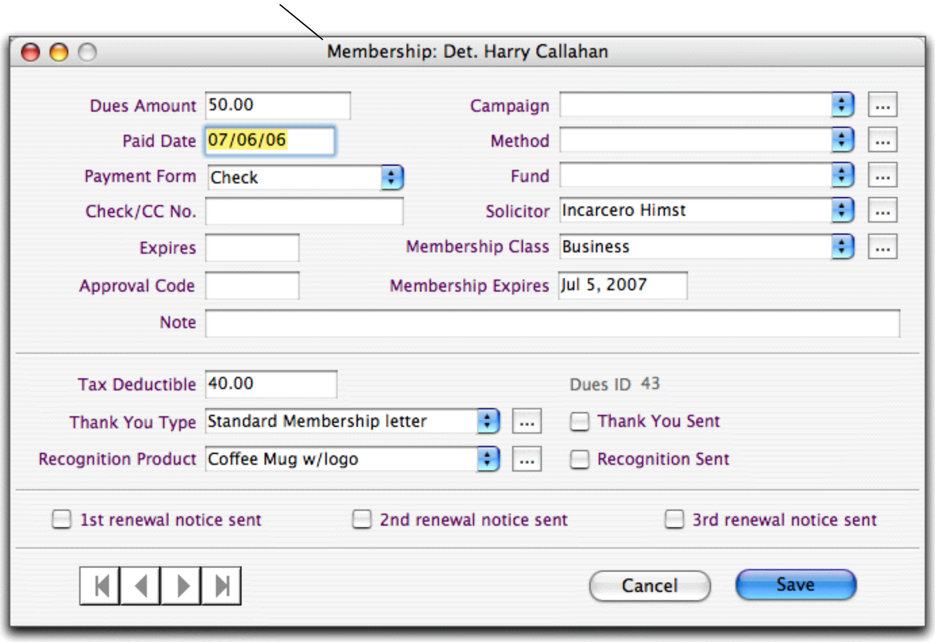


Figure 3.15 Membership Input Window (new record)

5 Complete the membership record by entering information in each field as directed in the table below, then click Save.

6 If you created the gift from the Gift pane of the Donor Input Window (per steps 2.1 or 3 above), you will be returned to the Donor Input Window where you can see your new gift record in the scrolling area for donations. To review or edit the record, double click on it in the scrolling list in the Donor Input Window.

You can also create new membership records by cloning an existing membership record. See “Advanced Data Entry: Cloning Records” on page 95 for more information.

This table lists all fields in membership records and details about each one, in the same order that the TAB key will move you through them:

Table 3.5 Membership Record Fields

Field Name	Method of Entry†	Required?	Default Available?	Comment
Dues Amount	type	yes	no	Type a decimal value only if needed; this field can accept zero for complimentary memberships.
Paid Date	type	yes	current date from computer clock	See other field for membership expiration date.
Payment Form	choice list	yes	If donor's previous membership was by credit card, the new membership copies credit card info, otherwise defaults to Check	35 characters maximum.
Check/CC No.	type	yes, unless Payment Form is "Check" and the mandatory attribute is off in Administrator Preferences	see above	Spaces added after every 4 digits when you tab out of field; if a credit card, checked for correct number of digits when the membership record is saved.
Expires	type	yes if Payment Form is a credit card	see above	Checked for current card when membership is saved; type only 3 or 4 numbers (do not type a slash).
Approval Code	type	no	no	For use with credit cards; any combination of letters and numbers up to 8 characters.
Campaign**	choice list	no	no	Track campaign that generated membership; 35 characters maximum.
Method**	choice list	no	no	Track sub-campaign or specific communication (event, mailing, ad, etc.) that generated membership; 35 characters maximum.
Fund**	choice list	no	no	Track designated purpose for membership dues, or selected item from your chart of accounts; 35 characters maximum.
Solicitor	choice list	no	yes, from Solicitor entry in donor record	35 characters maximum.
Membershi p Class	choice list	yes	yes, from Membership Defaults in Preferences*	For designating different membership levels, usually according to dues amount; 35 characters maximum.

For screenshots displaying the fields listed in this table, see Figure 3.15 and Figure 1.13.
† See "Choice List Data Entry" on page 50 for information on using choice lists.
‡ You can check these boxes all at once for a list of memberships; see "Mark Sent Flags" on page 303.
*See "Donation, Membership, Pledge and Payment Map" on page 272.
**The Campaign, Method and Fund labels may be changed through the Administrator dialog, so they may not match the names in this table. See page ix.

Table 3.5 Membership Record Fields

Field Name	Method of Entry†	Required?	Default Available?	Comment
Membership Expires	type	yes	yes, to one year from date in Paid Date field*	MM/DD/YY format; can also enter 4 digit year. To always default to the last day of the month, see page 273.
Note	type	no	no	Up to 80 characters.
Tax Deductible	type	yes	yes, from Membership Map*; can be linked to value of Recognition Product	Minimum amount is zero, maximum amount is dues amount.
Thank You Type	choice list	no	yes, from Membership Map in Administration window*	To assign thank you template to be used for this membership; 35 characters maximum.
Recognition Product	choice list	no	yes, from Membership Map in Administration window*	To assign recognition product to be sent for this gift; 35 characters maximum.
Thank You Sent‡	checkbox	no	no	For tracking which memberships have been acknowledged by letter.
Recognition Sent‡	checkbox	no	no	To track which memberships have been acknowledged by Recognition Product.
1ST Renewal Notice Sent‡	checkbox	no	no	To track memberships solicited for renewal once.
2?^{6} Renewal Notice Sent‡	checkbox	no	no	To track memberships solicited for renewal twice.
3⅝^6 Renewal Notice Sent‡	checkbox	no	no	To track memberships solicited for renewal three times.
Membership ID	not editable	NA	NA	This field is not modifiable, but you can highlight the number and copy it to the clipboard.

For screenshots displaying the fields listed in this table, see Figure 3.15 and Figure 1.13.
† See “Choice List Data Entry” on page 50 for information on using choice lists.
‡ You can check these boxes all at once for a list of memberships; see “Mark Sent Flags” on page 303.
*See “Donation, Membership, Pledge and Payment Map” on page 272.
**The Campaign, Method and Fund labels may be changed through the Administrator dialog, so they may not match the names in this table. See page ix.

Creating Pledges

To create a new pledge record, do this:

1 Find out if the donor record already exists:

   1 Perform a search for the donor (“Finding a Donor” on page 104), or

   2 browse the Donor List View for their name (see “Sort” on page 290).

2 If the donor record exists, create the gift record in either of 2 ways:

   1 Double-click the donor record in the Donor List View. This opens the Donor Input Window for the donor: click the Gift tab, then click the button underneath the Pledges label. (For a screen-shot, see “Donor Input Window, Gift pane” on page 9.)

   2 Right-click (CONTROL-click on Macintosh) on the donor record in the Donor List View, and choose Add Pledge from the contextual menu. See “Contextual Menu in Donor List View” on page 94. (This method is faster than the previous technique, since it does not require opening the Donor Input Window.)

   Skip to step 4.

3 If the donor record does not exist, create it following the instructions in “Creating Donor Records” on page 56. While you still have the new donor record open, click the Gifts tab, then click the button underneath the Pledges label. (For a screen-shot of this pane, see “Donor Input Window, Gift pane” on page 9.)

4 The Pledge Input Window appears. Confirm the donor name in the window title:

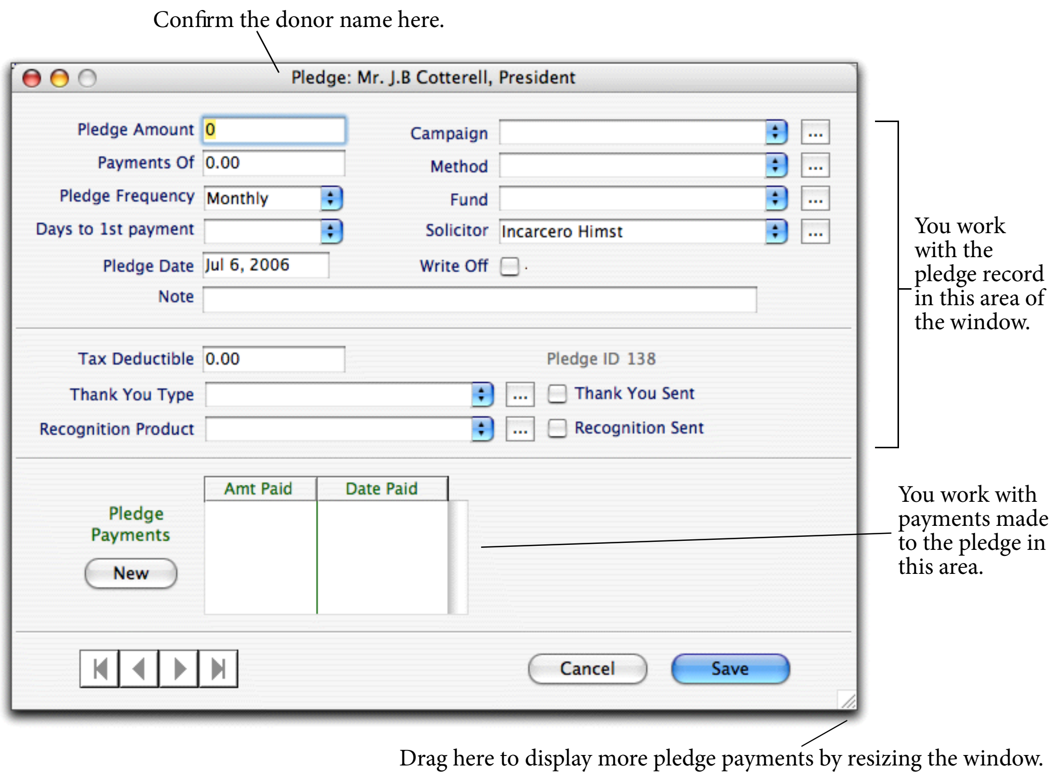


Figure 3.16 Pledge Input Window (new)

5 Complete the pledge record by entering information in each field as directed in the table below, then click Save.

6 If you created the gift from the Gift pane of the Donor Input Window (per steps 2.1 or 3 above), you will be returned to the Donor Input Window where you can see your new gift record in the scrolling area for pledges. To review or edit the record, double click on it in the scrolling list in the Donor Input Window.

You can also create new pledge records by cloning an existing pledge record. See “Advanced Data Entry: Cloning Records” on page 95 for more information.

Days to 1st Payment Field

The Days to 1st Payment field should contain the length of time between the record’s pledge date and the date when the first payment is expected; after this time has elapsed, the pledge will be marked overdue by the program unless a payment has been entered.

If you need to manually convert a pledge’s status from “Overdue” to “Not Overdue” you may usually do this by increasing the time period in the Days To 1st Payment field: doing so installs an extra grace period but otherwise does not affect overdue checking. You might want to do this if you know a donor will catch up later and don’t want them to receive reminder mailings generated from FUNDimensions' overdue searches.

Write-Off Checkbox

When the Write-Off checkbox is checked in a pledge record, FUNDimensions sets the delinquent amount to zero, and ceases to calculate or display the next due date and overdue information. The balance will still be displayed. You cannot add payments to a pledge that has this box checked, and it will not appear in searches made with the Overdue command in the Find menu, or appear as overdue in reports. This is so that these donors will not receive reminder letters. If you receive further payments for a write-off pledge, uncheck the box before entering the payment.

Pledge Status and the Information Palette

The Information Palette (see example, Figure 1.28, "Palette for donor record, example #3" on page 32) displays the following values for pledge status:

- **New:** appears before clicking the Save button for a new pledge.
- **Balance:** this is the normal "pledge in progress" status. It indicates that the pledge is not fully paid but is not behind in scheduled payment.
- **Overdue:** this indicates a pledge with over $1.00 in overdue payment. If the pledge is overdue, the amount overdue will appear as "Delinquent". This amount will often be less than the Pledge Balance, which is calculated as the difference between the Pledge Amount and the total of pledge payments made.
- **Fulfilled:** this indicates a pledge that has been paid off, i.e. has a zero balance.
- **Write-Off:** this indicates a pledge for which the "Write-Off" box has been checked, indicating that the pledge has a balance, but you no longer wish to track the overdue amount or have the pledge appear in Overdue searches.

Also shown in the palette is the next date a payment is due, the date a payment became overdue, and the pledge balance and delinquent amount, if any. These are the fields whose values influence these calculations:

- Pledge Amount field
- Payments Of field
- Days to 1ST Payment field
- Pledge Frequency field
- Pledge Date field
- Write-Off checkbox
- Total amount of pledge payments made
- Current date (from your computer clock)

Changes made to these items will be reflected in the information palette as soon as you leave the field; the information palette is also updated immediately after you create and save a new pledge payment.

The palette also indicates the number of payments made and the number of payments remaining. The number of payments remaining is calculated from the pledge balance and payment amount. It updates whenever the balance or payment amount fields are changed, so you can use it as a pledge calculator when donors ask how many payments they will need to make for a new pledge, given a pledge amount and payment amount.

Pledge payments can be in amounts less than or greater than the amount in the Payments Of field. The software will still calculate overdue status, due date, balance and delinquent amount correctly.

This table lists all fields in pledge records and details about each one, in the same order that the TAB key will move you through them:

Table 3.6 Pledge Fields

Field Name	Method of Entry†	Required?	Default Available?	Comment
Pledge Amount	type	yes	no	Total amount donor agrees to give; type a decimal value only if needed.
Payments Of	type	yes	no	Amount of each payment donor agrees to make; type a decimal value only if needed.
Pledge Frequency	choice list	yes	no	Time interval for each payment.
Days to 1ST payment	choice list	yes	no	Time interval before 1ST payment is expected, starting from Pledge Date; choose “None” if you already have received the first payment.
Pledge Date	type	yes	current date from computer clock	MM/DD/YY format
Campaign**	choice list	no	no	Track campaign that generated pledge; 35 characters maximum.
Method**	choice list	no	no	Track the sub-campaign or specific communication (event, mailing, ad, etc.) that generated pledge; 35 characters maximum.
Fund**	choice list	no	no	Track the designated purpose for pledge, or item from your chart of accounts; 35 characters maximum.
Solicitor	choice list	no	yes, from Solicitor in donor record	35 characters maximum.
Tax Deductible	type	yes	yes, from Pledge Map*; can be linked to a Recognition Product	Minimum amount is zero, maximum amount is pledge amount.
Note	type	no	no	Up to 80 characters.
Thank You Type	choice list	no	yes, from Pledge Map in Administration window*	To assign thank you template to be used for this pledge.
Recognition Product	choice list	no	yes, from Pledge Map in Administration window*	To assign recognition product to be sent for this pledge.
Thank You Sent‡	checkbox	no	no	To track which pledges have been acknowledged by letter; 35 characters maximum.
Recognition Sent‡	checkbox	no	no	For tracking which pledges have been acknowledged by Recognition Product; 35 characters maximum.

For screenshots displaying the fields listed in this table, see Figure 3.16 and Figure 1.15.

† See “Choice List Data Entry” on page 50 for information on using choice lists.
‡ You can check these boxes all at once for a list of pledges; see “Mark Sent Flags” on page 303.
* See “Donation, Membership, Pledge and Payment Map” on page 272.
**The Campaign, Method and Fund labels may be changed through the Administrator dialog, so they may not match the names in this table. See page ix.

Table 3.6 Pledge Fields

Field Name	Method of Entry†	Required?	Default Available?	Comment
Write Off	checkbox	no	no	Used to mark overdue pledges so they do not appear in the results of searches for overdue pledges; see page 84.
Pledge ID	internally assigned	NA	NA	This field is not modifiable, but you can highlight the number and copy it to the clipboard.

For screenshots displaying the fields listed in this table, see Figure 3.16 and Figure 1.15.
† See "Choice List Data Entry" on page 50 for information on using choice lists.
‡ You can check these boxes all at once for a list of pledges; see "Mark Sent Flags" on page 303.
* See "Donation, Membership, Pledge and Payment Map" on page 272.
**The Campaign, Method and Fund labels may be changed through the Administrator dialog, so they may not match the names in this table. See page ix.

Creating Pledge Payments

To create a new pledge payment record, do this:

1 Find out if the pledge record already exists:

   1 Perform a search for the pledge ("Finding a Pledge" on page 112), or

   2 browse the Pledge List View for a pledge with their name (see "Sort" on page 290), or

   3 locate the donor record and open it in the Donor Input Window, then click the Gifts tab. Pledges made by the donor are listed there (See "Donor Input Window, Gift pane" on page 9), or

   4 locate the donor record in the Donor List View ("Finding a Donor" on page 104) and right-click (CONTROL-click for Macintosh), then choose Add Pledge Payment from the contextual menu (shown in "Contextual Menu in Donor List View" on page 94).

   If any one of these methods fail, there is no pledge record for the donor; skip step 2 and go to step 3.

2 If the pledge record exists, create the pledge payment record in either of 2 ways:

   1 Double-click the pledge record. This opens the Pledge Input Window: then click the New button underneath the Pledges Payments label. (For a screen-shot of this window, see "Pledge Input Window" on page 19.)

   2 If you located the donor in the Donor List View (using step 4 above), right-click (CONTROL-click on Macintosh) on the pledge record in the Pledge List View, and choose Add Pledge from the contextual menu. See "Contextual Menu in Donor List View" on page 94. (This method is faster than #1 above, since it does not require opening the Pledge Input Window.)

   Skip to step 4 (next page).

3 If the pledge record does not exist, create it following the instructions in "Creating Pledges" on page 82. While you still have the new pledge record open, click the New button underneath the Pledges Payments label. (For a screen-shot of this window, see "Pledge Input Window" on page 19.)

4 A new pledge payment record appears with the Amount Paid and Date fields already filled in with default values from the pledge record:

Confirm the donor name here.

Enter credit card numbers without spaces, or check numbers here. When you tab out of the field, spaces will be automatically added between each four digits.

This information is calculated once, when the payment record is created, and is not updated or changed if you reopen the record later. For updated calculations, see the Information Palette for the Pledge Input Window.

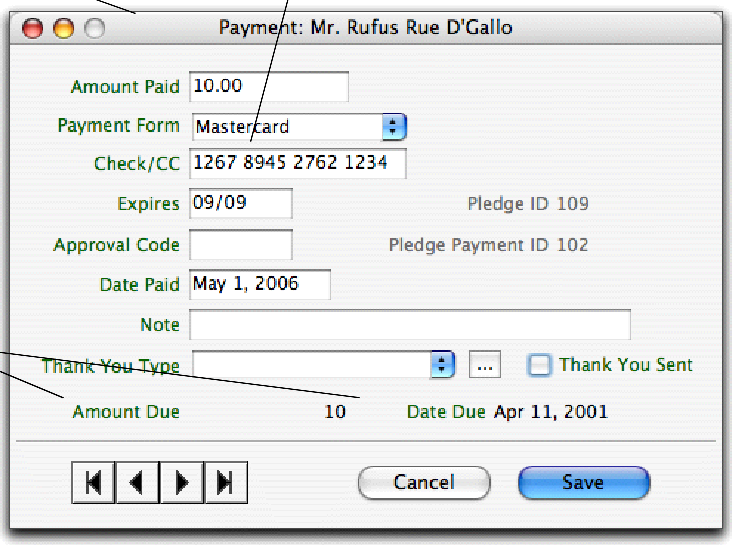


Figure 3.17 Pledge Payment Input Window

5 Complete the pledge payment record by entering information in each field as outlined in the table below, then click Save.

This table lists all fields in pledge payment records and details about each one, in the same order that the TAB key will move you through them:

Table 3.7 Pledge Payment Fields

Field Name	Method of Entry†	Required?	Default Available?	Comment
Amount Paid	type	yes	yes-from the Payments Of field in the pledge record	Type a decimal value only if needed.
Payment Form	choice list	yes	if donor's last pledge payment was by credit card, the new record copies credit card info, otherwise defaults to Check	35 characters maximum.
Check/CC No.	type	yes, unless Payment Form is "Check" and the mandatory attribute is off in Administrator Preferences	see above	Spaces are added by the software after every 4 digits when you tab out of field; if a credit card, checked for correct number of digits when the membership record is saved.
Expires	type	yes, if Payment Form is a credit card	see above	Checked for current card when pledge payment record is saved; type only 3 or 4 numbers (do not type a slash).
Approval Code	type	no	no	For use with credit cards; any combination of letters and numbers up to 8 characters.
Date Paid	type	yes	current date from computer clock	MM/DD/YY format; can also enter 4 digit year.
Note	type	no	no	Up to 40 characters.
Thank You Type	choice list	no	yes, from Payment Map in Administration window*	To assign thank you template to be used for this payment; 35 characters maximum.
Thank You Sent	checkbox	no	no	For tracking which payments have been acknowledged by letter.
Amount Due	not editable	NA	NA	Displays amount overdue in red letters, if pledge is overdue; otherwise displays Payments Of amount from the pledge.
Date Due	not editable	NA	NA	Displays the due date for the payment being entered if the pledge is not overdue; otherwise displays the date the pledge became overdue in red letters.
Pledge ID	not editable	NA	NA	Copied from linked pledge record. This field is not modifiable, but you can highlight the number and copy it to the clipboard.
Pledge Payment ID	not editable	internally assigned	NA	This field is not modifiable, but you can highlight the number and copy it to the clipboard.

For screenshots displaying the fields listed in this table, see Figure 3.17 and Figure 1.17.

† See "Choice List Data Entry" on page 50 for information on using choice lists.
* See "Donation, Membership, Pledge and Payment Map" on page 272.

Creating Keywords

Refer to Figure 1.18, “Keyword List View” on page 22 and Figure 1.19, “Keyword Input Window” on page 23 for the following text. For information on when to use keywords, see “Designing Your Database” on page 371.

While keywords are assigned from within the Donors module, they are created, edited and deleted from within their own module (except see *shortcut* below). To create a keyword, follow these steps:

1 Select Keywords from the File menu. The Keywords List View appears containing your keywords.

2 Choose Records>New.

3 Fill in the blank Keyword field. If desired, enter a descriptive note about the keyword in the Note field. Click OK to save the new keyword, or Cancel to reject the new keyword and return to the List View.

The new keyword will appear in the popup menu of keywords when you select the Assign Keyword menu item in the Records menu from the Donors module. *Note:* a new keyword is not assigned to any donors until you enter the Donors module and make the assignment. For help doing this, see “Assigning Keywords” on page 62.

To delete a keyword, select it in the Keyword List View. You may select multiple keywords to delete at the same time using the CONTROL key (Windows) or COMMAND key (Mac) to select discontiguous records or the shift key to select contiguous records, in the same manner as other List Views. Once you have selected the records to delete, choose Records>Delete Highlighted. A dialog appears warning you that deleting the keyword(s) will remove the keyword from all donors to which it may be assigned. Click OK to delete the keywords. Deleting keywords should be done with caution, since it is not undo-able and it may be difficult to recover if a mistake is made.

To edit a keyword, double-click it in the Keyword List View. The Keyword Input Window appears; use standard methods to edit the keyword, then click OK to save your changes or Cancel to reject the changes and return to the Keyword List View.

Shortcut: you can also create a keyword directly from the Donor Input Window by right-clicking (control-clicking on one-button Mac mice) on the keyword list of the Classification pane, which displays a contextual menu:

Right-click (control-click on single-button mice) on this area to get a menu for creating a keyword.

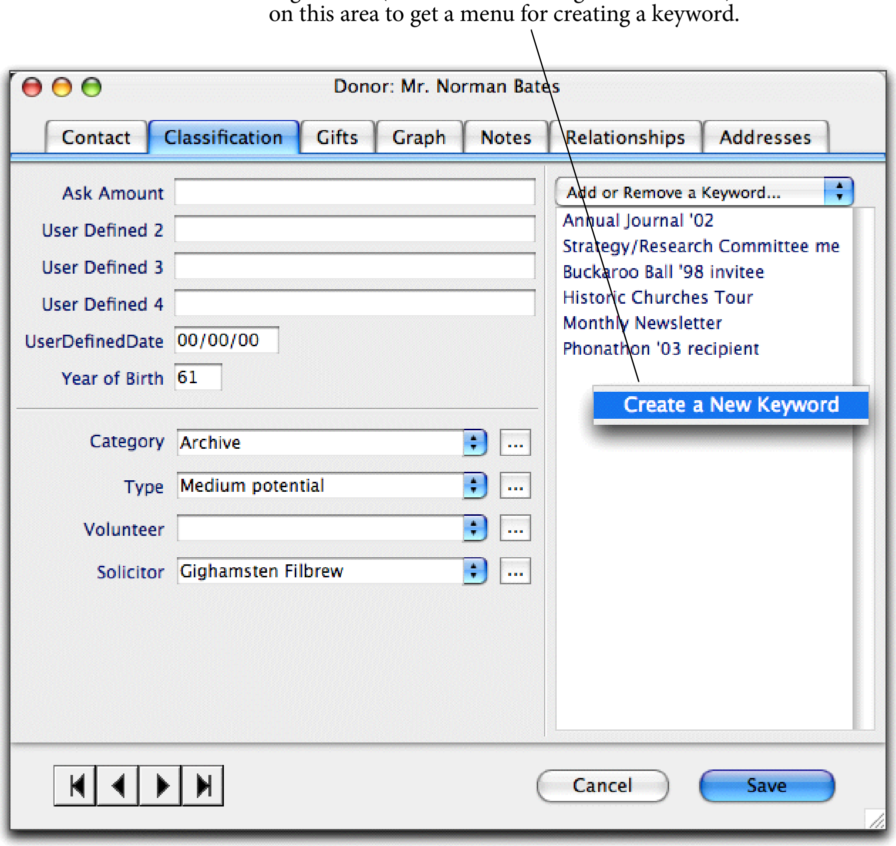


Table 3.8 Creating a new keyword from the Donor Input Window

Creating Relationships

Relationships are named groupings of donor records, used to track, browse, query and report on relationships and affiliations between your donors and prospects. While you add donor records to relationships from within the donor module (see "Adding Donors to Relationships" on page 67), you must first create the relationship by assigning it a name and optional note, as described next. This procedure is similar to that for creating keywords.

Creating Relationship Records

To define a relationship:

1 Choose File>Relationships. The Relationship List View appears.

2 Choose Records>New or type CONTROL-N (Windows) or COMMAND-N (Mac).

3 Type a name for the relationship, up to 35 characters. Optionally, type or paste a note about the relationship. Do not use the note to list the constituents of the relationship.

4 Click OK. If the relationship name you typed already exists, FUNDimensions refuses to save the record.

The following shortcut is an alternative to the procedure above. The shortcut allows for creating a new relationship without leaving the Relationship pane of the Donor Input Window:

5 Open the Donor Input Window for any donor and click the Relationships tab.

6 Right-click (CONTROL-click on Macintosh) anywhere in the scrolling list at the left side of the Donor Input Window, and choose Create a new relationship from the contextual menu, as shown below:

To create, edit or delete a relationship, right-click (control-click on Macintosh) anywhere in this list to produce the contextual menu shown.

To navigate to a constituent, right-click (control-click on Macintosh) anywhere in this list to produce the contextual menu shown.

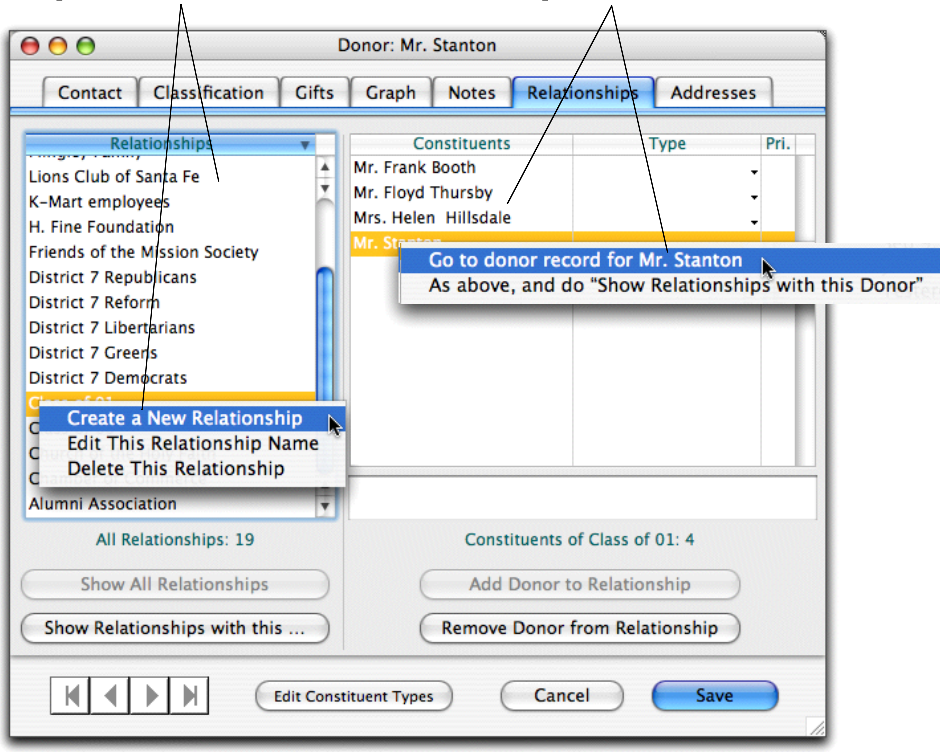


Figure 3.18 Contextual Menu in Relationship Pane

7 The Relationship Input Window appears (Figure 1.21, "Relationship Input Window" on page 25).

8 Enter a relationship name and optional note in the fields provided, then click OK. The Relationship Input Window closes, and the new name appears in the Relationship list in the Donor Input Window.

Editing Relationship Records

You can change the name or edit the note of a relationship. To edit a relationship record, do this:

1 Choose File>Relationships. The Relationship List View appears.

2 Locate the relationship to edit in the list. The list can be sorted with Records>Sort.

3 Edit the relationship name and/or note, then click OK. If the relationship name matches another relationship record, FUNDimensions refuses to save the record. Otherwise, confirm the action in the warning dialog.

The following shortcut is an alternative to the procedure above. The shortcut allows for editing a relationship without leaving the Relationship pane of the Donor Input Window:

4 Open the Donor Input Window for any donor and click the Relationships tab.

5 Locate the relationship name you want to change. You may need to use the button labeled “Show All Relationships” to get the relationship to appear. To assist in locating the relationship, the list is sorted in ascending alphabetical order, or in descending order by clicking the “Relationships” label immediately above the list.

6 Right-click (CONTROL-click on Macintosh) the relationship you want to edit in the scrolling list at the left side of the Donor Input Window. A contextual menu appears as shown in “Contextual Menu in Relationship Pane” on page 92: choose Edit This Relationship Name from the menu.

7 The Relationship Input Window appears (Figure 1.21, “Relationship Input Window” on page 25).

8 Edit the relationship name and note, then click OK. The Relationship name is limited to 35 characters.

Navigating From the Constituent List

You can right-click (control-click on Mac) on any constituent to go to their donor record. See the example in Figure 3.18, “Contextual Menu in Relationship Pane” on page 92.

The contextual menu offers you 2 choices:

1 **Go to Donor record for (Donor Name)**. This replaces the current donor record with the one for the donor you clicked on. The contents of the Relationship List will not change.

2 **As above, and do Show Relationships with this Donor**. Switches the donor as above, but also changes the Relationships List to display the relationships in which the selected donor is a constituent. This is the same as choosing option 1, and then clicking the button “Show relationships with this Donor”.

After selecting either option, you can confirm the change by checking the title bar of the window; it should show the name of the donor you selected.

More On Linking New Gifts to Donors

When you create a new gift record, FUNDimensions requires that it be associated with a donor record. You create this association by first referring to a donor record, then executing an action to create a new gift, or by referring to an existing gift by the same donor, and creating a copy ("clone") of that gift. There are 2 ways to make the necessary reference to a donor record; see the next section for information about cloning:

- Open the donor record in the Donor Input Window. You usually do this by locating the donor record in the Donor List View, then double-clicking that row to open the record in the Donor Input Window. (Its also possible to move to a donor record from another donor record in the Donor Input Window using the navigation buttons; see "Button Bar in Input Windows" on page 37). When you click one of the New buttons in the Gift pane of the window ("Donor Input Window, Gift pane" on page 9), the new gift record is associated with the donor record.
- Right-clicking (CONTROL-clicking on Macintosh) the donor record in the Donor List View. This produces a contextual menu where you can select a command to create a new gift record; the new gift is linked to whatever donor you clicked on. An example is shown below:

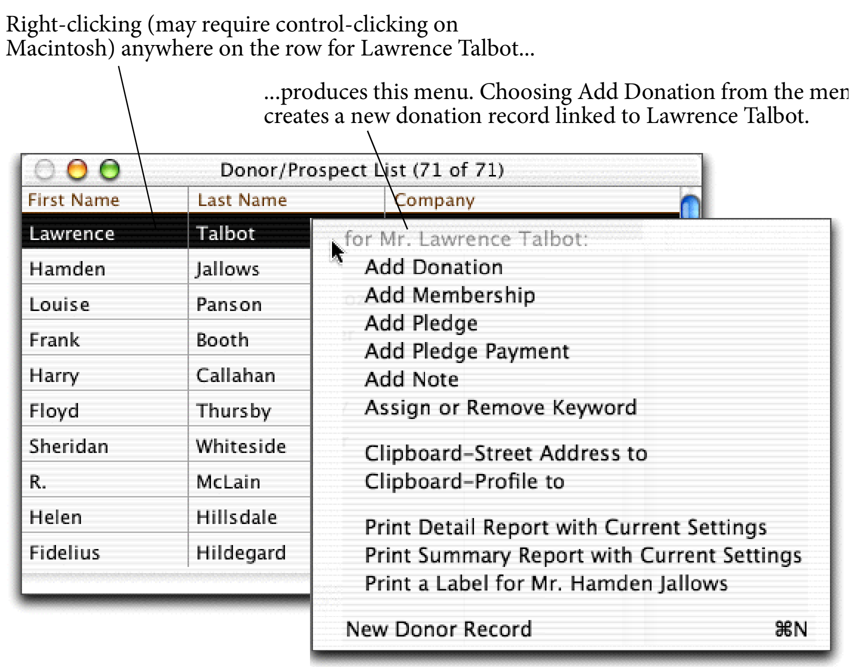


Figure 3.19 Contextual Menu in Donor List View

(More information about creating gift records appears earlier in this chapter, including step-by-step instructions and tables describing each field you will encounter.)

Advanced Data Entry: Cloning Records

Instead of creating new records from scratch, it may be faster to create a copy of an existing record that is close to the one you want to create. Then you edit only the fields in the “clone” that need to be changed.

A cloned gift record is associated with the same donor associated with the original gift. You cannot edit the association, so you should clone a gift record made by the same donor who made the new gift. This means cloning won’t work for the first gift made by a donor; in this case, you will have to use one of the techniques above, in “More On Linking New Gifts to Donors” on page 94.

Cloning of gift records is made available through contextual menus. Locate the record you want to clone in a List View, then right-click (CONTROL-click on Macintosh®) and select Duplicate This (record type) from the menu.

For example, to create a donation record by cloning, you locate *any donation made by the same donor* in the Donation List View, then right-click (CONTROL-click on Macintosh) and select Duplicate This Donation Record from the menu:

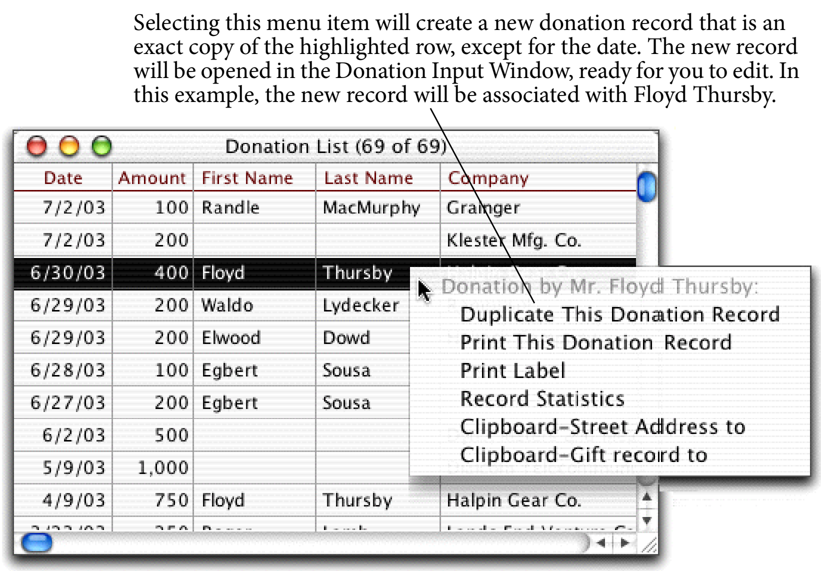


Figure 3.20 Cloning a Donation

The same technique works for Memberships, Pledges and Pledge Payments in their respective List Views. You can clone a donor record by choosing Duplicate from the Records menu, when a Donor Input Window is frontmost: see “Duplicate” on page 289.

When you clone a gift record, FUNDimensions automatically changes the gift date in the clone to the current date.

Importing Data

Importing data lets you add to your database without typing everything in, by directing FUNDimensions to read data from a file on your computer, create records containing that data, and store them in the database.

If password security is turned on, you must be logged in at the Administrator, All Privileges or Maintenance level to perform an import.

FUNDimensions can read data from two kinds of structured text files: tab-delimited and XML. These two formats are described below, together with the procedures for importing them.

In addition to the import formats and procedures described here, custom import services are also available: contact the publisher of FUNDimensions for details.

Text File Import Format

Tab-delimited text files use tab characters to indicate ("delimit") fields, and carriage returns to indicate end-of-record. Most databases and some other software can export to tab-delimited text files, which you can use for importing to FUNDimensions. Or, if your data is in DBF files, an Excel® spreadsheet, or some other format, it is possible to convert it to the tab-delimited format required by FUNDimensions, using a spreadsheet program; see the instructions for your spreadsheet program.

Please observe the following when importing text files:

- For the phone or Postal/Zip Code fields, any formatting characters in the source file will be ignored. FUNDimensions will format these fields automatically.
- Data in the Note field of an import (field 23 in "Table of Import Fields") will appear in the lower area of the Note pane of the Donor Input Window.
- During the import process, FUNDimensions will automatically fill in the Label #1, Label #2 and Letter Salutation fields based on the contents of the imported fields for Salutation, First Name, Middle Name, Last Name and Company. This is the same as in manual creation of donor records.

- The following table lists the fields in the order in which they must be imported, and the maximum length of each field:

Table 3.9 Table of Import Fields

Field Number	**Field Name**	**Maximum Characters**
1	Salutation	36
2	First Name	36
3	Middle Initial	11
4	Last Name	40
5	Title	45
6	Company	60
7	Address	60
8	Address 2	60
9	City	45
10	State	2
11	Zip	10
12	Country	20
13	Home Phone	14
14	Work Phone	14
15	Fax Phone	14
16	Mobile/Other Phone	14
17	Email	80
18	User Defined field #1*	80
19	User Defined field #2*	80
20	User Defined field #3*	80
21	User Defined field #4*	80
22	User Defined Date*	MM/DD/YY
23	Year of Birth	2
24	UserList_1*	35
25	UserList_2*	35
26	UserList_3*	35
27	Solicitor	35
28	Note	approximately 32,000

*The names of these fields may be edited, see “Preface” on page ix.

If the fields in the source file are not in the correct order, a spreadsheet program can be used to open the file and change the order. Commands to insert and delete cells or columns in the spreadsheet can be used with copy and paste of columns to set the fields to the order shown in the table above. Save the results as a tab-delimited ASCII text file, then return to FUNDimensions and perform the import.

Imported fields containing more than the maximum characters allowed will be truncated.

Text File Import Procedure

Warning: In some instances, several attempts at importing a source file are necessary before satisfactory results are obtained, so consider assigning all your imported records a unique keyword, such as "Imported (current date)" so that you can remove them if the import was unsatisfactory. This might happen if the fields in the imported file are in the wrong order, or if the tab characters are missing between some fields, or if the return characters are missing between some records. In cases like these you may want to delete the records from FUNDimensions and import the records again after cleaning up the problems in the source file. Assigning the imported records a unique keyword will make deleting them later much easier, by allowing you to easily locate the imported records; for help creating a keyword to assign, see "Creating Keywords" on page 90, and for help assigning a keyword to a list of records in a single step, see "Assign or Remove Keyword" on page 299.

To perform this type of import:

1 *First, back up your data file.*

2 Do File>Import.

3 Choose **Standard Import of Tab-Delimited Text File** in the dialog below:

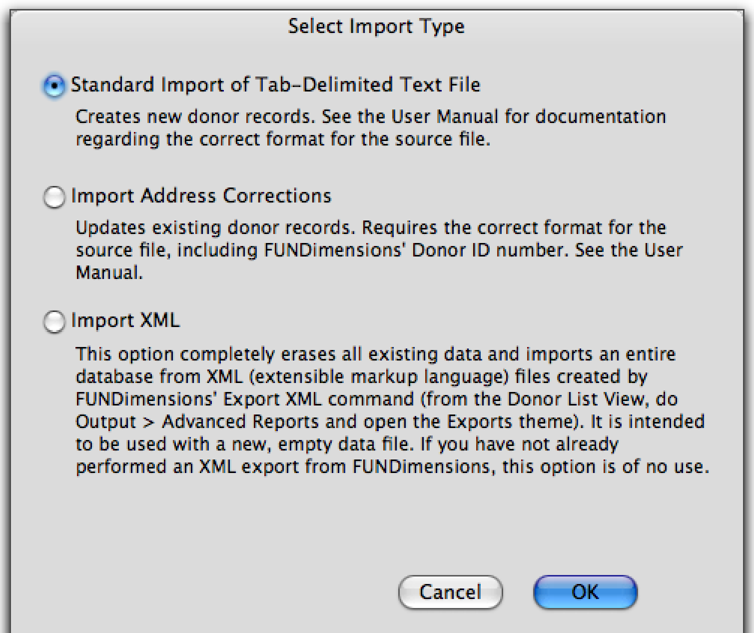


Figure 3.21 Select Import Type dialog

4 A standard Open dialog is displayed; locate the file to import and click OK.

5 The import begins. The thermometer goes away when the process is complete.

At this point, FUNDimensions displays only the imported records in the Donor List View, so this is an ideal time to assign them Categories, Types, Keywords, Solicitors and Volunteer status, using the Assign Keyword and Assign Other commands from the Records menu. Using the Save Set item from the Records menu, you can also save the imported records as a named set; see “Save Set” on page 303.

If you want to print a listing of the donors you just imported, and this can be done with the Print List command in the Output menu.

XML Import Procedure

The XML Import supports only exports generated by using the XML export feature of FundDimensions (see “Export Entire Database as XML” on page 178). However, it is possible to edit these exported files prior to importing, using any software capable of parsing XML, such as Excel®, text editors, and software specialized for XML editing.

Importing XML completely erases all data already in the database, so it is usually imported into a new, empty data file (for instructions on creating a new, empty data file, see “Creating a New Data File” on page 41).

To perform this type of import, do File>Import and choose Import XML in the dialog shown above (“Select Import Type dialog” on page 98). When you click OK, a standard Open dialog window appears: select the *folder* containing the XML files you exported from FundDimensions, and click OK. The import begins; it can take considerable time to complete.

To cancel the import while it is taking place, type the ESCAPE key on your keyboard, This will leave the data file in an indeterminate state—there is no way to tell which records were or were not imported, except by your inspection: no journal of the import is made.

CHAPTER

4

Searches

FundDimensions performs searches, also known as queries, to locate specific records or specific sets of records. This is usually done in preparation for entering gift records, producing mailings, printing reports and other actions. Searches produce a set of records which appear in the list view; when you choose to make a report, print labels, make an export for mail merge, or other actions, FundDimensions will refer to the records in the list and produce output only for those records. For example, to send acknowledgement letters to your donors, you first perform searches to locate those donors who have made unacknowledged gifts. This places the unacknowledged gift records in the Donation, Pledge or Membership List view. Then, you use menu commands to initiate label printing and an export for mail merge.

FundDimensions allows you to locate specific records based on a wide variety of single or multiple criteria. Searches examine the contents of fields in your database and compare the contents (or a value calculated from the contents) with the criteria you specify for the search.

Searches may use a wildcard character for partial matches (page 106), and you can search for records with empty fields (page 106). Searches are never case-sensitive, so searching for "Doe" finds "doe", "Doe" and "DOE".

Relevant criteria for a search depend on the module you are in, so it is important to enter the correct module prior to conducting a search. For example, you cannot conduct a search for donations from the pledges module, and the menu item for locating overdue pledges is disabled in the membership module. You ascertain the correct module by deciding whether the records you want to find are donor, donation, membership, pledge, or pledge payments. Some searches associated with gift modules are also available in the donor module. For example, you can search within the Donors module for donors with gifts in a range of amounts or dates. This is explained in "Amount" on page 310.

Searches may take place in all the records of that module, or the search may be limited to those records currently in the list view. This is called controlling the *scope* of a search. To confine a search to the records in a list, turn on the Search in Selection radio button located in the dialog boxes presented by commands in the Find menu. This button is disabled in input windows.

Any records found by the search will appear in the List View, and records not meeting the search criteria will be removed from the List View, unless Add To List was turned on in the search dialog. If that radio button was turned on, the list will consist of the previous records plus any records found in the search.

This table summarizes the Normal, Search in Selection and Add to List options in search dialogs:

Table 4.10 Search Options Radio Buttons in Search Windows

Button	Behavior
Normal	Search all records in *module*; replace records in the list with records found by the search.
Search in Selection	Search only records in the *list*; *replace* records in the list with records found by the search.
Add to List	Search all records in module; *add* records found by the search to records in the list.

For examples and additional explanation of these buttons, see page 308.

Note: if no records are displayed in the List View, or you perform a search from the Input Window, the Search in Selection and Add to List radio buttons will be disabled.

Selecting an item from the Find menu will present a dialog asking for more information about the records you are seeking. For example, when searching for records associated with a particular solicitor, you will select the Solicitor item from the Find menu, and then be presented with a window allowing you to specify which solicitor to search for. Choose the solicitor (in this case from a popup menu), then click OK to conduct the search, or Cancel to change your mind and stop the search.

When you are working in a search dialog that asks for a range of money amounts or a range of dates, you can use a shortcut when the range you want is only a single number (i.e. $500, not $500?600). This shortcut is to type the desired value into the From: field in the dialog, type TAB to move to the To: field, and type the DELETE key to empty the second field of its contents. When you begin the search, FUNDimensions detects the blank second field and automatically copies the first value into it, saving you several keystrokes and a possible mistake.

If no records are found in a search, a dialog box will appear to inform you. When this dialog appears after a search using the Basic command, it has an additional Search Again button that returns you to the Basic search.

When you perform a search from an Input Window, the List View for that module will still display all the found records, while the input window will display the first record found. You can use the navigation buttons to move through the found records one at a time from the input window, or switch to the List View to see the found records as a group. If the Input Window is open but you conduct the search from the List View, the record displayed in the Input Window will *not* change.

In most searches, FUNDimensions remembers your last search so that when you return to a Find menu item again (in the same session), the search criteria you entered previously are displayed. This feature can help you remember your last search during multiple searches and saves time if you conduct a search more than once.

There are several ways to work with records that can be described in the nomenclature of set theory:

- Through the Search in Selection buttons in search dialogs. This operation performs the set operation known as "intersection," in which a set is created that contains only the records belonging to both of two other sets—the set that matches the search criteria and the set that is in the list prior to the search.
- Through the Add To List radio button available in search dialogs. This operation performs the set operation known as "union", where a set is created that contains all the records of two other sets—the set already in the list prior to the search, and the records meeting the search criteria.
- Through the Invert Selection command in Records menu. This operation performs the set operation known as "difference", where a set is created that contains the records of one set—the set of all records belonging to the module—only if they do not belong to the set of records listed before choosing this menu command.
- Through the Lapsed Donors search in the Find menu, which performs a specialized difference set operation.
- Through the Records>Hide Highlighted menu command, which performs a difference set operation with highlighted records and records in a list.
- Through the Records>Show Highlighted menu command, which performs a intersection set operation with highlighted records and records in a list.

Because of the many searches and the infinite ways of combining them, this manual can provide only representative examples of searches and the logic used to formulate them. You'll have to do some thinking to come up with strategies that will yield the records you want from the search capabilities in the software. Sometimes it helps to write down the criteria or make simple graphics to represent the various sets of records you want to define. The strategy will involve a statement of each attribute of the records you want to locate. Then, each attribute will be paired with an appropriate search and/or set operation.

When your search involves exclusionary criteria, e.g. all the donors in the state of New Mexico not having a zip code of 87501:

1. First perform searches for the exclusionary criteria. In the example above, that would be for the 87501 zip code.
   - perform subsequent searches for other exclusionary criteria using the Add to List option in searches to accumulate results.
2. Then use Invert Selection menu command (page 289).
3. Follow with the other searches using the Search in Selection option, which will constrain the searches to those records not having the exclusionary criteria.

Finding a Donor

To find specific donor records, do this:

1 Go to the Donors module by choosing File>Donors, or by clicking the Donor List View or Donor Input Window to bring one of them to the front.

2 Choose an appropriate command from the Find menu, depending on what criteria you want to use for the search (see next bullet list).

3 Fill in the information requested in the dialog box and click OK. For information about the Normal, Search in Selection and Add to List buttons, see page 101.

4 The records meeting the search criteria will appear in the List View. If you conducted the search from the Donor Input Window, the first record found by the search appears there.

In the Donor module, items in the Find menu allow these searches:

- **Basic:** search for first name, last name, company, address, city, state, postal code, country, email address, Donor ID Number or any user-defined field.
- **Amount:** search for size of individual gifts or total gifts, for donations, memberships and/or pledges. You can limit the gifts used in the search to those falling within a specific date range.
- **Date:** search in gift records for gifts in a specified date range.
- **Duplicates:** find potential duplicate donor records.
- **Giving Frequency:** find donors who have made a specific number of gifts in a date range that you specify.
- **Keyword:** search for donors with or without specified keywords.
- **Lapsed:** search for donors who have made gifts in one period of time, but not in another.
- **Membership:** search for donors who hold or have held a specific membership class.
- **Relationships**: find donors who are constituents of a specified relationship, or who are of a specified constituent type.
- **Solicitor:** search for donors assigned (or not assigned) to a specified solicitor in your organization.
- **Advanced:** conduct complex searches of any field(s) with the Search Editor.

Additional searches may be conducted on fields whose names may be customized by you; see “Setup” on page 268. The default names are listed below, but these will change to reflect the customized name:

- **Category:** search for donor records containing a specified Category designation.
- **Type:** search for donor records containing a specified Type designation.
- **Volunteer:** search for donor records containing a specified Volunteer designation.

- **Campaign:** search in gift records for donors with (or without) participation in a campaign(s).
- **Method:** search for donors who have (or have not) made gifts in response to a specified method(s) (communication, mailing, ad, etc.).
- **Fund:** search in gift records for donors with participation in a specified fund(s).

See “Find Menu” on page 307 for more information on these searches.

The Basic search from the Find menu is available in all modules except Keywords and Relationships. Use this command to locate any record by first and last name, first name, last name, company name, address line 1 or 2, city name, state name (abbreviation), Postal or Zip Code, or to search the contents of any user-defined field. You may specify the way FUNDimensions compares the characters you enter to the data in records with the Exact, Begins With, Contains and Does Not Contain buttons; see “Basic” on page 308 for more information on these items. You can also specify a fuzzy search, which will match first name, last name, company name, or address by phonetic or string-matching* criteria: see “Fuzzy Searches” on page 107.

This is the dialog that appears when you select Basic from the Find menu:

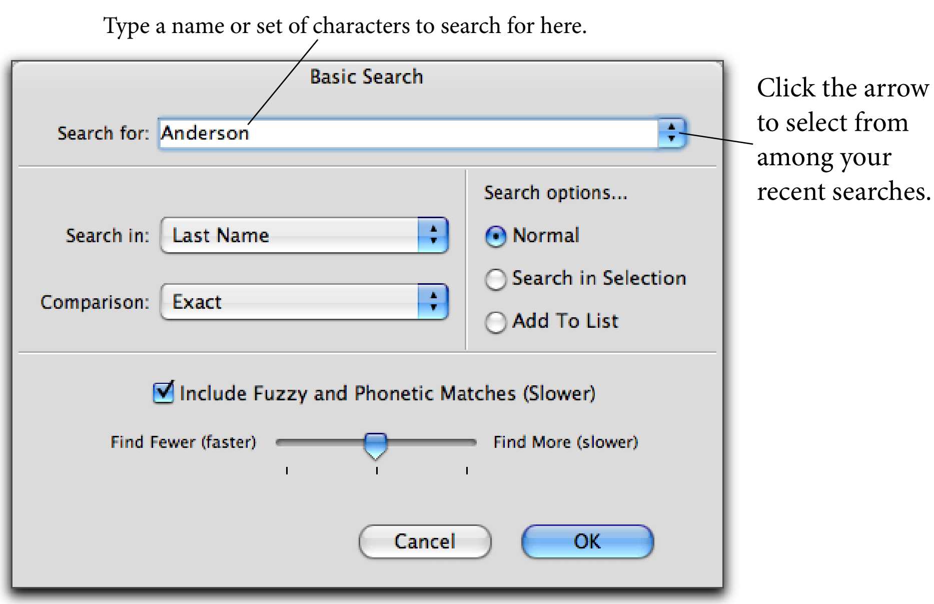


Figure 4.1 Basic search dialog

The “First and Last Name” option depicted above functions in one of two modes, switching between them automatically:

- If a first and last name is entered, with the two names separated by a space, FUNDimensions searches for records matching both names, i.e a search for John Doe finds records containing John in the first name and Doe in the last name.

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* String matching is performed using the Edit Distance algorithm, also know as the Levenshtein distance algorithm (original variant).

- If only one name is entered, FUNDimensions looks for records containing the name in either the first or last name fields, i.e. a search for Francis would find records for Francis Johnson and John Francis.

The ID Number and First and Last Name options allows only the Exact comparison; the Comparison popup menu will show Exact and be disabled whenever the First and Last Name option is selected.

You can use the Basic search to locate records with empty (a.k.a. null) fields. For example, if you leave the Search In field empty in the basic search dialog, set the Search in popup to Address, and the Comparison popup to Exact, FUNDimensions finds records with an empty Address Line 1 field.Conversely, if you change Exact to Does Not Contain in this example, you get all the records with non-empty Address fields. *Note:* In searches for an address conducted from the Basic search, FUNDimensions usually searches both the Address Line 1 and Address Line 2 fields: the only exception is when you search for an empty address as in the example above. To confine searches for a non-empty address to Address Line 1 or Address Line 2 (e.g. find records with Suite 207 in the Address Line 2 field but not in the Address Line 1 field), you should use the Advanced search (“Advanced” on page 335).

Using a “**wildcard**” in a search means you specify some characters to appear in the field you are searching on, but leave other characters ambiguous. For example, you might wish to locate all the donor records with an phone number beginning in 505, or all the donor records with a last name starting in “M” and ending in “y”. To perform a wildcard search, just type the @ character before, after or in between the values you wish to specify. For the examples above, you would enter search values of “505@” and “M@y” respectively.

Using combinations of successive searches with the Search in Selection and Add To List options, many complex criteria can be accommodated. Examples are:

- The Basic and Solicitor searches could be combined to produce a list of all donors in your state assigned to a particular solicitor:

  1 Choose Donors from the File menu.

  2 Choose Basic from the Find menu.

  3 Type in the state abbreviation.

  4 Set the Search In: popup menu to State and the Comparison: popup menu to Exact. Set Search Options to Normal. Click the Search button.

  5 Choose Solicitor from the Find menu.

  6 Select the solicitor in the popup menu and set the Search Options to Search in Selection. Click the Search button.

- The Lapsed and Campaign searches could be combined to find donors that contributed to last year’s Annual Fund Drive, but did not contribute to this year’s drive:

  7 Choose Donors from the File menu.

  8 Choose Lapsed Donors from the Find menu.

9 Click the radio button for "Year to date in this year/calendar year in previous year". Click the Search button.

10 Choose Campaign from the Find menu.

11 Choose a campaign from the popup menu and set the Search Options to Search in Selection. Click the Search button.

- The Keyword and Type searches could be combined to create a list of all donor prospects with a "high" potential (tracked in the Type field) who attended a specific event (tracked in Keywords):

12 Choose Donors from the File menu.

13 Choose Keywords form the Find menu.

14 Choose a keyword from the popup menu. Set Search Options to Normal. Click the Search button.

15 Choose Type from the Find menu.

16 Choose a type from the popup menu. Set Search Options to Search in Selection. Click the Search button.

If you prefer to specify all criteria of a complex search at the beginning of the process and conduct the multiple searches in a single step, the Search Editor provides you this function. See "Advanced" on page 335 for information on using the search editor.

You can save the results of any search into a static set; see "Save Set" on page 303 for more information. You can also locate donors based on relative criteria by sorting donor records. These criteria include frequency of giving, gift amounts, and donors with most or least recent gifts. See "Sort" on page 290 for more information.

Fuzzy Searches

Fuzzy searches allow you to match records to searches based on phonetic attributes. This overcomes the limitation in most databases, that you need to know exactly what you are looking for. For example, consider these names:

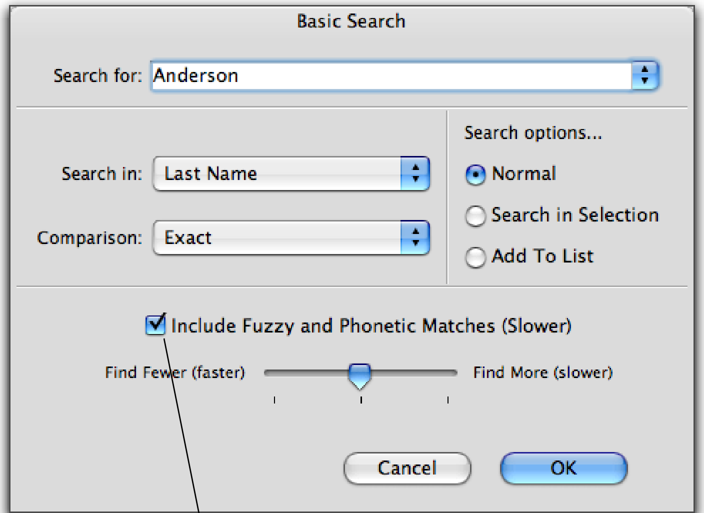
- David **Anders**
- **David Anderson**
- David **Andersen**

It is easy for humans to see that these names are similar, but databases see them as completely different. In fact, to most databases, these names are just as different as Andy and Zoe.

Enter fuzzy searches: by generating phonetic equivalents for names and addresses, and storing these "keys" with the donor record, FUNDimensions can locate records based on phonetic similarity, and do so with almost as quickly as ordinary searches.

Fuzzy searches are also performed by comparing your search string with the record data, and counting the number of transformations (characters added, changed or deleted) needed to create a match. The number of transformations required is compared with a threshold that you set, and the record is considered a match if the number of transformations is less than or equal to the threshold.†

Performing a fuzzy search is no more difficult than a standard search. You begin by selecting the Basic search from the Find menu. In the Basic search window, turn on the Include Fuzzy Matches checkbox, as shown below:



Check this box to turn on fuzzy searches. If the box is disabled, it is because you must select either First Name, Last Name, Company or Address from the Search In pull-down menu above the checkbox.

Figure 4.2 Include Fuzzy Matches checkbox in Basic Search

Now set the slider control to allow fewer or more transformations and configure your search in the ordinary way. If you need help in this window, see "Basic" on page 308. As indicated above, the Basic search with fuzzy matching is available in all modules except Keywords and Relationships via the Find menu.

The fuzzy match option is available only for searches on First Name, Last Name, Company and Address searches. The checkbox will be disabled for other searches. (Future versions may extend the range of phonetic searches. Please request or inquire.)

Because reversing first and last name during data entry is a common error, both fields are searched when you choose fuzzy matching for a first or last name field. So, a fuzzy search for a first name of "David" will also find donors with a last name of "David".

† String matching is performed using the Edit Distance algorithm, also know as the Levenshtein distance algorithm (original variant): see http://en.wikipedia.org/wiki/Levenshtein_distance.

Finding a Donation

To find specific donation records, do this:

1 Go to the Donations module by choosing File>Donations, or by clicking the Donation List View or Donation Input Window to bring one of them to the front.

2 Choose an appropriate command from the Find menu, depending on what criteria you want to use for the search (see next bullet list).

3 Fill in the information requested in the dialog box and click OK. For information about the Normal, Search in Selection and Add to List buttons in these dialogs, see page 101.

4 The records meeting the search criteria will appear in the List View. If you conducted the search from the Donation Input Window, the first record found by the search appears there.

In the Donations module, items in the Find menu allow these searches:

- **Basic:** search for first name, last name, company, address, city, state, postal code, country, email address, Donor or Donation ID Number, or any user-defined field.
- **Amount:** search for the dollar amount of donations (a range of amounts or a single amount).
- **Date:** search for donations made within a range of dates or on a single date.
- **Solicitor:** search for donations credited to specified solicitors in your organization.
- **Payment Form:** search for donations made by check, Visa, Mastercard, etc.
- **Recognition Products needed:** search for donations which are in need of acknowledgement by specified Recognition Products
- **Thank Yous needed:** search for donations which are in need of acknowledgement by specified letter templates
- **Advanced:** conduct complex searches of any field(s) with the Search Editor.

Additional searches may be conducted on fields whose names may be customized by you; see "Setup" on page 268. The default names are listed below, but these will change to reflect the customized name:

- **Campaign:** search for donations made to a specified campaign(s).
- **Fund:** search for donations made to a specified fund(s).
- **Method:** search for donations made in response to a specified method(s) (communication, mailing, ad, etc.).

See "Find Menu" on page 307 for more information on these searches.

This is the dialog that appears for the Date search:

Type in the oldest and newest you want to find here. To search for a single date, type the value into the first field, then use the delete key to empty the second field, or make both fields the same value. Use the tab key or mouse to move between these fields. For shortcuts in typing dates, see“Date Entry” on page 49.

On Macintosh, you may type option-1, 2, or 3 to select the type of search, or use the mouse. On Windows, do CONTROL-1,2,or 3.

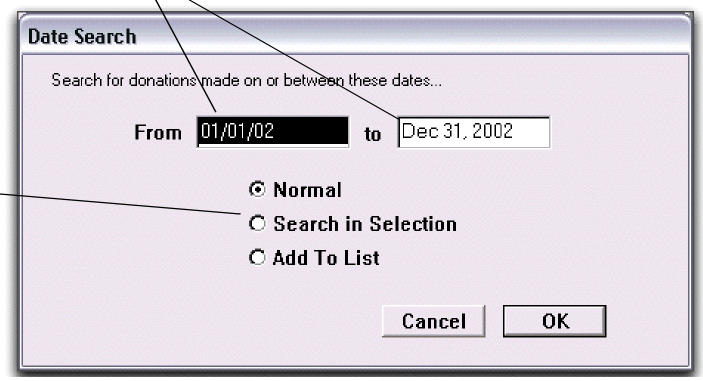


Figure 4.3 Date Search dialog

For example, you could use the Date search in conjunction with the List Statistics menu command to produce a fast total of today's (or any other time period) donations by doing this:

5 Choose Donations from the File menu.

6 Choose Date from the Find menu.

7 Type today's date in MM/DD/YY format; for example, "12/31/99". Type the TAB key followed by the Delete or Backspace key to empty the contents of the second date field. For other date entry shortcuts, see "Date Entry" on page 49. Click the Search button.

8 Choose List Statistics from the Output menu. The amount for "Total, listed donations" is your total for the day.

For more information on performing searches, see the rest of this chapter and "Find Menu" on page 307.

Finding a Membership

To find specific memberships, do this:

1 Go to the Memberships module by choosing File>Memberships, or by clicking the Membership List View or Membership Input Window to bring one of them to the front.

2 Choose an appropriate command from the Find menu, depending on what criteria you want to use for the search (see next bullet list).

3 Fill in the information requested in the dialog box and click OK. For information about the Normal, Search in Selection and Add to List buttons in these dialogs, see page 101.

4 The records meeting the search criteria will appear in the List View. If you conducted the search from the Membership Input Window, the first record found by the search appears there.

In the Membership module, items in the Find menu allow these searches:

- ♦ **Basic:** search for first name, last name, company, address, city, state, postal code, country, email address, Donor or Dues ID Number, or any user-defined field.
- ♦ **Amount:** search for the dollar amount of dues (a range of amounts or a single amount).
- ♦ **Date:** search for memberships made or expiring within a range of dates or on a single date.
- ♦ **Membership Class:** search for memberships in a class (individual, family, student or other categories you set up).
- ♦ **Membership Status:** search for current or lapsed members, or by the number of renewals, e.g. current 1st time members, lapsed 2-time members, etc.
- ♦ **Solicitor:** search for memberships credited to specified solicitors in your organization.
- ♦ **Payment Form:** search for memberships made by check, Visa, Mastercard, etc.
- ♦ **Recognition Products needed:** search for memberships which are in need of acknowledgement by specified Recognition Products.
- ♦ **Renewals Needed:** search for expired or expiring memberships who have/have not received a first or second renewal notice
- ♦ **Thank Yous needed:** search for memberships which are in need of acknowledgement by specified letter templates.
- ♦ **Advanced:** conduct complex searches of any field(s) with the Search Editor.

Additional searches may be conducted on fields whose names may be customized by you; see “Setup” on page 268. The default names are listed below, but these will change to reflect the customized name:

- ♦ **Campaign:** search for memberships made to a specified campaign(s).
- ♦ **Method:** search for memberships made in response to a specified method(s) (communication, mailing, ad, etc.).
- ♦ **Fund:** search for memberships made to a specified fund(s).

You can find more information on these searches in “Find Menu” on page 307.

The date search dialog for the Memberships module is modified from the one that appears for other modules. This allows you to perform a search based on when the dues were paid (the Date Paid field), or for when the membership is or was due to expire (the Expires field in a membership record). A further refinement of the search for expired membership allows you to find only expired memberships that have not been renewed. Because you will often be searching for expired memberships with the intention of soliciting their renewal, this function can be very useful. Access it by checking the box indicated below:

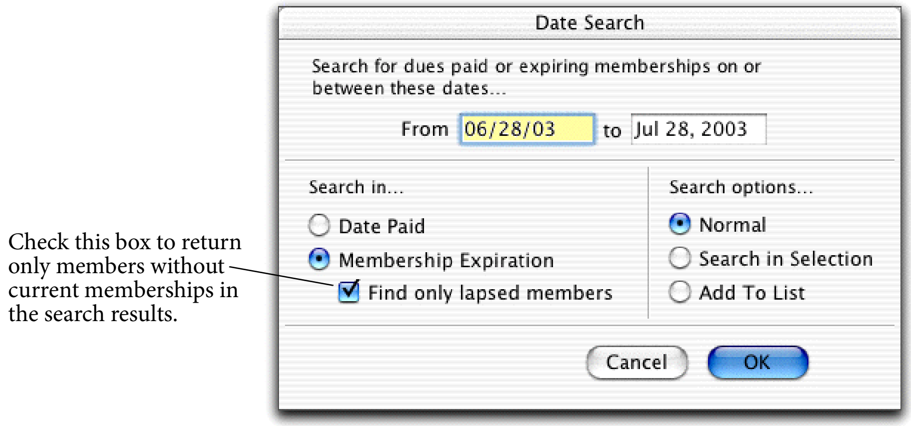


Figure 4.4 Membership date search dialog

This search is similar to the Renewals Needed search mentioned in the bullet list above. However, it is simpler than that search and useful when you do not need to limit results to expired memberships with specific Renewals Sent checkboxes enabled or disabled; by turning off the checkbox for Find only lapsed members, it also allows a search of the expiration fields without automatic filtering-out of renewed members, something the Renewals Needed search always does. This search is also unique in offering a search of the Date Paid field, in addition to the Date Expires field.

For more information on using search commands, see the rest of this chapter and "Find Menu" on page 307.

Finding a Pledge

To find specific pledges, do this:

1 Go to the Pledges module by choosing File>Pledges, or by clicking the Pledge List View or Pledge Input Window to bring one of them to the front.

2 Choose an appropriate command from the Find menu, depending on what criteria you want to use for the search (see next bullet list).

3 Fill in the dialog box and click OK. For information about the Normal, Search in Selection and Add to List buttons in these dialogs, see page 101.

4 The records meeting the search criteria will appear in the List View. If you conducted the search from the Pledge Input Window, the first record found by the search appears there.

In the Pledges module, items in the Find menu allow these searches:

♦ **Basic:** search for first name, last name, company, address, city, state, postal code, country, email address, Donor or Pledge ID Number, or any user-defined field.

- **Amount:** search for the dollar amount of pledges (a range of amounts or a single amount, for pledge amount, pledge balance or payment amount).
- **Date:** search for pledges made within a range of dates, or for pledges with a payment due within a range of dates.
- **Solicitor:** search for pledges credited to specified solicitors in your organization.
- **Fulfilled:** search for pledges that reached a $0 balance within a date range that you specify.
- **Overdue:** search for pledges whose payments are behind schedule (with optional grace period).
- **Next Payment Due Date:** search for pledges with payments due that fall within a date range that you specify.
- **Recognition Products needed:** search for pledges which are in need of acknowledgement by specified Recognition Products.
- **Thank Yous needed:** search for pledges which are in need of acknowledgement by specified letter templates.
- **Advanced:** conduct complex searches of any field(s) with the Search Editor.

Additional searches may be conducted on fields whose names may be customized by you; see “Setup” on page 268. The default names are listed below, but these will change to reflect the customized name:

- **Campaign:** search for pledges made to a specified campaign(s).
- **Fund:** search for pledges made to a specified fund(s).
- **Method:** search for pledges made in response to a specified method(s) (communication, mailing, ad, etc.).

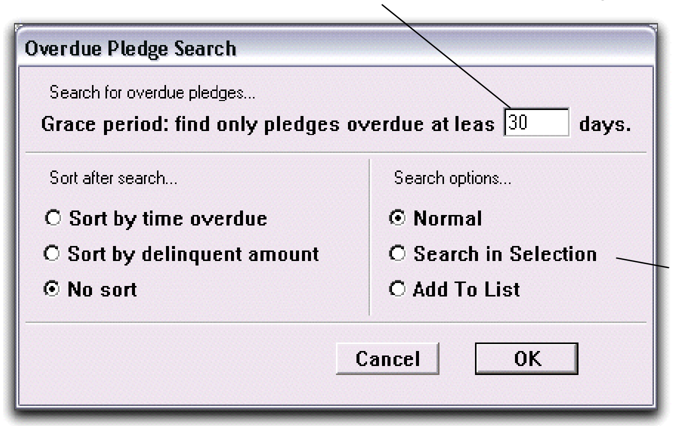
See “Find Menu” on page 307 for more information on these searches.

To accommodate the several kinds of amounts involved in pledges (Pledge Amount, Balance and Payment Amount), the amount search dialog for the Pledges module is different from that used for other gift records; see Figure 12.6, “Pledge Amount Search dialog” on page 318.

Overdue Pledge Search

The Overdue search is unique to the Pledges module. To locate all the overdue pledges, go to the Pledges module with the Pledges command in the File menu. Now, select the Overdue command from the Find menu. This dialog box appears:

The grace period will remove records from the search results if they are overdue for a period less than the number entered here. For no grace period, enter “1”.



Select a radio button to automatically sort results after the search. Choosing the No Sort option will eliminate delays from sorting.

Figure 4.5 Overdue Search dialog

In the top section of the dialog, you may specify a grace period. Pledges that are overdue by a time period less than specfied here will not appear in the list of overdue records. To use this feature, fill in the amount of days (defaults to 30) of grace period you want, or enter “1” to find all overdue pledges.

There are several useful ways to combine searches using the Search in Selection option. For example:

- Limit the overdue search results to those pledges with large payments or balances by beginning with an Amount search, followed by the Overdue search with Search in Selection turned on.
- Locate new pledges that have become overdue by preceding the Overdue search with a Date search (the date search could be for pledges made in the last 30 days), followed by the Overdue search with Search in Selection turned on.
- Anticipate funding shortfalls for specific projects by first performing a Fund search, followed by the Overdue search with Search in Selection turned on.

The right area of the dialog may be used to specify a sort order for the overdue pledges. Click one of the radio buttons if this is desired.

At the end of the search, a dialog box appears reporting a count of the overdue pledges and the total delinquency of all records found in the search, per this example:

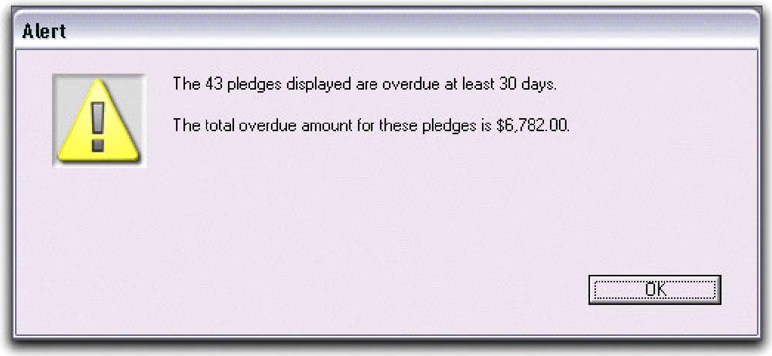


Figure 4.6 Overdue Search report

After dismissing this dialog, the overdue pledges appear in the Pledge List View. Remember that the results are affected by your settings for grace period and Search in Selection as described above.

The Overdue search options can be combined in powerful ways. For example, suppose you wanted to send one form letter to pledgers overdue by 30?89 days, another letter to pledgers overdue by more than 90 days, and no letter at all to pledges overdue less than 30 days. Follow this procedure:

1 Conduct a search for overdue pledges by selecting the Overdue command in the Find menu. Type in “90” (without quotes) in the day entry field in the upper section of the dialog, so that the line reads “Only Pledges overdue more than 90 days.” Make sure the Search in Selection radio button is off. The sort option does not matter—you may wish to select “No sort” to speed up this operation. Now, click the Search button. A small window appears informing you that the search is in progress; you can cancel by pressing ESCAPE.

2 Export the records found by this search using File>Export. Name the exported file “Overdue 90 or more.txt” (without quotes). Use this file when performing mail merge for pledgers overdue 90 days or more.

3 These records in the list are the ones we must not search in for our next search, which will be for those pledges overdue by 30 to 90 days. To avoid searching these records, select Invert Selection from the Records menu. The records returned by this operation are all those pledges not overdue by 90 days or more, including pledges which are not overdue at all.

4 To narrow this list of records down to those due by 30 days or more, choose the Overdue command (again) from the Find menu and type in “30” where you previously typed “90”. This time, to confine the search to the highlighted records (which do not contain pledges overdue by 90 days or more), turn on Search in Selection by checking the appropriate radio button. Click the Search button. The progress dialog appears, and in a few seconds you will have the list of records of pledges overdue by 30 to 89 days. Export them with the Export command from

the File menu, naming the file "Overdue 30 to 89.txt" (without quotes). Use this file when performing merging to the template for pledgers overdue 30?89 days.

After a search for overdue pledges you can:

- Export the records for use in reminder letters; see "Export" on page 344.
- Print a report with the Print List command from the Output menu; see "Print List" on page 150.
- Print the special Overdue report from the Output menu; see "Overdue Pledges" on page 200.
- Print mailing labels; see "Printing Labels" on page 142 and "Labels" on page 352.

Next Payment Due Date Search

When preparing to send reminder notices for pledge payments, you may want to locate pledges that have payments due within a date range that you specify. The Next Due date search is designed to accommodate this need.

Locating pledges by their next due date requires searching the Next Due Date field in each pledge record; the date stored in this field appears in the Information Palette for a Pledge Input Window as "Next Due Date" or "Due Since" (see Figure 1.28, "Palette for donor record, example #3" on page 32). This field is maintained and updated automatically whenever you do something that would change the next due date, such as add or delete a pledge payment, or change the pledge payment schedule (see page 84 for specific fields that influence pledge payment schedules). It cannot be modified through direct editing. You can search the Next Due date field through the search described here, or through the Advanced search interface (see "Advanced" on page 335).

The scope of the Next Payment Due Date search is limited to pledges with a balance greater than zero. Therefore, you will not see fulfilled pledges in the search results, but you might see overdue pledges if you enter dates prior to the current date in the search window. (If you want to find fulfilled or overdue pledges, please use the searches designed for those purposes, described at "Fulfilled" on page 330 and "Overdue Pledge Search" on page 114.)

To display the search window for Next Payment Due Date, choose Find > Next Payment Due Date while the Pledge List View or Pledge Input Window is frontmost. The following window is displayed:

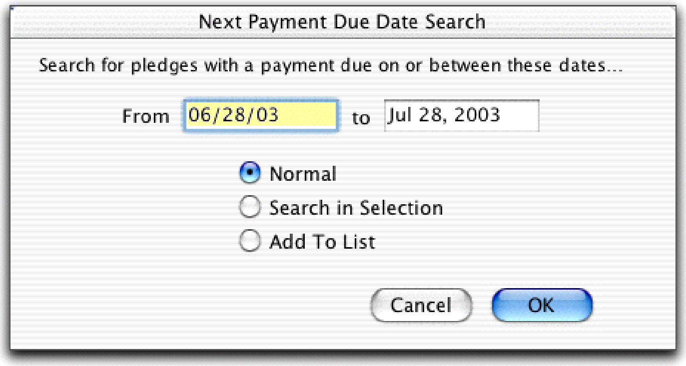


Figure 4.7 Next Payment Due Date search window

For more information on using search commands, see the rest of this chapter and “Find Menu” on page 307.

Finding a Pledge Payment

To find specific pledge payments, do this:

1 Go to the Pledge Payments module by choosing File>Pledge Payments, or by clicking the Pledge Payment List View or Pledge Payment Input Window to bring one of them to the front.

2 Choose an appropriate command from the Find menu, depending on what criteria you want to use for the search (see next bullet list).

3 Fill in the information requested in the dialog box and click OK. For information about the Normal, Search in Selection and Add to List buttons in these dialogs, see page 101.

4 The records meeting the search criteria will appear in the List View. If you conducted the search from the Pledge Payment Input Window, the first record found by the search appears there.

In the Pledge Payments module, items in the Find menu allow these searches:

♦ **Basic:** search for first name, last name, company, address, city, state, postal code, country, email address, Donor ID, Pledge ID, or Pledge Payment ID Number, or any user-defined field.

♦ **Amount:** search for the dollar amount of payments (a range of amounts or a single amount).

♦ **Date:** search for payments made within a range of dates or on a single date.

♦ **Payment Form:** search for payments made by check, Visa, Mastercard, etc.

♦ **Advanced:** conduct complex searches of any field(s) with the Search Editor.

Additional searches may be conducted on fields whose names may be customized by you; see "Setup" on page 268. The default names are listed below, but these will change to reflect the customized name:

♦ **Campaign:** search for payments to pledges made to a specified campaign(s).

♦ **Method**: search for payments to pledges made in response to a specified method(s) (communication, mailing, ad, etc.).

♦ **Fund:** search for payments to pledges made to a specified fund(s).

The campaign, fund, and method searches locate the pledge records with the search attributes you select, then display all pledge payments associated with those pledges. You can get a total for a specific method, campaign, etc. by following the search with the Output>List Statistics.

♦ **Thank Yous needed:** search for pledge payments which are in need of acknowledgement by specified letter templates.

For more information on using search commands, see the rest of this chapter and "Find Menu" on page 307.

CHAPTER

5

Saying Thank You

A telephone training module is available on this topic, with optional instruction in performing mail merge using Microsoft Word®. For more information or to sign up, contact the publisher using the information on the inside front cover of this manual.

Basic Gift Acknowledgements

FUNDimensions facilitates all phases of the gift acknowledgement process:

1 Attaching information to the gift record about what form letter and/or recognition product should be sent to the donor.

2 Continuously monitoring your database for gifts needing acknowledgement, and displaying this information to you in a convenient Dashboard window.

3 Locating the specific records that need acknowledgement, creating separate lists for the different letter forms and recognition products.

4 Generating exports for mail merge operations, with a separate export file for each form letter.

5 Printing mailing labels, with a separate batch of labels for each form letter. Both exports and labels sorted by postal code, so you assemble the mailing without having to scrutinize letters and labels to find the match.

6 Attaching information to gift records confirming that a letter and/or recognition product was sent.

7 Producing summary reports of the letters or recognition products sent.

The export file in step 4 will contain mailing information and all particulars of each gift in the selection of records. It also contains information about the donor's giving history and the position of their gift within that history. This information is provided so that you can report it to the donor, stimulate their interest, and cultivate discussion with them about their participation in your program. These items are discussed in the following list:

- Gift Sequence Number. This is the number of the gift in the donor's history, e.g. if they have given 3 gifts, and the exported gift is the third one, this will be 3.
- Gift Sequence Number (Ordinal). Same as above in ordinal form. For the above example, this would be "third".
- Total Gifts for Donor. Sum of the donation and pledge amounts for the donor. Does not include membership dues amounts.
- Total Gift Count. Number of donations and pledges made by the donor.
- Gift Total Year To Date. The donor's donations and pledges for the current year.
- Gift Count Year To Date. Count of the donor's donations and pledges for the current year.
- Gift Total Last Year. The donor's donations and pledges for the previous year. You can use this to compare current versus the previous year's giving.
- Gift Count Last Year. Count of the donor's donations and pledges for the previous year.
- Donor Since. The date of their first donation or pledge.
- Donor for X Years (rounded down). The number of years elapsed since the Donor Since date above, rounded down to the nearest whole number.
- Donor for X Years (Ordinal-rounded down). Same as above in ordinal form (first, 15th, etc.)
- Donor for X Years (rounded up). The number of years elapsed since the Donor Since date above, rounded up to the nearest whole number.
- Donor for X Years (Ordinal-rounded up). Same as above in ordinal form (first, 15th, etc.)
- Match To. In donation module exports only, this is the Donation ID number of any matching gift entered for the donation.

For a complete listing of the information contained in exports, see Table 13.1, "Export Fields (except 2nd Thank You Recipient, Event Manager and Year End Letter Exports)" on page 348.

Gift Acknowledgement Procedure

Proceed as follows to make thank you letters or send recognition products:

1 You begin the process of making thank you letters when you create the gift record in FUNDimensions, by making an entry in the Thank You Type field of the gift record. If you intend to send a recognition product, you also enter that during entry of the gift record. Instructions for creating gift records, including the entries in the Thank You Type and Recognition Product fields is in "Data Entry" beginning on page 47.

- Tip: you can set up a table of gift amount ranges, and map specific letter and recognition products to the amounts. When you create a gift, the correct letter and recognition product is entered automatically. This ensures consistency and speeds data entry. The letter and recognition product can be manually changed on a gift-by-gift basis, so there is no loss in flexibility. See "Donation, Membership, Pledge and Payment Map" on page 272.

2 Your second step in the thank you process is to locate a selection of gift records which are tagged with identical Thank You Types or Recognition Products. You can do this by clicking on buttons in the Dashboard Window ("Dashboard Buttons and Menus" on page 35), or by using searches from the Find menu ("Recognitions Needed & Thank Yous Needed" on page 332).

- Tip: If you do *not* need to send *different* thank you notes or recognition products for your gifts, use the "Find All" item in the Dashboard or popup menu for the Thank Yous Needed or Recognitions Needed search. This will find all gifts needing a thank you letter or recognition product, regardless of the thank you type or recognition product entered in the gift record.

3 After locating each selection of records above, your third step is to perform the export needed to perform the mail merge by choosing Output>Export ("Export" on page 344) and print the labels by choosing Output>Labels ("Printing Labels" on page 142).

- Tip: When you create the export file by choosing Output>Export, FUNDimensions asks you to name the file, and choose a folder in which to save it. We recommend that you create a folder named Thank You Exports or similar on your Desktop or in another convenient location on your hard disk. Save the file in that folder, and name the file with the current date and the Thank You Type (as it appeared in the dashboard menu (e.g. "2 Aug Major Donation"). After performing the mail merge successfully in your word processor (next step), delete the export file from the folder; this will prevent confusion during later thank you mail merges, which might cause you to merge the wrong export file.)
- If you wish to examine the contents of the export file, you can do so with a spreadsheet program, such as Microsoft Excel®. See page 345.
- A list of exported fields and data (for the exports discussed in this section) is in Table 13.1, "Export Fields (except 2nd Thank You Recipient, Event Manager and Year End Letter Exports)" on page 348.

4 If you performed an export in the step above (as opposed to just printing labels for recognition products), switch to your word processor and perform the merge. (See your word processor online help or documentation for specific instructions.) Do *not* quit or exit FUNDimensions when you do this, as you will need the selection of gift records (generated in step 2 above) intact for the next step.

5 Having performed the mail merge and printed mailing labels, the next step is to mark as "Thank You Sent" the gift records which were exported and for which labels were printed in the previous steps. You do this by selecting the Records>Mark Sent Flags ("Mark Sent Flags" on page 303). (Alternately, you can

manually open each gift record in the List View, and place a a checkmark in the Thank You Sent and Recognition Sent boxes.)

- ❑ Background: records with their Mark Sent Flags turned *on* are ignored by the Dashboard unacknowledged gifts section, and by the Thank Yous Needed and Recognitions Needed searches. Therefore, when you perform this step (#5), you are instructing FUNDimensions to ignore the gifts in future thank you procedures.

6 To complete the process, you repeat steps 2 through 5 above, until the Dashboard indicates no more gifts need acknowledgement, or searches for Thank Yous Needed and Recognitions Needed find no records. You need to do the steps for each gift type (donations, memberships, pledges and pledge payments) for which you decide to send thank you letters or recognition products.

Gift Acknowledgements to Named Donors

This section describes the procedures for managing acknowledgments for in-the-name-of and memorial gifts. Persons in whose name a gift is given, or the designated survivor of a person in whose name a memorial gift is made, are referred to as 2nd thank you recipients. Procedures are described for entering the named donor mailing information, printing mailing labels and generating exports for letters. Special procedures are given for combining multiple gifts to the same named donor into a single export record and label so that a single letter may be made that lists all the gifts made in their name.

Overview

FUNDimensions includes a feature set for creating 2nd thank you notes for gifts. These capabilities are designed to meet needs arising from several scenarios:

- ♦ A third party renders assistance is generating a gift, and you want to acknowledge their help.
- ♦ A donor makes a gift in someone else's name, or as a memorial, and you want to thank the named donor or a relative of the person memorialized.
- ♦ Similar to the scenario above, except there are many gifts from multiple donors made in the name of one person, or as a memorial to one person. In this instance, the usual procedure is to send one letter to the named donor or the relative or the memorialized person, stating the names of the actual donors, the amount they each contributed, and the total amount given. To meet these special requirements, FUNDimensions offers a way to identify identical records for 2nd thank you recipients and merge them into a single export record for mail merge, and into a single label for mailing.
- ♦ In all the scenarios above, mailing labels should be printed bearing the name and address of the named donor or relative of the memorialized person.

FUNDimensions meets the needs for all the above scenarios, using the following software tools:

- A date entry screen, available from within any donation, membership or pledge window, for entering the name and address of the 2nd recipient. A Donor ID field in this screen will allow lookup of a name and address from a donor record, for a shortcut to entering the name and address. This is especially useful in the instance of multiple donors making gifts in the name of one person; by entering that person or their next-of-kin in a regular donor record, you can enter their name in multiple gifts simply by entering their Donor ID. This will also result in a single, merged export record for all these gifts when exporting 2nd recipient records, so you can thank the named donor or next-of-kin with one letter instead of a letter for each contribution, with the single letter displaying the total amount given and the names and amounts for each contribution.
- An export function, capable of separate exports for the merged records above, and for single 2nd recipient records, i.e. those without matching Donor IDs.
- A label function, for printing mailing labels for the exported records.

Creating 2nd Recipient Records

Perform the following from within any donation, pledge or membership window.

1 Choose Add 2nd Thank You Note from the Records menu.

2 If the recipient of the 2nd thank you note is already entered as a donor record in your database, type their Donor ID number into the first field, then type the TAB key; the address from their donor record is copied into the rest of the window. Click OK.

3 If the recipient is not already in your database, type the TAB key and fill in the appropriate fields. The field layout is similar to that of the Donor Input Window, and it has the same features of auto-capitalization and auto-correction that are present in the Donor Input Window. Click OK.

Exporting 2nd Recipient Records

The export of 2nd recipient records is available from the Donation, Membership or Pledge List Views. You use this to generate mail merge letters to the named donors entered in “Creating 2nd Recipient Records” above.

Because the query for locating gift records that need acknowledgement to a 2nd recipient uses the Thank You Sent flag, you should perform these steps before exporting for regular thank you notes, or if after that export, then before using the Mark Sent Flags command to mark the records as “Thank You Sent”.

To generate this export, follow these steps:

1 Perform a query to locate the gift records needing acknowledgement, by choosing Thank Yous Needed from the Find menu. From the dialog, choose Find All from the popup menu, then click the Search button. For more information on this search, see “Recognitions Needed & Thank Yous Needed” on page 332.

2 Choose Advanced Reports from the Output menu. In the Advanced Reports window, expand the list of Exports by clicking the plus sign (Windows) or the disclosure triangle (Macintosh)., Choose one of the following items:

- **2nd recipients-not same ids**. This option creates a single export record for every 2nd recipient record that does *not* bear a Donor ID that is identical with another 2nd recipient record, within the selection of gift records.
- **2nd recipients-same ids** exports records with identical Donor IDs as consolidated export records. This option locates all the 2nd recipient records with one or more identical Donor IDs in the selection of gift records. Each set of records with matching IDs is merged into a single export record, which will contain the total amount given in that 2nd recipient's name, a count of the number of gifts given in their name, and the names of individual contributors and the amount of their contribution.

Like other exports from FUNDimensions, the first record of the export contains the names of each field exported, and contains a tab between each field and a return between each record. As an additional aid, the table below lists the fields in the order they will appear:

Table 5.1 Export Fields for 2nd Thank You Recipient Exports

Field Number	Export Fields from Donation, Membership and Pledge modules
1	Label Salutation 1
2	Label Salutation 2
3	Address Line 1
4	Address Line 2
5	City
6	State
7	Postal Code
8	Country
9	Letter salutation
10	Salutation
11	First name
12	Middle initial
13	Last name
14	Title
15	Company
16	Gift Amount*
17	Gift Date
18	Gift List 1†
19	Gift List 2†
20	Gift List 3†
21	Solicitor
22	Year of Birth
23	Number of Gifts
24	Note
25	Gift Sent by‡

* For consolidated exports, this will be the total of all consolidated gifts.
† Names of these fields can be changed; see "Preface" on page ix.
‡ For consolidated exports, this will contain the names of all the actual donors and the gift amounts from each of them.

When you choose the "2nd recipients-same IDs" option, data that is specific to gift records, i.e. gift date, note, campaign, method, fund, solicitor- will appear in the export only for the gift record with the highest gift ID number for the consolidated group; that would usually be the last gift entered for that group.

Printing 2nd Recipient Mailing Labels

Choose Output menu > Labels for the label printing dialog window. For general information on label printing see “Printing Labels” on page 142 and “Labels” on page 352.

The labels dialog offers the same options as for exporting, described above:

To print labels for 2?^{6} thank you recipients, click the first radio button in this group, and either of the 2?^{6} or 3ÂÎ radio buttons.

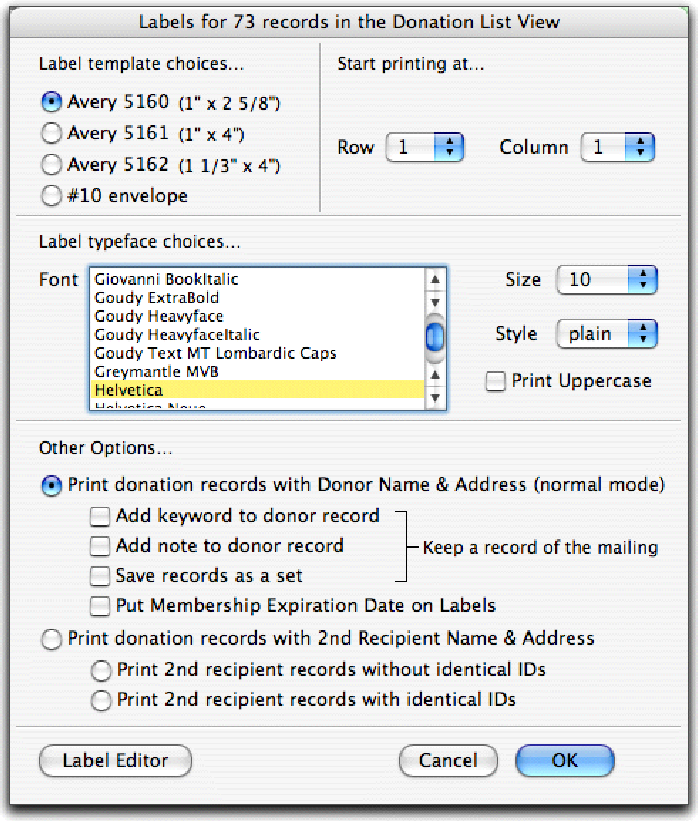


Figure 5.1 Label dialog

Except when printing the label from an Input Window, you should match the label printing option to whatever export option you selected in the previous section:

Table 5.2 2nd Recipient Mailing Labels Options

If you used this Export Option...	then use this Label Option.
2nd recipients-not same IDS	Print 2nd recipient records without identical IDS
2nd recipients-same IDS	Print 2nd recipient records with identical IDS

If you choose the Label menu command while a Donation, Membership or Pledge Input Window is frontmost, the choice above does not apply; the label for that gift record will be printed regardless of whether the 2nd recipient has an ID that matches some other 2?^{6} recipient record.

Year-End Letters

Introduction

This section describes the exporting capabilities of FUNDimensions for reporting annual gift summaries and tax information to donors, and provides instructions on their use. It is not intended to provide tax advice, and the features described do not necessarily provide legal conformance to tax laws. It is up to you to ascertain whether the features of FUNDimensions and procedures described in this document are necessary and adequate to comply with tax laws and regulations.

The intention of tax exporting in FUNDimensions is to provide the data for letters to donors of the taxable year, containing their total giving amount and the total tax-deductible amount for the calendar year.

Optionally, you can include itemized lists of each of their gifts. The itemized list includes the type of gift (donation, pledge or membership), the date of the gift, the tax-deductible amount of the gift and the gift ID number assigned by FUNDimensions. The ID number is the Donation ID, Membership ID, Pledge ID or Pledge Payment ID that appears in the gift input window. It is generated by FUNDimensions when a new gift record is created and cannot be changed. It will be unique within each gift type, i.e. there may be a Donation ID 100 and a Pledge ID 100, but never two donations with the same ID. (If a gift record is deleted, its ID number is *not* re-used for subsequent gifts.) If you receive an inquiry about a gift, ask for the ID number and gift type, and use this information to be sure you look up the correct record. You can use the Basic search (page 308) to locate a gift by its ID number. For further explanation of ID numbers, see “Donation Input Window” on page 15.

This is a summary of the software items you’ll use to perform year-end exporting:

- Tax-deductible amount fields in the Donation, Membership and Pledge Input Windows. These fields must contain the deductible amount for each gift. (To eliminate the chore of manually entering tax deductible amounts, you may associate a gift amount with a deductible amount and recognition product to automate entry of the tax-deductible amount when a new gift is created (see “Donation, Membership, Pledge and Payment Map” on page 272).
- A query to locate those donor records with gift records dated in the tax year you want to export. Templates are provided for the current year and for the previous calendar year. This is done from the Donor module, using the Amount query (Find>Amount).
- A template for use with the Report Editor. Instead of a printed report, this template produces a text file that can be used with your word processor to generate letters to each donor containing the tax reporting information. Several aspects of the report may be customized by changing formulas in the template.

Special Behavior With Pledge Payments

When producing the export for donors with pledges, non-deductible amounts left over from a previous year may need to be applied against gifts in the current year. FUNDimensions does this for you automatically and without requiring any special action. For example, Jane Smith makes a pledge in December of 1999 for $650, with monthly payments of $50 and a non-deductible amount of $100 because of some theater tickets she received as recognition for the pledge. She makes the first payment of $50 in December of 1999, and the balance of payments in 2000. Her year-end letter for 1999 from your organization should indicate $0 tax-deductible on gifts of $50, while the 2000 year-end letter should show $550 tax-deductible on gifts of $600.

Making the Export

To produce a year-end export, follow these steps:

1 Make the Donor List View the active window by clicking it or choosing File>Donors.

2 Choose Find>Amount. Enter the following values (displayed here in their native tab order):

- Minimum: 1, or other value corresponding to minimum reporting requirements.
- Maximum: any value exceeding your largest gift of the year (99,000,00 will usually suffice).
- Date filter: From 01/01/tax year To: 12/31/tax year Disable Checkbox: **off**
- Gift Types: check those that apply to your organization. If you take pledges, turn **on** Pledge Payments, but turn **off** Pledges. This is because donors get tax deductions for the amounts they pay (pledge payments), not for their commitments (pledges).
- Turn on Search On Individual Gift Amounts. Alternately, if minimum reporting requirements are for total yearly giving, you can turn on "Search on total of all gift types".
- Turn on Normal.

- This is how the window would look, configured for reporting on 1999:

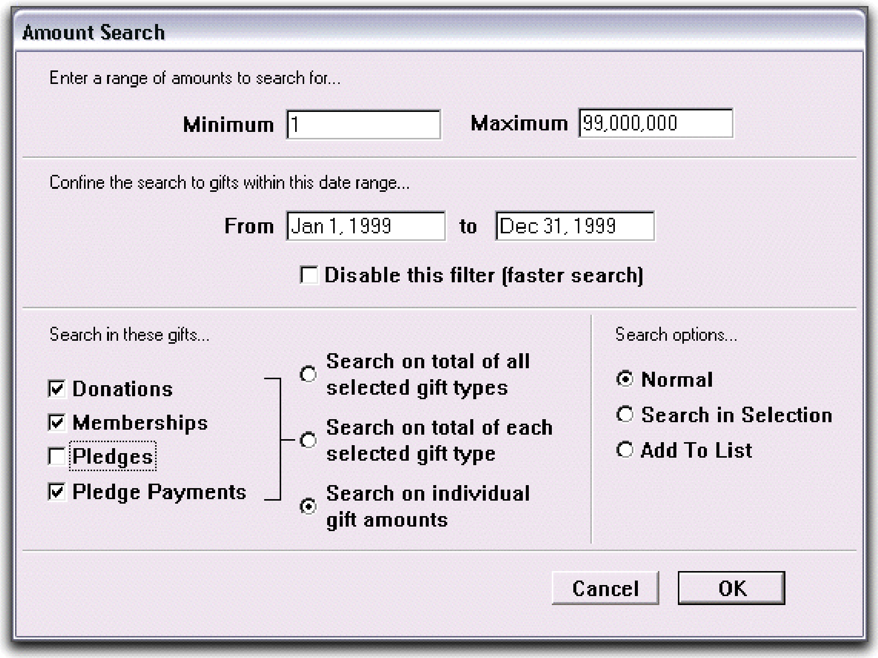


Figure 5.2 Amount Query for Year-End Export for 1999

3 Click the Search button. This results in a list of donors who have made gifts to your organization in the tax year.

4 Choose Output>Advanced Reports. The Advanced Reports window appears.

5 If necessary, expand the Exports topic in the left side of the Advanced Reports window. Select one of these items:

- Year-End Letter-YTD if the end of the tax year has not yet passed.
- Year-End Letter-Last Year if reporting on the prior year.

Except for date range, these two exports are identical. (If you need date ranges other than current or last year, you can modify either of these templates: see "Editing the Export Template" on page 130.)

6 Click the Export to Disk button in the lower right of the window. A dialog appears where you can name the disk file and save it to the folder of your choosing. Click the Save button to produce your year-end export.

7 You may see "Query in Progress" or other messages. When finished, you are returned to the Donor List Window.

8 Print mailing labels. For help with this step, see "Printing Labels" on page 142.

9 In your word processor, write the form letter and perform a merge using the data exported from FUNDimensions. To aid in constructing your letter, the first record of the export file contains the field names; in Microsoft Word, this may be used as the "Data Header" to populate the Insert Merge Field pull-down menu with field

names. See tax authority and word processor documentation for details on structuring the letter and performing the merge.

Editing the Export Template

You can edit the template prior to performing the export. Open the template by doing Output>Report Editor, the choosing File>Open. Navigate to the template, which is in FUNDimensions folder: Report Templates: Donors; Exports. Work on a copy of the template by doing File>Save As and saving a copy of the template someplace safe.

The possible variations are described below:

- You may delete gift types that do not apply to your organization. (You do not have to delete gift types not used in your organization, but it will result in a faster export.) For example, if you do not accept memberships, delete the columns labeled C4, C7 and C8, and modify the formula in C12 to eliminate ◊GrandTotal_Memberships, and modify the formula in C14 to eliminate ◊DeductableTotal_Memberships. To delete columns, click to highlight the column, then choose Edit>Delete Column.
- In the columns labeled C2, C4 and C9, you can set the separator to appear between gifts in the listing of gifts. The default is ": "(colon and space); you can change this to any value except a carriage return or tab, which are reserved for use between fields and records in the export. To change this separator:
  1. Double-click on the column label "C2". In the Formula Editor, change the 1st parameter (i.e., the string before the first semicolon) to the character(s) you want, i.e., change ": " to "– ". You can specify up to three characters to be used as a delimiter.
  2. Repeat the above for C4 and C9.
- The second and third parameters of the formulas in C2, C4 and C9 are the start and end dates of the last calendar year. This is the only difference between the Year-End Letter-Last Year and Year-End Letter-YTD templates. If this is not the tax period you want to reference in the export, change the formula. For example, to set the year to 2000, change the second parameter from "1/1/"+String(Year of(Current date(*))-1) to "1/1/2000". Change the third parameter from "12/31/"+String(Year of(Current date(*))-1) to "12/31/2000". Do this in C2, C4 and C9.
- You may include or exclude the FUNDimensions gift ID from the listing of individual gifts by setting the ninth parameter to True (include the ID) or False (exclude the ID). As the template ships, this is set to True.
- You can easily include other information in this report. For example, to remind your donors of the solicitor name to which they are assigned, add a column by dragging the Solicitor field into the report area of the editor.

Below is a table listing the export fields in the order the appear in the template.

Table 5.3 Fields in Year-End Letter Exports

Field #	Field Name	Field description and application in form letter
1	Donor ID Number	The Donor ID that appears in the Donor Input Window (page 6).
2	Label Salutation 1	Use this as the first line of the recipient address in your letter (usually donor name).
3	Label Salutation 2	Use this as the second line of the recipient address in your letter (usually company name).
4	Address	Use as the third line in the recipient address.
5	Address 2	Use as the fourth line in the recipient address.
6	City	Use in the fifth line in the recipient address, followed by a comma and space.
7	State	Append to the fifth line (containing City), followed by a space.
8	Zip	Append to the fifth line (containing City and State).
9	Letter Salutation	Place after "Dear" in the letter.
NA	C1-select donor's gifts	This field only executes a command; it is hidden, so it does not appear in the export file.
10	C2-list of donations and their deductible amounts	List of donations for the taxable year. For example, a donor with 2 donations in the tax year might have this entry: Donation (ID 1224) on 1/25/1999 of $100.00, tax deductible in the amount of $89.05: Donation (ID 1864) on 10/01/1999 of $50.00, tax deductible in the amount of $50.00.
11	C5-Total Donations	The total amount of donations for the donor and tax year; includes both deductible and non-deductible amounts; equal to the sum of the donation amounts listed in C2.
12	C6-Total Deductible Donations	Total deductible donations for the donor and tax year; equal to the sum of the deductible amounts listed in C2.
13	C4-list of memberships and their deductible amounts	List of membership dues for the taxable year. For example, a donor with 1 membership in the tax year might have this entry: Membership (ID 1231) on 6/9/1999 of $35.00, tax deductible in the amount of $25.00.
14	C7-Total Memberships	Total amount of membership dues for the donor and tax year; includes both deductible and non-deductible amounts; equal to the sum of the membership dues listed in C4.
15	C8-Total Deductible Memberships	Total deductible membership dues for the donor and tax year; equal to the sum of the deductible amounts listed in C4.
16	C9-list of pledge payments & their deductible amount	List of pledge payments for the taxable year. Both the Pledge ID and Pledge Payment IDs are included. For example, a donor with 2 pledges in the tax year might have this entry: Pledge (ID 85) on 8/22/1997 of $200.00, 2 payments (IDs 450, 573) tax deductible in the total amount of $40.00: Pledge (ID 122) on 11/24/1999 of $120.00, 1 payment (ID 734) tax deductible in the total amount of $10.00.
17	C10-Total Pledge Payments	Total amount of pledge payments for the donor and tax year; includes both deductible and non-deductible amounts; equal to the sum of the pledge payments listed in C9.
18	C11-Total Deductible Pledge Payments	Total deductible pledge payments for the donor and tax year; equal to the sum of the deductible amounts listed in C9.
19	C12-Total of All Gifts	Total of all donations, membership dues and pledge payments for the donor and taxable year. Includes both deductible and non-deductible amounts. Equal to the sum of C5, C7, and C10.
20	C14-Total Deductible Gifts	Total of all tax-deductible donations, membership dues and pledge payments for the donor and taxable year. Equal to the sum of C6, C8, and C11.

CHAPTER

6 Reporting Basics

This chapter is intended as an introduction to reporting. Related Material includes:

- A detailed description and sample print-out of each report in “Report Samples & Descriptions” on page 145.
- Reference material for each item appearing in the Output menu. See “Output Menu” on page 339.
- Instructions for using the Year End Letter export. See “Year-End Letters” on page 127.

Overview of Reporting

A report provides you with printed or on-screen information. This is a list of the general types of reports available in FUNDimensions:

- Printable, text-based reports, such as lists of donors and gifts.
- Printable graphs, such as gift amounts made to different campaigns.
- On-screen reports, such as summaries of gift activity for a donor (these can be printed and/or copied to the clipboard).
- Clipboards, such as a donor name and address or an entire gift record, which can be pasted into other software.
- Mailing labels, name tags, membership cards and place cards.
- The Information Palette, displaying information related to the record being viewed.
- The Dashboard, displaying current statistics for your fundraising, and certain items likely to need quick or periodic action, such as thank you notes needed, expiring memberships, pledges recently fulfilled, etc. For a list of available statistics and how to set them, see Figure 1.33, “Dashboard Buttons and Menus” on page 35. By clicking on buttons on the Dashboard, you can also display the

records referenced in the Dashboard for immediate examination, mail merge and label printing: see “Dashboard” on page 33 and “Gift Acknowledgement Procedure” on page 120.

- Exports, which are usually used for mail merge but may also be used with desktop publishing, spreadsheet and charting software.

Table 6.1, “Summary of Reports” on page 136 lists various options and procedures for each item above.

Reports always contains some specific types of information while excluding others, since putting all the information in your database into a single report would make the report difficult to read and impossible to use. Different modules and active windows offer different reports, so you will want to navigate to the appropriate module before attempting a report. If your report includes information from more than one module, this can usually be accommodated from the standard reports in the Donors module, or by producing reports separately from the various modules. It is also possible to combine information from several modules using Advanced Reports and the Report Editor (see “Advanced Reports” on page 340 and “Report Editor” on page 361 for more information).

Once in the correct module, the general procedure for making a report is to select the record or records you want to report on, then choose a command from the Output menu to:

- print or display a report,
- move information to the clipboard for use with other software,
- produce exports for mail merge letters, spreadsheets, or desktop publishing software, or
- print mailing labels.

Important: before using a report command when a List View is the active window, it is important to place the records you want in the report into the list, using searches or manual selections; see “Selecting Records” on page 55. To include all the records in a module on a report, choose Records>Show All, then choose a report.

In the final steps of printing a report, you may be shown the standard Print Setup (Windows) or Page Setup (Mac) and Print windows. The Print/Page Setup dialog may offer an option to print with the smallest margins possible; whether this option is available depends on your printer. In some versions of printer software this option is accessed through an Options button in the Print/Page Setup dialog, or you may be able to select US Letter instead of US Letter Small from a popup menu. The only way to know for sure if you need to set these options for reduced margins is to experiment. If possible, use the Letter-Small (larger margins) option because it tends to print faster.

When printing under Mac OS X, the Page Setup window defaults to an option of Any Printer in the Format For: popup menu. This option causes some reports to be clipped at the right margin. If you experience this, select your printer from the popup menu.

Summary of Reports

The following table is a summary of the reports available. In the PDF version of this document, you can click on the page numbers in the cross-reference column to jump to that report (cross-references work that way throughout this manual).

Table 6.1 Summary of Reports

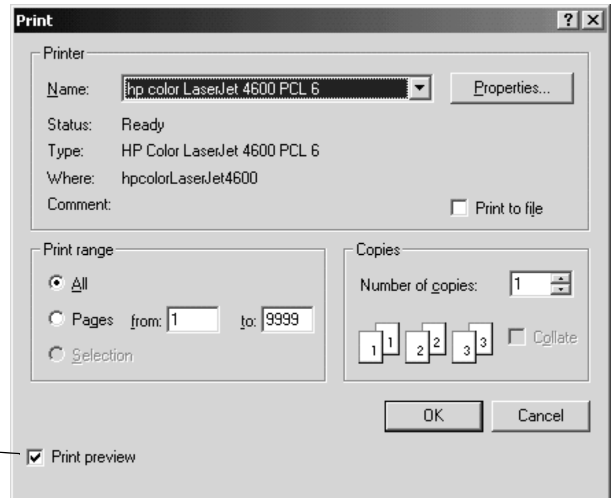
Report Description	Procedure to Make the Report	Cross-Reference
Print a single gift record (Record report)	1. Open the Input Window for the record. 2. Select the Print Donation, Print Membership, Print Pledge, Print Payment or Print Note command from the Output Menu.	"Print Record" on page 160
Print contact information for donors in column format	1. Place the records to print in the Donor List View. 2. Select Print List from the Output menu. 3. Choose Listing from the Print Options Window.	"Listing Report" on page 160
Print totals and counts for donations, memberships, pledges or pledge payments in column format	1. Place the records to print in a List View. 2. Select Print List from the Output menu. 3. Choose a sort field for subtotaling from the dialog.	"Print List" on page 150
For donor records, print a combination of contact info, keywords, gift summaries, relationships, gift graphs and/or note attachments	1. Place the records to print in the Donor List View, or open a record to print in the Donor Input Window. 2. Select Print List or Print Donor from the Output menu. 3. From the Print Options dialog, choose Detail and your choice of options from the Include and Date Filter tabs.	"Donor Detail Report" on page 155
Print gift amounts and/or totals for donors	1. Place the records to print in the Donor List View or open a record to print in the Donor Input Window. 2. Select Print List or Print Donor from the Output menu. 3. Choose Summary and your choice of options from the Include and Date Filter tabs.	"Summary Report" on page 158
Display, copy to clipboard or print gift statistics for a set of donor records	1. Place the records to include in the report in the Donor List View. 2. Select List Statistics from the Output menu. 3. Click the button to make a clipboard.	"List Statistics" on page 146
Display or copy to clipboard the count and total amount for a set of gifts or pledge payments, and additional statistics	1. Place the records to include in the report in a List View. 2. Select List Statistics from the Output menu. 3.Click the button to make a clipboard.	"List Statistics" on page 146
Display or copy to clipboard a donor's gift summary and the creation and modification date, time and user name	1. Open the Donor Input Window for the donor. 2. Select Record Statistics from the Output menu, or check the Information Palette for the information you want. 3. Click the button to make a clipboard or use Clipboard-Profile to from the Output menu.	"Record Statistics" on page 149
Display or copy to clipboard the creation and last modified date, time and user for a gift or pledge payment	1. Open the Input Window for the record. 2. Select Record Statistics from the Output menu.	"Record Statistics" on page 149
Copy the contents of a record to the clipboard	1. Open the Input Window for the record. 2. Select Clipboard-Street Address to or Clipboard-Gift Record to from the Output menu.	"Clipboard-Street Address to" on page 357 and "Clipboard-Gift Record to" on page 360
Copy the contents of a Donor List View to the clipboard	1. Place the records to include in the clipboard in the Donor List View. 2. Select Clipboard-Street Address to from the Output menu.	"Clipboard-Street Address to" on page 357

Table 6.1 Summary of Reports

Report Description	Procedure to Make the Report	Cross-Reference
Estimate future income from pledge payments	1. Place the pledge records to include in the Pledge List View. 2. Select Advanced Reports from the Output menu. 3. Choose Pledge Projection in the Advanced Reports dialog. 4. Enter dates and select output options, then click OK.	"Pledge Projection" on page 202
Find the postal or zip code grouping for bundling bulk mail	1. Place the records to include in the report in a List View. 2. Choose Advanced Reports from the Output menu. 3. If you are in the donor module, choose Gifts By Postal Code. For gift modules, use Postal Code and All Gifts Select Postal or Zip Code Groups from the Reports list in the Advanced Reports dialog window, then click the Print button.	"City, Postal Code, State or Country & All Gifts, Campaign, Method, or Fund" on page 168, and "Gifts By City, Postal Code, State, or Country" on page 186
Create a report with the columns and calculations of your choice	1. Place the records to include in the report in a List View. 2. Choose Report Editor from the Output menu. 3. Choose New from the File menu, or to use a template, choose Open from the File menu.	"Report Editor" on page 361
Create a graph of gift income across time	1. Place the records to graph in a List View. 2. Choose Advanced Reports from the Output menu. 3. Select Graph by Date from the Graphs list in the Advanced Reports dialog window, then click the Make Graph button. 4. Specify date range and records to include, then click OK.	"Gifts by Date and Graph By Date" on page 188
Pick a report, graph or export from a list of report templates	1. Place the records to include in a List View. 2. Select Advanced Reports from the Output menu. 3. Choose a report, graph or export from the lists in the dialog, then click the corresponding button to create the output.	"Advanced Reports" on page 340
Create assorted graphs	Use the Graph Editor (Output>Graph Editor). See also row above.	"Graph Editor" on page 366
Export data from your FUNDimensions database to a file for use in other programs (mail merge, spreadsheet, etc.)	1. Place the records to include in a List View. 2. Select Export from the Output menu. (Or, see also Advanced Reports [Output>Advanced Reports] for special export templates.) 3. You may create templates in the Report Editor and export them to a disk file instead of, or in addition to printing them. This allows you to create exports with your choice and ordering of fields and calculations.	"Export" on page 344 "Advanced Reports" on page 340 "Report Editor" on page 361
See a summary of a donor's giving.	1. Open the donor record for the donor in question. 2. The summary is located in the Information Palette. 3. Click any gift referenced in the palette window to open that gift.	"Information Palette" on page 30.
See the current day's total fundraising amount., or a variety of other statistics.	1. If the Dashboard is not displayed, choose Output>Dashboard. 2. The statistic is located at the top of the dashboard window. Click the upper left button to choose a statistic for display.	"Dashboard" on page 33
Discover which donor attributes (keywords, relationships, or donor choice list fields) correlate to funds raised by campaign, method or fund	1. In the Donor List View, choose Output>Advanced Reports. 2.From the Graph theme, choose Gifts by Donor Attributes, and click the Configure button. 3. Designate the donor and gift attributes you want to correlate.	"Gifts by Donor Attribute" on page 190

Preview to Screen

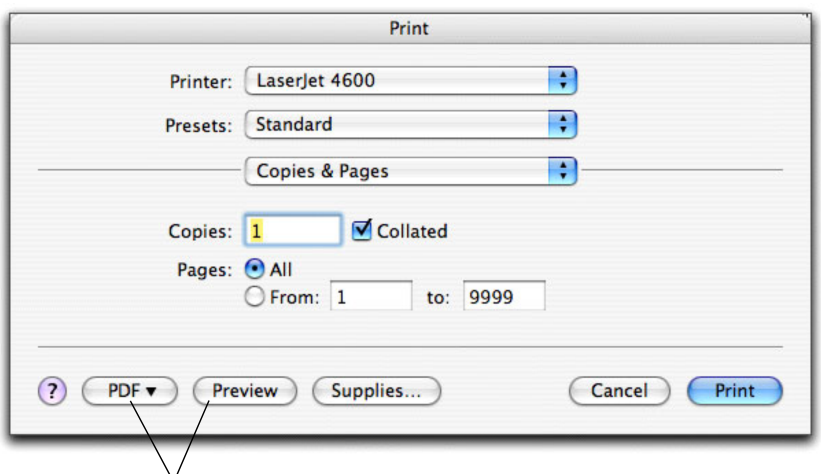
If you want to show the report on-screen, check the box for Preview to Screen in the Print dialog. On Windows, this is a checkbox in the Print dialog window:



Check this box to preview the print job to screen.

Figure 6.1 Setting Preview to Screen on Windows

On Macintosh, the Preview To Screen button is located at the bottom left of the print window, as shown below:



Click the PDF button to get an option to save directly to a PDF file, or click Preview to view the output in Apple's Preview application. Once in Preview, the file may be printed or saved as a PDF.

Figure 6.2 Previewing to Screen in Mac os x

The setting of the Preview to Screen checkbox is retained for each module until you quit the program. The setting of this checkbox the first time you use the print command in a session will be on or off based on the Preview to Screen setting in Preferences; see "General Preferences" on page 261.

Do Not Mail Flag in Exports & Label Printing

By default, FUNDimensions uses the Do Not Mail flag in donor records to remove those records with Do Not Mail checked from exports and mailing labels *only when the export or label printing job is performed from the donor module* (i.e. the Donor List View or Donor Input Window is frontmost at the time you select Export or Labels from the Output menu). Since solicitation mailings are usually generated from the Donor List View, this is usually the desired behavior.

When you perform an export or mailing label job from a gift module (i.e. the Donation, Membership, Pledge or Pledge Payment List Views), you are usually doing so to send thank you letters or other gift acknowledgements; in this instance, you usually want to send the mailing to donors, regardless of the Do Not Mail setting in their donor record. At least, that is the assumption made by FUNDimensions, which will ignore the Do Not Mail flag in cases.

The behavior of both cases cited above may be changed using the Export/Labels pane of the Preferences window. See “Export/Labels” on page 265.

Householding

When preparing a mailing, it is often desirable to limit each address to a single piece of mail, even if there are multiple donor records bearing identical addresses. You might want to do this to reduce mailing costs, or because it appears more professional to donors and prospects. FUNDimensions has a feature called “householding” to perform this function.

The householding function works by locating records with identical addresses just prior to exporting or printing labels. When it finds a group of two or more donor records with identical addresses, it checks to see if any of the group have an entry in the Household Label Line 1 field: see Figure 3.7, “Householding Fields (Contacts pane of Donor Input Window)” on page 59. If one or more in the group have an entry in the field, it chooses one of them at random to include in the mailing, and omits the rest from the mailing. For the included record, it substitutes the Household Label Line 1 field contents for Label Line 1 and 2 fields, so that mailing labels will show the Household Label Line 1 rather than an individual’s name. The inside address of merge letters will likewise omit the individual name, and reference instead the Household Label Line 1. Typical household salutations would be “Jetson Family”, “Delaney-Barrett Household”, and “Jim Doe and Jane Smith”.

If there is also an entry in the Household Letter Salutation field, FUNDimensions uses that for the Letter salutation in exports: otherwise, it uses the Household Label Line 1 for the Letter Salutation. Refer to Figure 3.7 on page 59 for the examples below:

- Example 1: You want letters to a household to say “Smith Family” on the mailing label, inside address, and after “Dear” in the letter. To make that happen, you enter “Smith Family” in the Household Label Line 1 field, and leave the Household Letter Salutation field empty. (It is also OK to enter “Smith Family” in both fields.)

- Example 2: You want letters to a household to say "Jones Family" on the mailing label and inside address, but you want the letter salutation to read "Dear Joe and Sally". To make this happen, you enter "Jones Family" in the Household Label Line 1 field, and enter "Joe and Sally" in the Household Letter Salutation field.

The householding function does *not* change any data in database records. It only makes the following changes to *export files and mailing labels*:

- It substitutes the Household Label Line 1 for the information in the Label Line 1 and 2 fields that would otherwise appear in an export or mailing label, as described above.
- If there is an entry in the Household Letter Salutation field, householding substitutes that for the Letter Salutation field. If there is no Household Letter Salutation, householding substitutes Household Label Line 1 for the Letter Salutation.
- In the Donor Since and Member Since fields of exports, the oldest dates for the entire householded group are used.
- The Gift Total field in exports is the total gift amount for the entire householded group.

The export also includes a field named Householded Records, that is a count of the number of records combined into that export record by the householding process. This may be viewed by opening the export file in Microsoft Excel or other spreadsheet software. For the location of this and other fields in exports, see Table 13.1, "Export Fields (except 2nd Thank You Recipient, Event Manager and Year End Letter Exports)" on page 348. For how to open the export file in Microsoft Excel, see page 345.

Four conditions must be met for householding to occur:

- The Householding option must be turned on in Preferences. This is on by default. See "Export/Labels" on page 265 for information on this setting.
- You must be performing an export or printing labels from the **Donor List View**. (Householding is not implemented for exports and labels made from gift modules or from the Donor Input Window. If you would like to see this feature, please let Technical Support know.)
- At least two records in the database must share an identical address, based on the Address Line 1 and Postal Code fields in the donor record. (You can use the Duplicate feature to assist you in creating records with identical addresses: see "Duplicate" on page 289.)
- For each group of records sharing an identical address, at least one of them must have an entry in the Household Label Line 1 field.

The first time you use householding, allow some extra time to produce the mailing, to accommodate inspection of the mailing and correction of the records as needed.

Implementing Householding in an Older Database

You can enter a Household Label Line 1 when you are creating a donor record that you know has the same address as another record, or when the duplicate detection* background process informs you of a potential duplicate as the record is created. For records already existing in the database, the easiest way to household them may be to use the Duplicates search. To use the Duplicates search to set up records for householding, do this:

1 If its not already, make the Donor List View the front window.

2 Do Find menu > Duplicates. Click the radio button for "Address Line 1 + Postal Code". Check the box for Beep When Done button if you'd like to have an audible cue when the search is complete. Click OK. (See "Duplicates" on page 320 for more information.)

3 When the search is finished, double-click the first record in the Donor List View. This opens the Donor Input Window. (If there are no records, you have no prospective records for householding at this time.)

4 Look at the name and address of the donor. Then, click the right arrow button (lower left corner of Donor Input Window) to view the next donor record.

5 Examine the second donor record name and address, and decide if you a single mailing to the address.

6 If you want a single mailing to the address, enter a suitable Household Label Line 1 (e.g. "Hawkins Family" or "King-Holoman Household") in either record. If you prefer, you may enter the Household Label Line 1 in both records. This will make it easier to observe that a record is householded with another, and enable you to perform searches on a Household Label Line 1 that will work to find all records in that household.

7 *Optional:* If you' d like to omit this pair of records from the results of future Duplicates searches, leave the Donor Input Window open, but switch back to the Donor List View,. Highlight the pair of records in the List View by clicking on one of them, then shift-clicking on the second. Choose Records menu > Assign Other. Click the Designate as Not Duplicates radio button, then click the Assign button. This prevents this unique pair of records as every appearing in the results of a Duplicates search. See "Assign Other" on page 299 for further information. Finally, return to the Donor Input Window by clicking on it.

8 Move to the third record. If its the same address as the first two, you need do nothing (but you may elect to enter a household name anyway, see step 6 above)—it will automatically be combined with the others. If its a new address, repeat the steps above to combine it with the fourth record.

9 Continue in a similar manner for all records in the search results.

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* See "Duplicate Detection" on page 61.

Printing Labels

FundDimensions offers flexible, fast label printing to built-in Avery® templates, envelopes or custom labels of your own design. You may also use the Label Editor to produce simple reports, phone books, name tags and membership cards, with an option to include your logo or other graphics. Editable templates for standard #10 business envelopes and labels are included with a full installation of the software.

You can use the Preview to Screen capability to examine your label job prior to printing. See "Preview to Screen" on page 138.

Follow these steps to print labels:

1 To print labels for multiple records, create a selection of the records. Refer to "Selecting Records" on page 55 for information on how to select records, or

2 To print a single label, open the Input Window for the single record for which you want to print a label, or right-click (CONTROL-click on Macintosh) on any row in a List View.

3 Choose Output>Labels. Make choices in the dialog box for label size, typeface, exceptions, inclusion of membership expiration date, and recording of your mailing as set and/or an attached note record and/or keyword. (For information about configuring this dialog, see "Labels" on page 352.) Click the OK button.

4 You see the standard Print Setup (Windows) or Page Setup (Mac) dialog box, which will vary depending on your printer. Normally, this will be set to portrait page orientation. Click OK to close this dialog and proceed, or Cancel to stop the printing process. *Tip:* it may help printing near the edges of the label sheet if you select options in the Page Setup or Print dialogs for a larger print area, smaller margins and/or for US Letter instead of US Letter Small. Also, when printing labels, to prevent clipping of text or page breaks at the wrong place, choose "Maximum" in your Print dialog, if that option is available. When printing under Mac OS X, be sure your printer is selected in the Page Setup dialog's Format For popup menu, rather than the "Any Printer" option. The Any Printer option leaves wide margins that cause clipping and erroneous page breaks.

5 Click Print in the Print dialog to print the labels.

6 A window appears with details about the results of the job:

Figure 6.3 Label Printing Results window

Labels are printed using the data in donor records, as it appears in the Contact pane of the Donor Input Window. For documentation of the fields used and their placement on the label, see the table “Layout for Built-In Label Templates” on page 353.

Records with the same address can be combined by FundImensions into a single label; see “Householding” on page 139 for more information.

The Labels menu item is enabled in all modules and windows except the Keywords and Relationships modules. When printing from the *Donor module*, labels are not printed for donors that have their Omit Mailing flag checked, unless you override this in the Preferences window. When printing from a *gift module*, the Omit Mailing flag in the donor record is ignored and all records are printed, unless this behavior is changed in the Preference window. For more information, see “Do Not Mail Flag in Exports & Label Printing” on page 139.

CHAPTER

7

Report Samples & Descriptions

This section describes each of the reports in FUNDimensions, and displays examples of most report types. For general instructions on producing and editing these reports, and a rough guide to choosing a report, see "Reporting Basics" on page 133.

Reports in this chapter are divided into five sections. All references to menu commands below refer to items in the Output menu:

Within these sections, reports are listed alphabetically. A table at the start of larger sections lists the reports and their page number for fast reference.

List Statistics

You use the List Statistics menu command to generate quick, on-screen or printed summaries. The command is available in all list views except the Keywords List View. It tells you how many records are highlighted, how many are in the list, and the total number of records in the module. The report will also present totals for each of these three sets, as shown in the following examples:

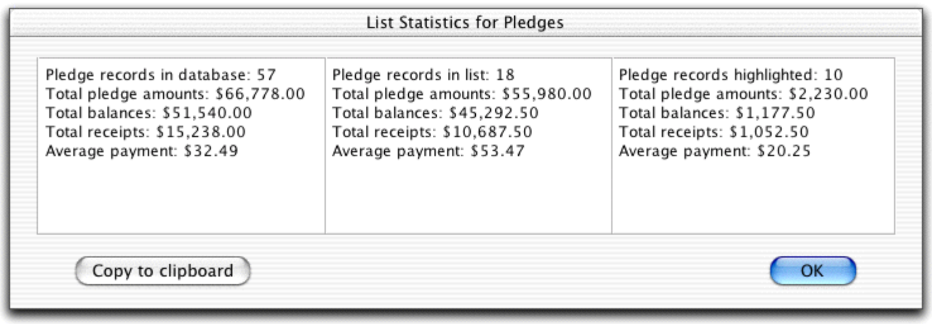


Figure 7.1 List Statistics for Pledge List View

The Average Payments entries in List Statistics for the Pledges module is computed based on the contents of the "Payments of" field in each pledge record, not on actual payments. To compute an average based on actual payments, use the List Statistics command in the Pledge Payments module and perform the necessary division using the sums there.

In Figure 7.2 below, the List Statistics window is comparing these sets of donors:

1 All donors.

2 The donors bearing a certain keyword. This set was made by performing a search with the Keywords command in the Find menu (you could use other searches and criteria). In this case, the keyword designated attendance at an specific fundraising event. This set is a subset of #1 above.

3 The top ten donors in the set in #2 above. This set was produced by sorting the set in #2 by "Rank by Gift Amount" in descending order using Records>Sort. Then, the first ten records were highlighted by clicking on the first record in the list,

holding down the Shift key, then clicking the tenth record in the list (see further explanation in “Selecting Records” on page 55). This creates a subset of #2.

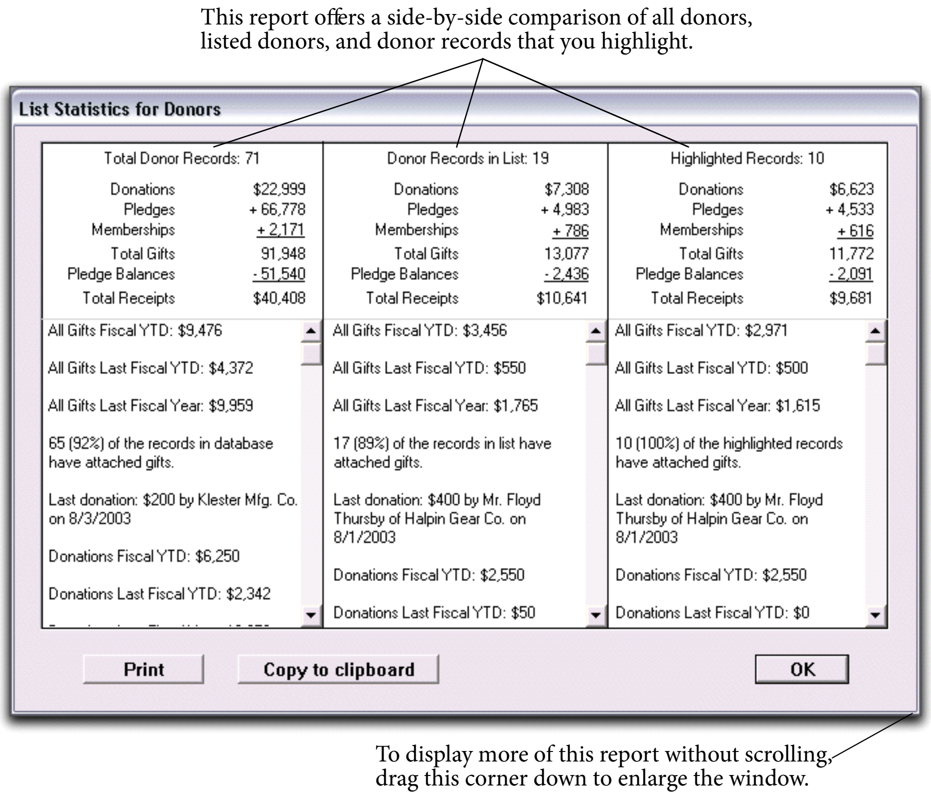
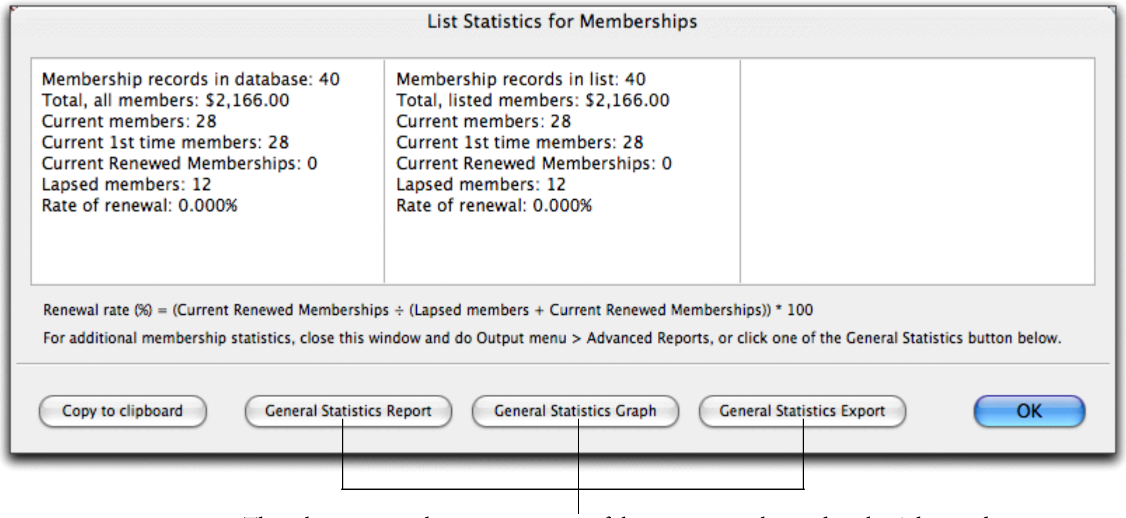


Figure 7.2 List Statistics in Donor List View

This example does not rank donors who attended the event by their giving associated with that event, but instead ranks them by their overall giving. To rank giving for an event, you should associate the event with the gifts it generated using the Campaign field in Donation and Pledge records when you create the gift records. Then perform a search in the Donation and Pledge List Views to place those records in the list view using the Campaigns query in the Find menu. Finally, sort the records by amount using the Sort command in the Records menu. You can use the List Statistics command in the Donations and Pledges modules to display a total amount generated by the event.

Through buttons, all List Statistics windows allows their contents to be printed and/or copied to the clipboard for placement in other software. By pasting the contents into a word processor or other software, the clipboard option allows you complete flexibility for formatting the data.

Below is a typical Membership List Statistics report. This report analyzes each of the three selections of membership records to calculate current, first-time, and lapsed members and the rate of membership renewal. The formula for renewal rate used in these calculation is displayed at the bottom of the report.



These buttons are shortcuts to items of the same name located in the Advanced Reports window. See "Membership General Statistics" on page 196.

Figure 7.3 Membership List Statistics Report example

For additional membership statistics reporting, including graphing and exporting, see "Membership General Statistics" on page 196.

Membership List Statistics Calculations

Current members summed with lapsed members do *not* equal total membership records, because a current member may have many previous memberships. Those previous memberships do *not* count as lapsed or as current memberships, because they are neither. They are not current memberships because they have an expiration date prior to the current day. They are not lapsed memberships because the member has a current membership. Previous memberships do, however, count as "Membership records in database, list or highlighted records".

Membership List Statistics is not useful for calculating renewal rates for specific date ranges. To perform that function, see "Membership General Statistics" on page 196. The rest of this section explains the way Membership List Statistics works, and why it is unsuitable for calculating renewal rates for specific data ranges.

In List Statistics, no date range is applied to the calculations. Therefore, a member is considered "Lapsed" if they ever had a membership, and are not now current. For example, someone who had a membership 5 years ago, and has not renewed since, will be factored as a lapsed member "forever" unless they renew. As these accumulate in the database, they dilute the events of your recent activity, so that adding a batch of renewals might not change the renewal rate as much as you would expect.

It is not possible to overcome this problem by performing a date search on the membership expiration or date paid fields (Find menu > Date in Membership List View) and referring to the Records in List portion of List Statistics. Why? In calculating Lapsed Members, FUNDimensions looks outside the records in list to find renewals, and will not count the expired member in the list as "lapsed", as long as they have a current membership. However, it does not do this for "current members" and "1st-time members". To see this for yourself, do this: from the Membership List View, do Find menu > date. Enter the From and To dates as the first and last days of any previous month, set to search on expiration date with the Find Only Lapsed members checkbox off, and make sure Search Options in set to Normal. Now do Output menu > List Statistics. You will observe that the Membership Records in List shows a Lapsed count, but shows no current or 1st-time members. (You may need to use the demo database provided with FUNDimensions for this to work.)

Now, since the renewal rate relies on a count of renewals, and since the List Statistics report finds renewals by subtracting 1st-time members from current members, and since those counts are both zero, then renewal rate will always be zero. In fact, the only time your renewal rate will be non-zero is if the selection contains at least one current, non-1st-time member. Again, To see this for yourself, do this: perform the same search and List Statistics report as in the paragraph above, but this time change the search date range to the first and last days of next month. You will see a non-zero renewal rate.

Record Statistics

This menu command is available from the Output menu in all Input Windows except the Keyword and Relationship Input Window. You can also access it from List Views by right-clicking (CONTROL-clicking on Macintosh) and choosing Record Statistics from the contextual menu.

In all Input Windows, this command displays dates and times of creation and last modification of the record. If security is enabled, it also displays the name of the user who created the record and the last user who modified the record. If there are errors in data entry, this information may help to discover the user who made the error.

In Donor Input Windows, this command produces quick, on-screen summaries of donor gift activity. Use it in conjunction with e Information Palette and the Gift and Graph tabs to profile the donor. In a Donor Input Window, choosing this command displays a dialog box with the following information for that donor:

- Total number of donations and their total amount.
- Total number of pledges and the total amount of the pledges.
- Sum of Donations total and Pledges total above.
- Average gift (Donation amounts + Pledge amounts) ÷ (number of donations + number of pledges).
- Donor Since (date of first gift, if any).
- Total Receipts; the amount received from the donor, computed as (Donations + Pledges) - (sum of all pledge balances, if any).
- Total of all outstanding pledge balances (total of both overdue amounts and non-overdue amounts).

- The creator (shown as their user name as it appears in the password dialog) of the donor record, and the date and time the record was created.
- The name of the user who last modified the record, and the date and time of the modification.

This is an example of the Record Statistics report made in the Donor Input Window:

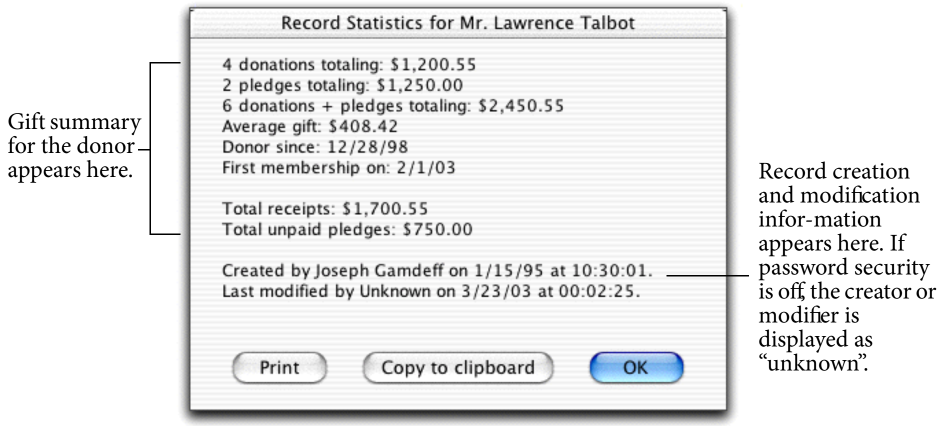


Figure 7.4 Example of Record Statistics for Donor Input Window

Close the dialog by clicking any button. The Print button will print a likeness of the window, while the Copy to Clipboard button places the contents of the dialog onto the clipboard for pasting in other programs or into a donor note within FUNDimensions. *Note:* the information placed on the clipboard is different with this button than with the "Clipboard-Gift Record to" menu command.

Print List

Reports made with the Print List command provide a sampled interface and are intended to meet most of your basic, general reporting needs. They are so named because they are produced using the Print List command from the Output menu, and are available when a List View window is active (except the Keyword or Relationship

List Views).One of the dialogs below appears, depending on the whether the donor module or a gift module is active:

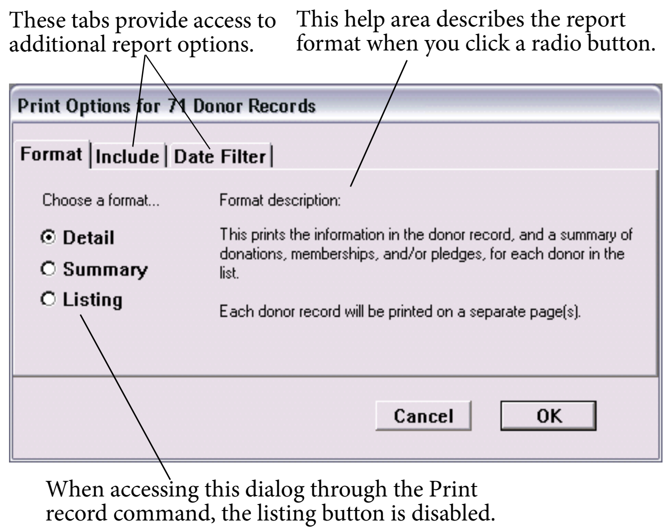


Figure 7.5 Print Options dialog, Donor Module

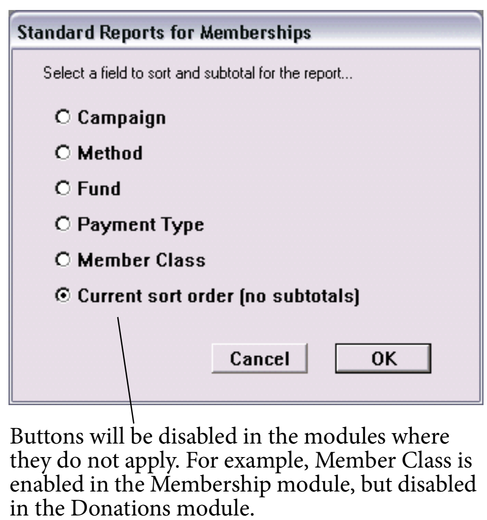


Figure 7.6 Print Options dialog, Gift Modules

When printing from the Donations, Pledges and Pledge Payments modules, you have the option to sort items in the report by campaign, method, or fund*, and include the subtotals for each category. These reports require a wide, landscape page orientation, so be sure this option is selected in the Print/Page Setup dialog presented prior to printing or previewing to screen.

* These labels can be edited and so may appear differently. See “Preface” on page ix.

Printing from the Donors module offers several formats, options on what type of gifts, if any, to include, and a filter to constrain inclusion of gifts to those made within a date range that you specify. (You can constrain reports in other modules to a date range by performing a date search prior to choosing an item from the Output menu.) These options are provided through the dialogs shown in Figure 7.5.

You can also print the Detail and Summary reports for donor records from the Donor Input Window, or by using a contextual menu in the Donor List View. This results in the printing of a single record. For more information, see "Print Record" on page 160.

Print List reports are ideal for attachment to monthly or other periodic accounting reports. From within a gift module, perform a search corresponding to your accounting period, then print a column report. Not only will you have a summary listing of each receipt, but also a total at the bottom of the report for entry into your accounting software.

If you have some records in the Donation List View, choose the Print List command from the Output menu, and select Sort and subtotal by Campaign* in the dialog as show above. Your report would look similar to this example:

Your organization name here

Confidential report of 18 Donations, printed 5/28/05 by Bill Moffit, sorted by Campaign   Page 1

Date	Donor Name (First, Last)		Company	Campaign	Method	Fund	Amount
2/23/00	Carl	Kolchak	Instant Signs Co.	Buckaroo Ball '98	Email invitation	General	2,500.00
3/15/00	Henry	Spencer		Buckaroo Ball '98	Mailed Invitation	Language Education	475.00
5/18/00	Frank	Booth	Beaumont Hardware	Buckaroo Ball '98	Mailed Invitation	General	250.00
5/14/05	Egbert	Sousa		Buckaroo Ball '98	Email invitation	General	200.00
5/16/05	Elwood	Dowd	Haltech Company	Buckaroo Ball '98	PSA '98	Research	200.00
5/16/05	Waldo	Lydecker	Rampusol	Buckaroo Ball '98	Mailed Invitation	General	200.00
			Donation Count 6		Total for Buckaroo Ball '98 Campaign		$3,825.00
6/30/03	Sam	Allouette	Al Siete Corp.	Capital Campaign '02	Telethon '02	Building	100.00
11/18/03	Ida	Carmody	Drovers, Inc.	Capital Campaign '02	Cable TV PSA '02	General	250.00
1/5/04	Edward	Jones		Capital Campaign '02	Telethon '02		789.00
1/5/04	Francis	Key		Capital Campaign '02	Telethon '02		300.00
1/5/04	Galvin	Geffin	McDonald's #45501	Capital Campaign '02	Cable TV PSA '02		678.00
1/5/04	Faustus	Jones		Capital Campaign '02	Cable TV PSA '02		100.00
			Donation Count 6		Total for Capital Campaign '02 Campaign		$2,217.00
8/14/04	Randle	MacMurphy	Grainger	Car Raffle '03	Mailed Invitation	Office	117.00
8/19/04	Frank	Booth	Beaumont Hardware	Car Raffle '03	Email invitation	General	3,000.00
12/15/04			CNS Network	Car Raffle '03	Email invitation	Guest Speakers	100.00
1/30/05	Floyd	Thursby	Halpin Gear Co.	Car Raffle '03	Mall Walk-Up	Research	1,000.00
5/17/05	Floyd	Thursby	Halpin Gear Co.	Car Raffle '03	Mall Walk-Up	General	400.00
5/19/05			Klester Mfg. Co.	Car Raffle '03	Mall Walk-Up	Guest Speakers	200.20
			Donation Count 6		Total for Car Raffle '03 Campaign		$4,817.20
End of report			**Total Count 18**		**Total Donations**		**$10,859.20**

Figure 7.7 Donation Report, sorted and subtotaled by campaign*

The column report for the Memberships module is similar but adds the option to sort by the Membership Class field in that module:

Your organization name here

Confidential report of 16 Membership Dues, printed 5/28/05 by Bill Moffit, sorted by Member Class Page 1

Expires	Donor Name (First, Last)		Company	Campaign	Method	Fund	Member class	Amount
03/03/05	John	Chance	Presidio County	Awards Dinner '00	City Poster 2000	General	Business	100.00
03/21/05	Ida	Carmody	Drovers, Inc.	Capital Campaign '02	Cable TV PSA '02	Publishing	Business	100.00
05/22/05	Z.T.	Williams	SS Magsen	Restaurant Fundraiser '	Mailed Invitation	Publishing	Business	100.00
06/20/05	Fidelius	Hildegard	Ramsay Corp.	Car Raffle '03	Mall Walk-Up	Guest Speakers	Business	95.00
11/18/05			1st National Bank	Car Raffle '03	Mall Walk-Up	General	Business	100.00
			Dues Count 5				Total for Business Member Class	$495.00
05/27/05	Harold	Angel	Angel Investigations	Goals 2000 Fund Drive	City Poster 2000		Family	50.00
06/21/05	Johannsen	Blistamozo		Awards Dinner '03	Radio PSA '03	Public Awareness	Family	55.00
11/18/05	Hannibal	Schecter		Car Raffle '03	Email invitation	General	Family	50.00
12/10/05			1st National Bank	Jazz Under the Moon '99	Special Funds Mailing '9		Family	50.00
05/12/06	Arch	Stanton	Civil War Museum	Awards Dinner '03	Mailed Invitation	General	Family	55.00
			Dues Count 5				Total for Family Member Class	$260.00
06/10/05	Kyle	Laughlin	Yep Sunset Skydives, Inc.	Capital Campaign '02	Telethon '02	General	Individual	35.00
06/19/05	Johannsen	Blistamozo		Benefit Concert '03	Radio PSA '03	General	Individual	35.00
11/18/05	Louise	Panson		Benefit Concert '03	Email invitation	General	Individual	35.00
03/08/06	Boake	Tackman	Boake Tackman Land Reclamation	Car Raffle '03	Radio PSA '03	General	Individual	35.00
04/19/06		Malst	Malst Gouges and Chisels Co.	Benefit Concert '03	Radio PSA '03	General	Individual	35.00
04/25/06	Cranston	Wilberry	Tankasset Manakin & Doll Corp.	Awards Dinner '03	Email invitation	General	Individual	35.00
			Dues Count 6				Total for Individual Member Class	$210.00
End of report			**Total Count 16**				**Total Dues**	**$965.00**

Figure 7.8 Membership Report, sorted and subtotaled by Membership Class

The reports depicted above do not include information about the payment form, check or credit card number, expiration date or approval codes. To print that information, set the choice to Payment Form in the Print Options dialog shown in Figure 7.5, "Print Options dialog, Donor Module" on page 151. The Campaign, Method and Fund† columns in other reports are substituted with the payment information.

The example below was produced from the Pledge List View by choosing the Print List command from the Output menu, and selecting Sort and Subtotal by Campaign

† These labels can be edited and so may appear differently. See "Preface" on page ix.

in the Print Options dialog shown in Figure 7.5, “Print Options dialog, Donor Module” on page 151:

Your organization name here

Confidential report of 11 Pledges, printed 9/12/97, sorted by Campaign

Page 1

Date	Donor Name	Company	Campaign	Fund	Mailing	Over	WOff	Amount	Received	Balance
10/5/94	Norman Bates	Bates Motel	Awards Dinner '94	General	None	☐	☐	100.00	100.00	0.00
1/5/95	Henry Spencer		Awards Dinner '94	General	None	☐	☐	170.00	170.00	0.00
					Total for Awards Dinner '94 campaign			270.00	270.00	0.00
4/30/95	Helen Hillsdale	Getstan Guitar Co.	Awards Dinner '95	Research	None	☒	☐	200.00	20.00	180.00
9/10/95	Floyd Thursby	Halpin Gear Co.	Awards Dinner '95	Public Awareness	Photo Brochure Au	☐	☐	500.00	500.00	0.00
1/3/96		8th National Bank	Awards Dinner '95	General	None	☒	☐	200.00	20.00	180.00
2/5/96	Henry Spencer		Awards Dinner '95	General	Annual Plea '95	☒	☐	300.00	60.00	240.00
6/27/96	Norman Bates	Bates Motel	Awards Dinner '95	General	Annual Plea '95	☒	☐	500.00	250.00	250.00
					Total for Awards Dinner '95 campaign			1,700.00	850.00	850.00
11/1/96		8th National Bank	Awards Dinner '96	Guest Speakers	None	☐	☐	149,000.00	9,500.00	139,500.00
11/12/96	Patrick Yaltan		Awards Dinner '96	General	None	☒	☐	300.00	45.00	255.00
12/17/96	Floyd Thursby	Halpin Gear Co.	Awards Dinner '96	Public Awareness	Postcard Dec '96	☒	☐	500.00	150.00	350.00
12/20/96	Harry Callahan	Tagamet Towel Co.	Awards Dinner '96	Research	Postcard Dec '96	☒	☐	100.00	10.00	90.00
					Total for Awards Dinner '96 campaign			149,900.00	9,705.00	140,195.00
					Report Totals	7	0	$151,870.00	$10,825.00	$141,045.00

Written off balances - 0.00
$141,045.00
Overdue balances - 720.00
Sound balances $140,325.00

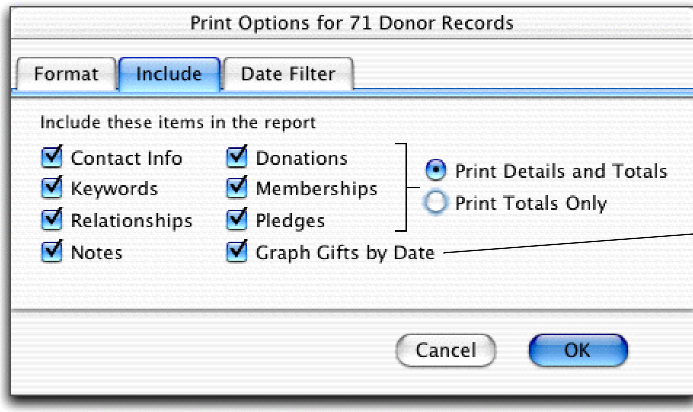
End of Report

Figure 7.9 Example of Pledge report, sorted and subtotaled by Campaign

The column report for the Pledge Payments module is similar in appearance to the examples above, except it includes columns for payment form, check/credit card number and credit card expiration date.

Donor Detail Report

This report can print out most of the information in the Contact, Classification, Gift, Graph, Relationships and Notes panes of the Donor Input Window. It is accessed through the Standard and Print Donor items in the Output menu. You can specify which detail elements to include in the report from items in the Include pane, and you can specify a date filter to be applied to gifts included in the report from the Date Filter pane. The Include pane is shown here:



This option uses the graph settings in the Graph pane of the Donor Input Window. In that window, at least one of the Show Donations, Show Memberships, Show Pledges or Show Totals check boxes must be turned on for printing graphs.

Figure 7.10 Print Options dialog, Include pane

When you select one or more of the Donations, Memberships and/or Pledges checkboxes, this report displays gift information in one of two possible formats:

♦ If the radio button for "Print Details and Totals" is on, the report displays a listing of each individual gift, a subtotal for each gift type and a grand total for all gifts, subject to the Date Filter settings and the gift types selected with the Donations, Memberships and Pledges checkboxes.

♦ If the radio button for "Print Totals Only" is on, the report omits the listing of each individual gift, but prints a subtotal for each gift type and a grand total for all gifts, subject to the Date Filter settings and the gift types selected with the Donations, Memberships and Pledges checkboxes.

If the Graph option is on, the printed graph uses the settings in the Donor Input Window (see "Donor Input Window, Graph pane" on page 10). By changing the settings in that window, you can print any combination of donations, memberships, pledges and totals, using any of the 2D or 3D options available with the slider control. The graph will ignore settings under the Date Filter pane; it prints a graph of all gifts for the donor.

To print the notes for donors, check the box for Notes in the Include pane of the Print Options dialog. This option prints the note attachments that appear in the upper section of the Notes pane; the note area in the lower section of that pane is not printed.

You can select this report from either the Donor Input Window or the Donor List View. From the Donor List View, a separate report is printed for each listed donor, while from the Donor Input Window the currently-displayed donor record is printed.

The next page is an example of the detail report with the Contact Info, Keywords, Donations, Memberships and Pledges checkboxes turned on in the Print Options dialog. The graph and notes appear on separate pages if those options are selected.

Your organization name here

Donor Detail for Mr. Lawrence Talbot, printed on 12/27/1999 Confidential

Salut	Mr.
F Name	Lawrence
L Name	Talbot
Title	
Company	
Address	5 Halert
City	London
State	Zip Code SJ25B-N
Country	England Yr Birth
Label L1	Mr. Lawrence Talbot
Label L2	
Letr Sal	Mr. Talbot
User-Defined	you can change the labels for these fields
User-Defined	by choosing File menu > Preferences
User-Defined	example: spouse name
User-Defined	example: ask amount

Home Ph	011.1.646.448.1555
Work Ph	011.1.646.448.1555
Fax	
Mobile	
Email	
	☐ Omit Mailings ☐ Do not call

Category	Intermediate
Type	Medium potential
Volunteer	Consulting
Solicitor	Mistimara Rilbedoo
UserDefinedDat	00/00/00

Keywords: 6

Annual Journal '93	Apple Harvest '95	Benefit Dance '94
Golf Classic '98	Monthly Newsletter	Historic Churches Tour

Relationships: 2	Relationship Name	Constituent Type	
	Talbot Household	male head-of-household	Primary
	Plingley Family	former head-of-household	

Donations: 4	Date	Amount	Campaign	Method	Fund
	2/1/1999	500	Capital Campaign '98	PSA '98	Building
	1/25/1999	101			
	4/18/1997	100	Raft 'n camp '97		Research
	3/17/1995	500	Dance Aug '95		Research
		$1,201			

Memberships: 3	Date	Amount	Campaign	Method	Fund
	6/9/1999	35	Jazz Under the Moon '99	Email invitation	General
	10/4/1997	50		Radio PSA '97	
	10/4/1996	51	Capital Campaign '98	TV PSA Jan '97	Publishing
		$136			

Pledges: 2	Date	Amount	Campaign	Method	Fund
	4/12/1998	250	Storytelling Party '97	None	Research
	4/1/1997	1,000	Tee Off '97		General
		$1,250			
		$2,587	Grand Total		

Figure 7.11 Donor Detail report example (notes and graph pages not shown)

Summary Report

This report provides a capsule summary of donations, memberships and/or pledges for each donor. The Donor List View or Donor Input Window must be the active window to print this report. If the List View is active, the command will create the report for all donor records in the list, so use queries and/or manual selection techniques to reduce the list and print the report for only the records you want included. Then choose Print List or Print Record from the Output menu, and select the Summary button in the Print Options dialog.

Through the Include pane of the Print Options dialog, you may include or omit any combination of donations, memberships and pledges from the report. This report displays gift information in one of two possible formats:

- ♦ If the radio button for "Print Details and Totals" is on, the report displays a listing of each individual gift, a subtotal for each gift type and a grand total for all gifts, subject to the Date Filter settings and the gift types selected with the Donations, Memberships and Pledges checkboxes.
- ♦ If the radio button for "Print Totals Only" is on, the report omits the listing of each individual gift, but prints a subtotal for each gift type and a grand total for all gifts, subject to the Date Filter settings and the gift types selected with the Donations, Memberships and Pledges checkboxes.

Through the Date Filter pane, you can limit the date range of gifts that will appear on the report. This filter examines the donation date, pledge date, and membership paid date fields in gift records to determine which gifts to place on the report. Click OK to proceed to the standard Page Setup and Print dialogs, then the report will print.

This is a sample of a Summary Report:

Your organization name here

page 1 | **Summary of 2 Donors, printed 12/27/1999** | Confidential

Name	Date	Campaign	Method	Fund	Amount
Mr. Floyd Thursby Halpin Gear Co.					
Donations					
	12/10/1997	Raft 'n camp '97		Research	250.00
	12/1/1997	Raffle '97	None	General	400.00
	9/10/1997	Tee Off '97		Web site	751.00
	8/16/1995	Awards Dinner '95	Photo Brochure Aug '95	Research	1,000.00
				Donation Total	$2,401.00
Memberships					
	10/6/1997		Annual Plea '97		75.00
				Membership Total	$75.00
Pledges					
	12/17/1999	Awards Dinner '96	Postcard Dec '96	Public Awareness	500.00
	9/10/1995	Awards Dinner '95	Photo Brochure Aug '95	Public Awareness	500.00
				Pledge Total	$1,000.00
				Donor Total	$3,476.00
Mr. and Mrs. Elwood Dowd Histamine Company					
Donations					
	9/10/1997	Raft 'n camp '97		General	100.00
	4/15/1996	Awards Dinner '96	Annual Plea '95	Research	200.00
				Donation Total	$300.00
Memberships					
	11/14/1999	Jazz Under the Moon '99	Special Funds Mailing '99	General	45.00
				Membership Total	$45.00
Pledges					
	2/10/2000	Awards Dinner '96	Postcard Dec '96	General	200.00
	4/15/1997	Raffle '97	Annual Plea '97	Public Awareness	150.00
				Pledge Total	$350.00
				Donor Total	$695.00

Donation Count:	6	Donation Total	$2,701.00
Membership Count:	2	Membership Total	$120.00
Pledge Count:	4	Pledge Total	$1,350.00
Total Count:	12	Grand Total	$4,171.00

Figure 7.12 Donor Summary report example

Listing Report

A simple listing of donor names, companies, addresses and phone numbers is available from the Donor List View, by selecting the Print List command from the Output menu, then choosing the Listing button in the dialog:

Your organization name here

Confidential report of 6 Donors, printed 8/29/97 Page 1

First Name	Last Name	Company	Address	City	St	Zip	Home Phone	Work Phone
Lawrence	Talbot		5 Halert	London		SJ25B-N	011.1.646.448.155	011.1.646.448.155
Hamden	Jallows		532 Untillment Lane	Gillpicks	LA	90261		
Louise	Panloss		678 Taligent	Second City	PA	90216		
Frank	Booth	Beaumont Hardware	221 Vista St.	Lumberton	WA	98636-7890	1.206.555.8619	1.206.555.1986
Harry	Callahan	Tagamet Towel Co.	357 Wessonloss Ave.	San Francisco	CA	98565-7639	1.415.555.7119	1.415.555.1971
Floyd	Thursby	Halpin Gear Co.	65 West Gamson Ave.	Eastover	NY	98537	1.345.987.2631	1.345.987.1625

Figure 7.13 Donor contact listing

Print Record

Print Record reports are printouts of individual records. They are approximate replications of the Input Windows, and may be used as donor receipts. To print one, do either one of these steps:

- ♦ Open the Input Window of the record (donor, note, donation, pledge or pledge payment) you want to print. Then select the Print Record command from the Output menu. Or,
- ♦ In the Donor List View, right-click (CONTROL-click on Macintosh) on any row; this displays a contextual menu (see "Contextual Menu in Donor List View" on page 94). From the menu, choose Print Detail Report with Current Settings, or Print Summary Report with Current Settings. (This bypasses the Print Options window, using whatever settings you last made there. Also, no Page setup or Print dialog is displayed. If you need to change settings in these windows, use the first procedure instead.) Or,
- ♦ In any List View in a gift module, right-click (CONTROL-click on Macintosh) on any row in a List View and choose Print This (gift type) Record from the contextual menu. (This bypasses the Page setup or Print dialog. If you need to change settings in these windows, use the first procedure instead.)

The Pledge Record Report shown below indicates the pledge status (Overdue is shown as the status in the example), which is also displayed in the Information

Palette when you view a pledge record on the screen. You also get a listing of all pledge payments for the pledge, balances, due date and other features:

Your organization name here

Confidential pledge record, printed 5/20/06 by Administrator

Donor	1st National Bank
Company	1st National Bank

Balance

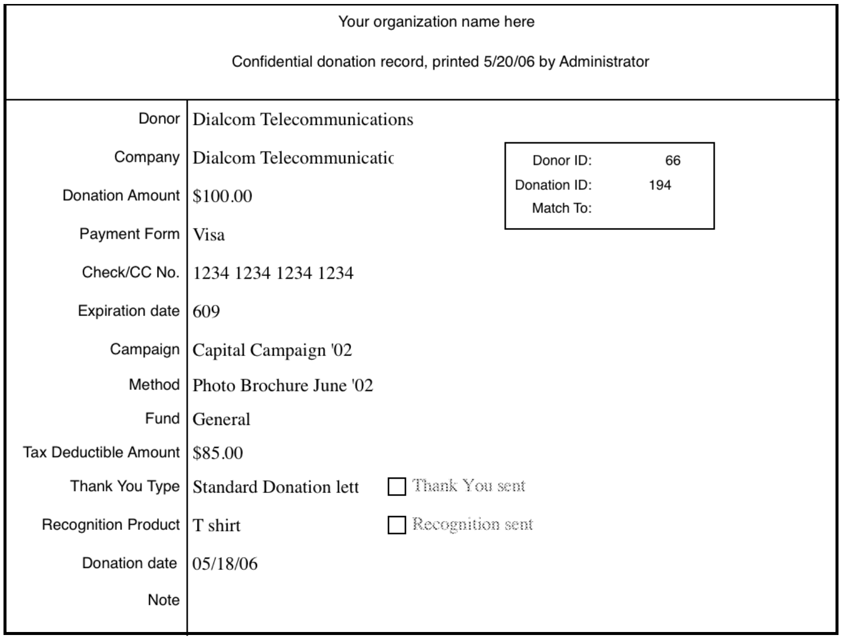
Pledge Amount	$10,000.00	Campaign	Awards Dinner '00
Payments Of	$500.00	Method	Mailed Invitation
Pledge Frequency	Quarterly	Fund	Guest Speakers
Days to 1st payment	10 days	Solicitor	Gighamsten Filbrew
Pledge Date	5/8/04	Write Off	☐
Thank You Type	Large Pledge letter	Recognition Product	Mug & T shirt
Thank You sent	☒	Recognition sent	☒
Tax Deductible Amount:	$9,970.00	Balance:	$2,500.00
Donor ID:	46		
Pledge ID:	23	Next due date:	2/18/08
Note			

Pledge Payments

Amount Paid	Date Paid	Check/CC No.
1,000	6/12/03	48764
1,000	6/12/03	45435
2,000	8/9/02	45354
500	7/20/02	9283 0329 4803 9483
500	7/9/02	9873 4216 8575 4675
1,500	6/9/02	9873 4216 8575 4674
1,000	6/29/01	50947

Figure 7.14 Pledge Record report example

Examples of this report for a donation and membership records are shown below. A similar report is available for pledge payment records.



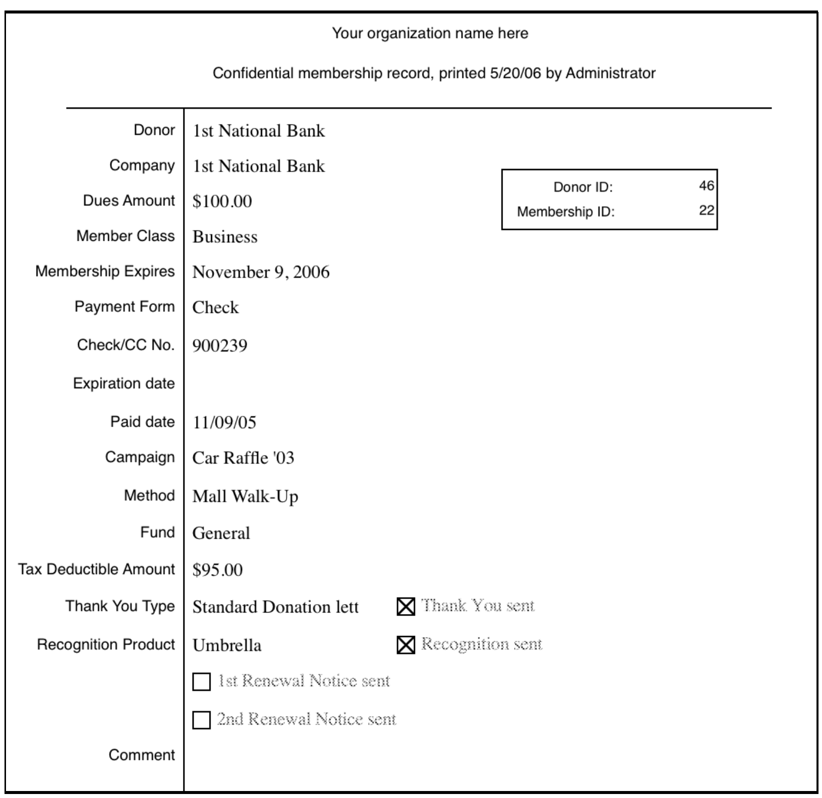
Your organization name here

Confidential donation record, printed 5/20/06 by Administrator

Donor	Dialcom Telecommunications
Company	Dialcom Telecommunicatic
Donation Amount	$100.00
Payment Form	Visa
Check/CC No.	1234 1234 1234 1234
Expiration date	609
Campaign	Capital Campaign '02
Method	Photo Brochure June '02
Fund	General
Tax Deductible Amount	$85.00
Thank You Type	Standard Donation lett ☐ Thank You sent
Recognition Product	T shirt ☐ Recognition sent
Donation date	05/18/06
Note	

Donor ID: 66
Donation ID: 194
Match To:

Figure 7.15 Donation Record report example



Your organization name here

Confidential membership record, printed 5/20/06 by Administrator

Donor	1st National Bank
Company	1st National Bank
Dues Amount	$100.00
Member Class	Business
Membership Expires	November 9, 2006
Payment Form	Check
Check/CC No.	900239
Expiration date	
Paid date	11/09/05
Campaign	Car Raffle '03
Method	Mall Walk-Up
Fund	General
Tax Deductible Amount	$95.00
Thank You Type	Standard Donation lett ☒ Thank You sent
Recognition Product	Umbrella ☒ Recognition sent
	☐ 1st Renewal Notice sent
	☐ 2nd Renewal Notice sent
Comment	

Donor ID: 46
Membership ID: 22

Figure 7.16 Membership Record report example

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Advanced Reports

For a general description of Advanced Reports and the procedure for producing reports, exports and graphs with this command, see "Advanced Reports" on page 340.

This section describes each report available under the Advanced Reports menu command, and provides a sample for most of them. Use the table below to help you navigate quickly to the report you want to investigate. In the PDF version of this document, you can click on the page numbers to jump to that report (cross references work this way throughout this manual.) This table lists every item available through the Advanced Reports menu command and the page number on which a sample and description of the report may be found. The table is ordered alphabetically by report name as it appears in the Advanced Reports window

Note: The Category, Type and Volunteer labels in donor records, and the Campaign, Method and Fund labels in gift records may be changed through the Administrator dialog, so they may not match the names shown in this manual. See page ix.

Table 7.1 Advanced Reports Listing

Table 7.1 Advanced Reports Listing

Report Name	Type	Page
Export Entire Database as XML	Export	178
Gift Average Per City, Country, Postal Code and State	Graph	180
Gifts By Campaign	Graph	180
Gifts By Category, Solicitor, Type or Volunteer	Report, Graph	182
Gifts By Category, Solicitor, Type or Volunteer and Date	Report, Graph	184
Gifts By City, Postal Code, State, or Country	Report, Graph	186
Gifts by Date, Graph By Date	Graph	188
Gifts by Donor Attribute	Graph	190
Gifts by Fund	Graph	180
Gifts by Member Class	Graph	180
Gifts by Method	Graph	180
Gifts By State or Province	Report, Graph	193
Gifts Last 365 Days	Report, Graph	194
Gifts Previous Year	Report, Graph	195
Ignore Omit Mailing Flag	Export	195
Keyword Join Table	Export	195
Membership First & Last	Report	196
Memberships By Geography	Graph	174
Member Class and Totals	Report	166
Membership General Statistics	Report, Graph, Export	196
Method List and Totals	Report	166
Method Total	Report	167
Observe Omit Mailing Flag	Export	199
Overdue Pledges	Report	200
Pledge Projection	Report, Graph	202
Pledges By Donor and Year	Report	173
Pledges By Geography	Graph	174
Postal Code & All Gifts, Campaign, Method, or Fund	Report	168
Relationship Join Table	Export	205
Solicitor and Campaign Totals	Report	206
State & All Gifts, Campaign, Method, or Fund	Report	168
Year End Letters	Export	127

2nd Recipients-Not Same ID and 2nd Recipients-Same ID

These exports are used when you have gifts made "in the name of" or in memorial of another entity. They allow you to send a thank you not to the named donor ore their relatives, describing the gifts made in their name. For a listing of the fields exported and other details, see "Exporting 2nd Recipient Records" on page 123 and the enclosing chapter, "Gift Acknowledgements to Named Donors".

Address Table

This exports the first, second and third addresses for the current selection of donors. It is available only from the donor module. This is intended to help you move or copy data in FUNDimensions to another database. See the header row of the export for field labels, and the description that appears when selecting this export in the Advanced Reports window for more information.

Campaign List and Totals, Method List and Totals, Fund List and Totals, Member Class and Totals

These reports list each campaign, method, fund or member class present in a Donor List View or Gift List View, and display the total gift amounts for each item. When run from the donor module, all gift types are included in the totals. When run from a gift module, the report displays only the totals for the type of gift in the module, i.e., if you run the report from the Donations List View, donations but not pledges or memberships are not included in the calculations. For graph versions of this report, see "Gifts By Campaign, Method, Fund, Member Class and Solicitor" on page 180.

Campaign	Total Donations/Campaign
	2982.55
Awards Dinner '00	590
Awards Dinner '95	1200
Awards Dinner '96	4950
Buckaroo Ball '98	95
Capital Campaign '98	555
Dance Aug '95	792
General	1200
Goals 2000 Fund Drive	235
Jazz Under the Moon '99	291.5
Lecture Series '99	300
Movie festival '95	3400
Raffle '97	400
Raffle May '96	1225.2
Raft 'n camp '97	7248
Tee Off '97	1976
Total	**27440.25**

Figure 7.17 Campaign List and Totals

Campaign Total, Method Total, Fund Total

Last Name	First Name	Company Name	Donor ID Number	"Awards Dinner '96" campaign total
Booth	Frank	Beaumont Hardware	25	$250
Callahan	Harry	Tagamet Towel Co.	232	$100
Thursby	Floyd	Halpin Gear Co.	571	$500
Schecter	Hannibal		47	$250
		8th National Bank	46	$49,000
Dowd	Elwood	Histamine Company	235	$400
		Dialcom	66	$1,000
Plingley	Patrick		243	$300
		CNS Network	52	$100
Lydecker	Waldo	Rampusol	44	$200
MacMurphy	Randle	Grainger	31	$200
Sousa	Egbert		99	$200
Kolchak	Carl	Stress Matress Manufacturing	43	$3,000
			Campaign Total for Listed Donors	$55,500

Figure 7.18 Campaign Totals

This report displays each donor in the Donor List View and their total contributions to a specific campaign, method or fund. As the template is supplied, all gift types (i.e. donations, memberships and pledges) are included in each donor's total, and there is a grand total for the campaign, method or fund at the end of the report.

The Donor List View must be frontmost to use this report. Before use, you should edit the template to display the campaign, method or fund you want by editing the name in quotes in the report formulas. For example, if you want to run this report for your "Annual Giving 2002" campaign, change the formulas in C2, C4 and C5 to this campaign. The formula for C2 would be: QUERY SELECTION([Donations]; [Donations]Gift_List1="Annual Giving 2002").

To eliminate donors who made no gifts to the campaign, method or fund from appearing in the report, first do a search to reduce the donors in the Donor List View to only those participating in that campaign, method or fund. For example, use the Campaign search (Find>Campaign) prior to running the Campaign Total report to search for donors participating in the campaign.

The template may be edited to exclude one or more gift types. To do this, delete the column bearing the search formula for the gift type you want to omit, i.e. to omit pledges, delete the C4 column. Then, delete the appropriate sum from the formula in C3, i.e to omit pledges, change the formula to SUM([Donations]Donation Amount)+SUM([Memberships]Amount_paid).

An export version of the Campaign Total report is available under the Exports category of Advanced Reports. It includes the campaign total as described above, and adds mailing information, so that you can use it to thank donors for their total contribution to a campaign. This might be useful at the conclusion of a lengthy campaign, to acknowledge donors who made more than one gift to it. Before using this export, you should perform the same editing as that described above for the report version, i.e. setting the correct campaign name using the Report Editor.

City, Postal Code, State or Country & All Gifts, Campaign, Method, or Fund

These reports are available under the Donations By Geography, Memberships By Geography and Pledges By Geography sub-lists under the Reports list. You must have the List View for Donations, Memberships, or Pledges frontmost to access these items. As in all FUNDimensions reports, the report will use only the records contained in the List View, so you can perform a search prior to reporting to generate reports that focus on specific subsets of your gift records.

In the example below, the City and All Gifts report lists the cities in which the donors live, the number of gifts from each city, and the average gift for each city.

Donations by City/Town, Sorted and Subtotaled by Campaign   Page 3

City/Town	Campaign	Total Number of Donations	Total Amount of Donations	Average Donation per Donor
	Dance Aug '95	1	$100	$100
	Raft 'n camp '97	1	$500	$500
	Tee Off '97	1	$300	$300
Recumbent		**4**	**$1,100**	**$275**
	Dance Aug '95	1	$75	$75
Riley		**1**	**$75**	**$75**
	Movie festival '95	1	$200	$200
Santa Fe		**1**	**$200**	**$200**
	Jazz Under the Moon '99	1	$48	$48
Tabatha		**1**	**$48**	**$48**
	Buckaroo Ball '98	1	$50	$50
Tankasset		**1**	**$50**	**$50**
	Awards Dinner '96	1	$100	$100
Yappydog Hollow		**1**	**$100**	**$100**
	Raft 'n camp '97	1	$50	$50
	Tee Off '97	1	$250	$250
Yilips		**2**	**$300**	**$150**
Grand Totals/Average		**66**	**$27,116**	**$410**

Figure 7.19 City and Campaign example

When you choose the City and Campaign, City and Fund or City and Method variants, the calculations above are made for each campaign, method or fund, and subtotaled for each city.

In the example below, the Country and All Gifts report lists the countries in which the donors live, the number of gifts from each country, and the average gift for each country. This report can only be run from the Donations, Memberships or Pledges List Views.

```
Printed on Monday, March 11, 2002      Donations by Country
```

Country	Total Number of Donations	Total Amount of Donations	Average Donation per Donor
	55	$24,216	$440
England	5	$1,401	$280
France	1	$99	$99
USA	5	$1,400	$280
Grand Totals/Average	**66**	**$27,116**	**$410**

Figure 7.20 Country and All Gifts example

When you choose the Country and Campaign, Country and Fund or Country and Method variants, the calculations above are made for each campaign, method or fund, and subtotaled for each country.

Distribution By Amount

This report is similar to "All Gifts, Donations, Memberships or Pledges By Amount" on page 170, except that it displays only one type of gift, and is run from the Donations or Pledges List Views instead of the Donor List View.

Donation totals by amount

Last Name	First Name	Company	Donation Date	$1-$99	$100-$999	$1000+
		CNS Network	7/1/1997		$100	
		Conner Peripherals	11/14/1999	$47		
		Dialcom	8/5/1997			$5,000
			10/10/1996			$1,000
		Diamond Bands Inc.	7/1/1997		$125	
		Digital Storage & Archiving Co.	7/1/1997	$50		
		Dynix	11/3/1997		$500	
		EasyLink	1/4/1995		$200	
		Klester Mfg. Co.	12/3/1996		$200	
Allouette	Sam	Al Siete Corp.	1/14/2000		$100	
Angel	Harold	Angel Investigations	8/31/2000	$85		
			Total Given	**$182**	**$1,225**	**$6,000**

Figure 7.21 Distribution by Amount (Donations)

All Gifts, Donations, Memberships or Pledges By Amount

Last Name	First Name	Company	≤$1000	$1001-$2000	>$2000
Hildegard	Fidelius	Ramsay Corp.			
Thursby	Floyd	Halpin Gear Co.			$2,401
Booth	Frank	Beaumont Hardware			$4,450
Jallows	Hamden				
Callahan	Harry	Tagamet Towel Co.			
Hillsdale	Helen	Getstan Guitar Co.			
Talbot	Lawrence			$1,200	
Panson	Louise		$200		
McLain	R.	Tess Land Corp.			
Whiteside	Sheridan	Woolley's Meals-To-Go	$100		
		Total for ranges	**$300**	**$1,200**	**$6,851**

Figure 7.22 Distribution-Donations by Amount

This report is located in the Distribution and Cross Tabular sub-list. The example above shows each donor's total donations distributed across columns according to amount ranges. A similar report is available for all gifts, memberships and pledges. In the All Gifts version, donations, pledges and memberships are summed for each donor, and the sum is placed in the appropriate column.

The Donor List View must be frontmost to use this report. You may edit the template to display the ranges you want by editing the report formulas.

All Gifts, Donations, Memberships or Pledges by Quantity

Pledge quantity by amount range

First Name	Last Name	Company	$1-$100	$101-$1000	over $1000	Total Pledges
		CNS Network			1	1
		Diamond Bands Inc.			1	1
Dale	Cooper	Yep Cola Co.	1	1		2
Floyd	Thursby	Halpin Gear Co.		2		2
Frank	Booth	Beaumont Hardware		1		1
Hamden	Jallows					0
Harry	Callahan	Tagamet Towel Co.	1			1
Helen	Hillsdale	Getstan Guitar Co.		2		2
Lawrence	Talbot			2		2
Louise	Panloss					0
Norman	Bates	Bates Motel	1	2		3
		Total for Range	**3**	**10**	**2**	**15**

Figure 7.23 Pledge Quantity by Amount Range

This report is located in the Distribution and Cross Tabular sub-list. The example above shows each donor's total pledge amounts distributed across columns according to amount ranges. A similar report is available for all gifts, memberships and donations. In the All Gifts version, the quantity of donations, pledges and memberships is summed for each donor, and the sum is placed in the appropriate column.

The Donor List View must be frontmost to use this report. You may edit the template to display the ranges you want by editing the report formulas. To limit the report to a subset of donors, perform searches with the Find menu before creating the report.

Donations and Zero Balance Pledges

Donors With Donations and Zero Balance Pledges Page 1

Last Name	First Name	Company	Total Donations	Total Pledges	Donations + Pledges	Gift Count
Dowd	Elwood	Haltech Company	$300	$150	$450	3
Bates	Norman	Bates Motel	$75	$600	$675	3
McLain	R.	Tess Land Corp.		$1,000	$1,000	1
Kolchak	Carl	Instant Signs Co.	$3,000		$3,000	2
		Totals for report	$3,375	$1,750	$5,125	9

Figure 7.24 Donations and Zero Balance Pledges

This report lists donors and all their donations, together with all their pledges having a zero balance (i.e. fulfilled pledges).

Donations and Zero Balance Pledges with Date Filter

Donors With Donations and Zero Balance Pledges (Date Filter Applied) Page 1

Last Name	First Name	Company	Total Donations YTD	Total Fulfilled Pledges YTD	Donations + Fulfilled Pledges YTD	Gift Count
Dowd	Elwood	Haltech Company	$200	$150	$350	2
Bates	Norman	Bates Motel	$75	$600	$675	3
McLain	R.	Tess Land Corp.		$1,000	$1,000	1
Kolchak	Carl	Instant Signs Co.	$500		$500	1
		Totals for report	$775	$1,750	$2,525	7

Figure 7.25 Donations and Zero Balance Pledges with Date Filter

This report lists donors and their donations, together with their pledges having a zero balance (i.e. fulfilled pledges).

A date filter is applied so that only donations and fulfilled pledges with the date range are shown. The default date filter is year-to-date, but you can edit the formulas in columns C24 and C25 (pledge dates) and C26 and C27 (donation dates). For general help editing formulas, see "Formula Editor" on page 364.

For example, to change the date range to a specific date range, use the formulas below, substituting your start date for X and your end date for Y:

- In C24:Query Selection([Pledges];[Pledges]Pledge Date>=!X!)
- In C25: Query Selection([Pledges];[Pledges]Pledge Date<=!Y!)
- In C26: Query Selection([Donations];[Donations]Donation Date>=!X!)
- In C27: Query Selection([Donations];[Donations]Donation Date<=!Y!)

The exclamation marks shown above must surround your dates, and the dates should be in the MM/DD/YY format (e.g. 3/20/59).

Donations or Pledges by Donor and Year

This report lists the donations in the Donation or Pledge List View, grouped by Donor Name or Company Name. For each donor, the donations are sorted by gift date, with a subtotal and gift count displayed for each year, and a total and gift count for each donor. The report concludes with a total and count for all gifts in the report.

Printed on Wednesday, July 4, 2001 Donations, Sorted and Subtotaled by Year Page 1

Last Name	First Name	Company Name	Donation Date	Amount	Campaign	Method	Fund
Talbot	Lawrence		3/17/95	$500.00	Dance Aug '95	Email invitation	Research
			Total, 1995	**$500.00**	Gift Count for 1995	**1**	
			4/18/97	$100.00	Raft 'n camp '97	Radio PSA '97	Research
			Total, 1997	**$100.00**	Gift Count for 1997	**1**	
			1/25/99	$100.55	Buckaroo Ball '98	Special Funds Mailing '99	General
			2/1/99	$500.00	Capital Campaign '98	PSA '98	Building
			Total, 1999	**$600.55**	Gift Count for 1999	**2**	
			Total, All Years	**$1,200.55**	Gift Count, All Years	**4**	
			Gift Amount, Report Total	$1,200.55	Gift Count, Report Total	4	

Figure 7.26 Donations By Donor and Year

Donations By Geography, Memberships By Geography, Pledges By Geography

These items only appear when you choose Advanced Reports while the Donations, Memberships or Pledges List Views are frontmost. They offer a variety of ways to graph gifts by city, postal code, state or country.

When this item is selected, the graph window lets you choose the types of information to graph. The Y axis (vertical) is always gift amounts. The X axis lists the geographical region. The Z axis is suppressed if you choose None from the popup menu for the axis; otherwise, you can use it to divide the gifts for each geographical region according to Campaign, Method, or Fund.

You can create several of these graphs and display them at the same time. To print a graph, choose Output>Print Graph.

This is an example of the Donations By Geography graph:

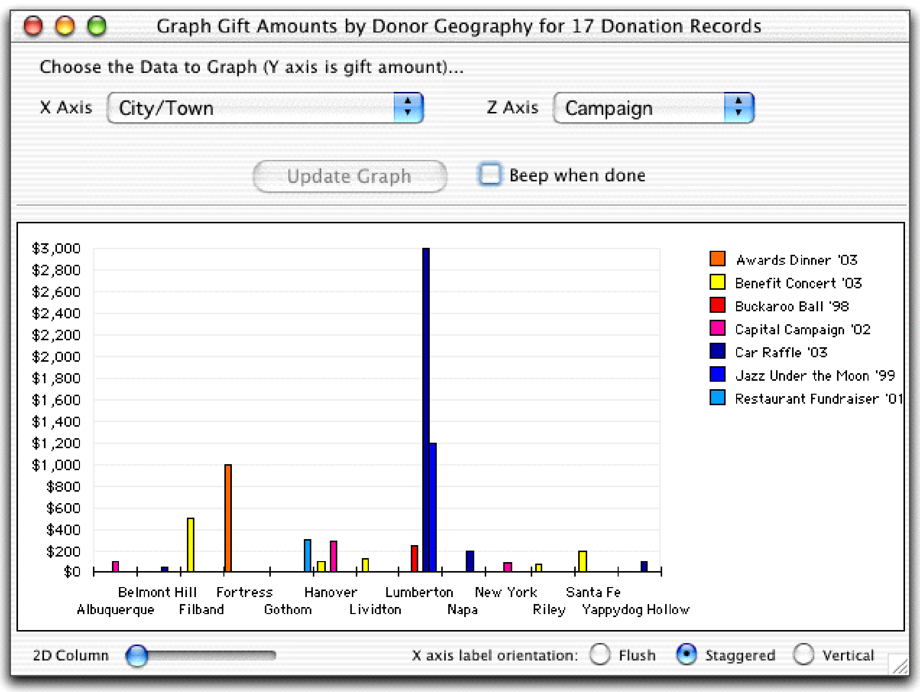


Figure 7.27 Donations By Geography example

Donor Notes, Tab Delimit and Special Delimit Exports

This item appears only when you choose Advanced Reports while the Donor List Views is frontmost.

When exporting notes with this command, every note associated with the records in the Donor List View is exported. (To export a selection of notes other than this, use

Output>Export from the Note List View. See "Export" on page 344.) The following fields appear in the output file:

Figure 7.28 Fields in Note Exports

Field Number	Field Name
1	Last Name
2	First Name
3	Salutation
4	Company
5	Donor ID
6	Note Date
7	Author
8	Subject
9	Secure
10	Note

Fields 1-5 are from the related donor record; the other fields are from the note record. The picture field in note records is not exported.

If you choose the "Tab Delimit" variant of the export, the export is structured with a carriage return (ASCII 13) between records, and a tab character (ASCII 9) between fields. This is the same structure as that used by other exports from FUNDimensions. The problem with this option is that return and tab characters within the note text itself will confuse whatever software is used to read the note data. To solve this problem, you have the option of using special non-printing characters as delimiters. Using the "Special Delimit" variant requires that you configure your spreadsheet or other software used to open the export file, to recognize these special, non-printing characters as the field and record delimiters. The special delimiters are ASCII 252 for fields and ASCII 253 for records. If you would prefer to use some other characters as delimiters, just export with the "Special Delimit" variant and use a text editor to "find and replace" the special characters in the export file with whatever characters you would prefer.

To export notes, follow this procedure:

1 In the Donor List View, generate the selection of donors having the notes you want to export. See "Selecting Records" on page 55 for information on generating a selection.

2 Choose Output menu>Advanced Reports, In the Exports sub-list, choose Donor Notes-Tab Delimit or Donor Notes-Special Delimit (see above).

3 Click the Export button.

4 In the next dialog, type a name for the export file and choose a location for it, then click the Save button.

5 The export is performed, and a message appears at its conclusion displaying the number of notes exported.

Donor Since & Last & Total Gifts

Donor Since, Last Gifts, and Total Gifts, Printed Friday, March 16, 2001

Last Name	First Name	Company	Last donation	Date	Last pledge	Date	Last dues	Date	Donor Since	Total Gifts
Blistamozo	Johannsen		$200	7/1/1995			$35	6/9/1999	7/1/1995	$390
Booth	Frank	Beaumont Hardware	$3,000	2/28/1997	$400	2/28/1995	$25	10/5/1997	2/28/1995	$4,875
Callahan	Harry	Tagamet Towel Co.			$100	12/20/1999	$50	10/5/1997	10/5/1997	$150
Hildegard	Fidelius	Ramsay Corp.					$95	1/9/1997	1/9/1997	$95
Hillsdale	Helen	Getstan Guitar Co.			$120	12/30/1999			4/30/1997	$330
Jallows	Hamden				$75	6/9/1999	$75	10/5/1997	10/5/1997	$150
McLain	R.	Tess Land Corp.			$1,000	11/3/1999	$35	12/8/1996	12/8/1996	$1,035
Panson	Louise		$200	8/19/1995	$150	12/14/1999	$25	6/9/1999	8/19/1995	$435
Talbot	Lawrence		$500	2/1/1999	$1,000	4/12/1998	$51	6/9/1999	3/17/1995	$2,586
Thursby	Floyd	Halpin Gear Co.	$1,000	12/10/1997	$500	12/17/1999	$75	10/6/1997	8/16/1995	$3,476
Whiteside	Sheridan	Woolley's Meals-To-Go	$100	6/19/1997	$23	11/3/1999	$35	6/9/1999	6/19/1997	$158
Donor count:	**11**	**Gift Totals:**	**$5,000**		**$3,368**		**$501**			**$13,680**

Figure 7.29 Donor Since & Last & Total Gifts

This report lists the most recent donation, membership and pledge for each donor, and the date of their first gift. The Donor Since column displays the earliest donation or pledge: memberships are not considered. The Donor List View must be the frontmost window to use this report.

Similar information may be found in the graph "Donors & Last Gifts" on page 176 and the report "Donors with Last and Largest" on page 178.

Donors & Last Gifts

This report will produce a bar chart with 3 bars per donor. One bar represents their last (last="most recent") donation, the next bar their last pledge and a third bar their last membership dues payment. By deleting columns in the template, you could choose to show only one or two of the gift types (click column header to highlight column, then choose Delete Column from the Edit menu).

Similar information may be found in the reports "Donor Since & Last & Total Gifts" on page 176 and "Donors with Last and Largest" on page 178, but these are not graphs.

To edit this template, choose Output Menu > Report Editor, then File menu > Open. The template is located at FUNDimensions folder/Report Templates/Donors/Graphs/Donors & Last Gifts.

Donors By Gift Amount

Last Name	First Name	Company	Total Donations	Total Pledges	Donations + Pledges	Gift Count
Hildegard	Fidelius	Ramsay Corp.				0
Jallows	Hamden			$75	$75	1
Callahan	Harry	Tagamet Towel Co.		$100	$100	1
Whiteside	Sheridan	Woolley's Meals-To-Go	$100	$23	$123	2
Hillsdale	Helen	Getstan Guitar Co.		$330	$330	2
Panson	Louise		$200	$150	$350	2
McLain	R.	Tess Land Corp.		$1,000	$1,000	1
Talbot	Lawrence		$1,200	$1,250	$2,450	6
Thursby	Floyd	Halpin Gear Co.	$2,401	$1,000	$3,401	6
Booth	Frank	Beaumont Hardware	$4,450	$400	$4,850	4
		Totals for report	**$8,351**	**$4,328**	**$12,679**	**25**

Figure 7.30 Donors by Gift Amount

The Donors By Gift Amount report displays the total of pledges and donations for each donor and the count of gifts for each donor. There are similar functions in the Sort dialog (Records menu>Sort, page 290) to rank donors in the Donor List View. You could customize these reports to reverse the sort order or include memberships or additional fields from the donor record.

The Donor List View must be frontmost to use these reports.

Donors With Keywords

This export produces a text file containing basic donor information and the keywords assigned to each donor. Each keyword is separated by a semicolon and space (“; “). The semicolon and space delimiter may be changed by editing the formula in column C1 of the template for the export.

The report is sorted on the Donor Last Name but this may be edited. You may also add columns such as mailing address, phone number, email address, etc.

You may view and print the export file using any spreadsheet program.

To edit this template, choose Output Menu > Report Editor, then File menu > Open. The template is located at FUNDimensions folder/Report Templates/Donors/ Exports/ Donors with Keywords. See also “Keyword Join Table” on page 195.

A similar report is available for exporting relationships; see “Donors with Relationships” on page 178. See

Donors with Last and Largest

Printed on Wednesday, March 14, 2001 Last and Largest Gifts per Donor

Last Name	First Name	Company	Date of last donation	Last donation	Largest donation	Date of last membership	Last membership	Largest membership	Date of last pledge	Last pledge	Largest pledge
Booth	Frank	Beaumont Hardware	2/28/1997	$1,200	$3,000	10/5/1997	$25	$25	2/28/1995	$400	$400
Callahan	Harry	Tagamet Towel Co.				10/5/1997	$50	$50	12/20/1999	$100	$100
Hillsdale	Helen	Getstan Guitar Co.							12/30/1999	$210	$210
Jallows	Hamden					10/5/1997	$75	$75	6/9/1999	$75	$75
McLain	R.	Tess Land Corp.				12/8/1996	$35	$35	11/3/1999	$1,000	$1,000
Panson	Louise		8/19/1995	$200	$200	6/9/1999	$35	$35	12/14/1999	$150	$150
Talbot	Lawrence		2/1/1999	$500	$500	6/9/1999	$35	$51	4/12/1998	$250	$1,000
Thursby	Floyd	Halpin Gear Co.	12/10/1997	$250	$1,000	10/6/1997	$75	$75	12/17/1999	$500	$500
Whiteside	Sheridan	Woolley's Meals-To-Go	6/19/1997	$100	$100	6/9/1999	$35	$35	11/3/1999	$23	$23

Figure 7.31 Donors with Last and Largest Gifts

This report displays the amount of the last gift made by each donor listed. Possible changes you could make to this report include eliminating columns irrelevant to your fundraising activities, or replacing the last gift with the calculated amount of the most recent 3 gifts. Their is also a graph version of this report, displaying only the last gifts.

The Donor List View must be frontmost to use this report.

Similar information may be found in the graph "Donors & Last Gifts" on page 176 and the report "Donor Since & Last & Total Gifts" on page 176.

Donors with Relationships

This export produces a text file containing basic donor information and the relationships assigned to each donor. This is the same listing of relationships you see when you open the Donor Input Window and click the Relationship tab, as shown in "Donor Input Window, Relationships pane" on page 12.

Each relationship in the export is separated by a semicolon and space ("; "). The semicolon and space delimiter may be changed by editing the formula in column C1 of the template for the export.

The report is sorted on the Donor Last Name but this may be edited. You may also add columns such as mailing address, phone number, email address, etc.

You may view and print the export file using any spreadsheet program.

To edit this template, choose Output Menu > Report Editor, then File menu > Open. The template is located at FUNDimensions folder/Report Templates/Donors/Exports/ Donors with Relationships.

A similar report is available for displaying keywords; see "Donors With Keywords" on page 177. See also "Relationship Join Table" on page 205.

Export Entire Database as XML

You can export the entire database, including user preferences, calendar data and data otherwise inaccessible, by using this export. Current selections are ignored: all records from all tables are exported. Passwords and certain other data are exported in encrypted form, which can only be decrypted during the XML import process available elsewhere in the software ("XML Import Procedure" on page 99).

This export is usually performed in conjunction with the Import XML function to restore a damaged database.

Follow this procedure to perform the export:

1 Working from the Donor List View (page 5), do Output > Advanced Reports.

2 In the Advanced Reports window, scroll the lost at left as necessary to locate the Export theme. Expand the theme and click on Export Entire Database as XML.

3 Click the Export to Disk… button.

4 Click the Export at Next Launch button in the dialog that appears:

Figure 7.32 Export XML at Next Launch confirmation

5 Immediately quit and re-launch FUNDimensions. During startup, the window below appears. Click the Export button:

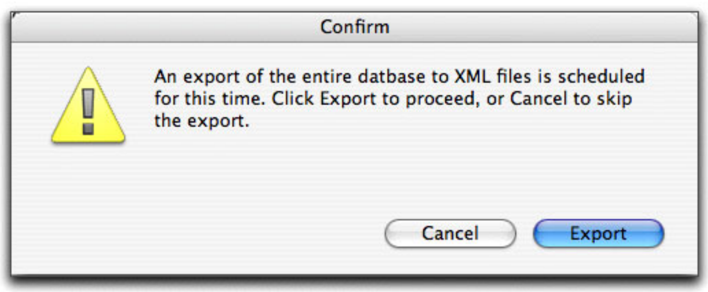


Figure 7.33 Confirm Export at Startup window

6 A window appears to *select or create a folder* to receive the export, which will consist of 25 or more files. Select a folder, then click the Choose button.

7 The export begins. It will require significant time to complete. To cancel the export process, type the ESCAPE key.

Upon completion, the folder you specified in step 6 is opened in a window in your operating system, displaying the files created by the export. Each file bears the name of the table from which it received its data, followed by a suffix of .xml. You can open these files in Microsoft Excel®, any text editor, and in software specialized to edit XML. The files can be imported back into a FUNDimensions data file following the instructions at “XML Import Procedure” on page 99.

Gift Average Per City, Country, Postal Code and State

These items are available when the Donor List View is frontmost. In the Advanced reports window, choose Graphs>Gifts By Geography to see these items. The graph plots the average gift per donor on the Y axis against the geographical region in the X axis, as shown in this example:

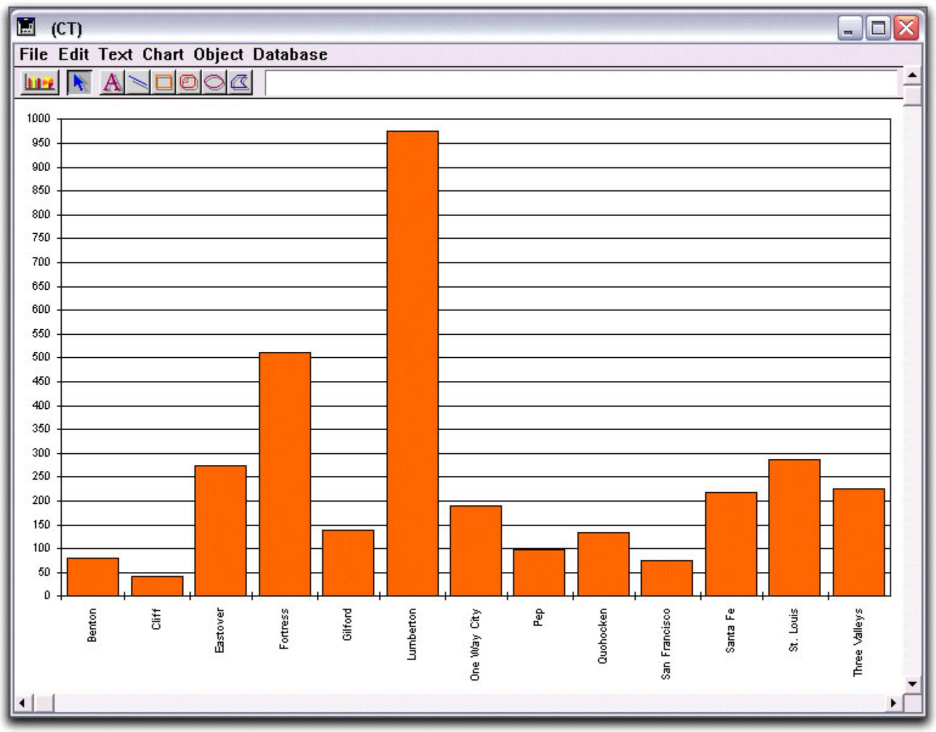


Figure 7.34 Gift Average per City example

Gifts By Campaign, Method, Fund, Member Class and Solicitor‡

These graphs are available from the Donor List View and from gift modules (see "Gifts by Category, Solicitor, Type or Volunteer" on page 182 for documentation of Gifts by Solicitor from the Donor List View). They calculate the total giving associated with campaigns, methods, solicitors, member classes or funds, and plot the amounts. The gifts in the calculations will be those associated with whatever donors records make up the current selection in the Donor List View, or the current gifts in a Donation, Membership or Pledge List View; this allows you to make these charts for a specific subset of your donors or gifts. When you run these reports from the Donor List View, all gift types are included in the graph. When the graph is run from a gift module, only gifts belonging to that module's list view are graphed.

‡ The Campaign, Method and Fund labels may be changed through the Administrator dialog, so they may not match the names shown in this manual. See page ix.

For a textual version of this chart, see "Campaign List and Totals, Method List and Totals, Fund List and Totals, Member Class and Totals" on page 166.

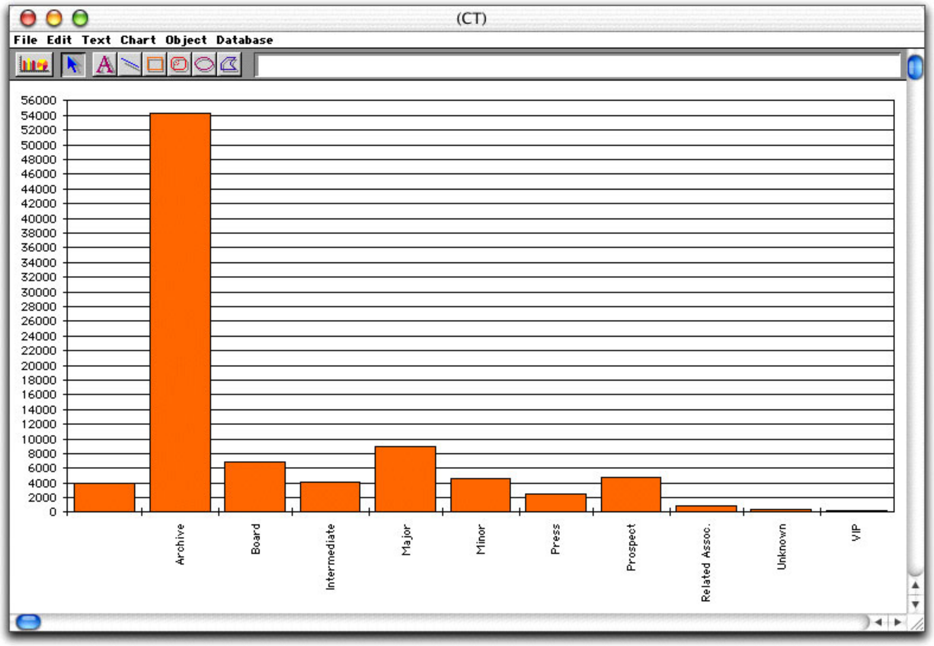


Figure 7.35 Graph By Campaign example

Gifts by Category, Solicitor, Type or Volunteer**

This report or graph displays the gifts of donors in the current Donor List View, subdivided according to the category or solicitor to which donors are assigned in the Classification pane. The result is similar to the Gifts By Category and Date report, except that there is no filtering or separating of gifts according to date—all gifts will appear in the report or graph. Another difference is that this report does not list individual donors, but instead breaks out gifts according to gift type.

See also the “Solicitor and Campaign Totals” on page 206.

This is an example of the report:

Printed on Thursday, May 9, 2002 **Gifts By Donor Category** **Page 1**

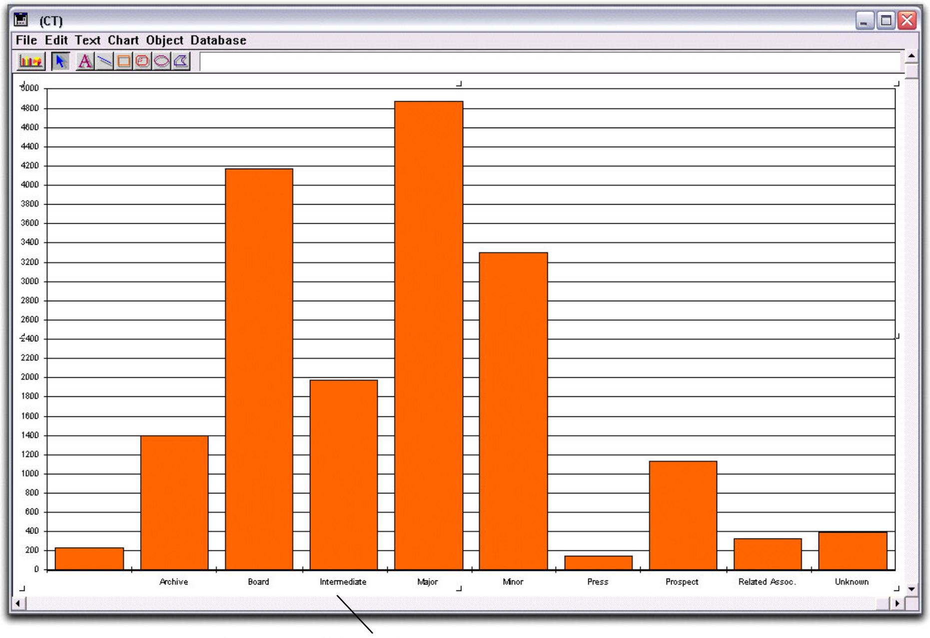
Donor Category	Total Donations	Total Pledges	Total Memberships	Total Gifts
	$2,862	$725	$430	$4,0[illegible]7
Archive	$2,465	$52,450	$245	$55,160
Board	$3,571	$3,050	$220	$6,841
Intermediate	$6,895	$1,520	$250	$8,665
Major	$4,647	$3,800	$160	$8,607
Minor	$2,124	$2,063	$436	$4,623
Press	$1,100	$1,370	$50	$2,520
Prospect	$3,000	$1,670	$155	$4,825
Related Assoc.	$200	$730	$35	$965
Unknown	$200	$0	$190	$390
VIP	$50	$200	$0	$250
Total, All Categories	**$27,115**	**$67,578**	**$2,171**	**$96,864**

This column will list Solicitors, Types or Volunteers in reports by that name.

Figure 7.36 Gifts By Category report example

** The Category, Type and Volunteer labels may be changed through the Administrator dialog, so they may not match the names shown in this manual. See page ix.

This is an example of the graph:



This axis will list Solicitors, Types or Volunteers in graphs by that name.

Figure 7.37 Gifts By Category graph example

Gifts By Category, Solicitor, Type or Volunteer and Date††

This report version of this item displays the total gift level for each donor, for gifts made within a specified date range. The donors are sorted and subtotals are calculated for each Donor Category. If you track categories such as foundation, business, individuals, or other categories, this report will compare the giving levels from those categories.

The Donor List View must be frontmost to use this report, or to produce the graph version referred to below. This is an example of the report:

This column will list Solicitors, Types or Volunteers in reports by that name.

Printed on Thursday, May 9, 2002 **Gifts By Category and Date**

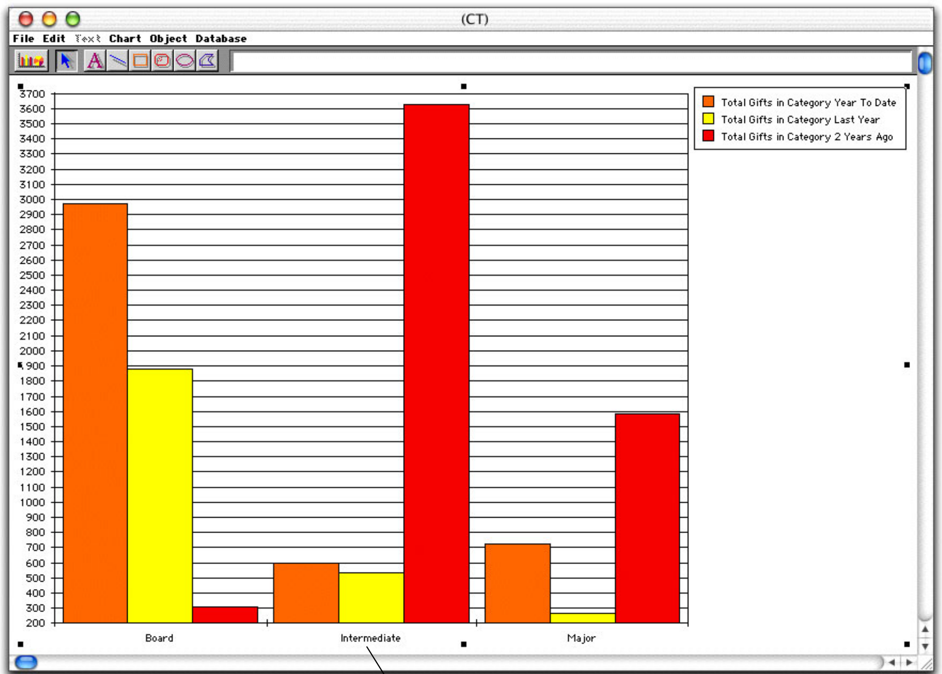
Category	Last Name	First Name	Company Name	Gifts Year To Date	Gifts Last Year	Gifts 2 Years Ago
			CNS Network			
	Lydecker	Waldo	Rampusol			
	Madoux	Joan	Custom Removals & Repossesion			
	Ruston	Doris				$600.00
Board	**Donor Count:**	**6**	**Gift Totals:**			**$800.00**
	Panson	Louise				
			Dialcom			
			Calumet Carton			
	Landsdowne	Mauricio	Quincy Potato Barns Inc			$35.00
	Wilberry	Cranston	Hedon Corp.			
	Collins	Eadie	Noir Photo			
	Houston	Sam	Gearco			
	Rue D'Gallo	Rufus	Almost There Productions			
	Lunkhauser	Kirsten	Lunkhauser Decorating Co.			
	Valens	Tom	Los Angeles Police Department			$85.00
	Valens	Joanie	Decroix Photography		$40.00	$300.00
	Cyphre	Louis	Talent Investments Associates			$250.00
Intermediate	**Donor Count:**	**12**	**Gift Totals:**		**$40.00**	**$670.00**
	Booth	Frank	Beaumont Hardware			
			Diamond Bands Inc.			
			Conner Peripherals			
	Lang	Bobby	Zeus Storage			
	Ruston	James				$150.00
	Carmody	Ida	Drovers, Inc.			$250.00
Major	**Donor Count:**	**6**	**Gift Totals:**			**$400.00**

Figure 7.38 Gifts By Category and Date example (report version)

You may change the date range by editing the formula in the Donations+Pledges column. Their are also 2 graph versions of this report, displaying either all gifts or only gifts in a date range.

†† The Campaign, Method and Fund labels may be changed through the Administrator dialog, so they may not match the names shown in this manual. See page ix.

The graph version of this report (listed under the Graph sub-list in Advanced Reports) displays the donations and pledges for each Category. There is no listing of specific donors as there is in the report above. This is an example of the graph:



This axis will list Solicitors, Types or Volunteers in graphs by that name.

Figure 7.39 Gifts By Category and Date example (graph version)

Gifts By City, Postal Code, State, or Country

These items are available under the Gifts By Geography sub-list of the Graph list in Advanced reports. The Donor List View must be frontmost to access these items.

Drawing a list of cities and towns from the City field in donor records, this report lists the number of donors and gifts for each city, and other statistics, as shown here:

City	Donor Records in City	Total Number of Gifts in City	Donor Records in City with at Least 1 Gift	Total Amount of Gifts in City	Average Gift per Donor in City
	2	2	1	$150	$37
Albuquerque	1	2	1	$350	$175
Amesbury	1	3	1	$355	$118
Amherst	1	1	1	$90	$90
Belmont Hill	1	2	1	$250	$125
Boston	1	1	1	$100	$100
Chicago	1	2	1	$225	$113
Eastover	2	10	2	$3,634	$275
Falcrest	2	5	2	$49,385	$8,238
Festapod	1	1	1	$100	$100
Filband	1	2	1	$575	$288
Fort Sumnter	1	1	1	$100	$100
Fortress	1	3	1	$6,035	$2,012
Fresno	2	1	1	$789	$394
Gijinks	1	5	1	$1,493	$299
Gilford	1	5	1	$695	$139
Gothom	1	2	1	$600	$300

Figure 7.40 Gifts By City example

For a listing using a specific list of donation, membership, or pledge records from your database, see “City, Postal Code, State or Country & All Gifts, Campaign, Method, or Fund” on page 168.

The graph version of this report plots the city names against the information shown in the Total Amount of Gifts in City column of the report (see figure above), as shown in this example:

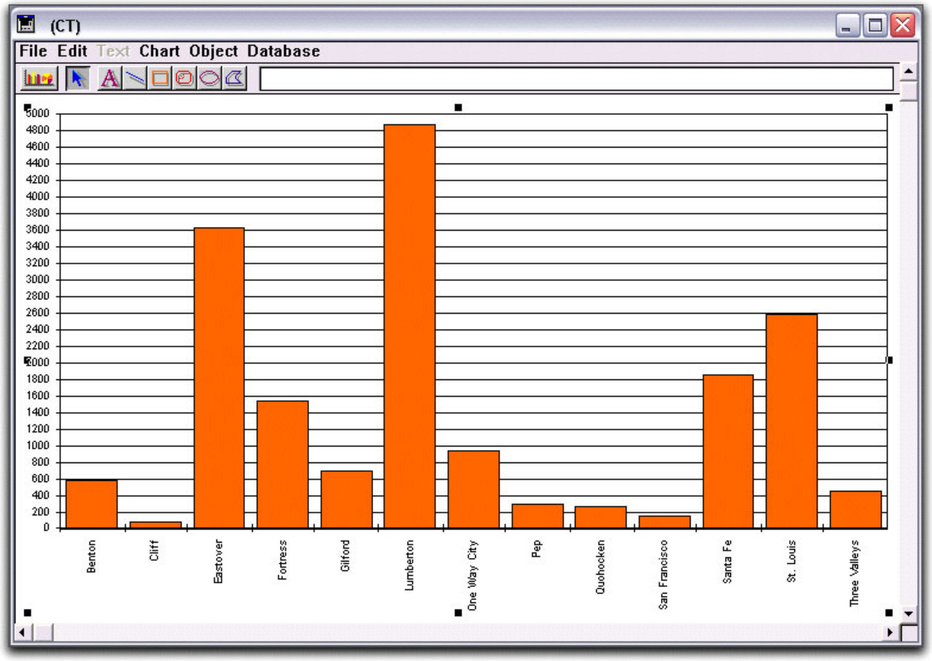


Figure 7.41 Gifts By City example, graph version

For a chart of the Average Gift per Donor in City column of this report, see "Gift Average Per City, Country, Postal Code and State" on page 180. For a chart of specific donations, memberships or pledges (as opposed to the combination of all three types of gifts represented in this report), see "Donations By Geography, Memberships By Geography, Pledges By Geography" on page 174.

Gifts by Date and Graph By Date

This graph is available in the Donor, Donations, Memberships, Pledges and Pledge Payments modules. It is labeled Gifts by Date in the Donor module, and labeled Graph by Date in all other modules.

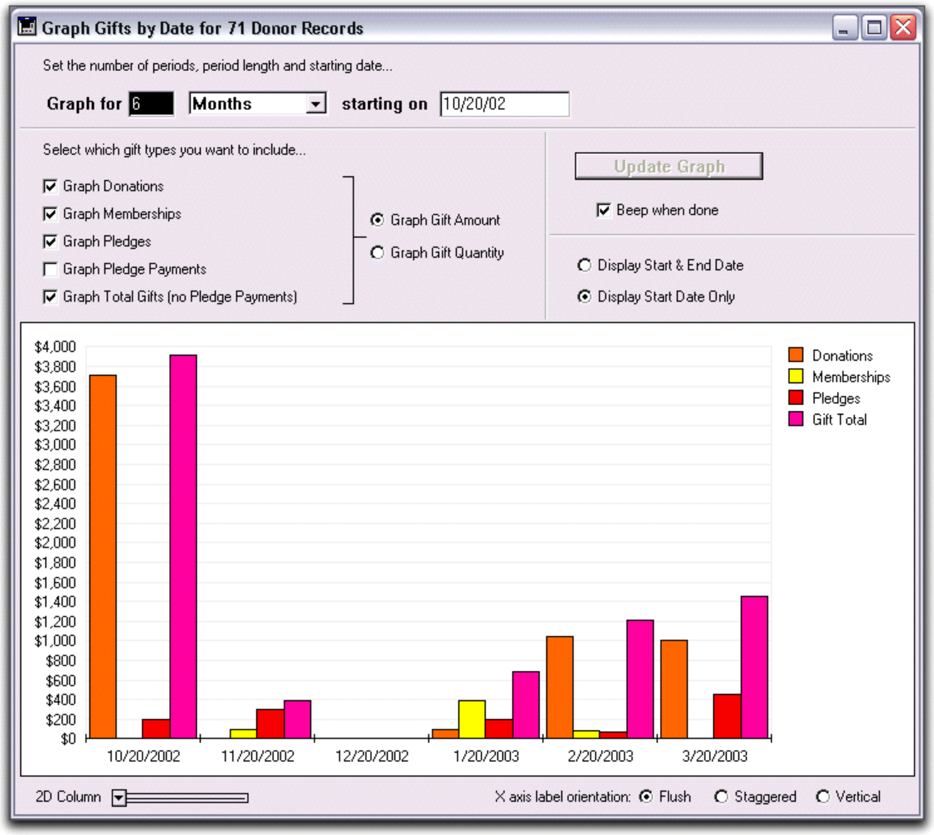


Figure 7.42 Gifts by Date example

This graph requires you to specify five parameters:

- The number of days, weeks, months, quarters, half-years or years that you want to graph. For example, if you want to graph one bar for each of the last twelve months, enter "12" (this is the default value). This entry must be between 1 and 60 inclusive.
- The length of each period to graph. This is done with a pop–up menu that offers a choice of days, weeks, months, quarters, half-years or years.
- The date on which to begin the graph. This defaults to the current month minus one year. Enter any date you wish here, on or prior to the current date. In US systems, the format is month/day/year. (For date entry shortcuts, see "Date Entry" on page 49.)
- A choice of records to graph. These choices exist only if you initiate the graph from the Donor List View (i.e. only for the Gifts by Date, not for Graph by Date items.)

- A choice to display the either the amounts (in currency units) or quantity (i.e. number) of gifts. Turn on the Graph Amount or Graph Quantity radio button to specify your choice.

Click the Draw Graph button to draw or update a graph after setting the items above. The button label then changes to Update Graph; click it if you make further changes to the graph settings. The Enter key may be used instead of clicking.

You can work in other windows while the graph is being made or printed by clicking another window or using menu commands in the File menu. Use the “Beep when done” checkbox to have the software notify you when graphing is complete.To cancel the graphing process, press ESCAPE.

The graph appears in its own window; you may scroll to see the entire graph and adjust the window size to display as much of the graph as possible on your monitor.

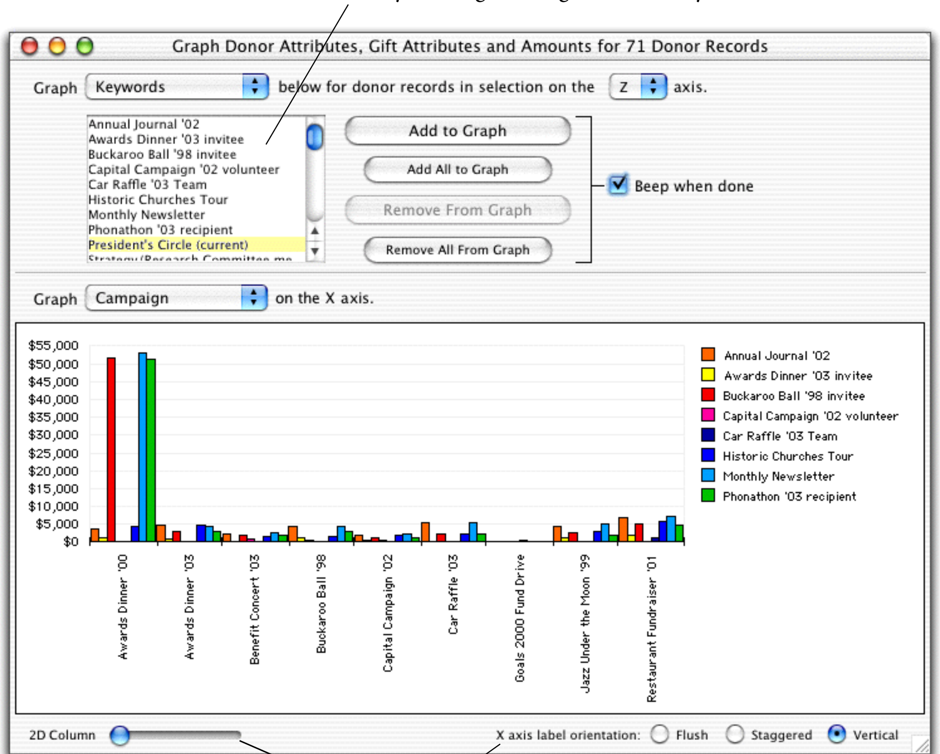
You may print this graph with the Print Graph command in the Output menu. The size of the printed graph reflects its size on screen. If the screen size and paper setup you use would cause the graph to be split (tiled) across multiple pages, that’s what will happen when you print. To prevent or control this, resize the graph on your screen, or use the scaling function in your Print Setup (Windows) or Page Setup (Macintosh) to change the printed graph size. Alternately, use the steps below to copy the graph into a graphics program, and edit the size and print using that software.

To copy the graph for use in other software, just click on it. Handles appear around the graph perimeter. Choose Edit>Copy, then switch to a graphics program, word processor, or other software and paste (Edit>Paste).

Gifts by Donor Attribute

This graphs keywords, relationships or donor list items against gift list items and gift amounts. This assists in determining the best fundraising strategies for donors by displaying the Campaigns, Methods, Funds or Solicitors that were most effective with various donor groupings you have defined through keywords or donor choice lists (Category, Type, Volunteer or Solicitor fields). In this example, several keywords have been selected to graph with Campaigns:

You can select an item in this list by clicking or using the arrow keys.



These controls affect the graph appearance. Settings are preserved for the next time you use make a Graph by Donor Attributes.

Figure 7.43 Graph by Donor Attributes example (Keywords versus Campaign configuration)

This graph works as follows:

1 It locates donors in the current selection that have the keyword, relationship or choice list items (donor attributes) you select. The keywords, relationships or donor choice list items become the x or z axis. The example uses keywords and graphs them on the z axis.

2 The gifts made by these donors are found.

3 The software scans one of the three choice list fields in the found gifts, and a list is built consisting of all the unique values for the field (gift attributes). You can choose which choice list field will be used to construct this list. This list becomes

the z or x axis, depending on the selection you make in #1 above. The example plots Campaigns on the x axis.

4 For each combination of keyword or donor choice list item, and gift choice list item, the amount of gifts is calculated. This becomes the y (vertical) axis.

By plotting gift amounts as a function of donor attributes and gift attributes, the graph attempts to show what kinds of campaigns, communication techniques, purposes, or solicitors work best with donors having various attributes. This can help you anticipate which appeals may work well with prospects and newer donors, by finding out what appeals worked well with older donors that share the same attributes.

For example, suppose you track your donors' membership in several third-party organizations. You might have this information because you purchased the membership lists of these organizations, or because your donors completed a questionnaire.

The graph might help you discover that members of one organization responded much better to your last annual appeal letter, than did members of another organization.

So, next year you send a similar letter to members of the first organization, but you use FundImensions' searches to generate a separate mailing list for the second organization, and you send them a different letter, which is better tailored to the interests they have demonstrated by being a member of the second organization, as opposed to the first organization.

This graph may take some time to calculate and draw. For convenience, you can configure the software to beep when the graph is complete, and you can continue to work in all other parts of the software while the graph is being constructed. You can also create multiple graphs and display them simultaneously, just by again selecting Gifts by Donor Attributes from the Advanced Reports window, while the first graph is still on the screen.

Each graph will be constructed from the selection of donors present in the Donor List View at the time you click the Configure button in the Advanced Reports window. To graph a different selection of donor records, create another graph.

To create a graph, follow this procedure:

5 If the Donor List View is not already the active window, click on it to bring it forward, or select File>Donors.

6 Select Output> Advanced Reports. In the advanced Reports listing, select Gifts by Donor Attributes from the Graph theme.

7 The window above appears. In the upper left corner, select the donor attribute type you want to include in the graph from the popup menu.

8 Just above the graph area, select the gift attribute you want to graph from the popup menu.

9 Now choose specific donor attributes to graph. To do this, either click the Add All to Graph button, or select items from the scrolling list one at a time, clicking Add to Graph between each one. The graph will draw.

10 Edit the graph appearance in 3 ways. These do not change the data being graphed, but only change the way it is displayed:

- Choose x or z from the popup menu in the upper right of the window. This swaps the Donor Attribute axis with the Gift Attribute axis. You may find that a graph displays with less collision of labels with one setting or another.
- Move the slider control in the lower left of the window to change the graph type.
- Click a radio button in the lower right to change the orientation of x axis labels, to avoid label collision and maximize readability.

11 Editing settings other than those above will change the data to be graphed and will initiate a redraw of the graph.

12 To eliminate a specific donor attribute from the graph, select it in the scrolling list, then click Remove From Graph. The graph redraws to reflect the change.

13 Turn on the Beep When Done checkbox to have the program issue a standard computer beep when graphing is finished. This lets you work elsewhere while you wait for results.

14 Resize the graph by dragging the lower right corner of the window. This can help you avoid collisions of labels.

15 To print your graph, chose Output>Print Graph. The size of the printed graph reflects its size on screen. If the screen size and paper setup you use would cause the graph to be split (tiled) across multiple pages, that's what will happen when you print. To prevent or control this, resize the graph on your screen, or use the scaling function in your Print Setup (Windows) or Page Setup (Macintosh) to change the printed graph size. Alternately, use the step below to copy the graph into a graphics program, and edit the size and print using that software.

16 To copy the graph for use in other software, just click on it. Handles appear around the graph perimeter. Choose Edit>Copy, then switch to a graphics program, word processor, or other software and paste (Edit>Paste).

Gifts By State or Province

State/Province	Total Gifts
GA	$3,310.00
ID	$100.00
IL	$450.00
IN	$695.00
MA	$795.00
MO	$1,145.00
MT	$3,695.00
NC	$45.00
NH	$255.00
NM	$2,490.00
NY	$5,584.00
PA	$300.00
RI	$85.00
SC	$160.00
TX	$52,465.00
WA	$6,475.00
WI	$270.00
YN	$600.00
Total Gifts	**$78,919.00**
Average for State	**$1,753.75**
Count of States	**45**

Figure 7.44 Gifts by State or Province

This report lists all the states or provinces appearing in the current Donor List View, and calculates the total gifts for each one.

The gift calculation could be limited to a specific data range by using the Report Editor to insert formulas.

A graph version of this report is also available.

The Donor List View must be frontmost to use this report.

Gifts Last 365 Days

Donor Name	Total Giving Previous 365 days
Mr. John Chance	$100.00
Mr. Boake Tackman	$60.00
Mr. Edward Jones	$789.00
Mr. Francis Key	$300.00
Mr. Galvin Geffin	$678.00
Mr. Faustus Jones	$100.00
Mr. Richard Martin, Ph.D	$90.00
Mr. Harold Angel	$135.00
Mr. Louis Cyphre	$250.00
Ms. Ida Carmody	$250.00
Ms. Joanie Valens	$340.00
Ms. Doris Ruston	$600.00
Mr. Phillip Ruston	$25.00
Sgt. Tom Valens	$85.00
Dr. James Ruston	$150.00
Agent Dale Cooper	$300.00
Total Gifts	**$4,252.00**

Figure 7.45 Gifts Last 365 Days

This report lists each donor appearing in the Donor List View, and calculates their total gifts for the previous 365 days, counting back from the current date. Their is also a graph version of this report.

The Donor List View must be frontmost to use this report.

Gifts Previous Year

Last Name	First Name	Company	Total Gifts last Year
Allouette	Sam	Al Siete Corp.	$120
Angel	Harold	Angel Investigations	$85
Carmody	Ida	Drovers, Inc.	$15
Cyphre	Louis	Talent Investments Associates	$12
Geffin	Galvin	McDonald's #45501	$678
Jones	Faustus		$100
Key	Francis		$300
Martin, Ph.D	Richard		$90
Ruston	James		$15
	Phillip		$25
	Doris		$500
Valens	Tom	Los Angeles Police Department	$50
	Joanie	Decroix Photography	$75
Donor Count:	**13**	Total Amounts:	**$2,065**

Figure 7.46 Gifts Previous Year

This report displays each donor in the Donor List View with their total gift amount of the previous calendar year. Their is also a graph version of this report.

The Donor List View must be frontmost to use this report.

Ignore Omit Mailing Flag

This export creates the same export as that obtained with the Export menu command (Output menu>Export), except that records with the Omit Mailing flag **are** included in the export.

Keyword Join Table

This exports the Keyword/Donor ID pair for each keyword assigned to a donor. It is available only from the Keywords module. This is intended to help you move or copy data to another database. See the header row of the export for field labels, and the description that appears when selecting this export in the Advanced Reports window for more information.

In addition to the Keyword/Donor ID pair, the export contains the donor name, company name and keyword note. This makes the export useful for certain reporting needs. See "Exporting FUNDimensions to Another Database" on page 350 for another application of this export.

You can export a simple list of keywords, without the Donor ID assignments, by choosing Output>Export from the Keyword List View.

Membership First & Last

Last Name	First Name	Company Name	Date of First Membership	Current Member?	Class of Current or Last Membership
Angel	Harold	Angel Investigations	Aug 22, 2000	Yes	Family
Blistamozo	Johannsen		Jun 9, 1999	No	Business
Booth	Frank	Beaumont Hardware	Oct 5, 1997	No	Senior
Callahan	Harry	Tagamet Towel Co.	Oct 5, 1997	No	Individual
Carmody	Ida	Drovers, Inc.	Oct 10, 2000	Yes	Business
Chance	John	Presidio County	Aug 10, 2000	Yes	Business
Cooper	Dale	Yep Cola Co.	Dec 30, 1999	No	Individual
Dowd	Elwood	Histamine Company	Nov 14, 1999	No	Business
Fall Hallows	Gill-Ips	Rilepp Failure Group	Dec 14, 1999	No	Individual
Flbrew	Richard		Jan 14, 2000	No	Business
Hildegard	Fidelius	Ramsay Corp.	Jan 9, 1997	No	Business

Figure 7.47 Membership First and Last

This report lists all the donors in the Donor List View, along with the date of their first membership ("member since") and their current membership status. In the last column, the report displays the membership class (aka "level") of their current or most recent membership.

Membership General Statistics

This report presents the following statistics in either a printed report, tab-delimited export suitable for use in a spreadsheet, or as a series of graphs:

1 Total members. This is the sum of Running Current members and Sign-ups below.

2 Running Current members. These are members who were members before the period started, and whose memberships extended past the end of the period.

3 Sign-ups. This is the count of the number of membership records with "Date paid" falling within the period.

4 Renewing Members. These are members who renewed their memberships during the period. Renewals are counted whether the membership expired before or during the period.See page 199 for further explanation.

5 1st time members. If any member buys more than one membership, each membership will be counted.

6 Lapsed in Period members. These are memberships that expired during the period, and were not also renewed in the period. Even if they renew in a later period, the membership will still appear in this count.

7 Lapsed To Date Members. These are memberships that lapsed in the period and have never been renewed as of the date the report was made.

8 Renewal Rate. using the terms above, this is the ratio of Lapsed in Period members, to the sum of Renewing and Lapsed in Period members. See page 199 for further explanation.

9 Membership Revenue. This is the sum of renewing and 1st time membership dues.

The report allows specification of a start date, period length of months, quarters or years, and the number of periods. It uses the current selection as a basis for the report. (For additional, simplified membership statistics, see page 147.)

To produce this report, follow this procedure:

10 Do File>Memberships.

11 Do any steps you like to produce the current selection you want to use in the report. This might include a search or manual selection of records; for more information on creating current selections, see "Selecting Records" on page 55.

12 Do Output>Advanced Reports, and choose General Statistics from the Reports, Graphs, or Exports themes. For a screenshot of the Advanced Reports window, see Figure 13.2, "Advanced Reports window" on page 341.

13 If you selected from the Reports or Exports themes, you get this dialog:

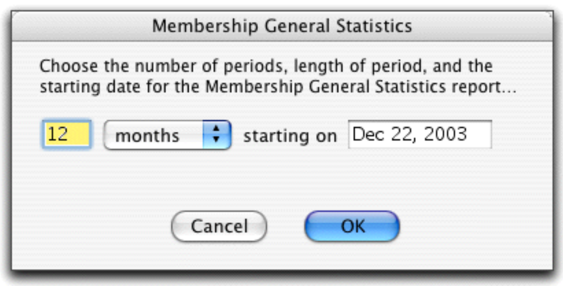


Figure 7.48 Membership General Statistics dialog

If you selected from the Graph theme, the information in the dialog is located in the graph window.

Click OK.

14 The standard print dialogs appear for a report. The standard Save File dialog appears for an export. If you selected Graphs, a graph window appears. Samples of the report and graph appear below.

Your Organization Name Here

General Membership Statistics by month for the period 1/1/03 to 12/31/03, printed on 12/22/04. "na" appears in Renewal Rate when no memberships expired in the period.

Page 1

Period Number	Period Start Date	Period End Date	Total Members	Running Current Members	Sign-ups	Renewing Members	1st Time Members	Lapsed in Period	Lapsed to Date	Renewal Rate (%)	Membership Revenue
1	01/01/03	01/31/03	628	495	133	66	67	3	0	95.7	$27,130.00
2	02/01/03	02/28/03	741	611	130	106	24	2	0	98.1	11,015.00
3	03/01/03	03/31/03	892	722	170	157	13	2	0	98.7	10,745.00
4	04/01/03	04/30/03	1,083	877	206	158	48	2	0	98.8	28,070.00
5	05/01/03	05/31/03	1,143	1,064	79	58	21	5	0	92.1	36,885.00
6	06/01/03	06/30/03	1,167	1,109	58	23	35	29	1	44.2	7,090.00
7	07/01/03	07/31/03	1,186	1,078	108	82	26	21	0	79.6	11,020.00
8	08/01/03	08/31/03	1,208	1,123	85	59	26	18	0	76.6	10,465.00
9	09/01/03	09/30/03	1,257	1,143	114	55	59	20	0	73.3	75,860.00
10	10/01/03	10/31/03	1,416	1,154	262	125	137	36	0	77.6	170,578.00
11	11/01/03	11/30/03	1,572	1,380	192	82	110	14	1	85.4	31,920.00
12	12/01/03	12/31/03	1,711	1,537	174	56	118	11	1	83.6	85,660.00
	01/01/03	12/31/03	1,167	1,024	1,711	1,027	684	163	3	83.6	$506,438.00

Report Grand Totals are sums of the periods, except Total Members, Running Current Members and Renewal Rate, which are the average of the periods.

Figure 7.49 Membership General Statistics report

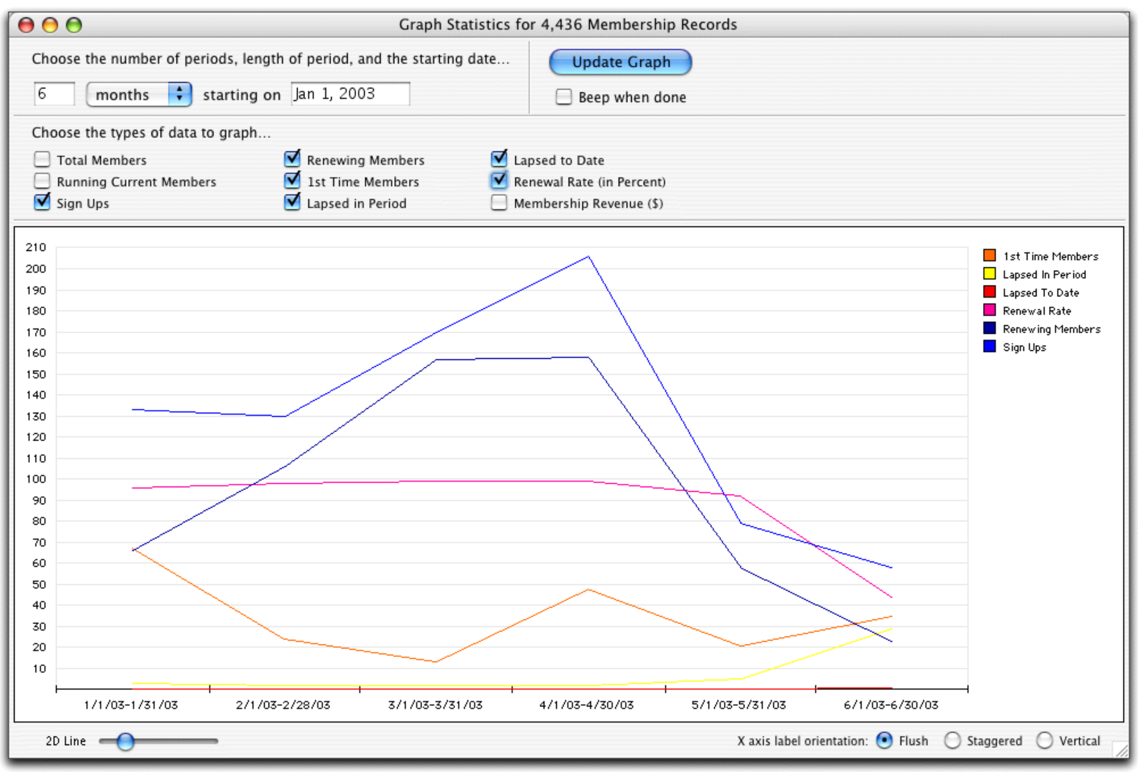


Figure 7.50 Membership General Statistics graph

In calculating renewal rate‡‡, General Statistics has to address the question: how should a renewal be counted if the member renews outside the time period in which they lapse? For example, suppose one of the time periods in the report is May 1-31, 2005. John Doe's membership expires in that period, but he does not renew until September. Should we count the renewal in the report for September, or in the report for May?

In the General Statistics report, answer to that question is to count the lapse in May, lowering the renewal rate in that month; and count the renewal in September, raising the renewal rate in that month. The expiration/renewal cycle shows up twice in the statistics: once as a lapse, a second time as a renewal.

This leads to an interesting side effect: if you get memberships renewed promptly, your average renewal rate will be higher. This is because, in contrast to the example cited in the paragraph above, promptly renewed memberships *never* show as lapsed members: they show up only once in the statistics, as a renewal.

For further information on membership statistic calculations, see "Membership List Statistics Calculations" on page 148.

Observe Omit Mailing Flag

This export creates the same export as that obtained with the Export menu command (Output menu>Export), except that records with the Omit Mailing flag **are not** included in the export.

‡‡ Renewal rate is ratio of Lapsed in Period members, to the sum of Renewing and Lapsed in Period members.

Overdue Pledges

This report is designed to aid you in restoring overdue pledges but may be used with any pledge or pledges. It provides selected information about the donor combined with pledge information. Up to three pledges per page are printed, and several overdue statistics appear at the end of the report.

To produce this report, select the pledges you want to include from the Pledge List View. If you want only overdue pledges on this or any report, use the Overdue command in the Find menu to reduce the list. Then choose the Output>Advanced Reports. Select Overdue Pledges from the Reports list, then click the Print button. The following page shows an example of this type of report.

Your Organization Name

Confidential report of 3 pledges, printed 7/22/95 by Bill Moffit page 1

Pledger Information			Pledge Information		
First Name	Hannibal		**Deficit**	**$30.00**	Payment $20.00
Last Name	Schecter		**Due Since**	**May 5, 1995**	Frequency Bimonthly
Company			Pledge Date	Mar 5, 1995	Campaigns General
Home Phone			Pledge Amount	$250.00	Fund General
Work Phone			Balance	$240.00	Solicitor Gighamsten Filbre
Category	Archive				
Type	Mailing List				
Yr Birth		Do Not Call ☐			
Pledge Note					
Keywords	Song Club Bookbuyers club Spring Dance Costumes n Cocktails				
First Name	Floyd		**Deficit**	**$50.00**	Payment $30.00
Last Name	Thursby		**Due Since**	**Apr 12, 1995**	Frequency Quarterly
Company	Turing Gear Co.		Pledge Date	Jan 12, 1995	Campaigns Storytelling Party '93
Home Phone	212.555.4119		Pledge Amount	$200.00	Fund Research
Work Phone	212.555.1941		Balance	$160.00	Solicitor Incarcero Himst
Category	Prospect				
Type	Major				
Yr Birth	56	Do Not Call ☐			
Pledge Note					
Keywords					
First Name	Harry		**Deficit**	**$10.00**	Payment $10.00
Last Name	Callahan		**Due Since**	**Jul 14, 1995**	Frequency Monthly
Company	Tagamet Towel Co.		Pledge Date	Apr 14, 1995	Campaigns General
Home Phone	415.555.7119		Pledge Amount	$100.00	Fund Research
Work Phone	415.555.1971		Balance	$100.00	Solicitor Incarcero Himst
Category	Inactive				
Type	Major				
Yr Birth		Do Not Call ☐			
Pledge Note					
Keywords	Fall Ball Costumes n Cocktails				

Overdue Total	$90.00
Records in report	3
Average Time Overdue (Days)	62
Longest Time Overdue (Days)	101

End of Report

Figure 7.51 Overdue Pledge Report example

Pledge Projection

Pledge projection is a function designed to aid you in forecasting pledge income. Working from any selection of pledges, the command will calculate each pledge payment, then add the payments for each month or quarter together. It then outputs the results to an on-screen summary for each period, a listing of each payment sorted and subtotaled by period, and/or a graph depicting income levels for each period.

This item is accessed from the Advanced Reports menu command *only* while in the Pledges module. It produces the following dialog box:

Four areas in this dialog offer options for creating your pledge projection report:

1 Set the time period for which you want a projection.

2 Select your desired output format(s) here.

3 Specify handling of existing payments here.

4 Set your preference for handling overdue pledges here.

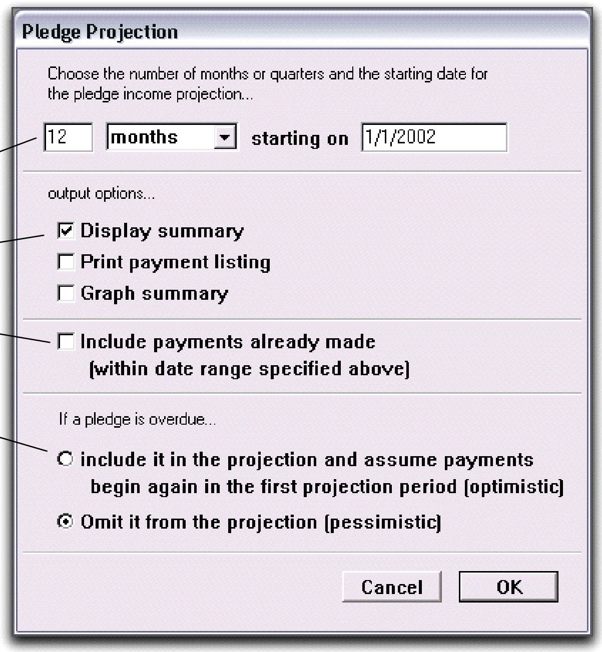


Figure 7.52 Pledge projection dialog

Depending on your output choices in the checkboxes, you will be presented with:

- A scrolling list of totals for the month or quarter periods within the date range you typed, the quantity of payments for each period, along with a grand total for the period. This is an example:

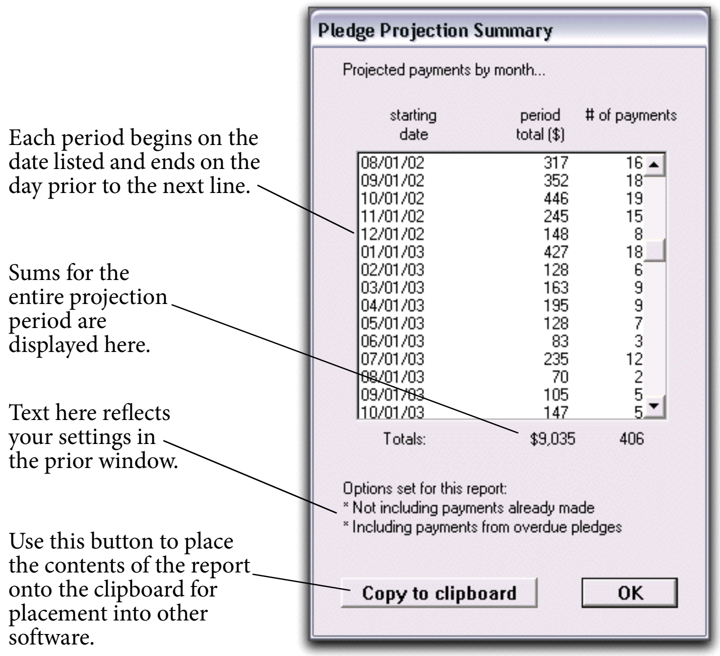


Figure 7.53 Pledge Projection Summary example

- A printed listing of each projected payment, with donor name, date and amount of payment, and other information. You also get break areas within the report containing subtotals by month or quarter and a grand total for the whole date range. The rightmost column of the report displays a checkbox indicating if a projected payment is actually already paid; this will occur only if the date range you specify for the report begins prior to the current date or prior to an existing payment for the selected records, or if a payment has been post-dated. Payments already paid are totaled in the report and a final total is given for amounts unreceived. An example is shown next.

.

Your organization name here Page 1

Confidential report of 19 projected pledge payments for the period 1/1/95 to 1/1/96, printed 6/2/97

Payment Date	Amount	Pledge ID	Donor name	Company	Donor ID	Paid
1/1/95	40	4	Booth, Frank	Beaumont Hardware	25	☐
1/1/95	10	76	Dowd, Elwood	Histamine Company	235	☐
1/1/95	10	82	Rizzo, Ratso		240	☐

$60 Total for the period beginning 1/1/95 and ending 1/31/95

2/1/95	40	4	Booth, Frank	Beaumont Hardware	25	☐
2/1/95	10	76	Dowd, Elwood	Histamine Company	235	☐
2/1/95	10	82	Rizzo, Ratso		240	☐
2/28/95	40	4	Booth, Frank	Beaumont Hardware	25	☒

$100 Total for the period beginning 2/1/95 and ending 2/28/95

3/2/95	40	4	Booth, Frank	Beaumont Hardware	25	☒
3/3/95	30	4	Booth, Frank	Beaumont Hardware	25	☐
3/3/95	10	76	Dowd, Elwood	Histamine Company	235	☐
3/3/95	10	82	Rizzo, Ratso		240	☐
3/5/95	0	15	Bates, Norman	Bates Motel	23	☒
3/9/95	40	4	Booth, Frank	Beaumont Hardware	25	☒
3/9/95	20	4	Booth, Frank	Beaumont Hardware	25	☒

$150 Total for the period beginning 3/1/95 and ending 3/31/95

7/30/95	10	82	Rizzo, Ratso		240	☒
7/30/95	10	82	Rizzo, Ratso		240	☒

$20 Total for the period beginning 7/1/95 and ending 7/31/95

8/22/95	10	82	Rizzo, Ratso		240	☒

$10 Total for the period beginning 8/1/95 and ending 8/31/95

9/24/95	0	15	Bates, Norman	Bates Motel	23	☒

$ Total for the period beginning 9/1/95 and ending 9/30/95

12/2/95	150	4	Booth, Frank	Beaumont Hardware	25	☒

$150 Total for the period beginning 12/1/95 and ending 12/31/95

$490 Total payments this report

– $320 Total already paid, this report (Paid checkbox = true)

$170.00 Projected income

End of report

Figure 7.54 Pledge Projection Report example (4 pledges projected)

♦ An on-screen column bar chart of the totals for the month or quarter periods in the specified date range. This can be printed by doing Output>Print Graph. This is an example:

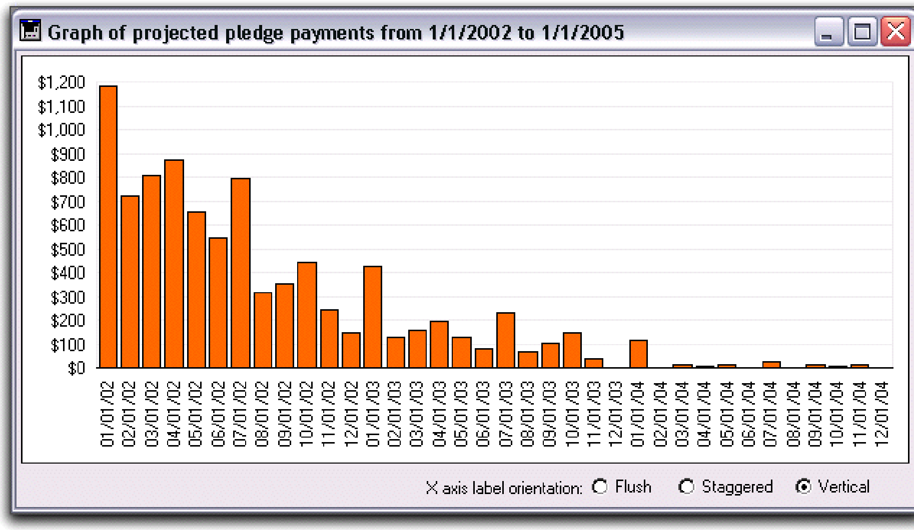


Figure 7.55 Pledge Projection Graph (projected pledge income)

Relationship Join Table

This exports the Relationship Name/Donor ID pair for each relationship assigned to a donor. It is available only from the Relationships module. Also exported from the Relationships Join Table are the Constituent Type, Constituent Note, Relationship ID, and the Primary status. Additional fields in the export are not from the Relationships Join Table but are included to extend the application of this export to meet certain reporting needs: these fields are donor name, company name, mailing information***, and relationships note. See the header row of the export for field labels, and the description that appears when selecting this export in the Advanced Reports window for more information.

See "Exporting FUNDimensions to Another Database" on page 350 for another application of this export.

You can export a simple list of relationship names, without the Donor ID assignments, by choosing Output>Export from the Relationship List View.

*** For details on these fields, see Table 13.1, "Export Fields (except 2nd Thank You Recipient, Event Manager and Year End Letter Exports)" on page 348.

Solicitor and Campaign Totals

The next example displays total amounts raised by each solicitor for a series of campaigns. Similar templates are provided for each of the gift modules. The amount raised in each campaign is listed in addition to the total for each solicitor and a grand total for the report.

Donation Amount	Campaign	Solicitor
$2,500	Total for Awards Dinner '96	
$1,201	Total for General	
$200	Total for Movie festival '95	
$550	Total for Raft 'n camp '97	
$4,451		**Total for Gighamsten Filbrew**
$117	Total for Dance Aug '95	
$600	Total for Raffle May '96	
$717		**Total for Incarcero Himst**
$750	Total for Awards Dinner '96	
$100	Total for Raffle May '96	
$500	Total for Tee Off '97	
$1,350		**Total for Mistamra Rilbedoo**
$6,518	Total Donations	

Figure 7.56 Totals by Solicitor and Campaign

This Donation, Membership or Pledge List View must be frontmost to make this report.

You could modify this report in any of the ways below—be sure to save the modified template to another file, so that the original template is available untouched for future editing. To display totals for campaigns and subtotals for Solicitors (instead of the other way around), do this:

1 In the Sort Order area of the report editor, click and drag the Solicitor item underneath the Campaign item. This will reverse the order in which the two

columns are sorted when you print the report. When you're done with this step, the report editor looks like this:

Drag items the Solicitor item under the Campaign item.

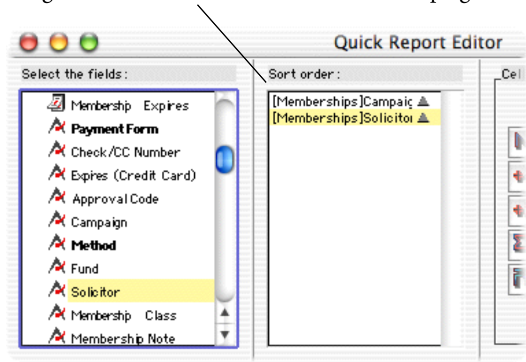


Figure 7.57 Sort Order area of Report Editor

2 By copying and pasting, move "Total for #" from the Campaigns column to the Solicitor Column. Do not change the row (Break 2).

3 By copying and pasting, move "Total for #" from the Solicitor column to the Campaign Column. Do not change the row (Break 1).

4 When you print or preview the report, a total is displayed for each campaign, with subtotals for each solicitor.

CHAPTER

8

Calendar & Scheduling

The Calendar and Scheduling Module assists fundraisers in organizing and coordinating their efforts, and helps ensure important fundraising actions are performed at the ideal time. You can set reminders, display multi-day banners or pictures, drag and drop events between days, and use color to help you organize your schedule.

For purposes of this manual, an "event" is any calendar item, such as an appointment, call, meeting, to-do item, fundraising event, etc.

There are three main windows you will work with in the Calendar and Scheduling Module, discussed in detail below:

- The Calendar window, displaying the traditional month-on-a-grid layout (next section).
- The Event Input Window, where you create and edit calendar items (page 212).
- The Reminder window, which can be programmed by you to appear anytime in advance of a calendar item (page 216).

Opening the Calendar Window

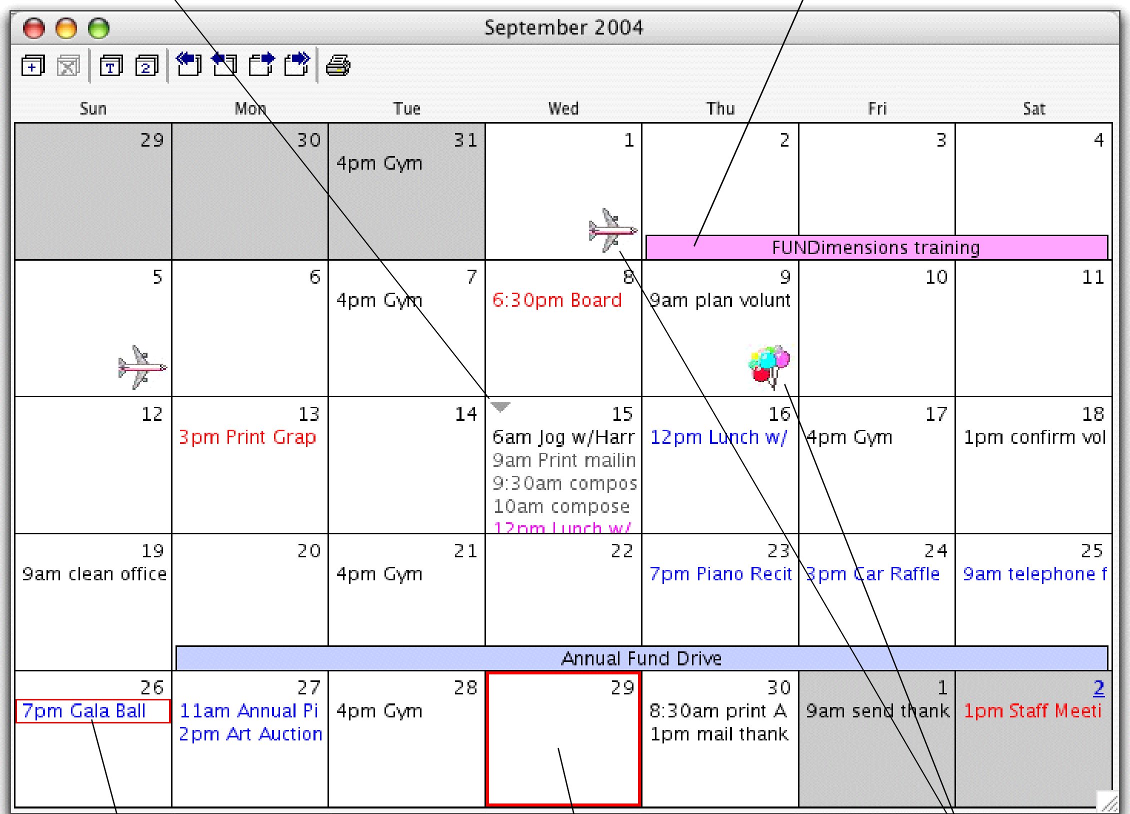
You can start the calendar in 3 ways:

- Choose File menu>Calendar, or
- Type CONTROL-9 (Windows), COMMAND-9 (Mac), or,
- Set the calendar to appear when the software is started, by choosing File menu>Preferences, clicking the new Calendar tab, and checking Always Show Calendar at Startup. Then select one of the options: to open the Calendar on top of other windows, or behind them. Click OK to save your settings.

Doing any of the items above (the last item requires a re-launch to take effect) opens the Calendar window, as shown in this example:

Arrows indicate more items than will fit in the current day box. Use the arrows to scroll events, or enlarge the calendar.

Banners are used to display events that last more than one day.



Most events are displayed as text. This event is bounded in red because it was clicked on (selected). You must do this before copying or cutting an event

When you click once in an empty area of a day box, it gets a red highlight to indicate it is selected. You must do this be fore pasting an event from the clipboard

Pictures may be used to display an event. A selection of pictures are included, or you can use your own.

Figure 8.1 Calendar window

Use the arrow buttons (upper left) to navigate between month and years. The outside buttons change the year, while the inside buttons change the month. The currently-selected month and year are always displayed in the title bar (top) of the window.

To jump to a specific date, click the “2” button and type the date. Clicking OK jumps to that year and month, and highlights the day with a red outline. Alternately, do Find>Date. You can use the same date shortcuts as are used elsewhere in the program; see “Date Entry” on page 49 for a listing of them.

The current day is highlighted in blue, bolded and underlined. You can always use the “T” button (upper left) to display the current day (alternately, do Find>Date). The calendar switches months as necessary and a heavy red outline appears around the current day.

To display the details of an event or to edit the event, double-click it in the Calendar. This opens the Event Input Window, described below. To open a second event, just double-click it in the calendar; the new event opens in the same window as the previous event. To open the second event in it's own window (so that you have two Event Input Windows open at the same time), select the second event in the calendar and do Records>Open In Second Window.

To delete an event, click on it. A red outline appears to indicate it is selected. Then click the "x" button (upper left) or do Records menu>Delete Event.

Scroll arrows appear if there are more text events than fit in a day box. (See August 20 in the screenshot above.) Click the scroll arrows to display the hidden events, or enlarge the Calendar by clicking the grow box (upper left on Mac OS X, upper right on Mac OS 9 and Windows), or dragging the lower right corner of the Calendar window. (It is possible for banner events to hide text and picture events. No scroll arrows appear in that case.)

To print the current calendar window, click the Print button (top of window), choose Print Calendar from the Output menu, or type CONTROL-P (Windows) or COMMAND-P (Mac).

Drag and Drop in the Calendar

Any event in the calendar can be dragged to another day, including banners and picture events. This changes the date of the event.

When you drag an event, if you hold down the ALT key (Windows) or the OPTION key (Mac), the event is *duplicated*, rather than moved.

Cut, Copy and Paste in the Calendar

Copy, Cut and Paste in the Edit menu allow you to move or copy events across months or years (unlike drag and drop, which is limited to the days displayed in the month you are dragging from).

- To enable the Copy and Cut items, click on any event to select it. Both menu commands place a copy of the event onto the clipboard. The Copy menu command leaves the original event intact, while the Cut menu command removes the original event.
- To activate the Paste menu command, first copy or cut an event as described in the previous bullet. Then, select the day you want to paste into by clicking on it. A heavy red outline appears around the entire day box. Finally, do Edit>Paste.

You can repeat the paste procedure for other days, as many times as you like.

When an event containing information in the Event Manager is cut or copied, the Event Manager information is included when the event is pasted. This makes it easy to establish a template for creating new fundraising events, conferences, etc. See "Event Manager Module" on page 217 for more information.

Searching the Calendar

You can search the events on the calendar for the occurrence of any text. To perform the search, do Find>Basic from the calendar window, enter the text you want to find, and choose whether to search forward or backward. The calendar changes months if necessary and highlights the first event record found with a match. To proceed to the next match, perform Find>Find Again. When the last match is found, the program beeps if you attempt to continue searching.

You can specify the day on which the search starts by selecting an event or day box before choosing Find>Basic. Otherwise, the search is performed from the first or last day currently showing on the calendar.

Creating an Event

Double-clicking any empty area of a day box creates a new event and opens the Event Input Window (Figure 8.2) with that date filled in. The upper part of day boxes is always empty for this purpose (to the left of the day number), even if events occupy the rest of the day.

You can also create a new event using the "+" button (upper left); in this case, you must type a date in the Event Input Window.

Doing either of the procedures above, or double-clicking any picture, banner or text event in the calendar produces the Event Input Window:

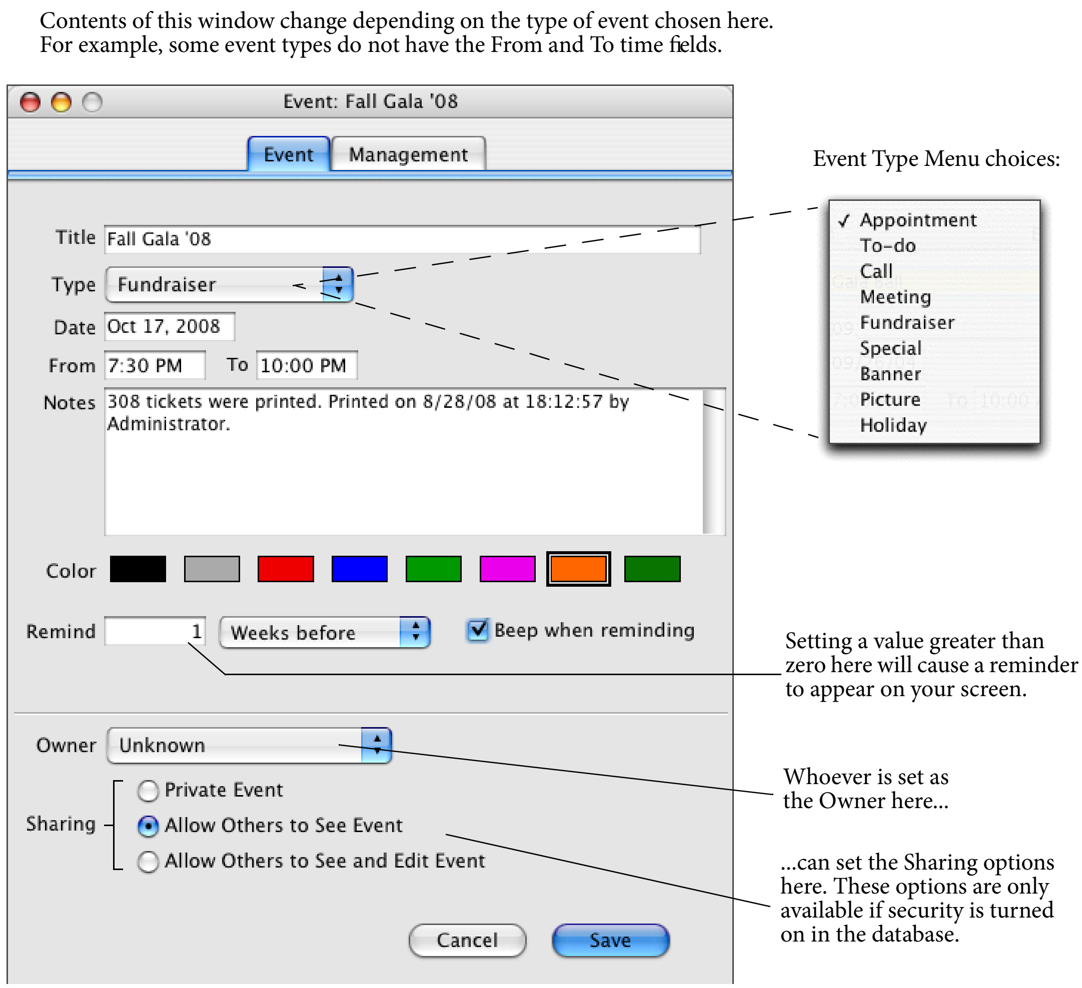


Figure 8.2 Event Input Window

The contents of the Title field appear at the top of the Event Input Window and in the Calendar. Use the TAB key or mouse to move from field to field.

You select the type of event from the Type popup menu. This may change the options available elsewhere in the window:

- Banner, Picture and Holiday event types do not have From and To times.
- Picture events have a popup menu for selecting a picture, and a field for displaying the current picture, or for pasting a picture from the clipboard.
- To-do and Call event types have a Status popup menu, where you can indicate the event is Not Done, In Progress, or Done. There is also an Auto-Forward checkbox, which causes the event to stay in the current day until it is marked Done, or until the Auto-Forward checkbox is unchecked.

The keyboard shortcuts for entering dates in other parts of the software work in the Date field, too. See “Date Entry” on page 49 for a listing of shortcuts.

You can select a color for the event by clicking on the color. Banner events have a different color palette than other events, while Picture events have no color palette. The color you select is used to display the event on the Calendar and appears in reminders.

Using the popup menu, the reminder interval can be set as minutes, hours, days or weeks before the event. If the event type does not have a start time (Banner, Picture and Holiday events), only day and week intervals are available. Reminders appear as a dialog box (Figure 8.4) with an optional beep sound: see below for more information.

FUNDimensions remembers your entries in each new event record for event type, start time, event duration, and event sharing. These settings become default values for the next new event you create.

Picture Events

Pictures can be set by selecting Picture from the Type popup, then selecting a picture from the Picture menu, or pasting in a picture:

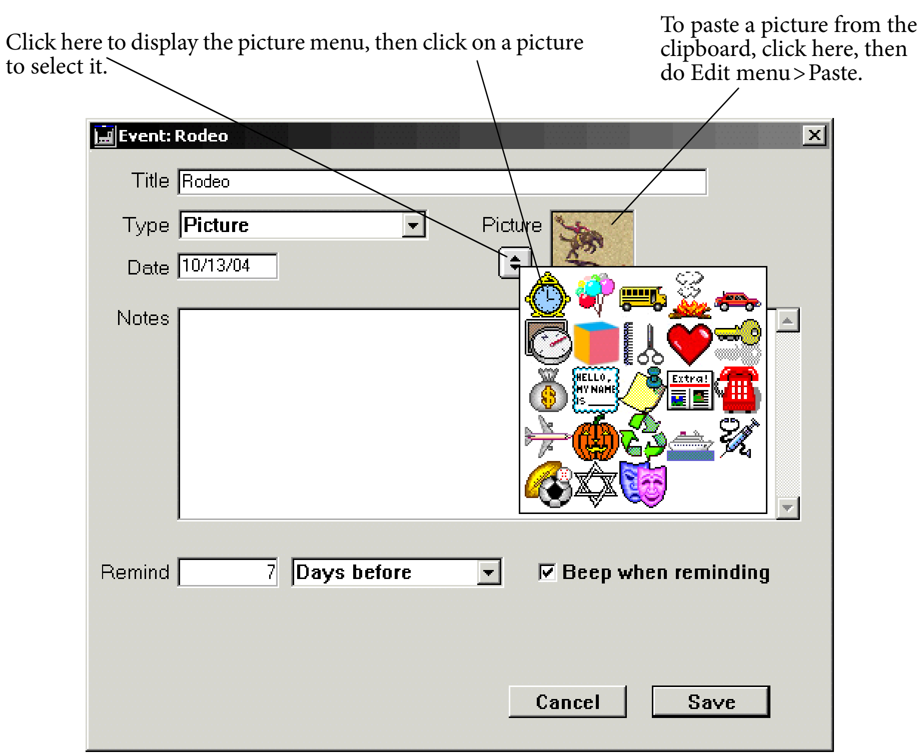


Figure 8.3 Event Input Window, Picture type

You can add pictures to the Picture menu by placing the picture file in the Images folder. This folder is in the same folder as the application. When displayed, the software will scale the picture to fit the size of the day box, or to the size of the actual picture file, whichever is smaller.

FUNDimensions loads all picture files in this folder into memory when the program is launched: placing lots of large picture files (high resolution, uncompressed, etc.) will dramatically increase FUNDimensions' memory requirements and may introduce a delay to the time when you can open the first Event Input Window after launching. We recommend the use of small resolutions, minimum color depths, and a reasonable number of files in the Images folder. Maximum display size depends on the screen size and calendar window size, but resolutions over about 128 x 128 are likely more than needed to provide good display.

Owner and Sharing Settings

If you have security turned on in your database, you have the option to hide specific events from other users, or show events these to them. If you let others see the event, you have the option to allow them to edit the event, or restrict them to viewing the event and setting a reminder for it. To exercise these options, do one the following:

- To hide and event from other users, choose Private Event. Only you, or someone logged in with your user name, will be able to see the event on the calendar, or edit the event.
- To let other users see an event, but not edit the event record, choose Allow Others to See Event. They will be able to open the event in the Event Input Window and see all details of the event, but won't be able to make changes *except to set a reminder for it.*
- To give full viewing and editing access, to everyone, select Allow Others to See and Edit Event.

A user's access to editing an event may also be limited by their general access privileges; a user must be assigned to the Edit level or higher to edit any event. If their access level is Browse or Data Entry, they will not be able to edit any events, regardless of the Sharing option. For more information on access privileges, see "The Access Privileges System" on page 235.

The Owner setting is used to determine who will see the event if it is a Private Event, or who will be able to edit the event if the Sharing option is Allow Others to See Event. By default, the Owner is the user who creates the event. There are several scenarios where you might want to change the owner:

- You want to put an event on someone else's calendar, but you don't want everyone else to see it. In this case, create an event, set the Sharing to Private, and change the Owner to the user name of the intended viewer. If you want the event on your calendar too, create the event, set the Sharing Option to Private, and leave yourself as the owner. Then use Copy and Paste (see "Cut, Copy and Paste in the Calendar" on page 211) to duplicate the event, and change the owner of one of the events to the other user.
- It is desired to reassign responsibility for updating events with the Allow Others to See Event sharing option. This would occur if someone who created these events is no longer using the database, or no longer responsible for a specific event.

In addition to the above, display of the Owner servers to inform other users of the person responsible for creating an event, and for updating an event set to **Allow Others to See Event**.

When changing the Owner of an event, any reminder set for the previous owner stays in place. The new Owner will need to set up their own reminder if they want one. If you are changing the ownership of an event and you don't want any reminder to come to you, set the Remind field to zero before saving the event.

Reminders can be set for any event a user can see, even if they cannot edit the event. Also, multiple users can each have their own reminder for any event. See "Reminder Window" on page 216 for help setting reminders.

Reminder Window

The reminder settings in the Event Input Window (see above) determine when and if a reminder is displayed, as in the example below:

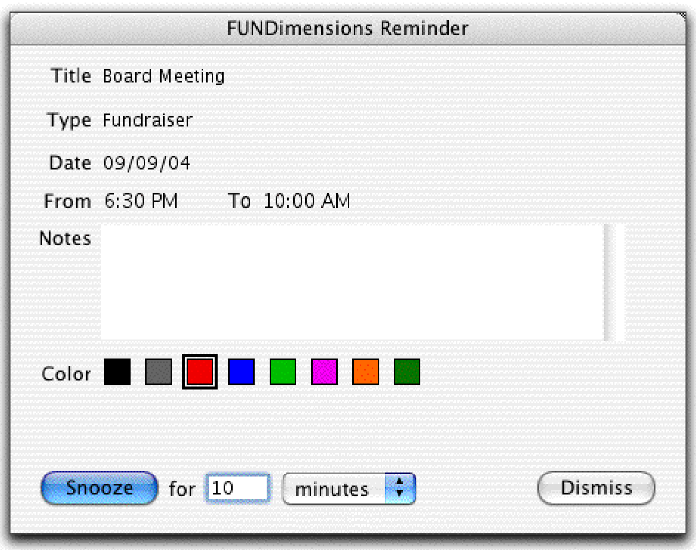


Figure 8.4 Event Reminder Window

The software checks every two minutes to see if any reminders need to be displayed. FUNDimensions must be running to display reminders.

Clicking the Dismiss button prevents any further reminders from appearing for that event, unless you open the Event Input Window and change the reminder settings there. Reminders are also re-activated if an event is dragged from a date prior to the current date, to the current date or to any date after the current date.

Clicking the Snooze button will result in another reminder being displayed at the snooze interval you set.

You cannot edit event information from this window, except To-do and Call event types, which you can mark as "Done", using the Mark as Done checkbox (not shown in the screenshot). The Mark as Done checkbox is only functional of you are the Owner of the event.

Tip: the reminder window remembers where it was when you last snoozed or dismissed an event, and reappears in the same place next time. You can use this to position the window where it is least likely to be blocked by windows of other applications if they are in front of FUNDimensions when a reminder is displayed.

Event Manager Module

You can use FUNDimensions' Event Manager module to design, organize, plan, communicate, implement, track and keep a record of your event and the fundraising done in conjunction with the event.

Benefits of Using the Event Manager

- **Design Your Event**. Use the Event Manager module to list the rooms, tables, teams, seating rows or other groupings of people. Add donors and prospects to those groups. Allocate seating by block or one seat at a time. Record special status, such as VIP, host, sponsor, or an advertiser at the event. Also record special comments for each group and registrant. Quickly access donor information directly from the event manager window. Use the integrated calendar and scheduling features to establish timelines.
- **Organize Your Event**. Quickly browse lists of registrants, or use the search feature to find them. Instantly identify tables that are full or have open seats, rooms that are over- or under-booked, and teams that are full or need additional members. Print lists showing each group, each registration or member, each seat, each VIP, each host or each advertiser. Identify large donors or long-time members and control their seating arrangement. Set reminders to prompt you to perform tasks at the right time.
- **Communicate Your Event**. Print envelopes, postcards or mailing labels. Quickly access phone numbers and email addresses. Confirm attendance, and record information about latecomers.
- **Implement Your Event**. Print personalized tickets, place cards and name tags. Print the envelopes for mailing tickets. Make last-minute reassignments to tables, rooms or teams. Easily change dates, times, and color-coding.
- **Track Your Event**. Record attendance. Get instant, continuous feedback on fundraising at the levels of individual donor, group and for the event as a whole. Continuous tracking of open and used seating for each group and for the event as a whole.
- **Keep a Record of Your Event.** Record attendance, ticket serial numbers and fundraising results for each donor, group and event. Review and update all event information from a single window and menu. Restrict or prohibit access to the information by certain users or groups of users.

Since Event Manager is part of the Calendar Module, event management automatically includes reminders, notes, color coding, and setting of access privileges for different users of the software.

Getting Started With the Event Manager

To begin managing your event, create an event:

1 Open the Calendar window by doing File menu>Calendar, or click on the Calendar to bring it forward.

2 Double-click on the day in the calendar when your event will occur. The Event Input Window appears:

Click the Management tab to open the window to the Event Manager.

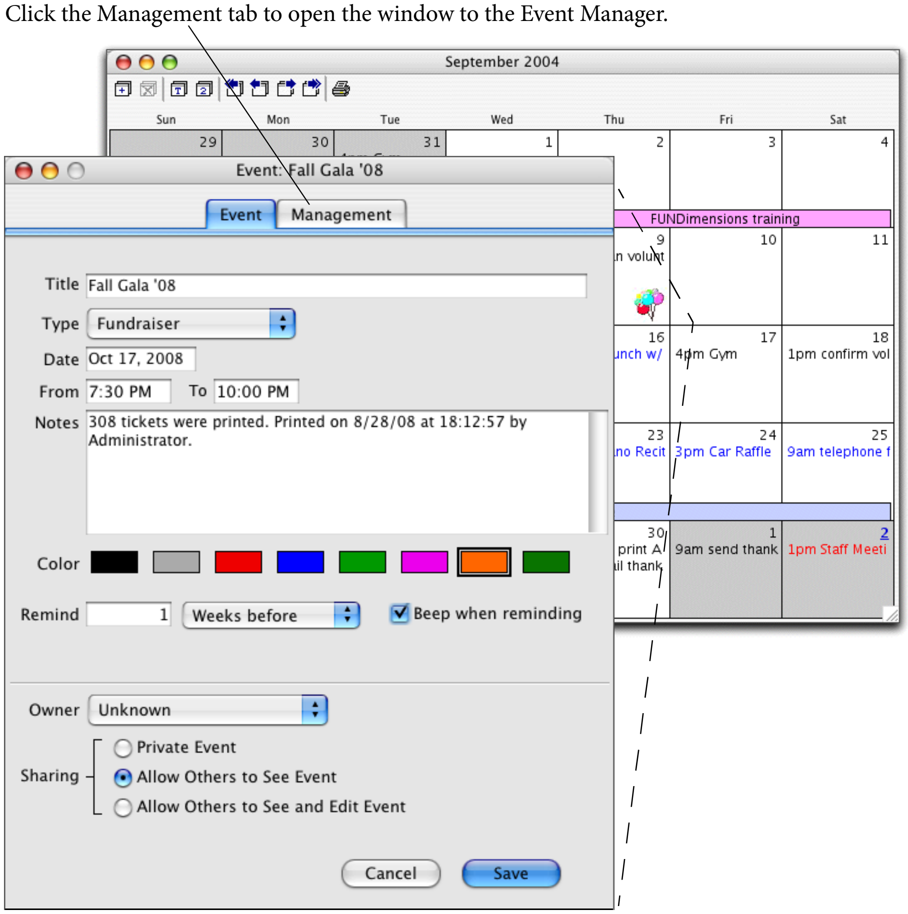


Figure 8.5 Creating a Calendar Event

3 Complete the fields in the Event window shown above. At a minimum, you must enter a Title for the event. For more information on this pane of the window, see “Creating an Event” on page 212.

4 Then click the Management tab in the Event Input Window. This will display the Event Manager:

Choose the type of grouping from this pull-down list, or enter a group type of your own (up to 11 characters).

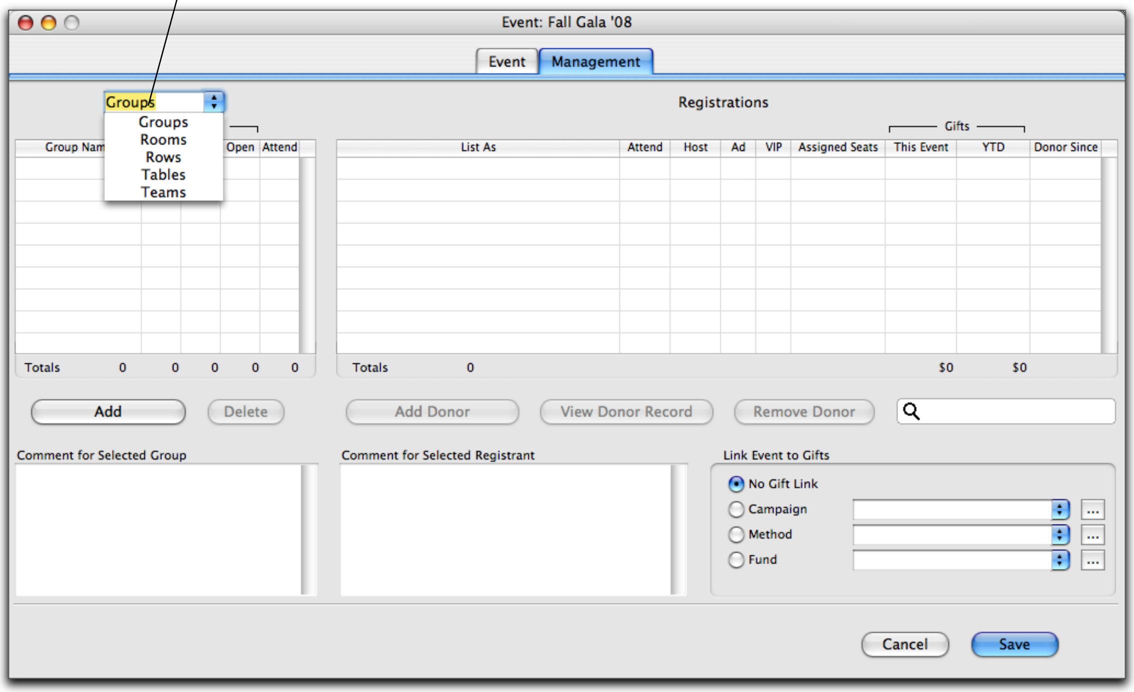


Figure 8.6 Setting the Group Type in the Event Manager

Identify the Group Types

The Event Manager window allows you to create groups of several types:

- ♦ Tables at a party, or
- ♦ Classrooms in a building, or
- ♦ Rows in an auditorium, or
- ♦ Teams in a golf tournament, or
- ♦ Other group names that you define.

You begin setting up your event by selecting a group type:

1 Click on the arrow to display the pull-down menu shown above (Figure 8.6), then click on one of the items in the menu.

2 If none of the choices in the pull-down menu are appropriate to your event, type your own group type in the field. Your custom group type can contain up to 11 characters. If you are not sure what group type to use, you can leave it as the default "Groups," and change it later.

Note: When you select Teams as the group type, the following changes are made to the Registrations list: the Host column is re-titled to "Sponsor", so that you can record registrants who are sponsoring a team; and the Assigned Seats column title is changed to Member #, for recording the number worn by team members.

Create the Groups

Now that you have defined the type of groups appropriate to your event, you create and name the groups that will comprise your event, as described below:

1 Click the Add button under the Group list, as shown below:

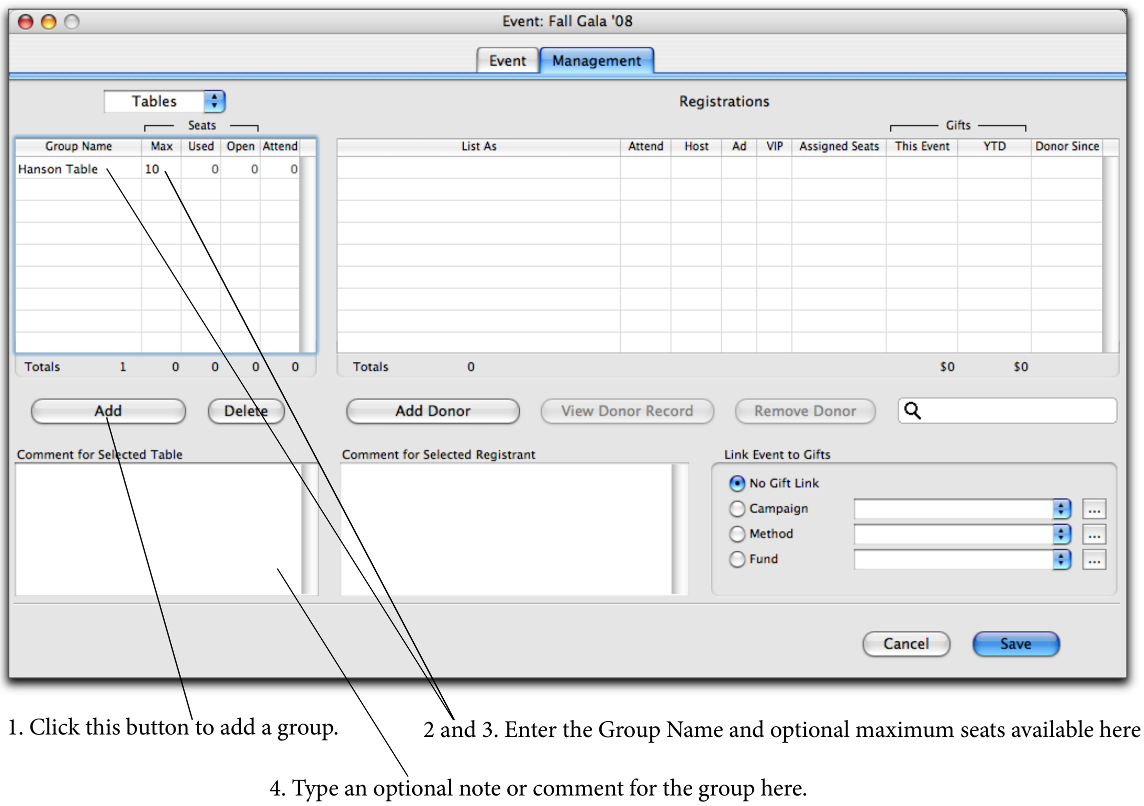


Figure 8.7 Creating a Group in the Event Manager

2 Type a name for the group in the Group Name column.

- Example names are Room 7, Table 7, Southwest Region Table, or Row B in an auditorium. For a competition, enter the names of each team, e.g. Rockwell Team. Group names can be up to 35 characters in length.

3 After typing the group name above, type the TAB key and enter an optional Maximum Seats for the group. For example, if the table holds no more than 10 people, type 10 in the Maximum Seats cell for that table. This will allow you to see where you have space remaining and where your groups are full, by allowing FUNDimensions to report the available seats for each group in the Open column of the list, and for the event as a whole underneath the Groups list.

- For teams, you may specify the maximum members for each team.

4 Add an optional comment for each group in the comment area underneath the Group list. Each group has it's own comment. Anything you enter here is displayed whenever that Group is selected in the Group List.

5 Repeat the steps above to add additional groups. To speed data entry and reduce typing, when you name groups of the form "group name" plus a number, e.g. "Group 1", then each subsequent group name will be automatically named group name and the previous group number plus one, e.g. "Group 2".

You can edit the group name and maximum seats anytime.

Once you have at least one group set up, you can assign donors to those groups. A donor assigned to a group is known as a "registrant". See the next section.

Creating the Registrations

A donor is registered into your event when they RSVP, purchase a ticket, show up at the the door, or otherwise agree to attend. Once you have used the steps above to create one or more groups, assign donors to a group with these steps:

1 Click on the group, table, or room where you want the donor seated, or the team where you want them to be a member.

2 Click the Add Donor button. A new window appears with a list of donors (see Figure 8.8 below). Select one or more donors from the list.

- To select more than one donor, hold down the SHIFT or COMMAND keys on Macintosh, or the SHIFT or CONTROL key on Windows. For detailed instructions on multiple selections in a list, see "Selecting Records" on page 55 of the User Manual.

3 Click the OK button to add the donors to the group.

In this example, Floyd Thursby is being registered into the Smith Table.

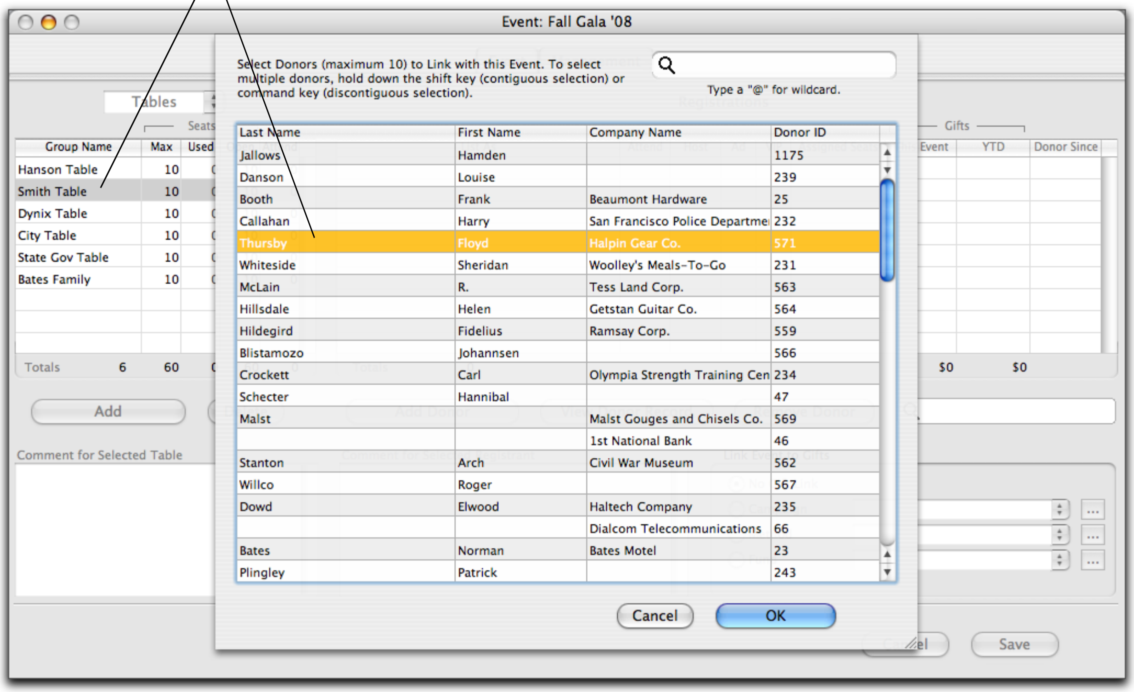


Figure 8.8 Creating a Registration in the Event Manager

4 For each donor added with the step above ("registrant"), edit their name as you want it to appear in your program, tickets or other printed materials in the List As column, if different than the name as it appears there.

5 Check the Attended checkbox to indicate a registrant attended the event. You may check this box in response to receiving their ticket.

6 Check the Host checkbox to indicate a registrant who is hosting or captain of the room, team or table.

7 Check the Ad checkbox to indicate a registrant who is an advertiser at the event.

8 Check the VIP checkbox to designate special status to a registrant.

9 To assign one or more seats to a registrant, type the seat number in the Assigned Seats column. You can type a series of seats by separating them with a comma, space or semicolon, e.g. 1, 2, 3 would reserve seats one, two and three at a table. To designate a range of seats, separate the first and last seats numbers of the range with a dash, e.g. 1-3 would reserve seats one, two and three at a table. For teams, you can use this area to specify ranking or designate a number for the team member.

10 Optionally, type a comment for the registrant in the area underneath the registrant list. Each registration has it's own comment.

11 To see an example of the Event Manager after several registrations have been added, see Figure 8.9, "Event Gift Display in Event Manager" on page 225.

12 Repeat the process above to create additional registrations, selecting the group where you want to add the registration first, the using the Add Donor button to create the registration.

If you make a mistake and add a registration to the wrong group, you can correct the problem without deleting and re-creating the registration. See "Drag and Drop of Registrations to Groups" on page 223.

The information you enter in the List As, Attended, Host, Ad, VIP, Assigned Seats and Comment fields are available to use in printing reports, tickets, placecards, and so forth. See below.

Getting a Table Cell Into Edit Mode

To edit a cell in the Groups or Registrants lists, double-click on the cell contents, pause briefly, then single-click. Once a cell is in edit mode, you can edit other cells without having to re-enter edit mode by typing the TAB key to move to the next cell, or SHIFT-TAB to move backward.

Drag and Drop of Registrations to Groups

You can change the group assignment of any registration by dragging a row from the Registration List at right onto a row in the Group List at left.

This is much easier than the alternative of deleting a registrant, then adding them back to a different group, with the additional advantage that drag and drop retains the registration comments, seat assignments and other attributes. (After drag and drop, you may want to check if the seat assignments do not conflict with other assignments in the new group.)

You can create duplicate registration records by holding down the ALT key (Windows) or the OPTION key (Mac) as you drag a registration to a group. In this case, the software leaves the original registration in it's group, and clones the registration into the group you drag to. All attributes associated with the registration are cloned, including the List As, Host, Ad, VIP, Assigned Seats and Comment values. Unless you intend these values to be identical in both registrations, you will need to edit the new registration.

Faster Creation of Repeating Events

If you host a similar event next year, you can use the current year's event as a template for the next year. Follow the instructions at "Cut, Copy and Paste in the Calendar" on page 211 to copy this year's event and paste it into the date next year in the calendar window. This will copy all groups and registrants, the gift link (see "Linking Gifts to Registrations" on page 224), all group and registrant comments, and the ticket printing setup. You can then edit these items as necessary to update them for next year's event.

Accessing a Registrant's Donor Record

You can open the donor input window (an example of this window is shown in Figure 1.3, "Donor Input Window, Contact pane" on page 6) for any registrant by clicking on a row in the registrant list to select it, then clicking the View Donor Record button.

If the underlying donor record for the registrant has been deleted (by a user of the software), the View Donor Record button will be disabled.

Linking Gifts to Registrations

Linking gifts (i.e. donations, pledges and memberships) to an event allows you to view the fundraising results for your event directly from the Event Manager window. You continue to enter gifts for the event in the same way as all other gifts are entered into the database. The Event Manager window will break out your fundraising results by individual registrant (in the This Event column of the Registrations List), by group (below the Registration List), and for the whole event (all groups: in the lower right corner of the Event Manager window, see Figure 8.9, "Event Gift Display in Event Manager" on page 225).

These results also appear in exports (see "Exporting Registrations" on page 231) and in printed reports (see "Printing Reports" on page 227).

To establish the link between an event and gifts, you specify in the event record the campaign, method or fund you are using to associate gifts with the event. Follow this procedure:

1 In the Event Manager window for the event, select Campaign, Method or Fund using the radio buttons, then click the ellipsis button (see callout in Figure 8.9 below) to the right of that to display the Choice List Editor window.

2 Type the new choice list item that you will use to associate gifts with the event, e.g. "Gala Banquet 2008." Click the Add button, then click the Select button to return to the Event Manager. For details about creating a choice list entry, see "Choice List Editing" on page 52.

After completing these steps, the software will begin displaying gifts associated with the event in the Event Manager window, as shown in the example below:

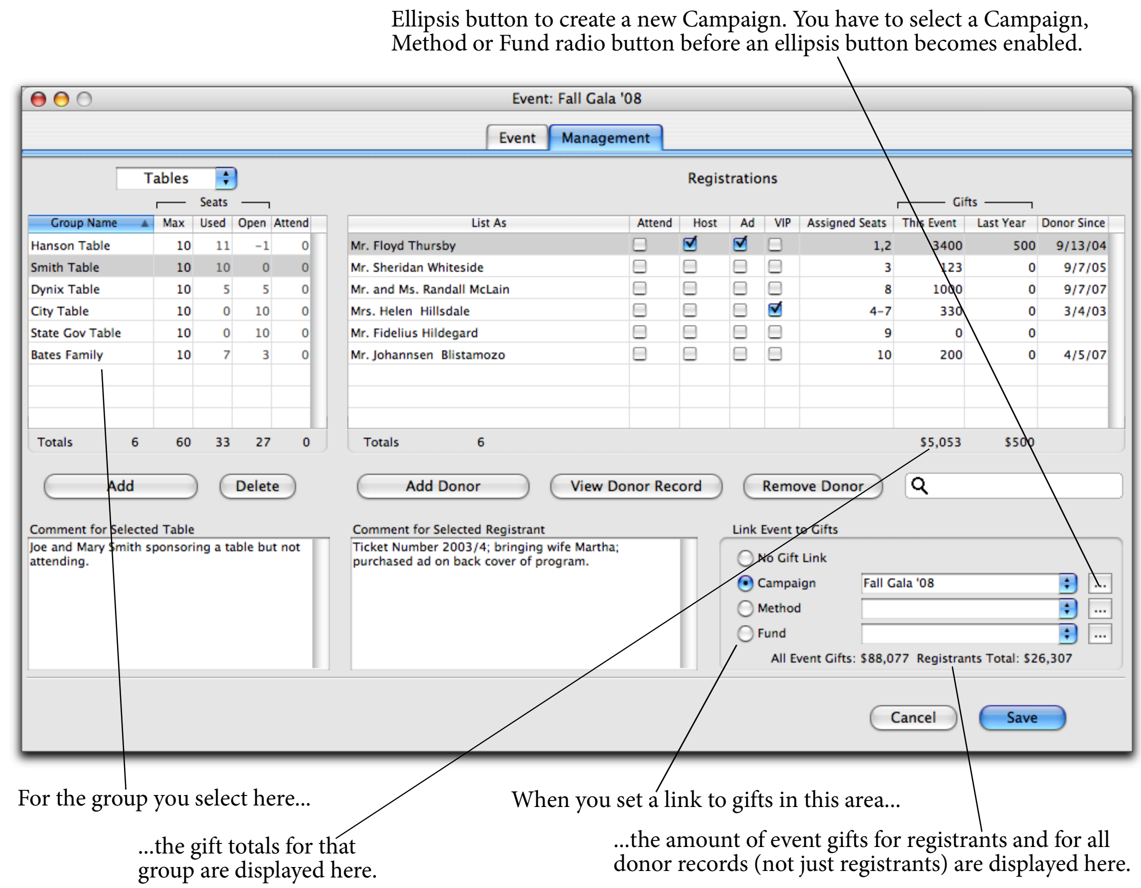


Figure 8.9 Event Gift Display in Event Manager

You create gift records in the same way as instructed in the User Manual, setting the Campaign, Method or Fund value in the gift record to match the one you set for the event. The gift is the linked to the event as soon as you save it. If the registrant makes more than one gift associated with the event, e.g. a donation and a membership, FUNDimensions displays the sum total of the gift amounts. Gifts associated with the event but not with a registrant at the event are also displayed in the "All Event Gifts" area of the Event Manager window, and the amounts displayed update automatically as gifts are added, deleted or edited.

Tip: to be sure a campaign, method or fund is set for each gift entered for an event, you can make that field mandatory for each new record. This prevents errors of leaving the field blank for a gift record, which would cause the gift not to be counted in the Event Manager window. To set a field as mandatory, do File>Administration >General tab. For complete instructions, see the User Manual.

You do not have to use this feature; the rest of the Event Manager will function without impediment if you ignore it.

Deleting Groups and Registrations

To delete a **group**:

- Select the seating group by clicking on it's row in the Event Manager window, then click the Delete button.
- Confirm the deletion in the following dialog.
  - This action **deletes all registrations** associated with that group.
  - To preserve registrations, drag the registrations to another group before deleting. See "Drag and Drop of Registrations to Groups" on page 223.

To delete a **registration**:

- Select the group that contains the registrant.
- Select the registrant by clicking on the row in the Registration List.
- Finally, click the Remove Donor button.

Searching Registrations

You can quickly locate a registration by the name of the registrant, their Donor ID, or by the contents of registrant comment field (which includes ticket numbers placed in comment fields by the ticket printing process: see "Printing Tickets" on page 229). Just type a few characters in the search field located in the Event Manager window, underneath the Registrations list.

Changing the Registration List Columns

Three options are available for customizing the display of registrants in the Event Manager window (as shown in Figure 8.6, "Setting the Group Type in the Event Manager" on page 219).

- The YTD column (second column from right) of the Registrant List can display either:
  - the Total Gifts of the registrant,
  - Year-to-Date gifts of the registrant,
  - Gifts Last Year of the registrant, or
  - the Total (membership) Dues for each registrant.
- You can set the last column of the Registrant List to display either:
  - the Donor Since date (date of the registrant's first donation or pledge),
  - their Member Since date (date of the registrant's first dues payment),
  - or the Donor ID number of the registrant.
- You can click on the List As column to split the column display to include the Donor Name exactly as it appears in the donor record.

To change any setting above, right-click on the column and choose from the contextual menu. On Macs with a single mouse button, CONTROL-click on the column instead.

Handling of Deleted Donor Records

It is possible to add a registrant, then later delete the donor record (see "Delete Highlighted & Delete Record" on page 295). You will be warned when attempting to delete any donor record that has associated registrations, but the software will allow you to perform the deletion.

When viewing the event, registrants with deleted donor records will affect the display as follows:

- The Gifts This Event column in the Registrations list will display zero for the registrant. This is because deleting donor records *always* deletes **all** gifts associated with the donor; this includes any gifts linked to the event. **The gift totals reported on-screen and in printed reports for the event will also reflect the deletion of these gifts.**
- If the underlying donor record for the registrant has been deleted (by a user of the software), the View Donor Record button will be disabled.
- The registration will display with a Donor ID of "Deleted" if you enable display of Donor IDs (see "Changing the Registration List Columns" on page 226).

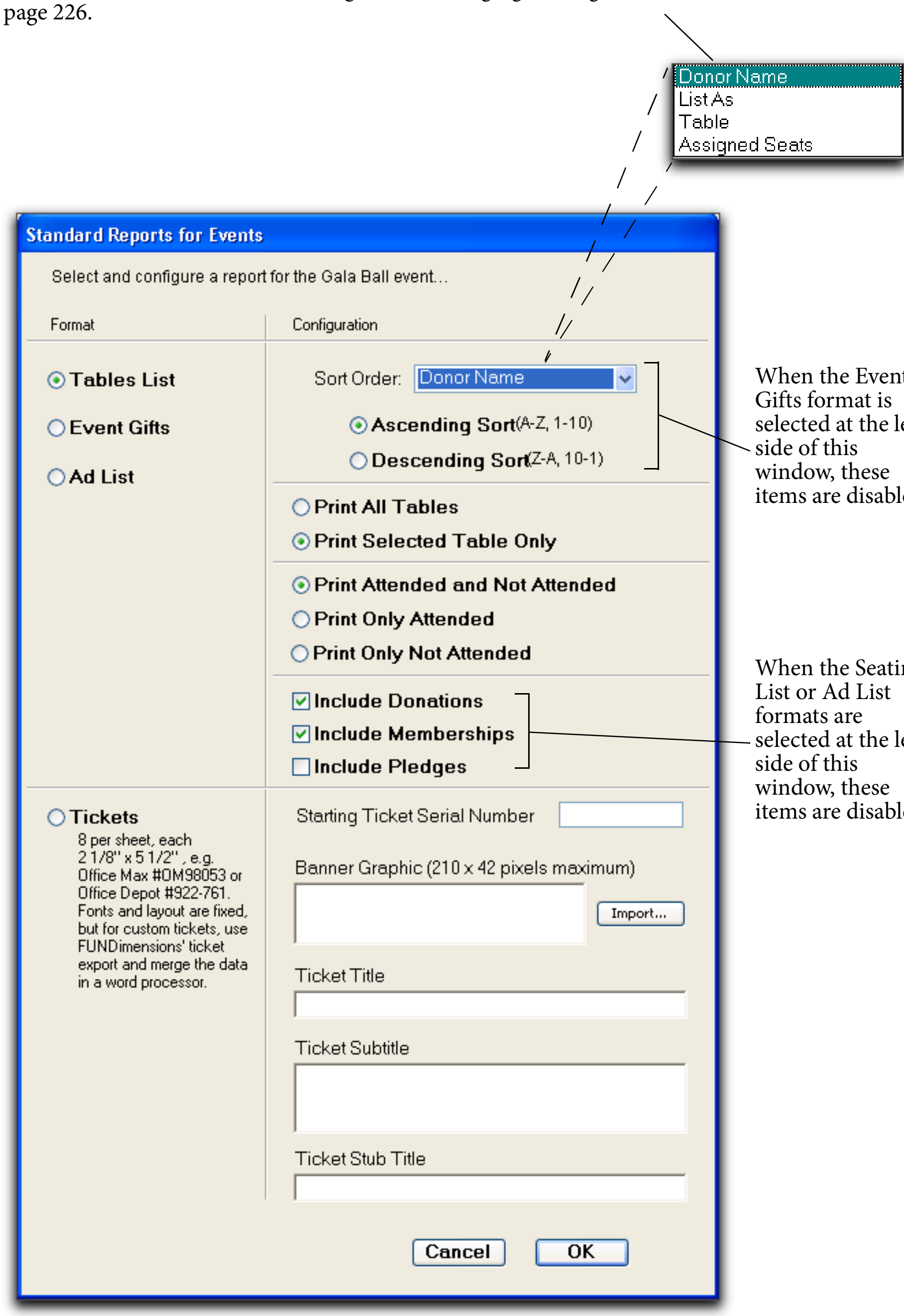
Printing Reports

You can print several report formats for an event:

- A listing of registrants, with their assigned groups and seats, comments, and the settings of the Host, Ad, and VIP flags. This is the Seating List format in Figure 8.10 below.
- A listing of registrants, with their gifts linked with the event (linking is set with the instructions in "Linking Gifts to Registrations" on page 224). This format is similar to the Donor Summary format described in the User Manual. This is the Event Gifts format in Figure 8.10 below.
- A listing of registrants who have placed ads in your event. Only registrants who have the Ad flag checked will be printed. The report displays their assigned seating groups and seats, comments, and the settings of the Host, and VIP flags. This is the Ad List format in Figure 8.10 below.
- A listing of registrants who attended or did not attend the event.
- A variety of reports created in the Report Editor. To use the Report Editor, do Output>Report Editor. Refer to "Report Editor" on page 361 for more information.

You can print a report for a single group, or for all groups in the event.To print any of these reports, open the Event Manager for the event. If you want to print only one group, click in the Group list at left to select it. Then choose Output>Print List. The following dialog appears:

List As uses the name you set in the List As column of the registrant List to establish the sort order. The Donor Name option uses the name from the donor record for sorting. You may show or hide the Donor Name in the Event Manager; see “Changing the Registration List Columns” on page 226.



When the Event Gifts format is selected at the left side of this window, these items are disabled.

When the Seating List or Ad List formats are selected at the left side of this window, these items are disabled.

Figure 8.10 Print List Dialog for Event Manager

Choose a report format at left, then configure the settings at right as you like. Click OK to proceed to the standard print dialogs.

Printing Tickets

You can print tickets to standard ticket stock, which is available pre-printed with serialized tickets and stubs, 8 per sheet. Each ticket and stub measures 2? by 5? inches. Office Max is one supplier of this stock. Their part number is OM98053. You could also use plain card stock and cut out the tickets.

Feed this stock with the stub end of the paper entering your printer last. If you are using a manual feed tray in a laser printer, you may need to reverse-collate the paper before loading; this is because, if the paper is loaded face down and the paper is drawn from the top of the stack, the serial numbers will not be in ascending order unless you reverse-collate the paper before loading.

FUNDimensions prints the registrant name, group and seat number on each ticket and stub. You can enter other text and a graphic to be printed on each ticket. For importing graphics under a Windows operating system, please install Quicktime software, which is a free download from Apple at http://www.apple.com/quicktime.

If you want a more flexible layout, such as control of fonts, additional graphic options, etc., use the Ticket Export option to export the name, and seating information, and perform a data merge in a word processor or other software. See "Exporting Tickets" on page 230.

To print tickets, follow this procedure:

1 Open the Event Manager for the event for which you want tickets.

2 Do Output>Print List. The dialog shown in Figure 8.10, "Print List Dialog for Event Manager" on page 228 appears.

3 Select the Tickets button.

4 If you want the serial numbers for each ticket stored in the in the registrant comments for each ticket printed, enter the starting (lowest) serial number (consult the paper stock) in the space provided.

5 Use the Import button to add a banner graphic to print on each ticket, if desired. (When running FUNDimensions under Microsoft Windows, you must install Apple Quicktime (free of charge) in order to allow most graphic file formats to be selected.)

6 Enter the event name or other text in the Title text field, and enter the event date, location and phone number or other text in the Subtitle field. You can also enter text to appear on each ticket stub (Ticket Stub Title field).

7 Click OK. The standard print dialog windows appear. For best results, designate label stock instead of plain paper in your print dialog.

Note: there may be more than one assigned seat per registration record: see "Creating the Registrations" on page 221. FUNDimensions checks each registration, and prints multiple tickets per registrant if required, so that there is one ticket for each seat assigned.

Exporting Tickets

If you want complete control over your ticket printing, or are using a third-party service to provide tickets, or want a report of the tickets printed, perform an export of ticket information following the procedure below. You might also do this if you had used the built-in ticket printing described above but also wanted to generate mailing labels or envelopes in order to mail the tickets.

1 Open the Event Manager for the event you want to export.

2 Do Output>Export. Select "Export Tickets" from the dialog box that appears.

3 When prompted, select a folder to receive the export file and type a name for the file, e.g. "Gala Banquet 2008 Ticket Export."

4 Click the Save button to perform the export. No progress dialog is shown; the export takes only a few seconds.

For each **ticket**, these fields are exported: Listing Name, Group, Assigned Seat, and Donor ID. (*Note*: there may be more than one assigned seat per registration record: see "Creating the Registrations" on page 221. FUNDimensions checks each registration, and exports multiple tickets per registrant if required, so that there is one ticket for each seat assigned.)

For each **registrant**, the following fields are also exported: Label Salutation #1,Label Salutation #2, Address Line 1, Address Line 2, City, State, Postal Code, Country, Letter Salutation and Email. These fields make it possible to prepare envelopes or labels for mailing tickets, or send an email confirming they have been sent. If a registrant has more than one ticket exported, the mailing and email information is only exported for the first ticket exported for them: this aids you in avoiding printing multiple envelopes or labels for the same registrant. (If a donor is registered in multiple groups, the export will still only contain one instance of their mailing and email addresses.)

Printing Mailing Labels and Envelopes

To print mailing labels to all the registrants at an event, open the Event Manager for the event, then choose Output>Labels. For more information, see "Printing Labels" on page 142.

Printing Place Cards

The Label Editor may be used to create a template and print place cards. Do Output>Labels. In the dialog that appears, click the Label Editor button (lower left). Instructions for working in the Label Editor are in the User Manual.

The above solution is effective for cases where only one place card per registrant is needed. However, the software does not restrict you to one seat per registrant; you can assign as many seats as you want to a registrant (see page 222); this has the effect of creating the registration as a subgroup. To print place cards where multiple seats are assigned a registrant, use the ticket export; see "Exporting Tickets" on page 230.

After exporting, merge the exported data to a place card template created in your word processor.

Exporting Registrations

You can export all the registrations for an event as a tab-delimited text file that can be opened in spreadsheet and text-editor applications. The information included in the export file allows for the creation of mail merge letters, charting or analysis of event-related gifts, and printing of custom lists.

To create the export file, follow this procedure:

1. Open the Event Manager for the event you want to export.
2. Do Output>Export. Select "Export Registrations" from the dialog box that appears.
3. When prompted, select a folder to receive the export file and type a name for the file, e.g. "Gala Banquet 2008 Export."
4. Click the Save button to begin the export. An indicator informs of you the export progress, and a Results window appears when the export is complete.

The export file includes many of the same fields that appear in the standard donor module export (see the User Manual). It also includes a field containing the Gifts This Event amount as shown in the Registrations list of the Event Manager window. If the export file contains "N/A" for "Gifts This Event", it is because no gift link is set in the

Event Manager window: see "Linking Gifts to Registrations" on page 224 for instructions on establishing this (optional) link.

Table 8.1 Table of Registration Export Fields[1]

Field #	Field Description	Field #	Field Description
1	Group Name (or Table, Team, Row, Room, etc. name)	28	Company
2	Donor Name	29	Donor ID Number
3	List As Name	30	Home Phone
4	Attended (true or false)	31	Work Phone
5	Host (true or false)	32	FAX Phone
6	Ad (true or false)	33	Cell Phone
7	VIP (true or false)	34	Email
8	Comment	35	User Defined 1*
9	Assigned Seats	36	User Defined 2*
10	Gifts This Event	37	User Defined 3*
11	Do Not Mail	38	User Defined 4*
12	Do Not Call	39	User Defined Date*
13	Do Not Email	40	Year of Birth
14	Label Salutation Line 1	41	Category*
15	Label Salutation Line 2	42	Type*
16	Address Line 1	43	Volunteer*
17	Address Line 2	44	Solicitor*
18	City	45	Gift Total
19	State/Province	46	Total Gift Count
20	Postal/Zip Code	47	Donor Since
21	Country	48	Membership Total
22	Letter Salutation	49	Member Since
23	Salutation	50	Gift Total Year To Date
24	First Name	51	Gift Count Year To Date
25	Middle Name	52	Gift Count Year To Date
26	Last Name	53	Gift Count Last Year
27	Title		

1. For more information on the contents of these fields, see footnotes for table Table 13.1, "Export Fields (except 2nd Thank You Recipient, Event Manager and Year End Letter Exports)" on page 348 of the User Manual.

*Names of these fields can be changed by you; see the User Manual. The header row of the export will contain the field name as it is set in your database.

CHAPTER

9 Administration

The database administrator is responsible for managing the password system. This will involve assigning each user a password and an access level. Access levels determine what functions of FUNDimensions may be accessed by a specific user. Access levels have certain editable characteristics, which will then apply to all users with that access level. When passwords are forgotten, the database administrator can assign a new password. The administrator can monitor the use of the database through a log of last sign-ons and sign-offs.

To allow some control over the data entry process, the Administrator may establish default values to appear in new gift records; these values can be configured to change depending on the amount of a gift. Also, the administrator can designate some fields in gift records to be mandatory in a new gift.

The Administrator also can edit the names of approximately a dozen user-defined fields; all users then see these changes in windows, menus and reports. This is usually done early in the deployment of the database, with few or no changes thereafter.

Finally, the Administrator can perform maintenance and repair of the database, and can configure FUNDimensions to perform backups and restores of the data file.

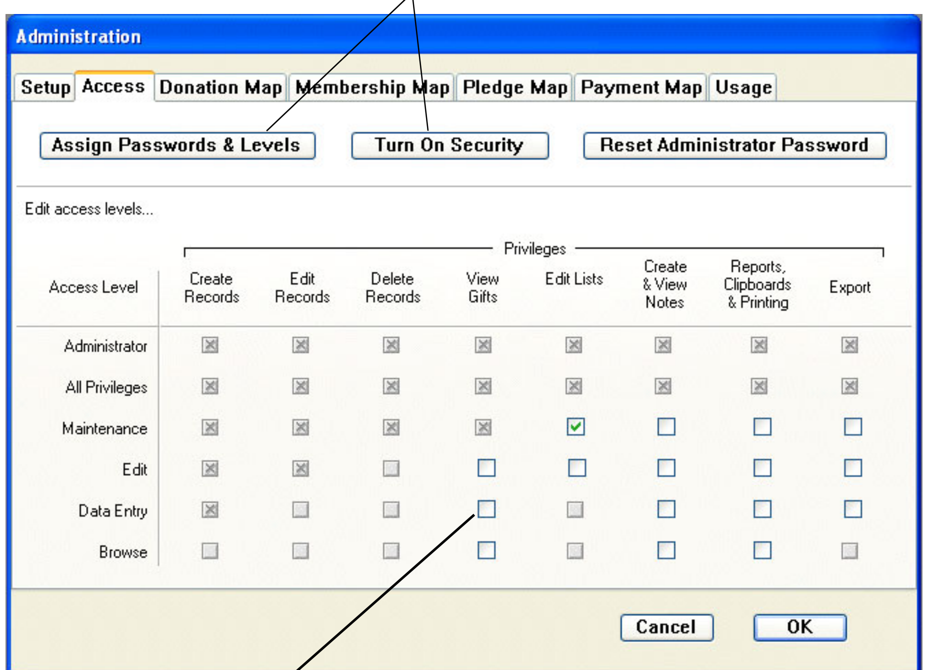
Who Should Be the Administrator?

The ideal person to appoint as database administrator would be someone with a good general familiarity with the computer platforms in use at your organization, and someone who is trusted in the organization, since the administrator has access to all functions of the database. Other desirable characteristics are willingness to help users and a responsible attitude concerning back up of the data file. The administrator should appreciate that failure to backup the data file may mean the loss of a great deal of valuable and irreplaceable information, and find that fact to be sufficient motivation to perform the backup procedures necessary to ensure the safety of your organization's precious data. This means the ideal administrator also needs the technical skills to implement backup procedures.

Turning Security On and Off

FUNDimensions ships to you with the password access disabled. You can easily turn it on to protect your database with password log-on, restricted access for users and other security features. To turn on security, choose File>Administration. In the dialog that appears, click the Access tab. The following window appears:

Initiate password security, create new users and assign users to an access level through these buttons



Checkboxes with a blue frame (appearance is slightly different under Mac OS X) are attributes that you can change. For example, the Data Entry access level can be edited to allow or disallow access viewing gift records.

Figure 9.1 Access pane of the Administrator window.

Click on the Security On button, write down the administrator password that will be displayed in a dialog, then quit the program. From then on, all log-on will require users to select their user name from a list, and entry of a password if one is assigned. The administrator password will be required to log-on the first time; this password is supplied in a dialog when you turn security on. Once password security is turned on, the File>Administrator menu item is available only to a person logged in as administrator.

The Administrator password should be changed immediately and periodically, and not shared with anyone other than the designated administrator. To change this password, use either the User dialog shown later in this chapter, or use the Change Password button that appears in the regular Login window.

The Access Privileges System

The Access Privileges system of FUNDimensions restricts who may use the database and what functions are available to specific users. The Administrator assigns each user:

- a user name
- a group (access level)
- a password

While the password can be changed later by the user or the administrator, group assignments are made only by the administrator, giving the administrator complete control over the level of access privilege for every user.

Each user has a unique User Name. All the user names appear in a list at startup; the user selects his name and enters his password. If the name and password correspond, the user will enter the database at the access level assigned by the Administrator; otherwise FUNDimensions will refuse access and present the password dialog again so the user may try again to log on.

Groups

Groups are hierarchical; each group includes the privileges of the group below it, plus additional privileges. The group names and privileges associated with them, from bottom to top of the hierarchy, are as follows:

1 **Browse**. Users in this group can view any information present in the database but may not add, delete or modify any information. These users also cannot move information out of the database by printing or exporting. (They could still copy the contents of single fields using the clipboard.) Because they cannot save edited or new records, users at this level will see the Save button disabled in windows that have it.

2 **Data Entry**. Users in this group have all the privileges of the Browsing group, with the additional privileges of adding records. Users at this level cannot modify existing records. This level and above has access to the Preferences dialog.

3 **Edit**. Users in this group have all the privileges of the Data Entry group, and may edit records, but cannot delete them.

4 **Maintenance**. Users in this group have all the privileges of the Edit group, and may delete records.

5 **All Privileges**. Users in this group have all the privileges of the Maintenance group with the addition of printing and exporting to text files and the clipboard.

6 **Administrator**. This user is a member of all groups. This user has all the privileges of the All Privileges group with the additional capability to configure certain aspects of the database, change user names, passwords and access levels. There can be only one administrator in FUNDimensions.

The administrator can alter the levels described in items 1-4 to allow or disallow some additional privileges. For example, users in the Edit and Maintenance groups can be granted printing privileges, and some levels can be blocked from seeing gift data. See "Access" on page 270.

Optional Group Privileges

After turning security on, the lower area of the Access pane of the Administrator window (Figure 9.1) allows you to edit the gift viewing, notes, printing and exporting privileges for some access levels that, by default, do not allow use of these items. Use the checkboxes to edit the access levels. Changes do not take effect until client software is quit and relaunched.

Many of the checkboxes are disabled; these indicate properties that cannot be edited. They are displayed to assist you in understanding the attributes of each access level.

For the Maintenance level, you can turn on the Reports, Printing and Clipboards checkbox, or the Exporting checkbox, but not both. When the Create & View Notes checkbox is off, users will be blocked from opening the note attachments or creating new attachments. They can still use the lower note area in the Donor Input Window, and will still be able to see the list of note attachments in the upper area.

Only users with "Clipboards, Reports and Printing" turned on can access the Dashboard (Output>Dashboard, "Dashboard" on page 33).

Only users with "Clipboards, Reports and Printing" turned on can access Advanced Reports (Output>Advanced Reports). This means that if "Export" is turned on but "Clipboards, Reports and Printing" is off in the Access tab of the Administration window, the user can access the standard exports (Output>Export), but not those exports listed in Advanced Reports.

Caution: Even if "Export" access is turned off for a user in the Access tab of the Administration window, if "Clipboards, Reports and Printing" is turned on they could still perform exports by using the Report Editor, or by using the exports listed in the Advanced Reports window. They are only blocked from using the standard export menu commands (Output>Export).

The View Gifts checkbox, when turned off, will cause users at that access level to be blocked from viewing gift records, or from using features of the program that would reveal gift information, such as searches for gift amounts, reports, and the Information Palette. (The year of a donor's first gift and membership is still available to these users via the export function, if they have export privileges.) Much of the blocking is performed by disabling tabs in the donor input window and by omitting the display of the Information Palette and Dashboard.

Users at the Edit and Data Entry level will be able to create and save new gift records regardless of the setting of the View Gifts checkbox, but they will not be able to view the records once they quit FundDimensions if View Gifts is off for their level.

Adding a User

Only the administrator can establish a new user and password. After logging in, the user can change their password anytime with File>Change Password.

This is the procedure for adding a new user and password to the database:

1 Log in as administrator by launching FUNDimensions or choosing File>Change Login. The password dialog appears. See Figure 2.1, “Password dialog” on page 40.

2 Select “Administrator” and enter the password. Click OK.

3 Select the Administration command from the File menu. In the window that appears, click the Access tab, then click the Assign Passwords/Privileges button. The Toolbox window appears, with the Users pane selected:

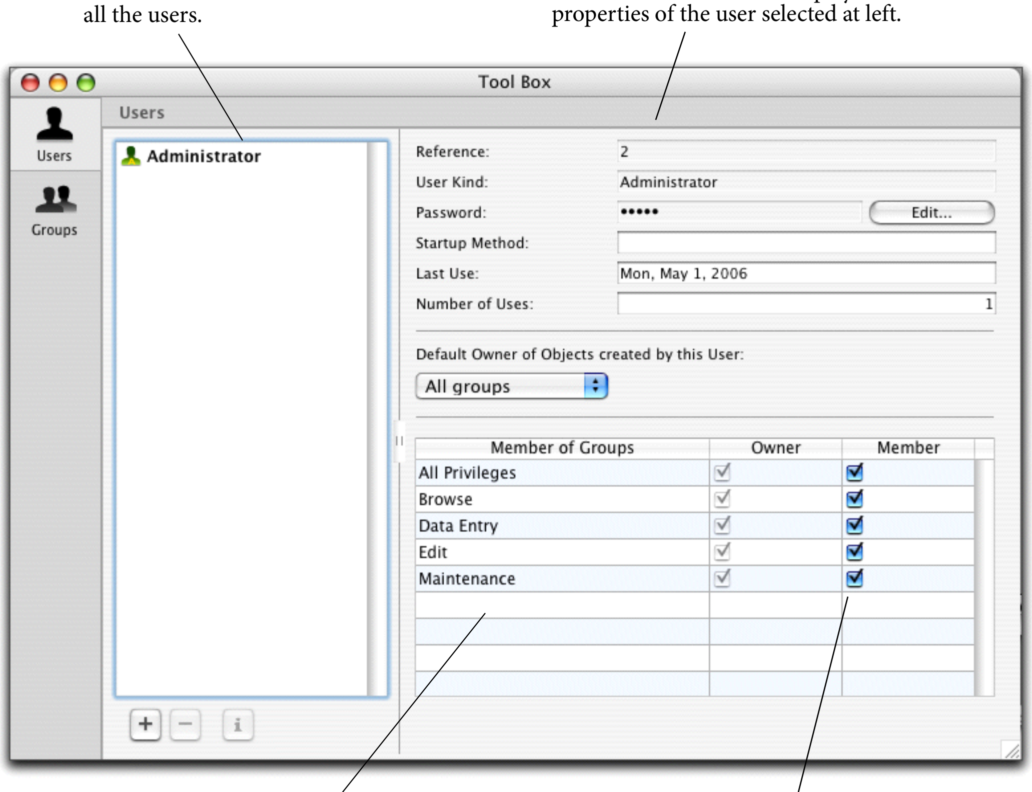


Figure 9.2 Users Toolbox window

4 Click the plus button (lower left) to create a new user:

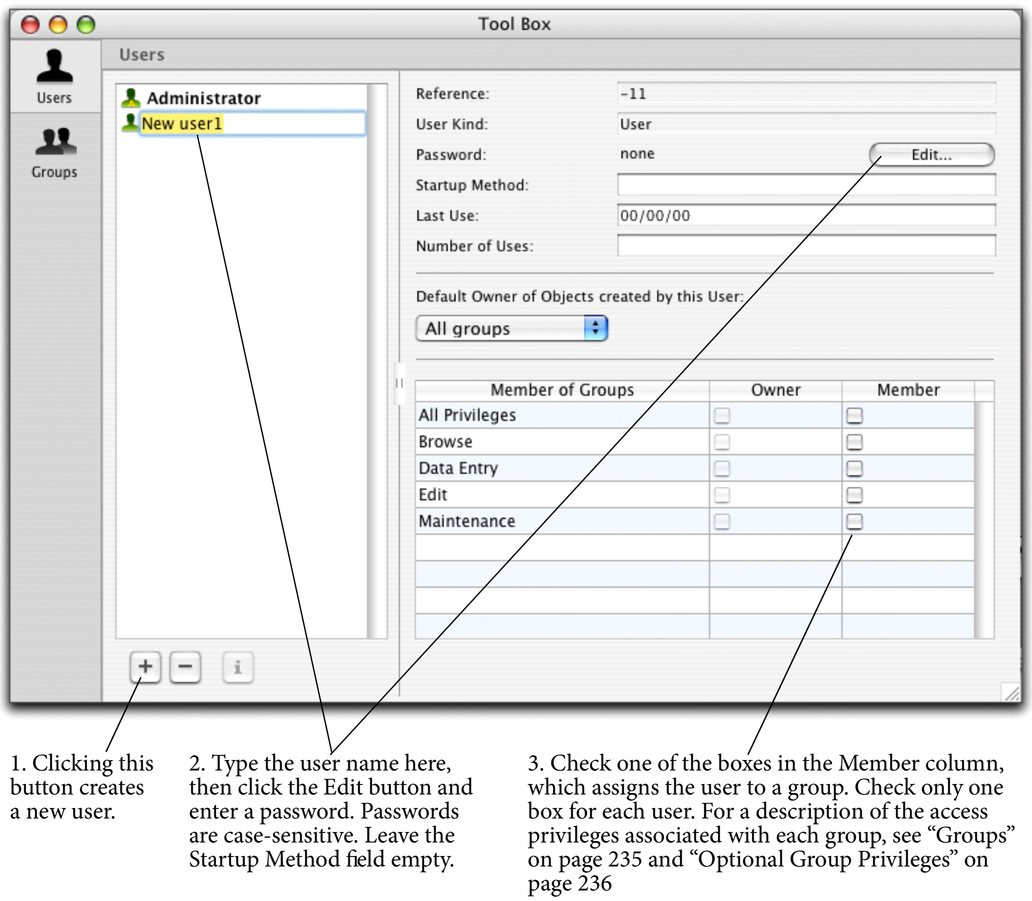


Figure 9.3 Creating a New User

5 Enter the user name as you want it to appear in the password dialog when the program launches. The password dialog can display about 30 characters for the user name.

6 Enter the password for this user. Passwords are limited to 15 characters, which may be numbers or letters, or both. (If you leave the password area blank, anyone may log on as that user without a password.) Users must enter the password exactly as it is entered here; be aware of the status of your CAPS LOCK key. Passwords are case sensitive. Click OK. You are returned to the Toolbox window.

7 Assign the user to a group by checking one, and only one, of the boxes in the member column. For a description of the access privileges associated with each group, see “Groups” on page 235 and “Optional Group Privileges” on page 236.

8 Close the Toolbox window by clicking the close box (upper left on Mac, upper right on Windows). This completes creation of a new user.

Duplicating Users

The Duplicate command can be used to create several users having the same characteristics quickly. Instead of creating a user and then assigning it to a group, you can duplicate a user belonging to the same groups then modify the user name.

1 Log in as administrator by launching FUNDimensions or choosing File>Change Login.

2 Select the Administration command from the File menu. In the window that appears, click the Access tab, then click the Assign Passwords/Privileges button. The Toolbox window appears with the Users pane selected, as shown in Figure 9.2.

3 Right Click on a user (Windows) or Control + Click on a user (Mac).

4 Select the Duplicate command from the contextual menu.

5 Now you can rename the user by doing the ALT-click (Windows) or OPTION-click (Mac) shortcut on the user name.

6 Set the user's password by clicking the Edit button.

Creating Accounts for Read-Only Mode

Password security can be used to limit access to gifts, notes and printing in Read-Only mode, the same as they can be used in Normal mode. For more information about Read-Only mode, see "Opening a Data File, Read–Only Mode" on page 43.

Administrators may wish to create user accounts specifically for use with Read-Only mode: if this is done, *a log-in must be performed once in Normal mode* with each of these accounts before they are used in Read-Only mode. This must be done to create a preferences record for the user account, which is necessary for operation, but which cannot be created in a read-only data file. If a log-in is not performed once in Normal mode with the user account, an error will occur and the user will not be able to log-in to that account in Read-Only mode.

Deleting a User

Deleting a user is done by clicking the Minus (-) button in the users pane of the Toolbox window. Follow this procedure:

1 Log in as administrator, then choose File>Administrator.

2 In the window that appears, click the Access tab, then click the Assign Passwords/Privileges button.

3 The Toolbox window appears. Select the user in the list at left, then click the Minus (-) button (lower left). This button is depicted in "Users Toolbox window" on page 237.

4 A confirmation window appears. Click Delete.

5 Close the Toolbox window by clicking the close box (upper left on Mac, upper right on Windows).

The deleted user will appear disabled in the user list. You cannot remove the deleted user from the list or reactivate the user. However, it is possible to create a new user with the same user name: if you do this, that user will inherit the preferences settings (“Preferences” on page 260) of the deleted user.

As an alternative to deleting users, consider changing the user name to denote that they are inactive, and changing the password: then when you need to add a user, edit the user name and password for the new user. In other words, you can recycle user accounts. See “Resetting Passwords and Changing User Names” on page 240.

Changing Access Privileges

The Administrator can change a user’s access privileges by removing them from their current group and assigning them to another group. Access privileges associated with each group are described in “Groups” on page 235 and “Optional Group Privileges” on page 236.

Follow this procedure:

1 Log in as administrator, then choose File>Administrator.

2 In the window that appears, click the Access tab, then click the Assign Passwords/Privileges button.

3 The Toolbox window appears. Select the user in the list at left, whose access privileges you want to change.

4 In the Member column, un-check the box for the group the user is currently in.

5 Also in the Member column, check the box for the group in which you want the user.

6 Close the Toolbox window by clicking the close box (upper left on Mac, upper right on Windows).

Resetting Passwords and Changing User Names

Use this procedure if a user forgets their password or wants to change their user name. This is also the procedure to use if you want to enforce a periodic change of passwords for better security. You cannot read users’ old password, but you can simply assign them a new one.

Warning: changing the user name will cause the user’s preferences to be reset to default values the next time they start up the software.

Follow these steps to change a user name or password:

1 Log in as administrator; choose File>Administration.

2 In the window that appears, click the Access tab, then click the Assign Passwords/Privileges button. The Toolbox window appears (Figure 9.2).

3 To change the user name, right-click (Windows) or control-click (Mac) on the user to be modified in the Users list at the left side of the window. A menu appears:

select Rename and type the new name. Type your enter key or click outside the user name to accept the changes.

4 To set the password, select the user in the Users list at the left side of the window, then click the Edit button and enter a password.

5 Close the Toolbox window by clicking the close box (upper left on Mac, upper right on Windows).

Users can change their own password by clicking the Change Password button when they login (see “Password dialog” on page 40). To prevent mischievous changing of passwords at unattended stations, they will need to enter their old password to make the change.

Saving and Loading Users and Groups

You can save the list of users, their passwords and their group assignments to an external file, and load them in from an external file. This is useful as a backup and in the event you wish to establish a second database with the same users.

Warning: loading a file deletes any and all existing users, passwords and group assignments.

Passwords are saved in an encrypted format to prevent reading them with an external editor used with the data file.

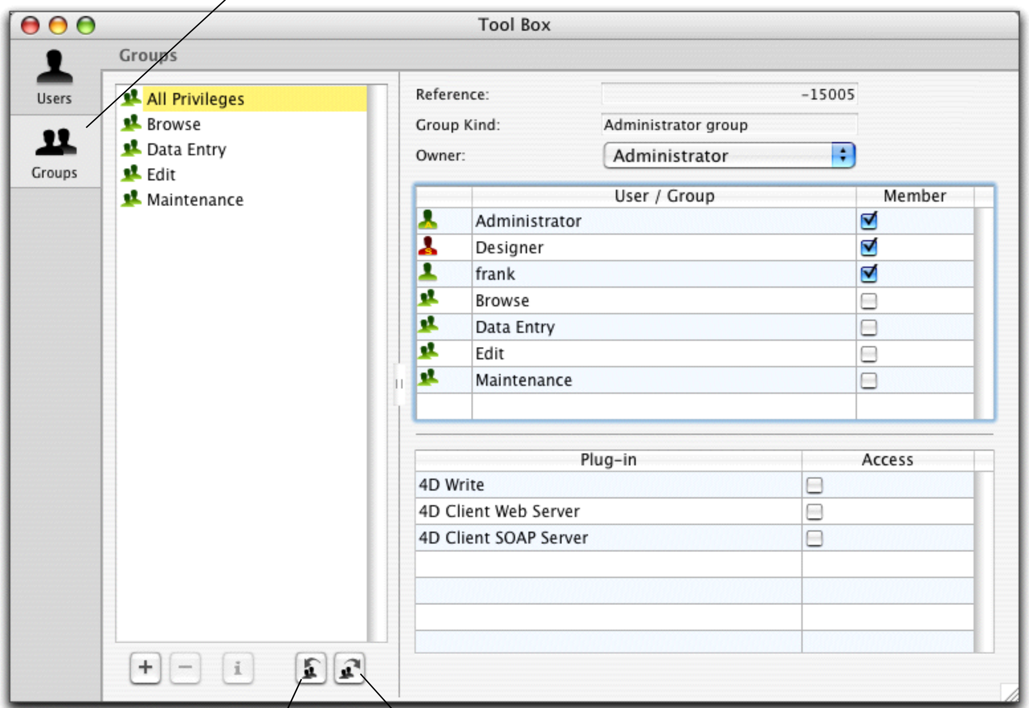
Follow this procedure:

1 Log in as administrator; choose File>Administration.

2 In the window that appears, click the Access tab, then click the Assign Passwords/ Privileges button. The Toolbox window appears (Figure 9.2).

3 Click the Groups button at the upper left of the window to display this pane:

You must select the Groups pane in order to reveal the buttons for loading and saving users and groups.



Click this button to **load** a users and groups file.

Click this button to **save** a users and groups file.

Figure 9.4 Groups pane of the Toolbox window

4 Use the buttons shown above to save a file containing the user names, passwords and group assignments, or to load a file created this way.

Monitoring Use

From time to time, you may wish to know who created or modified a record, or who has recently used the database. Methods for doing this are covered in "Record Statistics" on page 149 and "Usage" on page 274 of this manual. This is a summary of the options discussed there:

- The Administrator dialog allows only users logged in as "Administrator" to view the last log-on and log-off dates and times for each user, and the access level they had during that session.
- The Record Statistics command, available from the Output menu in most Input Windows, displays the user name for creation and last modification of any record, plus the date and time.

Using the Advanced search (Find > Advanced), it is possible to find records created by specific users and created on or modified on specific dates. This makes it possible to audit the activity of a user. See "Advanced" on page 335 for assistance creating these searches.

Specific actions in the database are also listed in the log file of the database, together with the user who performed them. The Log File option must be turned on for this to be used. See "Reviewing Log Files" on page 253.

Adding a License

If you are using the client-server version of FundImensions, you may add licenses to allow additional users to access the database simultaneously. The basic client-server system allows 2 users. Additional users up to about 100 can be added. To purchase additional user licenses, please call for pricing and delivery information.

To license additional users, you must enter different serial numbers for FundImensions and for FundImensions Server. To add the serial number to FundImensions, you click the Add Users button located in File > Administration > Usage tab; for a screen shot, see Figure 10.9, "Administrator dialog, Usage pane" on page 274. Follow the prompts. A key-code will be displayed at the server machine, which you must give to FundImensions representative, who will generate your serial number.

To add a user to FundImensions Server, follow the instructions supplied with that package.

Backing Up Your Data

This is the most important section of this manual.

Maintaining a series of backup copies of your data file is an absolute necessity. One saying is that there are only two kinds of computer users: those who have lost data, and those are about to! Hard disks are purchased from the manufacturer with a Mean Time Between Failure (MBTF) rating (usually in tens or hundreds of thousands of hours). This number is an average: no one knows exactly when your drive will fail, but *the manufacturer is telling you the drive will fail*—it is only a matter of time! If it fails and you don't have a recent backup, you will probably lose all your data. **Everything! This means absolutely no access to your database.** This could put you out of business permanently. The local repair person can replace the drive and get your computer running again, but your data will probably be gone forever. Your only alternative will be an expensive data recovery service, and the results of this are uncertain.

In most cases, hard drives will give no warning of impending failure. In the scheme of things, a catastrophic drive failure is often preceded by a long run of normal system performance.

In addition to hardware failure, your database file—like all files on your computer—is subject to possible corruption. This could mean the file cannot be opened by FUNDimensions, so your data would be inaccessible. Although the 4D Tools utility and XML export/import is available for solving most of these problems, your only certain insurance is a backup made prior to the corruption. Crashes and power failure are the common causes of data file corruption, but it can also be caused by damaged disk directories, incorrect or damaged disk driver software, stray magnetic fields, and unknown causes.

The publisher and author of FUNDimensions is not responsible for lost data. Neither is the local computer repairman, the manufacturer of the computer, or the store that sold or leased your system, even if you have a service contract. Your only safety net is the one you build through determined and enlightened action. You must avoid the belief that it won't happen to you, and assume it will. It will. And it always happens when you are not thinking about it, expecting it, or planning for it. It will usually happen at the least convenient time, just before you need to produce a mailing for a big campaign or something. Therefore, conduct your backup program as if you would need to rely on the backup completely and on short notice.

There are many backup strategies, and a detailed discussion of them is outside the scope of this manual. Briefly, a good plan provides for separate, rotated session, daily, weekly and/or monthly backups.

Your backup plan should make allowance for physical catastrophe to the database location, such as fire, flood, earthquake and burglary:

Some backups should be stored offsite.

Damage to your data file, or lost data, may not be noticed for a long time, so having only a backup from the day or even a week before may not save you:

Having just one backup copy is not good enough.

Again: having just one backup copy of your database is not good enough. Not even close! If you are backing up by replacing the last backup with the current backup, then you do not understand the perils of operation and the purpose of backups, and you are not currently qualified to design and implement a backup plan. In this case, you should get professional assistance in designing and implementing a backup plan.

If you are unsure of your ability to design a backup strategy, please, please get professional assistance in designing and implementing a plan. If it boils down to hiring a professional to actually perform the backups because you do not, will not, or can not, we strongly suggest that it is worth whatever it would cost. In every case we know of, the cost of reconstructing the database far exceeded the cost of a professional, well-maintained backup system.

This backup series should be maintained across at least 3 different pieces of media. Never rely on a single tape, disk or cartridge, as these media are known to be unreliable.

Generally, we recommend the use of software that automates backups. FUNDimensions includes a built-in backup module, but for greatest security, use other software to perform automatic backups of the backups created by that module; this facilitates retention of multiple backups and storage of backups off-site. An economical way to obtain this software may be to purchase a backup device that includes a copy of backup software, but be sure both are of the best quality. Sometimes, bundled software is of an inferior brand or type.

When purchasing a computer, you may wish to choose your backup software first, then purchase a computer with a writable CD or DVD drive mechanism (e.g. CD-RW DVD-RAM, etc.) that is specifically supported by the backup software you select. Begin by visiting the backup software vendor's web site and downloading the list of supported devices, then check your list of candidate computer models to see which have supported mechanisms. The operating system can report to you the type of mechanism installed, or contact the hardware vendor for information.

Backup Module

FUNDimensions includes a built-in backup software module. You can use this to perform both automated and manual backups. You need to supply your own backup hardware, typically some form of external hard drive, flash memory or other external storage.

You should supplement the backup procedures here by taking media containing your backups off-site on a regular basis. Design your strategy on the assumption that a catastrophic event will occur at your site that would destroy or render inaccessible all information stored there.

Built-in backup capabilities are not available in Read-Only mode.

Backups in the Client-Server Edition

See the separate Client-Server Administration Manual for information on configuring backups, performing restores and related procedures in the Client-Server edition of FUNDimensions. While the principles and procedures are similar to those described below, much of the interface is different, and several additional options are available.

The Client-Server edition only blocks write-access to the database during backups, while the Single-User Edition blocks all access during backups.

Configuring Backups in the Single User Edition

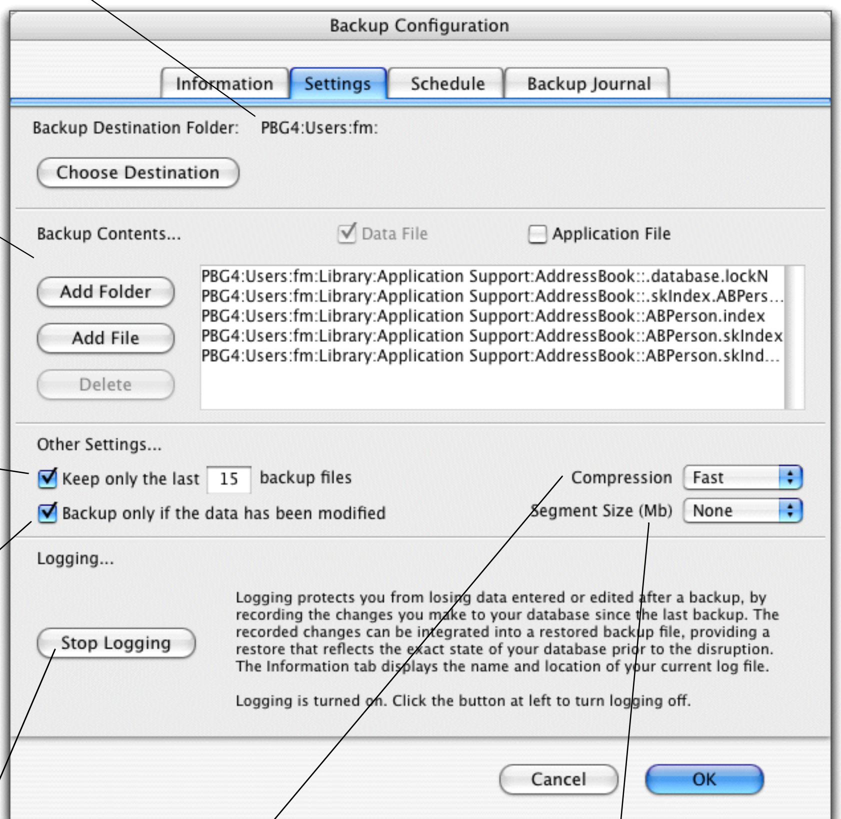
You configure backups by choosing File>Backup Configuration. In the window that appears, click the Settings tab to begin configuration:

Backups are saved in the folder displayed here. Use the Choose Destination button in the Settings pane to change the location. To provide better protection for your data, a disk other than the one containing your data file (as displayed in the upper section of the window) is strongly recommended for the backup destination.

You can specify any additional files to be backed up along with the data file in this section. Use the buttons to add folders and files; items appear in the scrolling area to the right of the buttons. To delete a file or folder, select it from the scrolling list and click the Delete button.

If checked, old backup files are deleted as the limit specified here is reached. This controls the amount of disk space used by backups. Usually, you should keep this number at 10 or higher.

If checked, scheduled backups are skipped if the data file has not been modified. This could cause items added to the backup in the Backup Contents section above to not be backed up at expected intervals.



Use this button to turn logging on or off For more information about logging, see “Performing Manual Backups” on page 249.

Select None, Fast or Compact from this menu to choose a trade-off between backup file size and backup speed.

Set the segment size to a value other than None if you have large backup files that need to be copied to recordable CDs. This causes the backup file to broken into pieces, which may each be copied to CD.

Figure 9.5 Settings Pane of the Backup Configuration Window

This window gives you controls for the following items, working from the top of the window:

- **Backup Destination Folder.** ***Warning***! To protect your database from hard disk failure, you must store backups to a disk other than the one where your data file resides. If a hard disk failure occurs and you have not followed this advice, your backups may be destroyed along with your data file, and recovery will be impossible.

  To set the destination for backups to a disk other than the one containing your data file, click the Choose button, and select a folder on the other disk. After completing this task, verify your choice in the Destination area of the window in. Check this again from time to time, to be sure it is still set to a location other than the disk with the data file. Also verify that backups are going to the location you expect, by visually checking the destination folder after a backup is performed, and the creation/modification dates and times of the backup files located in the folder. Also check the Last Backup Path in the Information pane of the Backup Configuration window. For additional tips on staying on top of your backup regimen, see "Monitoring the Backup Process" on page 257.

If you cannot obtain another hard disk to receive the backup, you could burn backups to a CD or DVD as soon as the backups are completed, but this is not recommended because it requires manual intervention to burn the discs, which is often forgotten or neglected. If you do choose this strategy, you can configure FUNDimensions to break up large backup files into pieces that will fit onto CD or DVD media. See page 248.

- **Backup Contents**. This section of the window offers you choices about what files to back up.

  A checkbox permits you to include the application file: you may elect not to check this box, and rely on restoring the application from the regular application installer in the event of a loss.

  Another checkbox is displayed, labeled Data File. You cannot turn this off: your data file is included in every backup.

  Use the buttons to add other folders (collections of files and other folders) or individual files to the backup. Use this to add critical files to your scheduled backup, but keep these things in mind:

  - You cannot use the database during while a backup is taking place, and adding files and folders to a backup makes the backup take longer. If the time it takes to perform backups locks you out of the database for an inconvenient length of time, reduce the files you have added here, and use some other means to back them up.
  - Adding files and folders increase the amount of disk space required by each backup, and you will be keeping multiple backups (see below); the additional items might consume enough disk space to cause you to run out.
  - If you select the option not to perform backups when the data file has not been modified since the last backup (see below), your other files and folders will not be backed up either—even if they *have* been modified. In certain situations this could result in an unexpected loss of data.

- **Other Settings**. This area offers the following options:

  - Keep Only The Last x Backup Files. The backup module is designed to make a series of backups, which allows restoration from an older backup if damage goes undetected for a period of time. This is an important feature; to take advantage of it, set this to keep at least 10 or 20 backups—or more. The only limitation is disk space. You might try setting this to 30, and reducing it if you run into disk space limitations. (You will receive an error message during backups if disk space is insufficient. You can also check for problems in your backup by clicking the Journal tab in this window.)

- Backup Only If The Data Has been Modified. This option causes scheduled backups to be skipped if no change has occurred in the data file since the last backup. (Manual backups will be made regardless of the setting of this item.) This would save disk space by not performing backups that would be redundant. However, if you have included files other than the data file and application file in your backups (see above), you may want backups to occur regardless of changes to the data file.
- Compression. The Backup Module includes a capability to compress backups to save disk space, but backups may take longer to execute or restore if compression is applied. You can select from None, Fast or Compact. Compact saves the most disk space but takes the longest time, while Fast is a compromise between speed and disk space.
- Segment Size. If you would like to copy backups to optical media having a smaller capacity than the size of the backup file, you can use this option to cause FUNDimensions to break the backup file into pieces that will fit the media, which can be reassembled during a restoration. In this case, select the appropriate size from the pull-down menu. Otherwise, leave this set to None.

♦ Logging. This section offers a button to start or stop logging of changes to the database made between backups. See“Performing Manual Backups” on page 249.

FUNDimensions can perform backups at specific time intervals that you designate. This is recommended to ensure that backups are made on a regular basis. To set a schedule for automatic backups, click the Schedule tab, which provides a variety of options for setting the times for automatic backups to occur. (You can also perform manual backups anytime by choosing File>Backup Now.) Because you cannot use the database during backups, select times that will minimize any inconvenience, but when FUNDimensions will be running. If FUNDimensions is not running when a backup is scheduled, a backup is performed as soon as you start the program.

For regular use of FUNDimensions, the Daily or Weekly options are recommended, as shown below:

This section permits you to specify days of the week and a separate time for each day. Most installations should use this section.

Hourly, daily and monthly options are available in this section. You can also turn off automatic backups here.

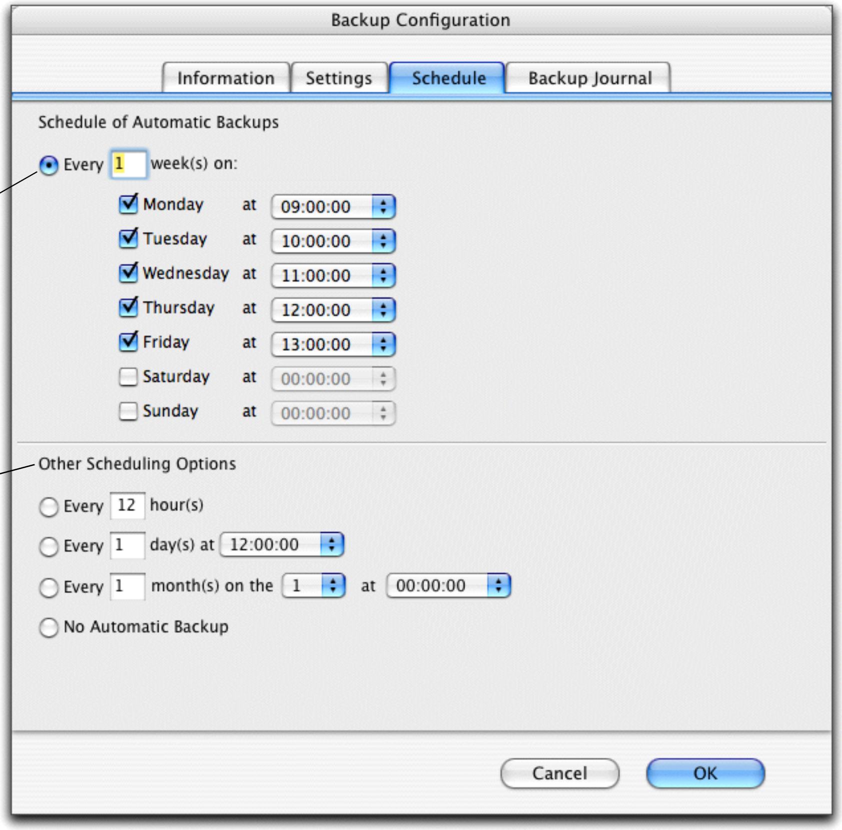


Figure 9.6 Schedule Pane of the Backup Configuration Window

Performing Manual Backups

You can perform a manual backup anytime by choosing File>Backup Now. If password security is turned on, you must be logged in as Administrator to use this command; the menu item is disabled for other users.

Manual backups will be performed using the settings in the Settings pane of the Backup Configuration window, shown in Figure 9.5, “Settings Pane of the Backup Configuration Window” on page 246.

You cannot use the database during backups.

Automatic Restoration

Restoration is the process of replacing a damaged or missing data file from a backup. If logging is turned on, the restoration of a backup can include integration of the log file to create a restored data file that is complete to the moment of failure.

When logging is turned on (see “Introduction to Log Files” on page 252) and FUNDimensions detects an anomaly with the data file at startup, it automatically restores the last backup and integrates the log file. The damaged data file is renamed, the restoration process completed, and the database is restarted with the restored data file. No intervention is ordinarily necessary, but you will see progress bars as the restoration process is executed. The backup journal contains a record of this process; see "Monitoring the Backup Process" on page 257.

If logging is turned off, automatic restoration does not function. In this case, use the manual restoration procedure below. You can also perform a manual restore when logging is turned on.

Manual Restoration

If password security is turned on for the database, you must be logged in as Administrator to perform this procedure. You begin the restore process in either of two ways:

1 If FUNDimensions is running, choose File>Restore Now., and skip to step 3.

2 If FUNDimensions is not running (i.e. if your data file is missing or damaged so that it cannot be opened), do one of the following to produce the Open window during startup:

- If password security is turned on, type in your password, then hold down the ALT key (Windows) or OPTION key (Mac) as you click the Connect button in the log-in window.
- If password security is turned off, hold down the ALT key (Windows) or OPTION key (Mac) immediately after double-clicking to start the program.

Either step 1 or 2 above displays the standard Open window, as shown below. *You must select "4D Backup File" from the Enabled pull-down menu*:

To begin working in this window, choose 4D Backup File from this menu. If you do not do this, you cannot select FUNDimensions' backup files in the area

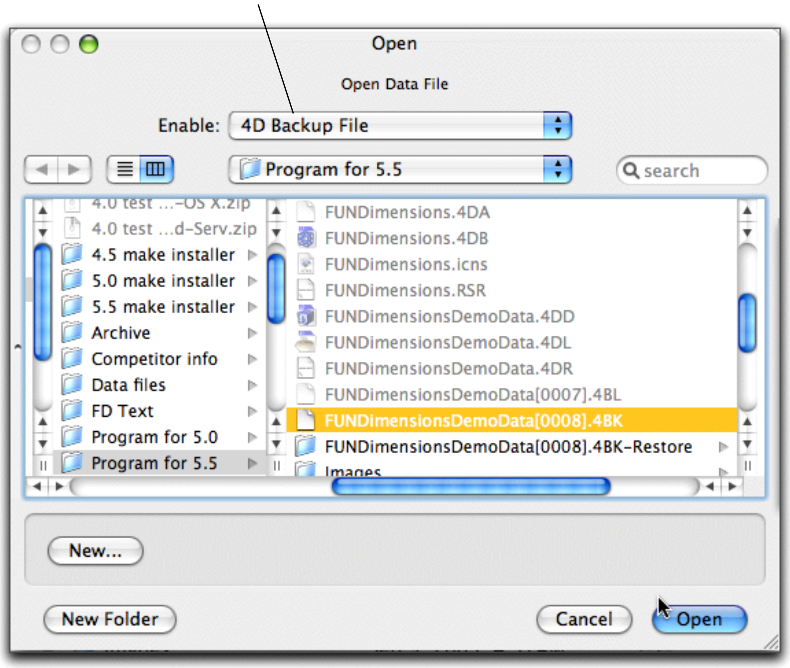
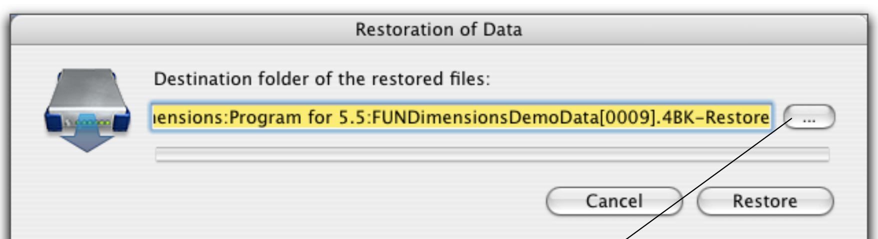


Figure 9.7 Selecting a backup from which to restore

3 Select a backup file to restore (they have a suffix of .4BK) and click the Open button. The window below appears:



This window sets the location for the restored files. *Make a note where these go, since you will need to locate them after the restore.* You may click the button indicated to select a location, then click the Restore button. A message appears that the restore was successful. Click OK in that window, then click Done in the lower left. of the main restore window.

Figure 9.8 Restoration of Data window

4 In the window above, select the destination folder to receive the de-archived backup files, then click the restore button. A progress bar shows when the de-archiving process is finished.

5 Move the restored files to the folder where you want them, keeping the files with suffixes of .4DD and .4DR together in the same folder.

6 Now, open the restored data file using one of these procedures:

- ❑ If FunDimensions is running, do File>Open Data File and select the restored database.
- ❑ If FunDimensions is not running, do one of the following to produce the Open window during startup:
- ❑ If password security is turned on, type in your password, then hold down the ALT key (Windows) or OPTION key (Mac) as you click the Connect button in the log-in window.
- ❑ If password security is turned off, hold down the ALT key (Windows) or OPTION key (Mac) immediately after double-clicking to start the program.

Any procedure above produces the Open Data File window, where you can select and open your restored database.

If prompted for a log file, select the log file that was in use at the time of failure (suffix of .4DL). If the log file contains operations that were performed on your data file since the restored backup was made, FunDimensions prompts with an offer to integrate those changes into the data file, or create a new log file. You usually select the option to integrate the log file.

Introduction to Log Files

Database backups have a limitation: restoring them only gives you the database as it was at the time of the last backup. Any changes made to the database since the backup was performed—edits, deletions, added records—are lost. It is often impossible even to know exactly *what* data was lost. Without log file technology, the only way to mitigate this limitation is to perform very frequent backups, a strategy which presents its own set of problems, such as being locked out of the database while all those backups are performed.

Log files offer protection from this kind of problem, by continuously recording changes made to the database. During restoration of a backup, the log file can be integrated with the restored backup, resulting in a restoration to the exact state of your database at the moment of failure.

Besides the use in data restoration, log files have two additional uses:

- ♦ Log files provide a human-readable record of changes to the database. You can inspect the log file to see what records were edited, added or deleted, by whom and at what time.
- ♦ If the inspection process above reveals actions that need to be reversed (un-done), the log file and last backup can be used to restore the last backup, and play back the log file up to a point you specify, so that all actions after that point are omitted.

Creating a Log File

Log files exist as files on your hard disk with a suffix of .4DL. You can enable logging by doing File>Backup Configuration, and clicking the Start Logging button in the Settings pane. A prompt appears where you can name the log file, and specify the folder where it will be created.

Each time you perform a backup, the log file is backed up too, and a new log file is started. This prevents the log file from growing in size to fill the hard disk. and from being so large that integrating it in to a data file takes a long time. Backup log files appear in the same folder where backups are saved (as set and displayed in the backup destination area at the top of the Settings pane of the backup Configuration window); they have a suffix of .4BL.These files will correspond to the backup with the next higher number, e.g. the log file for FUNDimensions[0005].4BK is named FUNDimensions[0004].4BL.

Reviewing Log Files

To view the current log file, log in as the Administrator and do File>Backup Configuration. In the Information pane of the window, click the Check Log File button. (see “Information Pane of the Backup Configuration Window” on page 257). The Check Log File window appears:

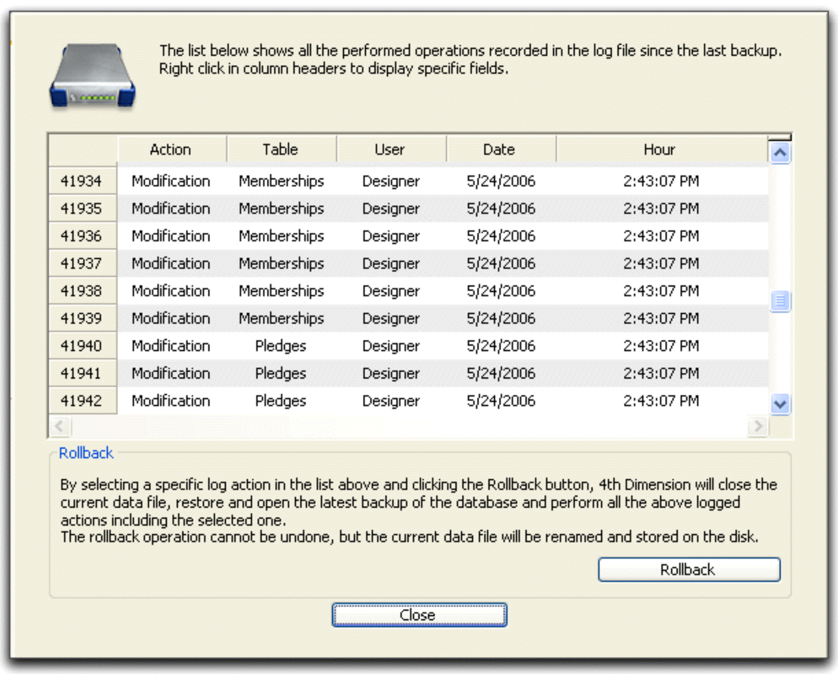


Figure 9.9 Check Log File Window

Scroll the list to view the operations performed. The Rollback button only gets enabled when you select an item in the list; see the next section.

Automatic Backup of Large Log Files

In the unlikely event that the log file approaches two gigabytes in size, FUNDimensions will trigger a backup and start a new log file. This archives the large log file, so it may be used later, and prevents a too-large log file from impacting performance.

This backup will use your settings for a manual backup and will occur irrespective of scheduled backups.

Un-Doing Operations With Log Files

FUNDimensions offers undoing of operations recorded in the log file. This is especially useful when a record was deleted by error from a database. In order for this function to be available, the database must have a log file; see "Creating a Log File" on page 253.

You specify the last operation you want to keep: all actions after that are un-done.

The un-do works by closing the current database and restoring the last backup of the database. The restored database is then opened and FUNDimensions integrates the operations of the log file up through to the selected operation. If the database has not yet been backed up, FUNDimensions starts with a blank data file.

To restore a database to a previous state:

1 Follow the instruction in the previous section ("Reviewing Log Files" on page 253) to open the log file.

2 Select the row after which all operations must be cancelled.

   The operation of the selected row will be the last kept. If, for example, you wish to cancel a deletion, select the operation located just before it. The deletion operation, as well as all subsequent operations, will be cancelled.

3 Click the Rollback button. FUNDimensions asks you to confirm the operation.

4 Click OK. The data is then restored to the exact state it was in at the moment of the selected action.

Integrating Multiple Log Files

It is possible to integrate a series of log files during a restoration process. You might want to do this if a data file became corrupt prior to your last backup, and you are restoring an older backup to get an uncorrupted data file.

To integrate multiple log files, open a freshly-restored data file from a FUNDimensions backup. When you do this, FUNDimensions prompts for a log file: at this point, choose the first log file you want to restore from the standard Open file window. The log file you select can be a regular log file (suffixed with .4DL) or a log file archived during a backup (.4BL). See "Creating a Log File" on page 253 for more information on log files and archived log files.

After that log file is integrated, FUNDimensions asks if you want to integrate another one. Click yes, and select the next log file in the standard Open file window. Repeat this process until all log files are restored.

Restoring Data From Log Files

You can integrate multiple log files from older backups. This may make it possible to restore from an older backup and avoid corruption that occurred due to disk failure, problems with the disk directory, viruses, or other problems. Follow this procedure:

1 Restore any backup using the instructions above (“Manual Restoration” on page 250).

2 Restore all the intervening log files (.4BL), between the backup you restored and the last backup performed, e.g if you restored FUNDimensions[0005].4BK, restore all the log files from FUNDimensions[0005].4BL and up to the last log file backup. Use this procedure to restore the files:

- If FUNDimensions is running, choose File>Restore Now, and skip to step 3.
- If FUNDimensions is not running (i.e. if your data file is missing or damaged so that it cannot be opened), do one of the following to produce the Open window during startup:
- If password security is turned on, type in your password, then hold down the ALT key (Windows) or OPTION key (Mac) as you click the Connect button in the log-in window.
- If password security is turned off, hold down the ALT key (Windows) or OPTION key (Mac) immediately after double-clicking to start the program.

Either action above displays the standard Open window, as shown below. *You must select "4D Log Archive File" from the Enabled pull-down menu:*

To begin working in this window, choose 4D Log Archive File from this menu. If you do not do this, you cannot select FUNDimensions' backup files in the area below.

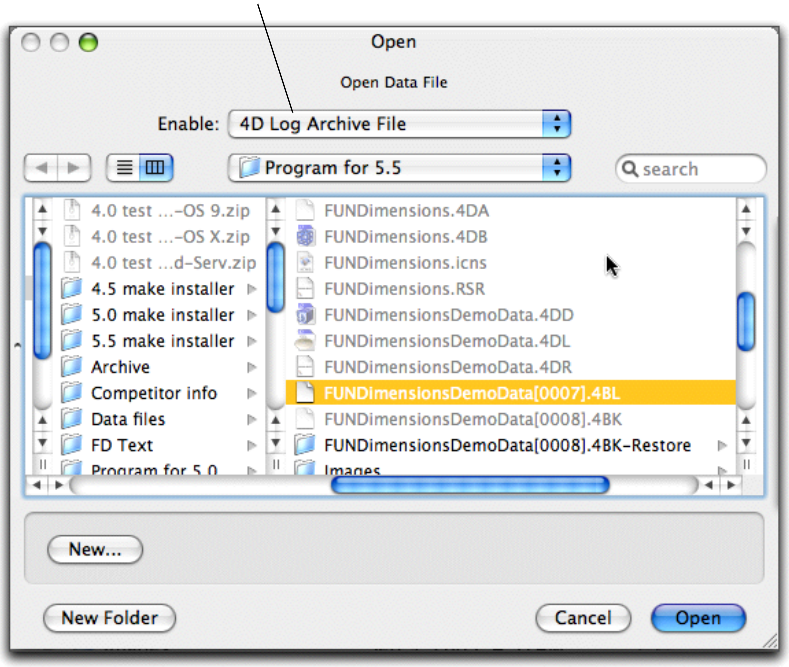


Figure 9.10 Selecting a log file archive from which to restore

3 Place each log file in a folder named to denote its sequence in the backup, e.g. restore log file 0003 to a folder named 0003, log file 0004 to a folder named 0004, etc.

4 Put the log file that was never backed up—the one in use when the disruption occurred—into a folder named "last log file".

5 Open the restored backup from step one (to specify the data file to open, hold down the OPTION key (Mac) or ALT key (Windows) immediately after starting the launch of the program, or in the Log-in window). When it asks you for a log file, designate the oldest log file you restored (in step 2). The contents of that log file will be integrated during the process of opening the data file.

6 Quit FUNDimensions. Delete the log file you designated in step 4 above.

7 Repeat steps 5 and 6, using the next log file in the sequence. Repeat this step until all log files are integrated, including the final log file from step 3.

Monitoring the Backup Process

Please check the backup process regularly: your data will probably depend someday on the integrity of backups. Perform the following steps at monthly intervals:

- ♦ Archive a backup to CD or DVD and take it off site. Keep it for at least a year.
- ♦ The best time to identify a problem with restoration is *before* you need to perform one; so perform a test restore and verify that you can open the restored the data file. (File>Open Data File.) This will also have you be practiced and familiar with the restore process.
- ♦ Check the Backup Journal by clicking the Journal tab of the Backup Configuration window. Look to see that the last several backups occurred when you thought they would, and that no error messages appear.
- ♦ Verify your backup settings by careful reading of the Information pane of the Backup Configuration window, show below:

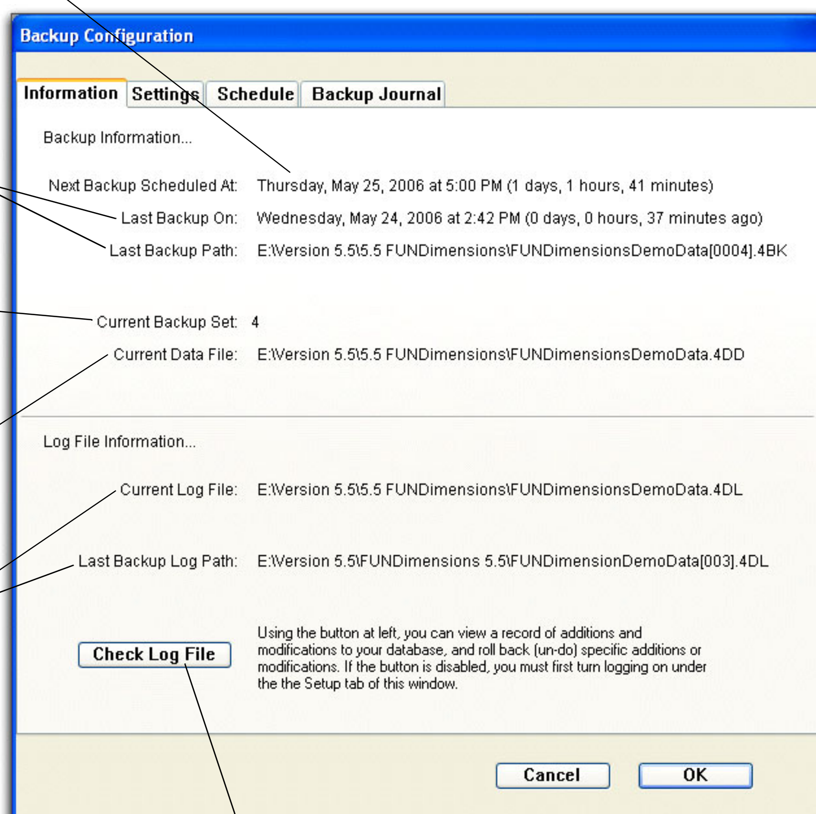
The top of this pane displays the date and time of the next scheduled backup, and the last backup. Check this information regularly to monitor your backup process.

The date and time of the last backup, and the location where it was saved are shown here.

This number is assigned to the last backup.It appears in the backup file name (see Last Backup Path, above), and resets at the number specified in "Keep only the last x backup files" (Settings pane).

This is the location and name of the data file you currently have open. Every backup will include this file.

The name and location of the log file currently in use, and the last backup of the log file are displayed here. Whenever a backup occurs, the current log file is backed up and logging starts over with an empty log file.



This button displays the log file contents and offers un-do of record additions, deletions and edits you have made to the database.

Figure 9.11 Information Pane of the Backup Configuration Window

CHAPTER

10

File & Edit Menus

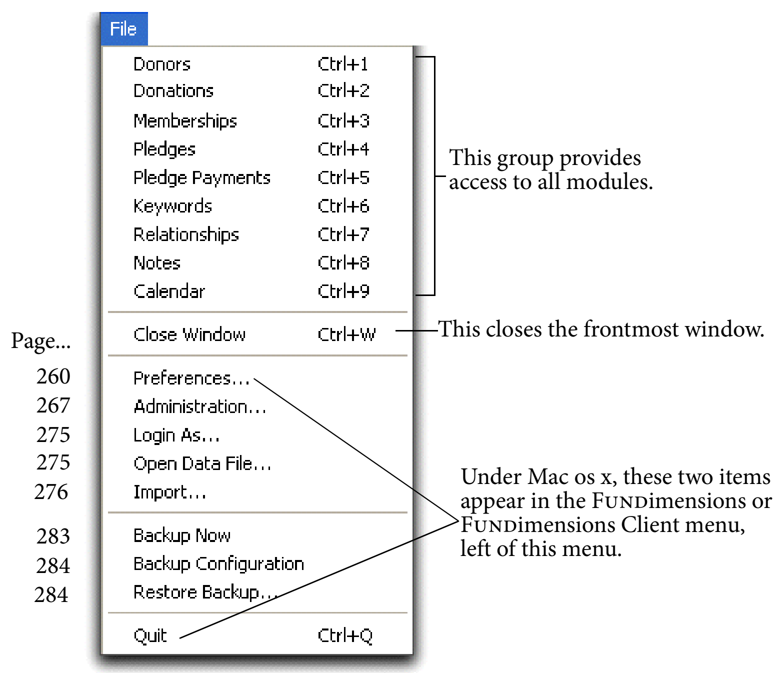


Figure 10.1 File menu

This menu has commands associated with navigating between the basic modules of the program. Commands associated with configuration of the database and security functions are located here, as are the Import, Quit and Close commands.

Donors, Donations, Memberships, Pledges, Pledge Payments, Keywords, Relationships, Notes and Calendar

Selecting any of these items displays a list view of the records in the database for that module. For example, selecting Donors shows a listing of the donors, one donor per row. Once open, clicking on a window associated with a module will bring that module to the front and allow you to work in it, or select the menu command again to bring the window forward. The first time you open a List View, FUNDimensions places all the records for that module into the list.

Close Window

Selecting this command will close the front window if it is a list view. The close box, located in the upper left corner of list view windows, performs the same function as this menu item. However, the Donor List View window can never be closed, so it has no close box and the Close menu item is disabled when the Donor List View is in front.

This command also works for Input Windows. If changes have been made since it was opened, using this command in Input windows will produce a dialog asking whether to save changes, discard changes or cancel the close action.

Preferences

The preferences dialog allows users to configure FUNDimensions for different needs. Under Mac OS X, this menu command appears under the application menu, i.e. FUNDimensions> Preferences in the Single-User edition, or FUNDimensions Client>Preferences under the Client-Server edition.

When password security is on, preference settings are stored separately for each user that has a log-in name, so that each user can customize the software to suit them. These preferences include:

♦ several settings for exporting and printing labels

♦ settings that control behavior when copying information to the clipboard with the Clipboard-Street Address to command

♦ eleven different initial settings (“defaults”) for new donor records, and auto-fill options for the Letter Salutation field in new donor records

♦ a option to set Preview to Screen as the default choice when printing

♦ optional layout formats for the Donor List View, to show or hide addresses and/or phone numbers, and change the order of columns, and set the format for dates

♦ options to perform automatic sorting of lists

♦ options to display alerts at startup indicating the existence of unsent thank you notes or recognition products

- configuration for the auto-dial capability of FUNDimensions, which can dial phone numbers using your modem
- option to reduce the memory needed to run FUNDimensions, by not displaying the Information Palette
- options to display the calendar when the program is started

The following subsections describe in detail the options available in each tabbed pane of the Preferences window.

General Preferences

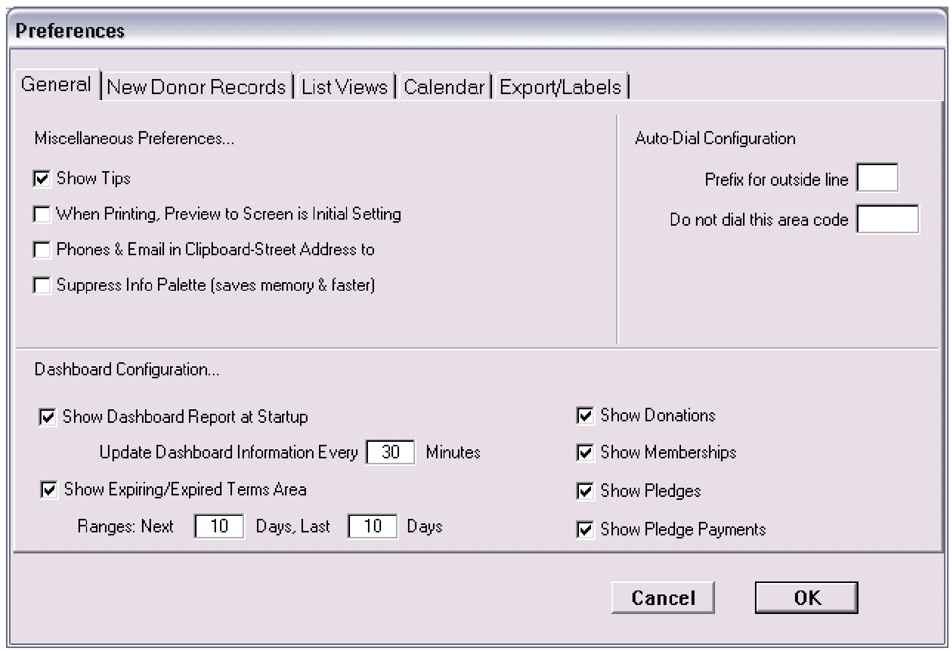


Figure 10.2 Preferences window-General pane

When the Preferences command is selected the first time, the previous dialog appears. The following choices are available (clockwise from top left) in the Miscellaneous Preferences area (upper left of window):

1. **Show Tips.** When checked, this will cause tips to appear when the cursor is moved over some screen objects. Tips are small windows containing information about the item under the cursor. Screen objects that may have a tip include buttons and fields in input windows and dialog boxes, and chart objects. Not all objects display a tip.
2. **When Printing, Preview to screen is Initial Setting.** If this is checked, your Print dialogs will always come up the first time with this choice set to on. Otherwise it will appear the first time as off After the first time it is used, the print dialog will remember the last setting you made in each module.

3 **Phones & Email in Clipboard-Street Addresses to.** When checked, this will cause all phone numbers, phone extensions and the email address in the donor record to be included when the Clipboard-Street Addresses to command is used.

4 **Suppress Info Palette.** When checked, this option prevents the Information Palette from opening or closes it if it is already open. Like the memory-conserving options above, this saves memory and may improve performance in Input Windows. The cost is the suppression of potentially important, useful information that the palette provides. The Pledge Input Window especially depends on the palette for display of key data. The recommended setting for this option is off.

If the Auto-Dial Preferences area (upper right of window), you can specify an outside line prefix to be added to numbers dialed. This is usually 9, or blank. If you enter your local area code in the lower field, FUNDimensions will omit this area code from its dialing sequence. If both fields are blank, FUNDimensions dials the phone number exactly as it appears in the phone number field. For information on how to use auto-dial, see “Donor Input Window” on page 5.

Items in the Dashboard Configuration area (lower portion of the window) are disabled unless you have printing privileges in the database*. The following items appear (see “Dashboard” on page 33for more information on the Dashboard):

- **Show Dashboard Report At Startup.** When checked, the Dashboard window appears when the program is launched, instead of requiring use of the Output>Dashboard menu command. There may be a brief delay before the Dashboard window appears as the data is gathered and calculations made.
- **Show Donations, Memberships, Pledges and Pledge Payments.** During normal operation, the dashboard hides gift types for which there is no relevant data, i.e. if there are no donations needing thank you notes, the dashboard does not display a Donations row. However, if you want to explicitly suppress display of a gift type, you can do so with these checkboxes. This might be useful if you had a policy of not sending thank you letters for individual pledge payments; by turning off the Show Pledge Payments checkbox, the dashboard would not be constantly “warning “you about unsent thank you notes for these items.
- **Update Dashboard Every __ Minutes.** This controls how often the Dashboard process reviews your data and updates its display. The process takes place in the background and does not interfere with other use of the software, but you may notice some hard disk activity during dashboard updates. The minimum interval is 10 minutes: the maximum interval is 120 minutes (2 hours).
- **Show Expiring/Expired terms Area.** During normal operation, the Dashboard hides the 2 rightmost columns if there are no expiring or expired memberships or pledges to display. However, if you wish to explicitly suppress display of this information, you can do so with this checkbox. This might be useful if you did not have memberships, and did not have a policy of following up completed pledges, and therefore did not want to be “warned” of pledges nearing or past completion.

* Only users with “Clipboards, Reports and Printing” privileges can access the Dashboard. See “Access” on page 270.

- **Ranges: Next __ Days, Last __ Days.** The Dashboard warns you of pledges and memberships nearing or recently-past their terms; the definition of "nearing" and "recently-past" is up to you. By default, these ranges are set to 10 days before or after term completion, but you can change those ranges here. The minimum value is 0 days; the maximum value is 99 days. If the checkbox for Show Expiring/ Expired Terms is off, these range fields will be disabled, since they would have no effect.

  For pledges with a non-zero balance, term completion is anticipated by a calculation of the date on which the last payment is due. This date is then compared with the Next ___ Days range you specify in this section of Preferences, and the pledge is either added to the dashboard count or not, depending on whether its last payment date falls inside or outside the range. Pledges with a zero balance are included in the Last ___ Days column of the Dashboard if their final payment date falls within the range.

  If the pledger has one or more additional pledges that have a last payment made date or last payment due dates *outside* the range, the pledge which *is* nearing or past completion will *not* be listed. This will cause a pledge listed in the Dashboard to be removed from the count when the pledger makes a new pledge or extends their old one, the next time the dashboard is updated. Similarly, a membership will *not* be listed in the Dashboard if there is any other current membership for the same donor that does not have an expiration date that falls with the data range specified in this section of Preferences.

New Donor Records

Text you place in this window will appear in new donor records as default values. You can also set keywords be placed as defaults into new donor records. See "Label Line 1, Label Line 2 and Letter Salutation Fields" on page 57, Figure 3.6, "Entering initial settings for new donor records in Preferences" on page 58 and "Default Values" on page 60 for more information.

Also in the New Donor Records pane, you can set keywords to be placed as defaults into a new donor record. You select default keywords using the same method used to add keywords to donor records, described on page 64.

List Views

Clicking the List Views tab in Preferences displays this pane:

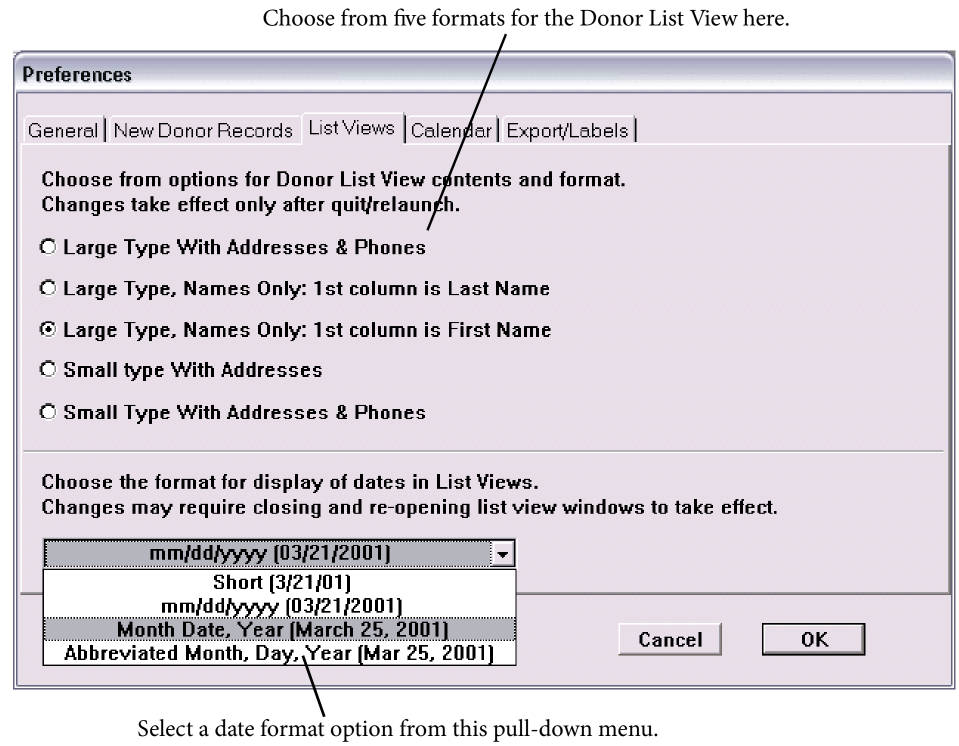


Figure 10.3 Preferences window-List Views

In the area labeled “Donor List View options” the following choices are available through 4 radio buttons. Changes made to these preferences require re-launching FUNDimen-sions to take effect. These choices do not affect printing in any way.

- **Large Type With Addresses *&* Phones** This option displays a hybrid of the options below: the donor and company name columns appear in a large typeface, while the address and phones appear in a smaller typeface. This option uses the most space on your screen.
- **Large Type, Names Only...** These 2 options display only the first, last and company name of each donor record. These options are best for conserving screen space. The additional information in the other choices is still available in the Donor Input Window that appears when you double click any row in this List View. You can choose to have either the first name or the last name appear in the leftmost column.
- **Small type/addresses.** This radio button will display a layout in a small font. The street address, city, state and zip are displayed in addition to the first, last and company names.
- **Small type/addresses & phones.** Similar to the layout in the choice above, except that an additional column is added for display of home and work phone numbers. This will be the slowest display, especially in multi-user configurations.

Options above that include address or phone information may be slightly slower to scroll in the client-server edition. For maximum performance in client-server, use one of the Large Type, Names Only options.

In the area labeled “Gift Module List Views,” you use the popup menu to choose a date format for use in the list views of the donations, memberships, pledges, and pledge payment modules. The initial setting is “MM/DD/YYYY.” List Views are explained in “Windows” on page 2.

Calendar

This tab allows you to configure FUNDimensions to open the calendar window when the program is started. This does not affect the behavior of reminders, which will always appear at the scheduled time regardless of whether the calendar window is open. (However, FUNDimensions must be launched for reminders to appear.)

You can also configure the calendar to appear on top of, or underneath other windows when it appears at startup.

Export/Labels

This area contains settings that modify the behavior of FUNDimensions when it performs exports and prints mailing labels.

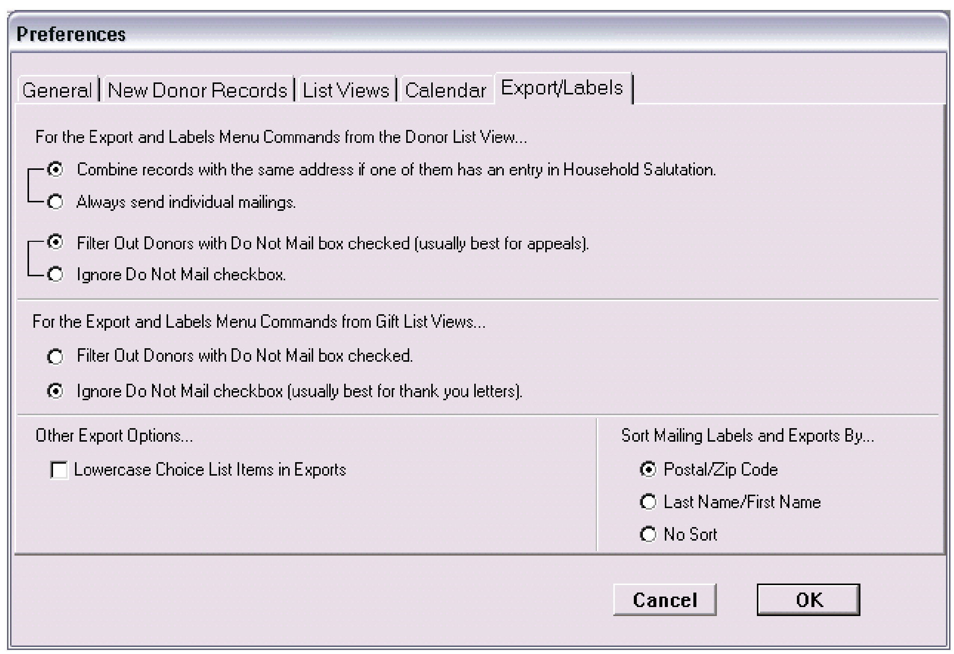


Figure 10.4 Preferences window-Export/Labels pane

Settings for the upper left section, labeled “For the Export and Label Menu Commands from the Donor List View...” will apply *only* when you choose Export or Labels from Output menu, *while the Donor List View is the front window*:

1 **Combine records with the same address if one of them has an entry in the Household Salutation field.** This enables the householding feature of FundDimensions. See “Householding” on page 139.

2 **Always send individual mailings.** This disables the householding feature, so that records appear in exports and label printing irrespective of whether they share the same address with other records.

3 **Filter Out Donors With Do Not Mail box checked.** This will cause FundDimensions to remove records from exports and label printing if the Do Not Mail is checked in the donor record.

4 **Ignore Do Not Mail checkbox.** This will export records irrespective of the Do Not Mail setting.

Settings for the section labeled “For the Export and Label Menu Commands from Gift List Views...” will apply *only* when you choose Export or Labels from Output menu, *while the Donation, Membership or Pledge List View is the front window*:

5 **Filter Out Donors With Do Not Mail box checked.** This will cause FundDimensions to remove records from exports and label printing if the Do Not Mail box is checked in the donor record.

6 **Ignore Do Not Mail checkbox.** This will export records irrespective of the Do Not Mail setting. This setting is the initial setting for a new database, because mailings produced from the Donation, Membership and Pledge List Views are frequently for the purpose of gift acknowledgement, and in that case you may want to send a letter regardless of the donor’s request not to receive other mailings.

Settings in other sections of the window are as follows:

7 **Lowercase choice list items in exports.** In exports from the Donations, Memberships, and Pledges modules, this option will set all characters to lowercase in the Campaign, Method and Fund fields†. You may prefer this in mail merge letters.

8 **Sort exports and labels by Postal/Zip Code.** This sorts your labels and exports by zip code, so your letters and envelopes will be in the ideal order for bulk mail rates. It is checked by default when a new data file is created.

9 S**ort exports and labels by Last Name/First Name.** This sorts your labels and exports by last name. Series with the same last name will be sorted by first name.

10 **No Sort.** This option will result in exports and labels that are in the record order that is native to FundDimensions.

Word Processor

This tab is enabled only when the word processor option is installed. See “Templates” on page 382 for a description of this item.

† The Campaign, Method and Fund labels may be changed through the Administrator dialog, so they may not match the names in this text. See page ix.

Administration

This menu item allows the administrator to configure FUNDimensions for different needs. The settings apply to all users of the database. If security is turned on, you must log in as administrator to access or change these settings. They include:

- organization name, to appear at the top of reports
- currency symbol or 3-letter ISO currency code
- all security functions:
  - creating new users
  - changing user access levels
  - editing access level characteristics
  - restoring forgotten passwords
- configuration of default values for thank you templates, recognition products and membership classes, based on gift amounts that you specify
- specifying default expiration date for new membership records
- a way to make check numbers mandatory for gift records paid by check
- field labels for the user-definable fields and choice lists in the Classification pane of the Donor Input Window and in gift records, and options to make an entry in these fields mandatory for new gift records
- Information concerning database usage. For each user, the listing displays last time and date of log in and log off, and their access level for that session.

Except for the user names and passwords, the administrator settings are stored in the data file: if you are maintaining multiple data files, you can have different settings for each file, i.e. a different organization name.

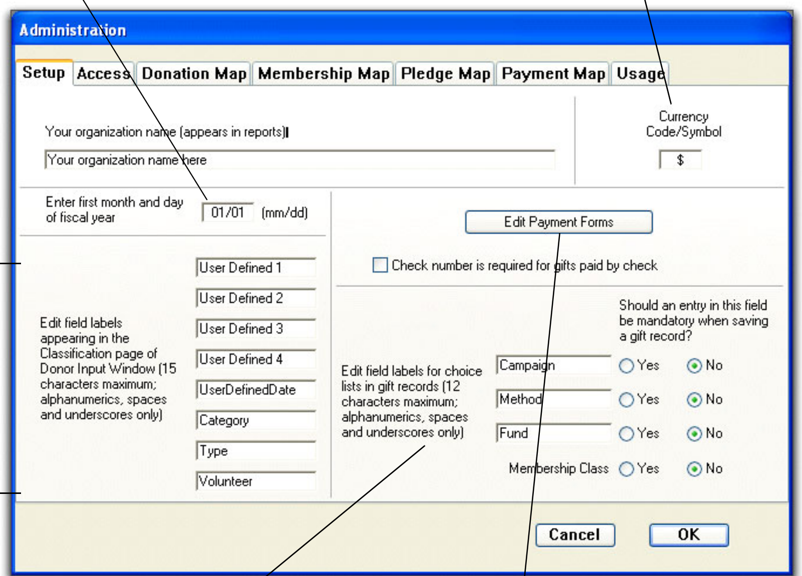
The following subsections describe in detail the options available in each tabbed pane of the Administrator window.

Setup

Fiscal Year is used in calculating year-to-date and last year gift totals in the Donor List Statistics report; see page 146. It may also be used in custom reports.

Currency symbol to appear in displays, exports and reports.

Set the labels here for certain fields in donor records, for customizing your database.



Items in this section set the labels for some fields in gift records, and allow you to make entries in some fields mandatory in new gift records.

This button produces a window for editing the for of payment (cash, check, Visa, In Kind, etc.) used during data entry in Gift Input Windows.

Figure 10.5 General Preferences dialog

This pane of the Administrator dialog provides an interface for setting field labels for donor and gift records. The capability to change these labels is important to customizing FundImensions to the needs of your organization; for help choosing the best naming scheme for your database, see “Designing Your Database” on page 371.

To change a field label, tab or click in the field, then use standard text editing techniques to change the label. You changes will appear in the donor and gift input windows and standard reports immediately, and in menu items after relaunching the software. The names of some items in Advanced Reports reference some of these fields names; you may manually change the names of these reports to reflect changes to field names you make in this window. The report templates are stored in the Report templates folder installed with FundImensions. For more information, see “Customizing the Advanced Reports listings” on page 343.

To designate fields as mandatory in new records, click the Yes button for the field. If an attempt is made to save a new gift record with this field empty, a message appears to inform the user the field is mandatory, and their cursor is moved to the field.

Place your organization name as you would like it to appear on reports in the uppermost field of this window.

You may change the default currency symbol of “$” to any other symbol or ISO-4217 three-character code (e.g., USD 123.45 or EUR 67.89)‡. The currency symbol you enter here will appear in standard reports, exports and screen displays. It can also appear in custom reports. When entering a 3-letter code, append a space to the code, so that a space appears in reports and displays. *Tip:* The Euro symbol is typed with ALT-0128 (Windows) or OPTION-SHIFT-2 (Mac).

The Fiscal Year field allows you to enter the numeric month and day that begins your organization’s fiscal year. This information is used for calculating the year-to-date and previous year gift totals in the Donor List Statistics report, and may also be used in custom reports by using the function “FiscalYear_current” in a formula to return the date your current fiscal year began.

By checking the appropriate box, you may specify that gift records must have a check number entered in gift records when the Payment Form field is set to “Check”.

Clicking the Edit Payment Forms button produces a window where you can edit the forms of payment that may be selected by users during data entry in the Donation, Membership and Pledge Payment Input Windows. For information on how to use the window, see “Choice List Editing” on page 52.

‡ A table of these codes is available at http://fx.sauder.ubc.ca/currency_table.html. See the iso-4217 Code column.

Access

This is where you will perform all functions related to passwords, user names and access levels. The window appears as in this diagram:

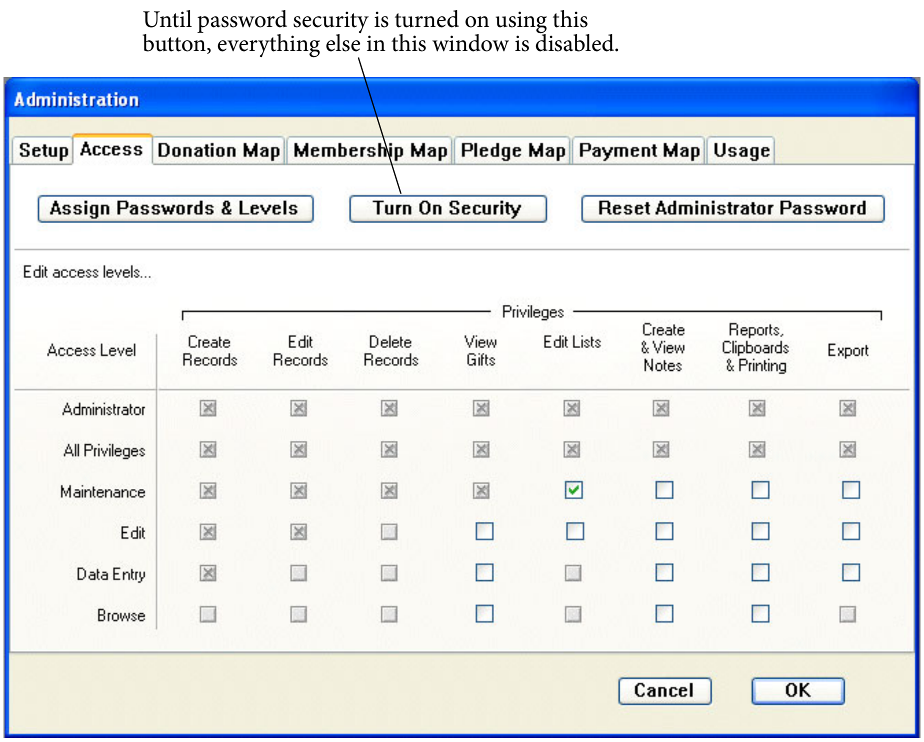


Figure 10.6 Administrator dialog, Access pane

The Security On button turns on password security features. Follow the prompts that appear after clicking the button. You'll be prompted to relaunch FunDimensions and enter the default administrator password. *Change the administrator password immediately* and set up users and passwords following the instructions in "The Access Privileges System" on page 235. If security is already turned on, this button is disabled.

The Passwords/Privileges button opens the Edit Access dialog where you can create and edit user names and passwords, and assign or block specific access privileges to users. See "The Access Privileges System" on page 235 for information on how to do this. If security is not turned on, this button is disabled.

After turning security on, the lower area of the dialog allows you to edit the gift viewing, notes, printing and exporting privileges for access levels that, by default, do not allow use of these items. Use the checkboxes to edit the access levels. See "Optional Group Privileges" on page 236 for more information. Changes do not take effect until client software is quit and relaunched.

Many of the checkboxes are disabled (this attribute is visible in Figure 10.6 as checkboxes *without* a blue-frame; appearance under Mac OS X is slightly different);

these indicate properties that cannot be edited. They are displayed to assist you in understanding the attributes of each access level.

For the Maintenance level, you can turn on the Reports, Printing and Clipboards checkbox, or the Exporting checkbox, but not both. When the Create & View Notes checkbox is off, users will be blocked from opening the note attachments or creating new attachments. They can still use the lower note area in the Donor Input Window, and will still be able to see the list of note attachments in the upper area.

Only users with "Clipboards, Reports and Printing" turned on can access the Dashboard (Output>Dashboard, "Dashboard" on page 33).

Only users with "Clipboards, Reports and Printing" turned on can access Advanced Reports (Output>Advanced Reports). This means that if "Export" is turned on but "Clipboards, Reports and Printing" is off in the Access tab of the Administration window, the user can access the standard exports (Output>Export), but not those exports listed in Advanced Reports.

Caution: Even if "Export" access is turned off for a user in the Access tab of the Administration window, if "Clipboards, Reports and Printing" is turned on they could still perform exports by using the Report Editor, or by using the exports listed in the Advanced Reports window. They are only blocked from using the standard export menu commands (Output>Export).

The View Gifts checkbox, when turned off, will cause users at that access level to be blocked from viewing gift records, or from using features of the program that would reveal gift information, such as searches for gift amounts, reports, and the Information Palette. (The year of a donor's first gift and membership is still available to these users via the export function, if they have export privileges.) Users at the Edit and Data Entry level will be able to create and save new gift records regardless of the setting of the View Gifts checkbox, but they will not be able to view the records once they save them if View Gifts is off for their level.

For further explanation of access levels, see "The Access Privileges System" on page 235.

Donation, Membership, Pledge and Payment Map

Clicking the Donation Map, Membership Map, Pledge Map or Payment Map tabs produces a window similar to this one:

Values entered in this column are subtracted from the gift amount to yield the Tax Deductible Amount that appears in the gift record.

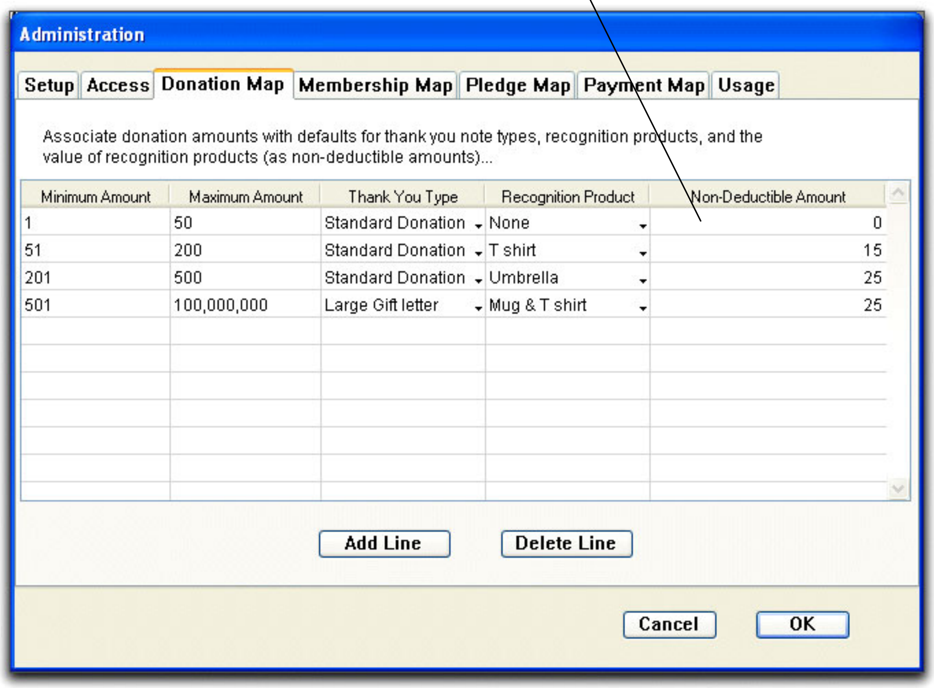


Figure 10.7 Administration Window, Donation Map pane

In these windows, you can set default values for Thank You Type, Recognition Product Member Class and/or non-tax deductible amount** according to the gift amounts that you specify. This aids in consistent and rapid data entry. For example, using the entries in the diagram above, a new donation record for $100.00 would automatically receive an entry in the recognition product field of “Umbrella” and an entry in the Thank You Type field of “Donation.major”. $35.95 would be deducted from the gift amount and the result placed in the Tax Deductible field of the new

** You can report the total tax-deductible amount for a year to your donors by using the Year-End Letter export. See “Year-End Letters” on page 127.

donation. These values appear in the gift record after tabbing out of the amount field. The resulting record would look like this:

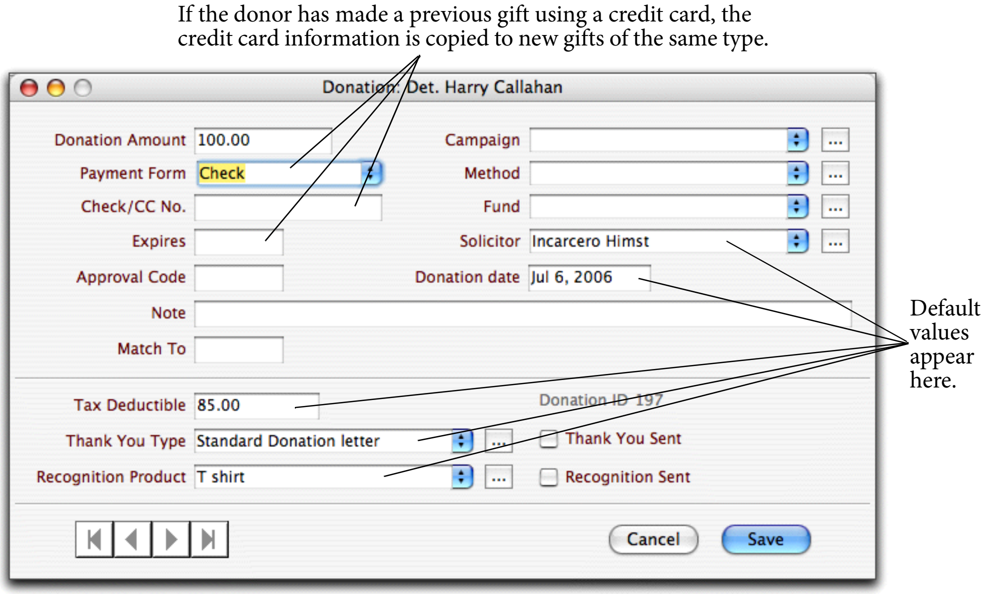


Figure 10.8 Recognition/Thank You default example

These assignments can be changed anytime. If security is enabled, you must log on as administrator to change these defaults. If no default has been entered for a gift amount, the gift record will not automatically receive any recognition, thank you or tax deductible amount default values, but you can still make assignments manually.

To set a default, click once in either the Donation, Membership, Pledge or Payment area, then click the Add Line button. Choice lists appear for Membership Class, Recognition Product and Thank You Type columns; you make a selection from the list, or click the Modify button to edit the list. After a selection is made, use the TAB key or the mouse to move to the next column. Press the TAB key or click in the MinAmount (minimum amount), MaxAmount (maximum amount) and/or Dues Amount fields, then enter whole numbers to correspond to the gift amount range or dues amount you want for the specified recognition and/or thank you type. FUNDimensions will present an alert when you click the OK button if there are overlapping amount ranges in a map. It is not mandatory to enter a recognition product, thank you type or membership class for an amount range; this lets you specify ranges that should not receive defaults.

In the Membership Map pane, you can change the default value for the Membership Expires field in the area beneath the other defaults for these records. The amount of time entered as a default is added to the date in the Paid Date field as soon as you leave that field in a new record. If you want the expiration to always default to the last day of the month, check "Round Expiration to Last Day of Month".

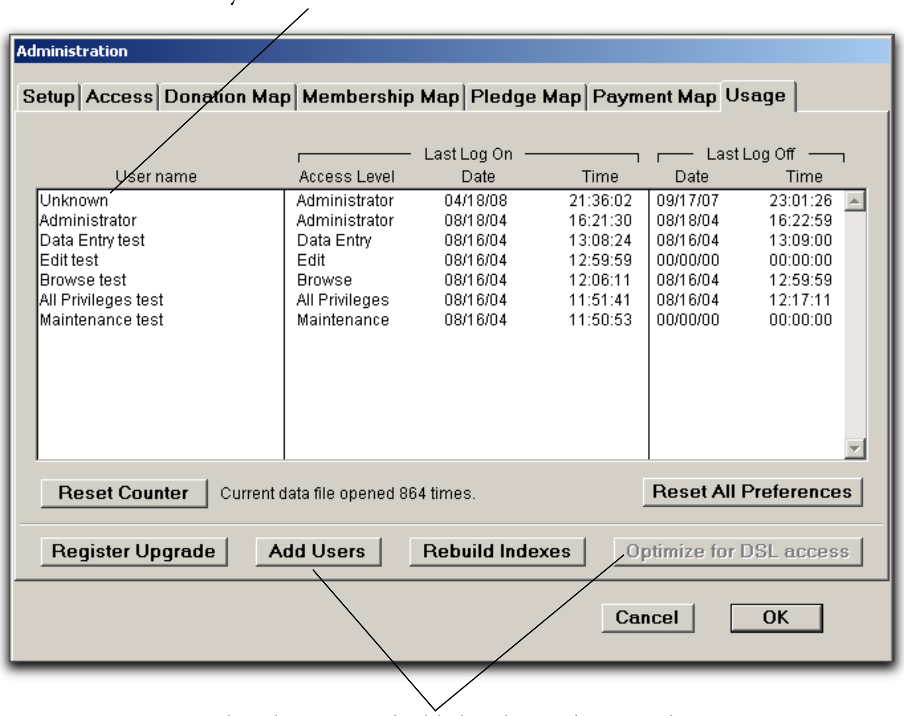
The Payment pane is for pledge payments only. Only mappings to Thank You Type are available for this pane.

To delete a default, click in one of the amount columns of the line you wish to remove and click the Delete Line button. This will not alter any gift records that have already received these defaults.

Usage

Clicking the Usage tab displays the following pane:

When password security is off, you will see only an entry for the user name of "unknown".



These buttons are disabled in the Single-User Edition.

Figure 10.9 Administrator dialog, Usage pane

These items appear in this window:

- A non-editable scrolling area where you view the last log-on and log-off dates and times for each user name.
- An area with a count of the number of times the current data file was opened, and a **Reset** button to reset the counter to zero.
- A **Reset All Preferences** button deletes the preferences for each user account, forcing them to be reset to default values when the program is relaunched.This is intended to be used to fix occasional corruption of window size and location values that results in distorted window features.

  These preferences are stored internaly in the data file, not in external files, and there is one preference record for each user account (i.e. username and password) created for the database.

This function does *not* affect settings in the Administrator window, but only resets values in the Preferences window: any changes made by users in their preferences will be reset to default values. If you want to restore these settings after the reset, you will need to record them by writing them down or making screenshots before performing the reset.

When using this function in the Client-Server Edition, all other users must first be logged out.

The program quits after performing the reset.

- An **Add Users** button to add users in the client-server version of FUNDimensions. A serial number is required. See "Adding a License" on page 243.
- A **Register Upgrade** button to start a process for entering serial numbers issued with paid upgrades.
- A **Rebuild Indexes** button to rebuild the indexes in your data file. This may resolve corruption problems that exhibit themselves as searches and sorts returning incorrect results, or other symptoms. Use of this button will require re-launching your FUNDimensions application (a server relaunch is required for the client-server edition). This provides an easier option than use of the more powerful 4D Tools utility application, but 4D Tools may resolve issues that rebuilding indexes may not. (4D Tools and documentation is available at no charge from the FUNDimensions web site or CD-ROM.) If neither of these repairs your database, you can export your entire database as XML files, and import those files into a new, empty database (see "Export Entire Database as XML" on page 178 and "Import XML" on page 283).
- **Optimize for DSL Access** and **Optimize for LAN Access**. This button toggles a low-level networking attribute to optimize performance for two different networking situations:
  - Optimize for LAN Access is the default setting. This works best for low latency connections which are characteristic of local area networks.
  - Optimize for DSL Access provides better performance for most access over wide area networks, such as the internet. These connections are characterized by high latency.

  If you are performing a combination of remote and LAN access, experiment to find the best setting.

Login as…

This menu command produces the same dialog that appears at startup for selecting a user name and entering a password, allowing you to login with another user name without quitting and relaunching the program. For instructions on logging in, see "Starting Up FUNDimensions" on page 39.

Password security must be enabled to use this menu command. See "Turning Security On and Off" on page 234 for information on how to turn on security in the program.

Open Data File

This command lets you switch data files in the same manner you switch documents in a word processor: by selecting the menu command and choosing the file to open. For more information, see "Creating a New Data File" and "Opening a Data File, Normal Mode" in Chapter 2. This command appears in the single-user version only. (Client-server data files must be switched at the server.)

You are limited to one open data file at a time, unless you perform multiple installations and launch multiple copies of the FUNDimensions application on your computer.

Import

You use this command when you want to move donor information from another source (database, spreadsheet, or other list) into your database without manually entering each record. You can also import address corrections to update existing records.

In addition to the import formats and procedures described here, custom import services are also available: contact the publisher of FUNDimensions for details.

This menu item is enabled for the Donors List View only. It will read either a standard, tab-delimited text file, with a tab between each field and a carriage return after each record, or an XML file generated through FUNDimensions' own XML export.

Choose which import type you want in the window that appears when you choose File>Import. The dialog appears below, while each of the three options it offers are discussed following:

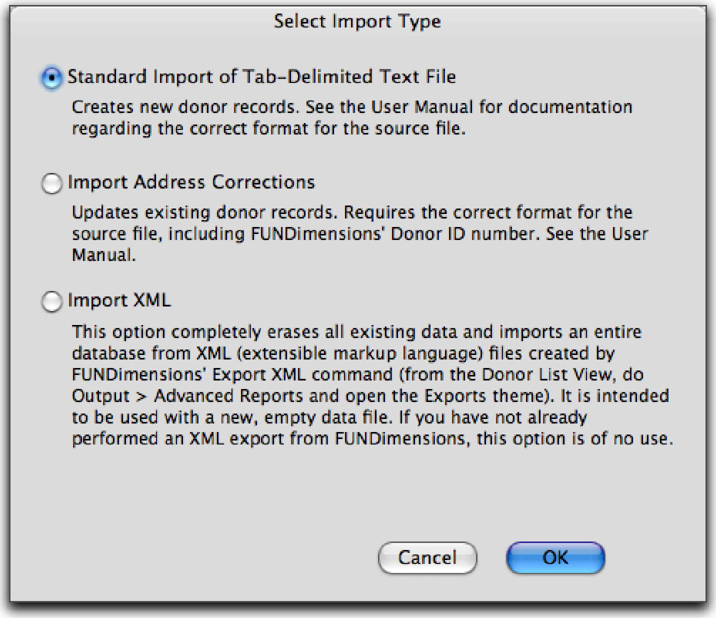


Figure 10.10 Import dialog

Standard Import of Tab-Delimited Text File

This is the first option in the dialog shown above. If your data is in DBF files, an Excel® spreadsheet, or some other format, it is possible to convert it to the tab-delimited format required by FUNDimensions, using a spreadsheet program; see the instructions for your spreadsheet program.

This import creates donor records without regard to whether a donor may already exist in the database. You can use the Duplicate search after the import to assist you locating duplicate records (see “Duplicates” on page 320).q

Please observe the following requirements when importing text files:

- For the phone or Postal/Zip Code fields, any formatting characters in the source file will be ignored. FUNDimensions will format these fields automatically.
- Data in the Note field of an import (field 23 in “Table of Import Fields”) will appear in the lower area of the Note pane of the Donor Input Window.
- During the import process, FUNDimensions will automatically fill in the Label #1, Label #2 and Letter Salutation fields based on the contents of the imported fields for Salutation, First Name, Middle Name, Last Name and Company. This is the same as in manual creation of donor records.

The following table lists the fields in the order in which they must be imported, and the maximum length of each field:

Table 10.2 Table of Import Fields

Field Number	Field Name	Maximum Characters
1	Salutation	36
2	First Name	36
3	Middle Initial	1
4	Last Name	40
5	Title	45
6	Company	60
7	Address	60
8	Address 2	60
9	City	45
10	State	2
11	Zip	10
12	Country	20
13	Home Phone	14
14	Work Phone	14
15	Fax Phone	14
16	Mobile/Other Phone	14
17	Email	52
18	User Defined field #1*	45
19	User Defined field #2*	45
20	User Defined field #3*	45
21	User Defined field #4*	45
22	User Defined Date*	MM/DD/YY
23	Year of Birth	2
24	UserList_1*	25
25	UserList_2*	25
26	UserList_3*	25
27	Solicitor	25
28	Note	approximately 32,000

*The names of these fields may be edited, see “Preface” on page ix.

If the fields in the source file are not in the correct order, a spreadsheet program can be used to open the file and change the order. Commands to insert and delete cells or columns in the spreadsheet can be used with copy and paste of columns to set the fields to the order shown in the table above. Save the results as a tab-delimited ASCII text file, then return to FUNDimensions and perform the import.

Imported fields containing more than the maximum characters allowed will be truncated.

Tip: When converting spreadsheets with postal codes to tab-delimited text files, check to see that Excel or other spreadsheet software is not stripping off leading zeros, e.g. converting 09002 to 9002. If this is occurring, you can change the cell format to “text” which will prevent removal of leading zeros. In Excel, the command to perform this change is under Format menu>Cells...

Text File Import Procedure

Warning: In some instances, several attempts at importing a source file are necessary before satisfactory results are obtained, so consider assigning all your imported records a unique keyword, such as “Imported (current date)” so that you can remove them if the import was unsatisfactory. This might happen if the fields in the imported file are in the wrong order, or if the tab characters are missing between some fields, or if the return characters are missing between some records. In cases like these you may want to delete the records from FUNDimensions and import the records again after cleaning up the problems in the source file. Assigning the imported records a unique keyword will make deleting them later much easier, by allowing you to easily locate the imported records.

To perform this type of import:

1 *First, back up your data file.*

2 Do File>Import.

3 Choose Standard Import of Tab-Delimited Text File in the dialog above.

4 A standard Open dialog is displayed; locate the file you wish to import and click OK.

5 The import begins. The thermometer goes away when the process is complete.

At this point, FUNDimensions displays only the imported records in the Donor List View, so this is an ideal time to assign them Categories, Types, Keywords, Solicitors and Volunteer status, using the Assign Keyword and Assign Other commands from the Records menu. Using the Save Set item from the Records menu, you can also save the imported records as a named set; see “Save Set” on page 303.

Hint: You should assign the imported records a keyword denoting an imported record immediately after importing them. See “Assigning Keywords” on page 62 if you need help assigning keywords.

If you want to print a listing of the donors you just imported, and this can be done with the Print List command in the Output menu.

Import Address Corrections

You can export the addresses of the donors in FUNDimensions, submit them to a third-party service for verification and correction, and then import the corrections back into FUNDimensions. The export from FUNDimensions will contain the Donor ID number of each donor record that you export: for the address correction import to work, the Donor ID field must be retained in the correction process, because the

Donor ID number is the means by which the software will match addresses in the import file to records in the database.

Because FUNDimensions relies on the Donor ID number for the import, you should make sure it is included in the export file you submit to the third-party service, and you should specify that the number be preserved in the file during and after the address correction process. The Donor ID number is automatically included in standard exports produced from FUNDimensions (i.e. exports produced from Output menu > Export), so its omission from files you send to a mail house is not ordinarily a concern. An exception would be custom exports produced using the Report Editor: for these exports, you would need to configure the export to include the Donor ID.

Tip: turn Householding **off** when exporting for address correction. This will ensure every record in the database is subjected to the address correction process. For more information on Householding see “Householding” on page 139. For instructions on turning householding off, see “Export/Labels” on page 265.

This import never creates or deletes donor records; it only performs an editing function.

Because of the potential for problems in this process, you must perform a backup of your database before performing this procedure, and be comfortable with the restore process. Please get training if you need it in these areas before performing the import, or request to have the FUNDimensions publisher perform the task for you.

The fields in the import file must appear in the order shown in the table below. The import file may contain additional fields after the ones shown in Table 3.3, but those field s will be ignored in the import process. If you import file does not contain all the fields shown in the table, you may insert empty fields to take their place, using any spreadsheet software (e.g. if the import file does not contain an Address Line 2 field). You can also rearrange the order of fields in your import file, and verify them using spreadsheet software. See the numbered steps on page 345 for instructions to help you open tab-delimited text files in Microsoft® Excel.

Table 3.3 Address Correction Import Fields

Field #	Field Name
1	Donor ID
2	Address Line 1
3	Address Line 2
4	City
5	State/Province
6	Postal or Zip Code
7	Country

To perform an Address Correction Import, follow these steps:

1 Perform a backup of your data file. This is a safety net in case the import process does not work as expected. You can use the integrated backup module to perform a backup (File menu > Backup Now), or quit FUNDimensions and manually make a copy of the data file.

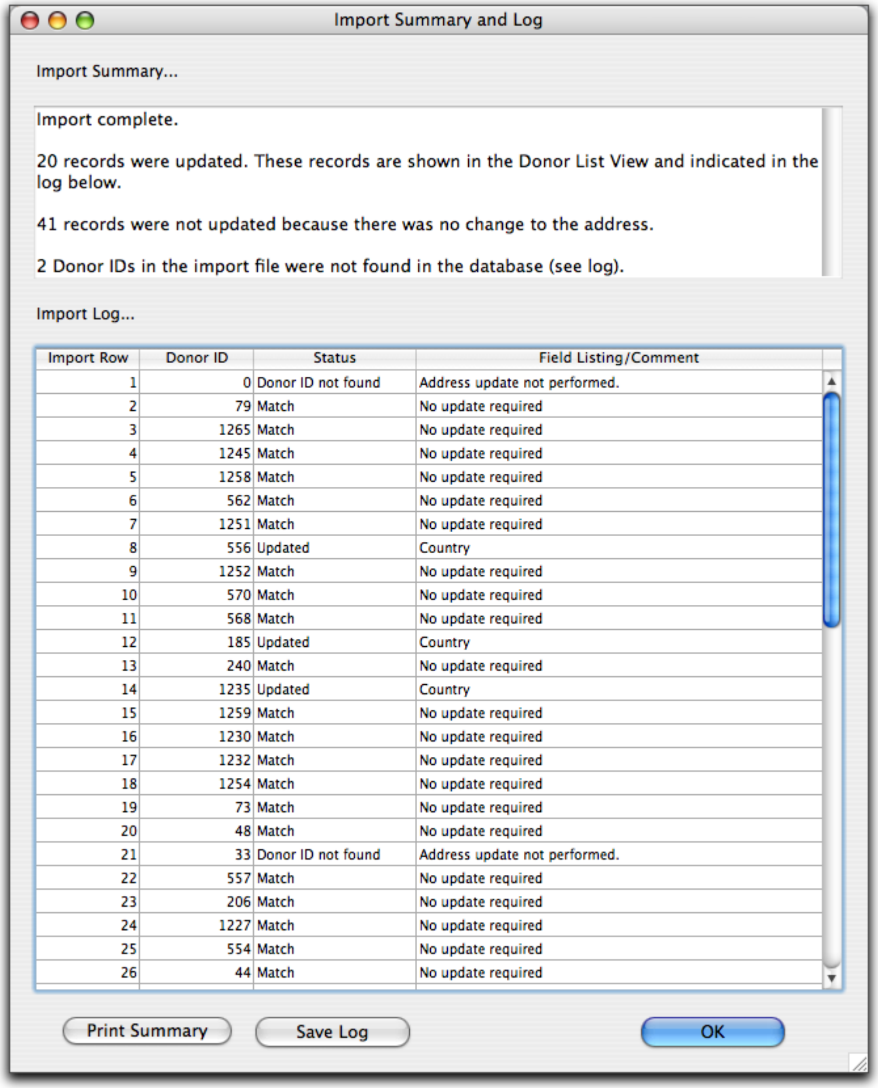
- For the location of your data file, do Help menu>About FUNDimensions on Windows, or FUNDimensions menu>About FUNDimensions on Macintosh. The exact name and location of your data file is listed at “Path to data File:”.

2 Working from the Donor List View, do File menu>Import. Select Address Correction Import from the dialog that appears, then click OK.

3 In the standard Open dialog that appears, select the file containing the address corrections. As mentioned above, this file must be a tab-delimited text file containing the exact fields in the same order as shown in Table 3.3 above.

4 The import process begins. If you cancel the process while underway by pressing the ESCAPE key, all changes made to that point are rolled back and your database is left untouched.

The import process is concluded with a summary displayed on your screen, as shown in Figure 10.11 below. A log file is also displayed and may be saved to disk containing details on the result of every attempted address correction, including which fields, if any, were corrected in each record. This log file may be opened, browsed, searched, or printed in any spreadsheet program or text editor.:


Import Summary and Log

Import Summary...

Import complete.

20 records were updated. These records are shown in the Donor List View and indicated in the log below.

41 records were not updated because there was no change to the address.

2 Donor IDs in the import file were not found in the database (see log).

Import Log...

Import Row	Donor ID	Status	Field Listing/Comment
1	0	Donor ID not found	Address update not performed.
2	79	Match	No update required
3	1265	Match	No update required
4	1245	Match	No update required
5	1258	Match	No update required
6	562	Match	No update required
7	1251	Match	No update required
8	556	Updated	Country
9	1252	Match	No update required
10	570	Match	No update required
11	568	Match	No update required
12	185	Updated	Country
13	240	Match	No update required
14	1235	Updated	Country
15	1259	Match	No update required
16	1230	Match	No update required
17	1232	Match	No update required
18	1254	Match	No update required
19	73	Match	No update required
20	48	Match	No update required
21	33	Donor ID not found	Address update not performed.
22	557	Match	No update required
23	206	Match	No update required
24	1227	Match	No update required
25	554	Match	No update required
26	44	Match	No update required

Print Summary   Save Log   OK

Figure 10.11 Import Summary and Log window

The address correction of a record may be prevented by certain conditions:

- If you are using the Client-Server Edition of FUNDimensions, a record may be locked by another user of the database who opened it prior to the attempt to perform the address correction. FUNDimensions will identify this error, and display the user name in the log file. You can have the user close the record and try the import again. You can prevent this problem by logging out all the other users before beginning the Address Correction import.
- The Donor ID number could not be found. If FUNDimensions cannot locate a record with the same ID number as that found in the import, this error is logged. If

the import file includes the name of the donor, you could look up the name in the database to see if you can locate the record.

Whenever a record is updated by this import process (or by any other means), FundDimensions updates the modification date, time, and user name fields for the record. To view this information, see “Record Statistics” on page 149. It is also possible to search on this information to locate records which were updated by the import process: see “Advanced” on page 335.

No provision is made in this import for deleting records not found in the import file.If you third-party service finds some records that need to be deleted, have them create a separate list of these records and delete them manually from the database (see “Delete Highlighted & Delete Record” on page 295.)

Import XML

The XML Import supports only exports generated by using the XML export feature of FundDimensions (see “Export Entire Database as XML” on page 178).

This import is usually performed into a new, empty data file for the purpose of resoring a database that is badly damaged. For instructions on creating a new data file, see “Creating a New Data File” on page 41.

To perform this import, choose Import XML in the dialog shown in Figure 10.10.

Backup Now

If password security is turned on for the database, you must be logged in as Administrator to access this menu command. (In the Client-Server edition, you can also perform this task on the Server software, by doing File>Backup.)

This menu item causes a backup to occur immediately (except on FundDimensions Server, where a window is produced, and you must click the Backup button), using the settings in the Information and Settings pane of the Backup Configuration window (see next section). These settings determine what files will be backed up (the current data file is always backed up), where the backup will be saved, and other settings.

During the backup, you cannot use the database, except in the Client-Server edition, you can use the database in read-only mode. If the backup interval is inconveniently long, please use the Backup Configuration window (“Configuring Backups in the Single User Edition” on page 245) to reduce the quantity of files being backup up, other than the data file.

An entry is made denoting the backup in a log file, “Backup Journal.txt”, located next to the application. The log file may be opened in any text editor or word processor, or viewed in the Log pane of the Backup Configuration window (see next section).

Backup Configuration

This menu command is available only in the Single-User Edition. See the Client-Server Administration Guide for information on configuring backups in that software.

If password security is turned on for the database, you must be logged in as Administrator to access this menu command.

The Backup Configuration menu command produces a window in which you can perform these tasks:

- ♦ Specify what files will be backed up. The data file is always backed up but you can specify any files or folders to be included with the backup.
- ♦ Specify where the backup files will be saved.
- ♦ Set up a log file to record changes between backups, so that complete, up-to-date restores are always possible.
- ♦ Specify how many backups to save before the oldest file is deleted.
- ♦ Set the compression to be applied to the backup files to save disk space, and whether the backup files should be segmented into sizes to fit recordable CDs.
- ♦ Set a schedule for automated backups to occur.
- ♦ View a log of recent backups, and get information about the next scheduled backup.
- ♦ Un-do additions, changes or deletions made to the database.

For more information, see “Backup Module” on page 245.

Restore Now

This menu command is available only in the Single-User Edition. See the Client-Server Administration Guide for information on restoring databases in that software.

This command initiates a process for recovering from data loss by extracting a copy of your database from backups and integrating log files. For more information, see “Manual Restoration” on page 250. (If password security is turned on for the database, you must be logged in as Administrator can access this menu command. In the Client-Server Edition, you must select Restore Now from the Server software, not on a client.)

Quit

This command ends your FUNDimensions session. For records in which you were performing data entry (i.e. new or modified records), each record is saved automatically unless problems with the data are discovered (e.g. you failed to enter an amount in a new gift record). In that case, the quit is aborted and the record needing your attention is brought to the front.

On Windows, FUNDimensions may also be quit by using the close box for the application window (marked with an "x").

Under Mac OS X, this command is located in the FUNDimensions menu, located to the left of the File menu.

You should use this command to end your FUNDimensions session before restarting or shutting down your computer.

Edit Menu

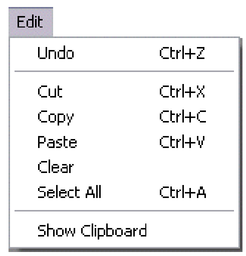


Figure 10.12 Edit menu

Copy, Cut and Paste, in this menu operate in the fields of records as they do in all Macintosh and Windows programs. Refer to your system software documentation if you are unfamiliar with these items.

Using the cut, copy and paste commands will be effective for the field containing the highlighted text or insertion point. To copy multiple fields in a single step, try the Clipboard commands located in the Output menu (see page 339).

The Select All command will highlight all the records in a List View. This may be useful prior to using other menu commands which require a highlighted selection. Such commands include the Delete Highlighted and Invert Selection menu items.

In a text field, such as a note in a donor record, Select All is useful for copying the entire text to another program; just choose Select All prior to choosing Copy.

In the Calendar window, the copy, cut and paste commands work on events, rather than on text in fields. See "Cut, Copy and Paste in the Calendar" on page 211.

CHAPTER

11

Records Menu

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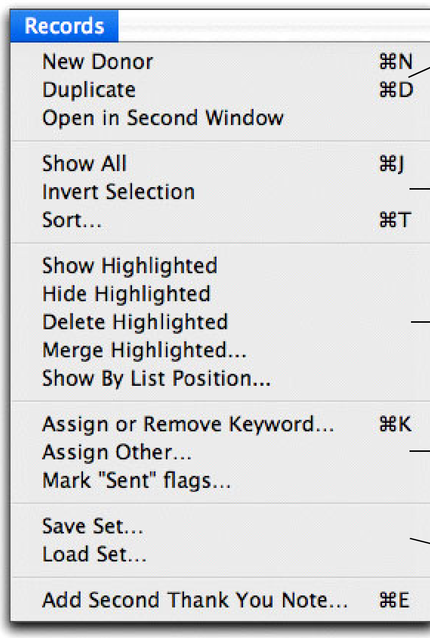


Items in this group create new donor, keyword, and relationship records. To create new gift records, see "Data Entry" on page 47.

Items in this group affect all records in a List View.

Items in this group influence records that you have highlighted by clicking on them.

Items in this group alter the contents of certain fields.

Items in this group create or load a file on disk that allows a specific listing of records to be restored.

Figure 11.1 Records Menu

This menu contains commands for changing which records are displayed in list views, editing the contents of certain fields for groups of records, for moving the contents of entire records or lists to the clipboard, and for working within named sets of records.

New... (Donor, Note, Event, Keyword, or Relationship)

This menu command creates a new record in the Donor, Note, Calendar, Keyword and relationship modules. For details on the process of creating new records with this command, see the reference in the following table:

Table 11.4 Cross-references for the New... menu command

Menu Command	See Page...
New Donor	56
New Note	66
New Event	212
New Keyword	90
New Relationship	91

This menu command creates a new record in the Donor module from either the list view or input window, and in the Keyword and Relationship modules from the list view only. You can also create new donor records by right-clicking (CONTROL-clicking on Macintosh) on the Donor List View and choosing New Donor Record from the contextual menu. To view and instance of this contextual menu, see “Contextual Menu in Donor List View” on page 94.

For information help you complete a new donor record made with this command, see “Data Entry”, beginning on page 47.

Gift records *cannot* be created from this menu command. The instructions for creating these records are located as follows:

- To add a donation, see “Creating Donations” on page 74.
- To add a membership, see “Creating Memberships” on page 78.
- To add a pledge, see “Creating Pledges” on page 82.
- To add a pledge payment, see “Creating Pledge Payments” on page 87.

Duplicate

This command creates a duplicate of the donor record appearing in the Donor Input Window. It is disabled in all other windows. You can use this command to speed up data entry when creating a series of similar donor records. You could also create one or more dummy donor records to use as templates with this command.

The duplicate record will be an exact copy of the source record, except that keywords, additional addresses from the Address pane, notes and gifts associated with the source record are not duplicated.

To duplicate a *gift* record, right-click (CONTROL-click on Macintosh) on the gift record you want to duplicate in a List View, and choose Duplicate This (gift type) Record from the contextual menu. For more information, see "Data Entry", beginning on page 47.

Open in Second Window

You can open two input windows of the same type, e.g. you can open two Donor Input Windows to easily compare two donors records side-by-side on your screen. You can open two donor records, two donation records, two pledge records, etc.

To use this feature, just hold down the OPTION key (Mac) or ALT key (Windows) when you double-click the second record in a List View. Instead of replacing the previous record in the existing input window, a second window appears to display the record.

Alternately, and so you do not have to remember a keyboard shortcut, you can select the second record to be opened, then choose the "Open in Second Window" command from the Records menu.

Show All

This command will display all records in the list view for the module in which it is used. For example, when viewing the Donor List View, choosing Show All will place all donor records in your database into the List View. This command is only available when a list view is the front most window.

Invert Selection

This command hides records in a list and displays instead the records that were not in the list. This allows you to easily perform boolean NOT searches; for example to get a list of all donors not possessing a keyword "X", you could perform multiple searches for each of the other keywords-but that might be a lot of separate searches. Alternately, you can perform one search for "X", then use the Invert Selection command to remove the found records from the display and place all the other records into the list. See page 103, and see the index under Menu Commands: Invert Selection for more information

Sort

Tip: in addition to this menu command, List Views may be sorted by clicking on their column labels. This is faster than using the command described here.See “Adjusting Column Widths and Sorting by Column in List Views” on page 4.

Enabled only in list views, this command presents a dialog offering choices for ordering the records in list views. The sort is temporary; records will revert to their natural order when the program is relaunched, or when any command changes the contents of the list view. Use of the Export, Labels or Report Editor menu commands may also change the sort order of a list view, since these items can be configured to perform their own sorts.

Users at the Browse, Data Entry and Edit access levels will not be able to use the Sort command *in gift modules*, unless the View Gifts privilege is enabled for their level. See page 271.

In gift modules, the Sort command presents a dialog like that shown below:

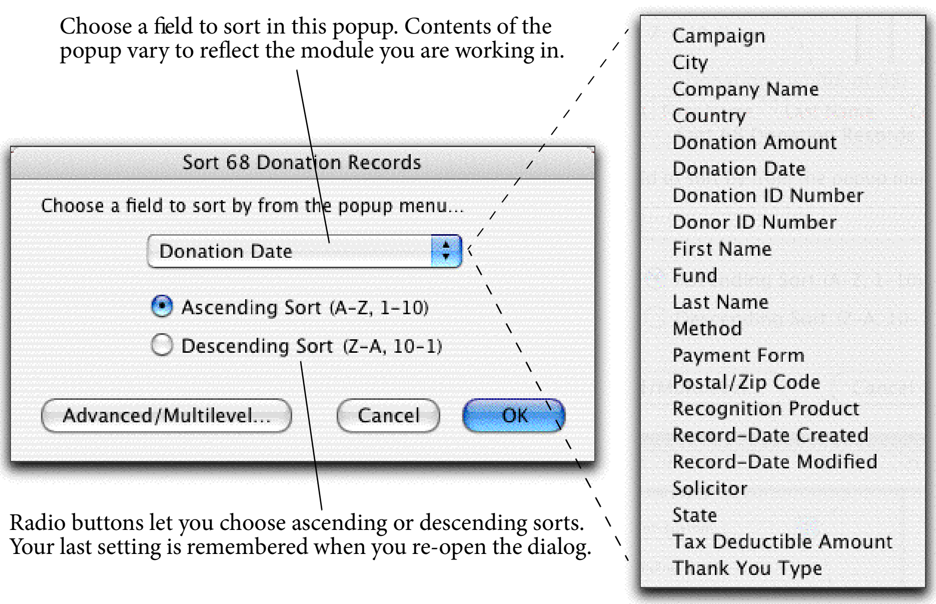


Figure 11.2 Sort dialog in gift modules

In the donor module, the sort dialog includes checkboxes and date fields, whose purpose is described in the diagram and text below:

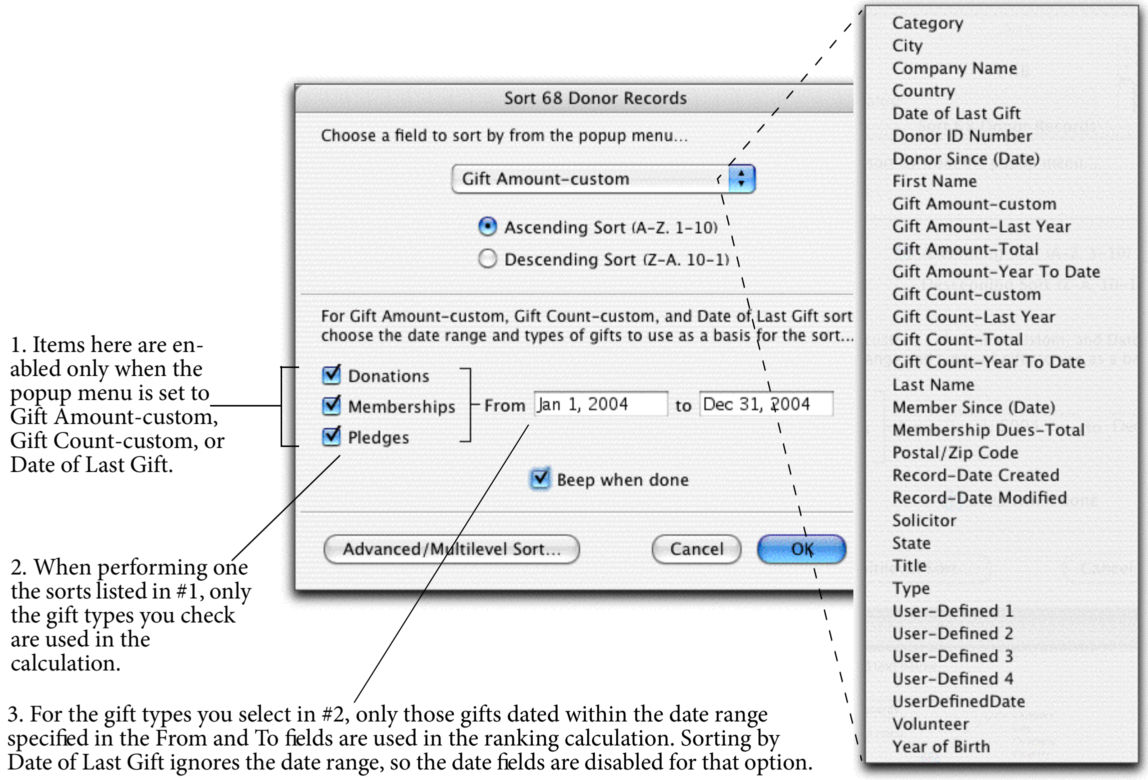


Figure 11.3 Sort dialog in donor module

After selecting the command from the Records menu, select the field you want to sort by in the pop–up menu, then use the radio buttons to choose whether you want an ascending or descending sort order. Click the OK button to sort the records or Cancel to close the dialog and return to the previous window.

Sorting can be used to help you identify donors most likely to respond to subsequent appeals, or to help you target appeals to donors with various giving history attributes; for example, you may wish to modify an appeal to donors with only one gift in your database, or omit your most recent donors from a pending appeal. To help you do these kinds of tasks, sorting from the Donor List View includes these choices (see restrictions below):

- **Gift Amount-custom**. When performing this sort, FUNDimensions uses only the gifts matching the gift types and date ranges you specify in the lower area of the dialog. Within those criteria, donors are ordered by the total amount of their gifts. This means all gift amounts are summed, and that sum is used as the sort criteria.
- **Gift Count-custom**. When performing this sort, FUNDimensions uses only the gifts matching the gift types and date ranges you specify in the lower area of the dialog. Within those criteria, donors are ordered by how many gifts they have made. This means that gifts for each donor are counted, and the count is used as the sort criteria.

- **Date of Last Gift.** When performing this sort, FUNDimensions uses only the gifts matching the gift types you specify in the lower area of the dialog. The date fields are disabled and do not apply when this sort is selected. Only the most recent gift of each donor is considered in the sort, subject to the choice you make in the gift type checkboxes. You could use this sort in conjunction with the Date query to define a date range of gifts used in considering how recently a donor made a gift.

In the following cases, the Gift Amount-custom, Gift Count-custom, and Date of Last Gift sorts listed above are *not* available (i.e. they are omitted from the popup menu of sort choices as shown in Figure 11.3):

- Users at the Browse, Data Entry, Edit and Maintenance access levels, if View Gifts is turned off in Administration> Access tab. See page 271 for information about the View Gifts setting.
- Users in Read-Only Mode. “Opening a Data File, Read–Only Mode” on page 43 for more information about Read-Only mode. This is because the Gift Amount-custom, Gift Count-custom, and Date of Last Gift sorts require writing to the data file, which is not possible in Read-Only mode.

You can continue to work in other modules and windows while these sorts are performed, and the sorts may be cancelled at any time following the instructions in the progress dialog.

With the Ascending and Descending radio buttons, you can have the largest donors at the top or bottom of the Donor List View. To display your top “x” donors:

1 Bring the Donor List View to the front.

2 Choose Records>Sort.

3 Choose Gift Amount-custom from the dialog popup.

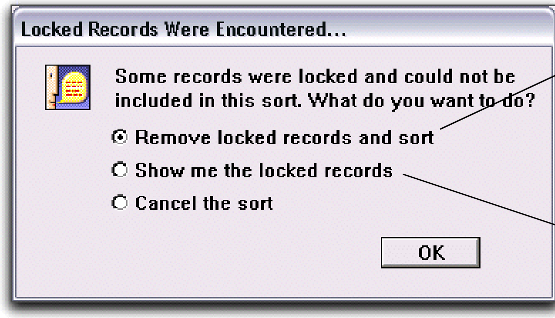
4 Set the gift types you want considered in the total gift amount using the checkboxes. You can include any combination of donations, memberships and pledges in the amount calculations for each donor.

5 Set a date range by entering maximum and minimum dates. Each gift selected in #4 above is tested against this range; if the gift date falls within the range, the amount of the gift is included in the total amount for the donor, otherwise the gift is ignored.

6 Click the Descending radio button, then click Sort.

7 Choose Records menu>Show By List Position. In the dialog, enter the number of top donor records you want, select Beginning of List, and click OK. (For more information on the Show By List Position command, see page 298.)

The Gift Amount-custom, Gift Count-custom, and Date of Last Gift sorts require that information be added and saved to each donor record. This is performed internally by FUNDimensions, but the software cannot perform this task on donor records that are open in a Donor Input Window. To prevent this problem, close the Donor Input Window on your computer before performing one of these sorts. If you fail to do this, or if donor records in the list to be sorted are open on another machine in the client-server version, the software will alert you and handle the situation without errors in the sorted list, but not until all the other records have been processed. The dialog produced when this error is encountered is similar to this:



This option displays the sorted list you requested, but the sorted list will not include any locked records.

This option displays the locked records. Client-server users: once displayed, opening each locked record will display a message displaying the name of the user with the record open. You can then arrange for them to close the record, then try the sort again.

Figure 11.4 Error dialog when sorting locked donor records

The Advanced/Multilevel button opens the Sort Editor, where you can create multi-level sorts. The example below contrasts the results of a single-level sort, obtained by sorting only on the state field of 8 donor records, with a multi-level sort using Sort Editor and sorting the same 8 records by both state and last name:

Table 11.5 Comparison of Single- and Multi-level Sorts

Single-Level Sort

State	Name
AZ	Fricks
	Abelman
	Martin
CA	Gelback
	Frampton
	Kelford
NM	Ramirez

Multi-level Sort

State	Name
AZ	Abelman
	Fricks
	Martin
CA	Frampton
	Gelback
	Kelford
NM	Ramirez

States are sorted, but names are in random order… …while names here are in sorted order.

The Sort Editor window is shown below:

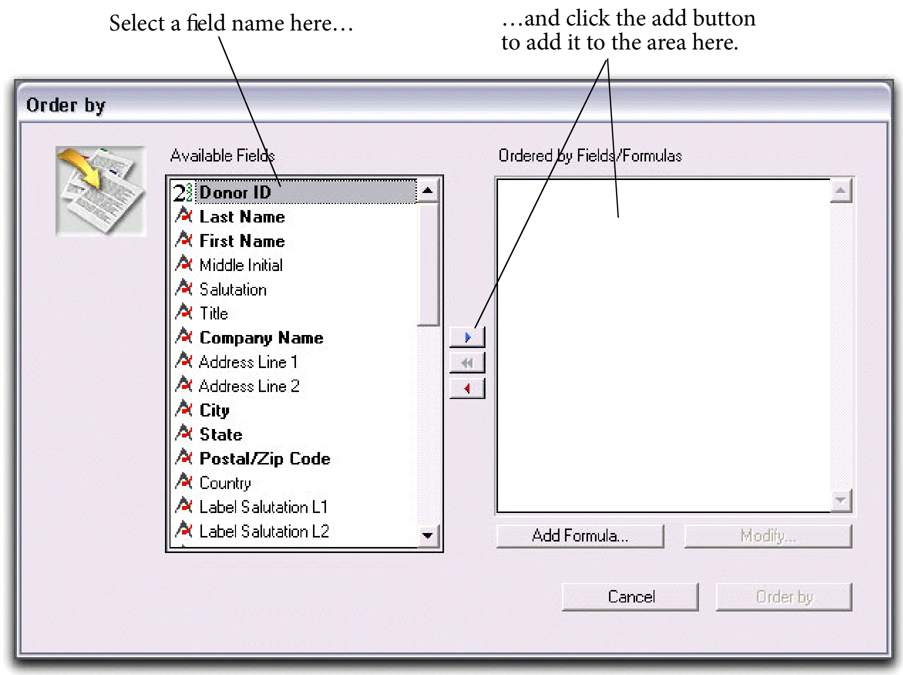


Figure 11.5 Sort Editor

For access levels with View Gifts turned off, this editor or certain fields may not be available.

To configure a multi-level sort in this window, click on the fields to sort by in the list at left, then click the button containing a right-pointing arrow. The fields appear in the list at the right with an arrow to indicate an ascending or descending sort. Clicking the arrow changes the sort direction. It is possible to sort a list of records by the fields in related files; for example, you can sort a list of donor records in the Donor List View by the Campaign field in related donation records. This is done by clicking Modify or Add Formula buttons to open the Formula Editor (see Figure 13.10, "Formula Editor" on page 364).

Multi-level sorts usually take significantly longer than single level sorts to complete. Sorts are temporary, so the records will not appear in a sorted order when you re-launch FUNDimensions. Sort order is also lost when using the Show All menu command and all commands from the Find menu, so plan on performing sorts after other operations that modify the list.

It is usually not necessary to sort records by postal code or last name before exporting or printing labels because this is done automatically if the appropriate Preferences checkbox is turned on (see "General Preferences" on page 261).

In the Pledge Input Window, the Sort command changes to Sort Payments. It sorts the payments listed in that window in reverse chronological order (most recent payment at the top). If you hold the ALT key down on Windows or the OPTION key down on Macintosh before clicking on the menu title, the payments will be sorted in the opposite (ascending) chronological order.

Sorting in the Keyword and Relationship List Views can be accomplished in descending order by holding down the ALT key on Windows or the OPTION key on Macintosh before clicking on the menu title.

Show Highlighted

This command will reduce the records displayed in a list view to only those that are highlighted. It does *not* delete records, but only causes them to be temporarily removed from the List View.

For instructions on how to highlight records, see page 55.

Hide Highlighted

This menu item, available only in list views, will hide from display any records you have highlighted. For instructions on how to highlight records, see page 55.

Hint: You may use this command to hide records that you manually select from a list prior to printing or exporting, to prevent those records from being included in the output. This could be convenient if, for example, several donors in the list you are about to export had recently received solicitations or made gifts, and you wanted to avoid asking again too soon.

Delete Highlighted & Delete Record

These commands *permanently* delete selected records in list views or input windows. In list views the records to be deleted must be highlighted before the command is selected from the menu. From input windows, the command deletes only the record showing in the input window.

For instructions on how to highlight records, see page 55.

If you are deleting records because you no longer wish that they appear in mailing lists, consider using the Do Not Mail function instead. This automatically blocks the record from mailing labels and exports. See “Creating Donor Records” on page 56 for more information on the Do Not Mail checkbox.

When you delete records that have other records linked to them, FUNDimensions must delete the linked records too. Linked records can be present for donor records (links to donations, memberships, pledges, pledge payments, relationships and notes) and pledge records (links to pledge payments). For example, when you select some donor records and choose the delete command, the software checks if there are any gift or note records associated with any if the selected donor records. When deleting pledge records, a check is made for associated pledge payments.

If linked records are found, FUNDimensions informs you and offers you appropriate choices through the dialog box below. If there are no linked records this dialog box is not displayed:

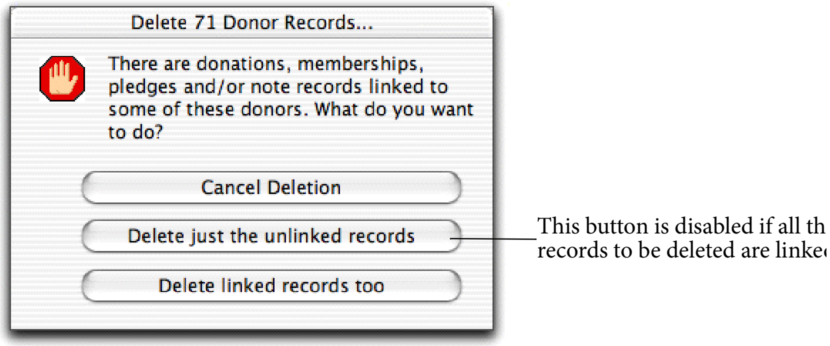


Figure 11.6 Deletion dialog for linked records

Before clicking the lower button labeled Delete Linked Records too, you should understand that this will cause not only the records you selected to deleted, but also their associated donations, pledges, pledge payments, and/or notes records. After deleting a donor this way, you will not be able to look up that donors's donations, memberships, pledges or pledge payments .

A confirmation dialog appears prior to all deletions. The exact text it displays varies with context, but its purpose is always to give you a chance to change your mind about deleting records. Click Cancel to stop the deletion process, or OK to continue the deletion process. You cannot undo a deletion.

When deleting records in a multi-user configuration of FUNDimensions, the situation can arise that you attempt to delete records which are open by other users, or for which a linked record is open by another user. When this happens, deletion cannot take place for these records, which are described as "locked". FUNDimensions presents a dialog to offer you choices to cancel deletion, delete just the unlocked records, or wait for records to become unlocked. If you elect to wait for this to happen a message window appears stating the number of records remaining to be unlocked before the deletion process can complete. Locked records will become unlocked as soon as the other users close their input windows.

If you are deleting donor records associated with an event, the software warns you of this with a dialog like the following:

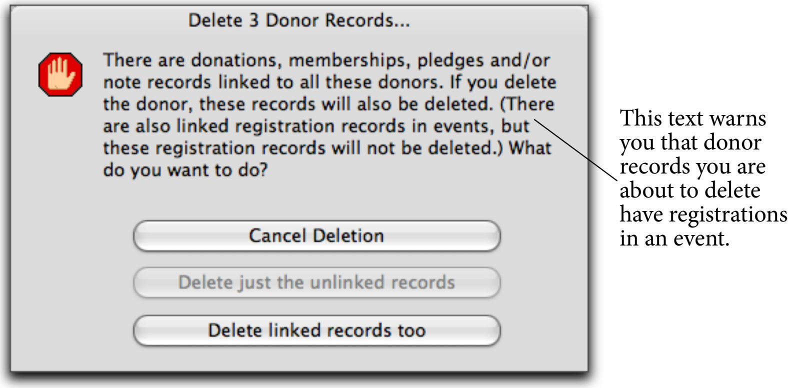


Figure 11.7 Warning when deleting donor records that are registered in an event

If you proceed with the deletion of donors who are registered in an event, display and reporting of the event record is impacted, even though the registration records will not be deleted. See “Handling of Deleted Donor Records” on page 227 for details.

Merge Highlighted

This command moves the gifts, notes, keywords and relationships associated with one donor record to a second record, and deletes the first record. It is primarily used to aid in the processing of duplicate records. For example, one day you discover that two records in your database, “S. Jones” and “Sam Jones”, are in fact the same donor. If one of the records had no gifts, notes, keywords, or relationships attached to it (as viewed in the Donor Input Window), you would just delete that record and all would be well. However, if both donor records have gifts attached, and they are not duplicate gifts, then you have a problem: the gifts need to be moved from one of the records to the other. Doing this manually is tedious and error-prone. The Merge Highlighted command can help.

You cannot un-do the merge, so if there is any doubt, perform a backup of your data file before using the Merge Highlighted command.

To merge records, follow this procedure:

1 Bring the Donor List View to the front by clicking on it or choosing File menu>Donors.

2 In the Donor List View, locate the two donor records to be merged. You can sort the list and browse to find the records, or use a search to find them. (See “Finding a Donor” on page 104 for help with this step.)

3 Decide which of the two records you want to keep, and which one will be deleted. The gifts, keywords, notes and relationships from the deleted record will appear in the kept record.

4 Highlight both records in the Donor List View. One way to do that is to click on either one, the hold down the CONTROL key (Windows) or COMMAND key (Macintosh) and click the other record. (For further instructions on highlighting records, see "Selecting Records" on page 55.)

5 Choose Records menu > Merge Highlighted. In the dialog, choose whether to keep the first record and delete the second, or vice versa. Click OK.

6 The merge is performed. To view the results, double click the donor record to open the Donor Input Window and browse the gifts, keywords, notes and relationships displayed there.

Show by List Position

This command shows a specified number of records according to their position in the list. Its useful when you want to select a specific number of records from a sorted list, i.e. if want to mail to your largest 150 donors, so you use this command after sorting your donor list with Records > Sort > Rank by Gift Amount.

Choosing this item produces the following dialog:

Figure 11.8 Show Records By Count and List Position dialog

Enter the number of records you want to display and select where you want them drawn from the list, i.e. entering "150" and choosing "beginning of the list" hides all the records from the list except the first 150. If you choose "middle of the list", FUNDimensions finds the record in the middle of the list and displays half the records from above it, and half from below.

For an example using this command, see "Clipboard-Street Address to" on page 357.

Assign or Remove Keyword

This command is enabled only in the Donors module. It may be used to assign or remove an unlimited number of keywords to a single donor at a time, or to a selection of donors all at once. FUNDimensions will not assign keywords to a donor more than once. Refer to "Assigning Keywords" on page 62 for more detailed information on using this command.

To use the command, select it from the Records menu. In the dialog box that appears, select a keyword from the popup menu. Then click the Assign button to apply that keyword to the Donor(s), or click the Remove button to un-assign the keyword you selected. The Cancel button will leave the selected Donor(s) untouched.

Keywords are displayed for each donor in the Classification pane of the Donor Input window; a popup menu above the list permits an alternate method of adding and removing keywords.

A complete list of keywords in available in the Keywords module, where Keywords may also be created, edited and deleted. Refer to"Creating Keywords" on page 90.

For strategic advice on using keywords to classify donor records, see "Designing Your Database" on page 371.

This command is disabled in Read-Only mode.

Assign Other

This command is enabled in the Donor, Donations, Memberships and Pledges List Views, but is disabled in Read-Only mode. In the donor module, Assign Other may be used to assign or modify the Category, Type, Volunteer*, Solicitor, or Do Not Mail status of one or more donors, or to assign donors to a relationship, or change the address using one of three stored addresses. In gift modules, Assign Other can alter the Campaign, Method and Fund fields of donation, membership or pledge records.

Only users at the Maintenance access level or higher may use this command (see "The Access Privileges System" on page 235 for more information on access levels).

In contrast to working in an Input Window, Assign Other can make an assignment to an entire selection of records in a single step. This makes it easy to change your mind about how items in choice lists are described, e.g. change the "Jazz By Moonlight" campaign to "Restaurant in the Rain".

Follow the procedure below to use the Assign Other command:

* The Category, Type and Volunteer items may be changed through the Administrator dialog. See page ix.

1 While a Donor, Donations, Memberships or Pledges List View is frontmost, select Records>Assign Other. This dialog window appears:

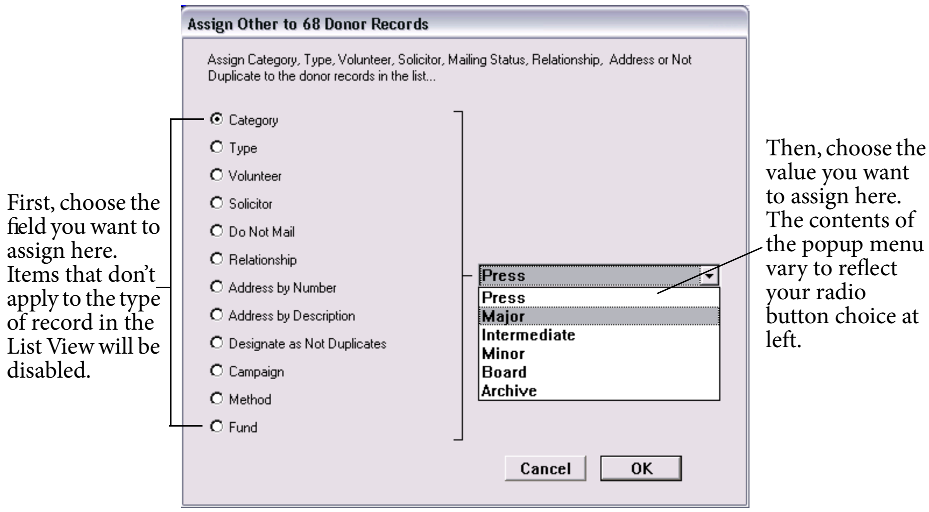


Figure 11.9 Assign Other dialog window

2 Click the radio button corresponding to the field or type of information you want to change.

3 Make a choice from the pop up menu and click the Assign button. After confirming your choice, the selection will be applied to all the records in the List View.

4 If you selected the Relationship radio button, you are provided an opportunity to assign a Constituent Type through the dialog below. (Constituent Type appears as a column in the Relationship pane of the Donor Input Window and may appear in

the Donor Detail Report. For advice on the use of constituent type, see “Designing Your Database” on page 371.)

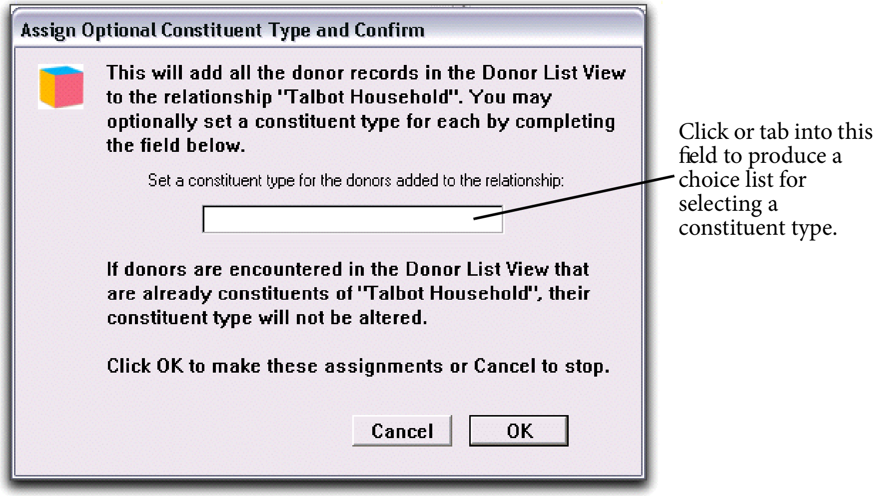


Figure 11.10 Adding Constituent Type when Relationship is selected in the Assign Other dialog

Record locking can prevent some records from being updated. Record locking occurs when a computer (including yours, or any computer in a client-server environment) has a record open with write privileges in an Input Window that would be updated by your Assign Other operation. If this occurs, a dialog window informs you.

In the example below, the Assign Other command is used to help manage a change in board membership. It assumes that board members are placed in the donor category† of “board”. In the first 3 steps, we change the newly replaced Board members from a category of “Board” to category “Major”:

5 Locate the old board members by searching for “Board” using the Category command in the Find menu.

6 Change them all to the “Major” category (or any other category you like) in one step using the Assign Other command.

To change the newly-elected members to the category of “Board”:

7 Search for their names in succession with the Basic command in the Find menu. In the first search, be sure the Normal button is on. After that, use the Add To List option by clicking its button in the search dialog.

8 Repeat step 2 above, substituting “Board” in the Assign Other dialog box.

Address by Number and Address by Description

The Assign Other command can also change a group of donor records from one address to another. The change can be made by address number, i.e. “switch all donors to address number 2”, or by address description, i.e. “switch all donors to the

† The Category item may be changed through the Administrator dialog. See page ix.

address labeled 'summer address'". The address number and address description are found on the Address pane of the Donor Input Window; see "Donor Input Window, Address pane" on page 14.

When switching addresses with the command described here, the switch is only made for the donor records in the Donor List View. This allows you to exclude some donor records from the change, by performing a query or manual selection beforehand. Additionally, FUNDimensions will examine each donor record and make the requested change only if the new address is not empty for the donor; this means that if you initiate a change to "summer address" for a list of donor records, and there are some records without a "summer address", they will remain unchanged at their old address. Similarly, a switch to "Address 2" would only occur if there was a non-empty address entered for Address 2.

Designate As Not Duplicates

The Assign Other command can designate any group of donor records as "Not Duplicates." This stops the group from being identified as potential duplicates when a search for duplicates ("Duplicates" on page 320) is performed. It is useful when a set of records bears identical names or addresses, but you want to leave them that way, and you don't want to see them in a list of potential duplicates. You begin by highlighting a set of donor records in the Donor List View:

- To specify multiple, discontiguous records, hold down the CONTROL key (Windows) or the COMMAND key (Mac) while clicking once on rows you want to select.
- To specify multiple, contiguous records, click on the first or last record in the series, then depress the SHIFT key and click the record at the other end of the series. The records you click and the records between them become highlighted.

With any of the techniques above, you will observe the records becoming highlighted to show that they have been selected. Now, choose Assign Other form the Records menu. Use the button labeled "Designate as Not Duplicates" in the dialog to designate the highlighted set of donor records as "not duplicates." After that, the set of records will not be shown as duplicates *of each other* in the Duplicates search. See "Duplicates" on page 320 for information regarding this search.

Mark Sent Flags

This command is enabled only in the Donation, Membership, Pledge and Pledge Payment List Views. Using the command produces the following dialog:

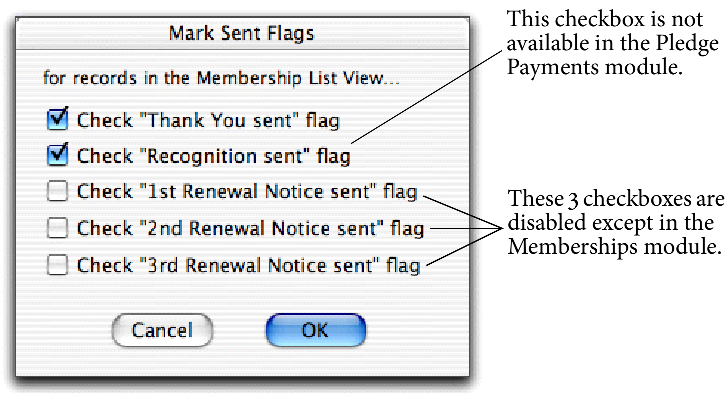


Figure 11.11 Mark Sent flags dialog as it appears in the Membership List View

Checking any of the boxes in this dialog will result in the corresponding flag being checked for all donations, memberships, pledges or pledge payments in the List View. You typically use this after exporting or label printing, to track the gift records that have received acknowledgement.

Hidden feature: If you wish to un-check the checkboxes in a group of records, hold down the ALT Key on Windows or the OPTION key on Macintosh as you click the OK button; a confirmation dialog appears. Clicking OK in the confirmation dialog will turn off the checkboxes you have checked in the dialog above.

Save Set

This command is enabled only for list views. It creates a file on your hard disk which contains a reference to each record in the current list view. Selecting this menu item produces a standard Save dialog, where you can name the set. See Load Set below for important guidelines on naming your sets.

The command does not save the records in the list view, but only *which* records were in the list. You can use this to save the results of a search for later recall, and for recalling a list of records that received a particular mailing, or anytime you want to be able to recall a specific listing of records. The Load Set command restores the list from a set.

Sets have an important limitation that you should keep in mind: they never reflect added or deleted records. Therefore, if a record is saved as part of a set and the record is deleted at a later time, the record will not appear when the set is loaded. Similarly, if you place all of a module's records into a list, save the list as a set, and then add records to the database, those records you added are not part of the saved set and will not appear in the list if you use the Load Set command to restore the former set.

Since FUNDimensions may reuse record numbers from records that were deleted, it is possible for a record never saved in a set to appear in that set when it is restored. Record numbers are not the same as the ID numbers that appear in input windows; ID numbers are never reused.

An additional limitation is that the sort order, if any, of the records in the list are not saved as part of a set.

These limitations may be easier to understand when you know that a saved set contains a reference number for each record in the module and a single "bit" that denotes whether that record belongs to the set, or does not belong to the set. The contents of records (i.e. fields) are not stored, only the reference and a bit indicating membership in, or exclusion from, the saved set. This keeps the disk files you create with Save Set small in size, and they load quickly. The limitations of saved sets mean that they should be used with respect for the conditions that can cause them to become invalid. Properly understood, saved sets can be very useful in recalling the results of complex, lengthy searches, or the records that received a specific mailing or other action. For example, the absence of a deleted record from a restored set often does not diminish the usefulness of the set.

To facilitate the use of sets to track mailings, a checkbox exists in the Label dialog that performs the same function after printing labels as selecting Save Set from the menu.

Use of the Compact and Sort commands in the 4D Tools utility available for FUNDimensions will usually cause saved sets to become invalid, because those functions change the reference numbers for records used in sets. Many users never require or use this utility, so this source of inaccuracy may be of less concern to you.

Load Set

This command restores a set of records referenced by a disk file created with Save Set, to the list view of the frontmost list view. You should only load sets created for the module from which this command is executed. If you violate this rule, no error notice is given; the command may appear to work, because the listing of records in the List View will change, but the results are completely unpredictable as to which records will be placed in the list. To avoid this potential problem, *always save sets with a name that clearly indicates the module to which they belong.* Examples of good naming are:

♦ **Donations-kmartemployees.2000**. This name describes a set of donations from K-Mart employees for the year of 2000.

♦ **Donors-imported from Org X**. This name describes a set of donor records imported from a non-profit named Org X.

When you load a set that contains invalid references, no warning or notice is given. Records added or deleted since the set was saved will not appear. If 4D Tools was used to sort or compact the database, the records returned by using the Load Set command may or may not be the ones in the original, saved set; there is no detection of this condition by FUNDimensions. Therefore, you should use saved sets with awareness of the fact that they can become inaccurate, and the actions that can lead to that inaccuracy.

There are two ways to combine the set you load with the current list contents, or you can replace the list contents with the set. When you select Load Set from the Records menu, the following window appears:

When you click this button, a dialog appears to locate and select the set to load.

Figure 11.12 Load Set dialog

The Load Set dialog offers 3 choices via radio buttons:

1 **Replace contents of list with set.** This option replaces the list with the records in the set.

2 **Merge set with contents of list.** This option loads the set without removing any records already in the list. By using this command multiple times, you can combine two or more sets, or combine the results of a query with one or more sets. In set theory, this command produces a "union" operation.

3 **Remove contents of set from contents of list.** This option compares the contents of the list with the contents of the set, and removes records in the set from the list. If a record is in the set but not in the list, nothing happens for that record. The records are not deleted from the database, but only omitted from display in the list. In set theory, this command produces a "difference" operation.

Add 2nd Thank You Note

This command produces a window where you enter the mailing information for a thank you note to be sent to a named donor, survivor for a memorial gift, or other person or organization you want to acknowledge besides the actual contributor. This command is enabled only in the Donation, Membership and Pledge Input Windows. More information is in "Designing Your Database" on page 371.

CHAPTER

12

Find Menu

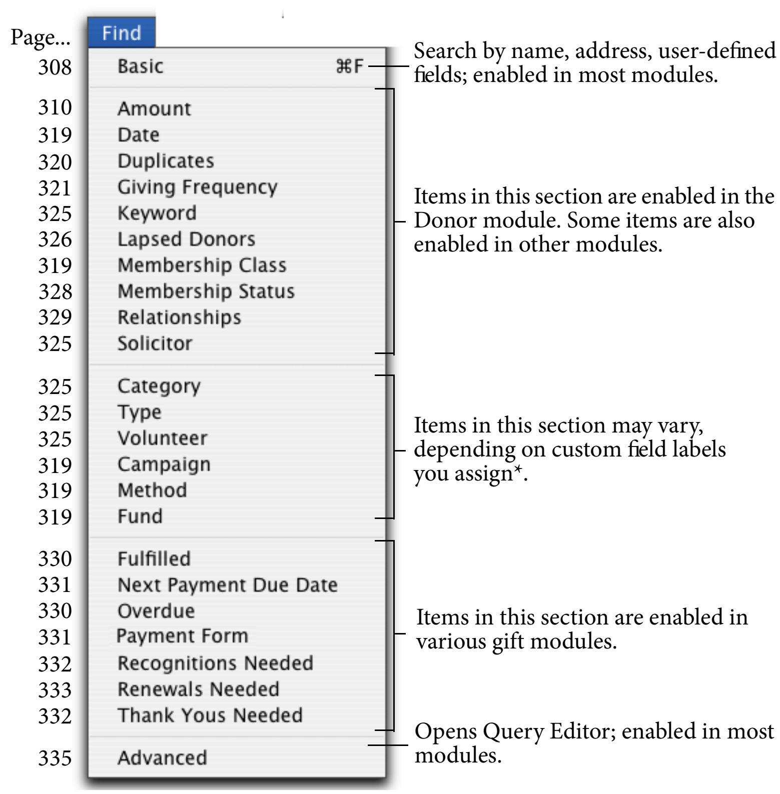


Figure 12.1 Find menu

This menu contains commands for searching your database, also know as searching. The menu is divided into several alphabetized sections, except for the section containing Category, Type, Volunteer, Campaign, Method and Fund* which may not be alphabetized. You select a menu command, enter the value you want to search for,

* The Category, Type, Volunteer, Campaign, Method and Fund items may be changed through the Administrator dialog. See page ix.

and click the Search button. Records matching your search criteria appear in the list view of the module where you conduct the search.

Normal, Add To List and Search in Selection

Search dialogs contain buttons for Normal, Add To List and Search in Selection:

1 The **Normal** option results in the search taking place in all records of whatever module you are in, and replacing any records in the display with those found in the search. Therefore, a search from the Donations module using the Basic command in the Find menu, with the Normal radio button on will cause only the matches for the string you entered in the search dialog to appear in the Donation List View.

2 When **Search in Selection** is on, the search will take place only within the records in the list. This option allows for "built" queries, in which a series of searches take place within the records found by previous queries, each search further narrowing the selection of records. For example, you can easily find all the donors of category "Major" who live in Colorado and have made donations of at least $1000.

3 Click the **Add To List** radio button if you want records currently in the List View included with the results of the search. This option allows you to get lists of records which meet any one of multiple criteria by conducting several queries and adding the results of each one to the results of the previous one. For example, you could make a list of all donations received for the 1995 Business Mailing and the 1995 Annual Mailing by searching for each mailing in sequence with the Add To List function checked for the second search. Also see the example for the Assign Other menu command, "Assign Other" on page 299.

When used from an Input Window, that window displays the first record found that meets the search criteria, while all the records found will be displayed in the corresponding List View. You can navigate from one found record to the next within the Input Window by using the navigation buttons on the button bar.

Basic

This command queries in the following fields of the Donor module:

- First & Last Name (see page 105 for more information on this option)
- First name
- Last name
- Company
- Address (searches both Address Line 1 and Address Line 2 fields)
- City
- State
- Postal or Zip Code

- Country
- Email address
- Donor ID Number
- Any of the user-defined fields

In addition to the items above, this search includes an option to search on gift ID Numbers. For example, when this search is selected from the Donation List View (only), an option appears to search on Donation ID Number.

You can specify one of four types of comparisons through a popup menu:

- **Exact**. The field contents must match the search string exactly, except that this is case-insensitive. For example, an Exact search on Francis finds Francis but not Frances.
- **Begins with**. The first characters in a field must match the search string. For example, a "Begins with" search on "angst" finds Angstrom. You can use this to find all the donors with last names beginning with "A", then with "B", etc.
- **Contains**. The search string must occur somewhere in the field contents. For example, a Contains search on "am" finds Sam, Ramsey, and Amanda but not Jones.
- **Does Not Contain**. The search string must not occur in the field contents. For example, a Does Not Contain search on New York finds donors and prospects who do not have a New York address.

You can specify that a fuzzy search be performed on searches in the First Name, Last Name, Company and Address fields. This matches records based on phonetic and string-matching criteria, and makes it easier to find something when you aren't sure of it's spelling, or when it is misspelled in the record. See "Fuzzy Searches" on page 107.

Note: Queries are never case sensitive.

Using this command requires five steps (see also page 105):

1. Enter the string of characters for the search in the entry field at the top of the dialog.
2. Select the field(s) where you want the search to take place from the Search In: popup menu.
3. Select the comparison option from the Comparison: popup menu.
4. Choose a search option from the Normal, Search in Selection, or Add To List buttons.
5. Click the Search button to execute the search, or Cancel to return to the input window or list view.

Amount

This search command is available in List Views and Input Windows of all modules except the Keywords and Relationships modules. It can be used to locate gift records matching an amount range or single amount. It can also be used to locate donor records based on the amounts of their associated gift records. In this application, a date filter may be applied to the associated gift records.

Shortcut: to search for a single amount in any of the Amount search dialogs, type the value into the Minimum field, tab to the maximum field, then use the DELETE key to empty the Maximum field. When the maximum field is empty, Fundimensions assumes you want the same value used for Maximum as appears in the Minimum field.

Shortcut: To search for a single date, type the date into the first field, then use the DELETE key to empty the second field, or make both fields the same value. For additional date entry shortcuts, see "Date Entry" on page 49.

This search works differently than described here when it is executed from the calendar module. See "Searching the Calendar" on page 212 for more information.

Which Module to Search?

When this command is used in a gift module, the records returned are *gift records* within the module with amounts that fall on or between the maximum and minimum amounts that you specify. The search works differently in the donor module, where the search still takes place on gift amounts, but the corresponding *donor records* are returned as the search results, instead of gift records.

This distinction is demonstrated below. The following donation records are the basis for the example:

Name	Amount
Jones	100
Smith	150
Smith	200
White	150
Brown	250

A search in the donation module for amounts between $100 and $200 yields these results (4 records returned by the search):

Name	Amount
Jones	100
Smith	150
Smith	200
White	150

A search for the same amounts in the donor module returns only 3 records:

Name	Amount
Jones	100
Smith	150 and 200
White	150

The second search is often more useful. For example, you may want to send out a mailing only to donors who have made donations of at least $100. Performing an amount search in the donation module and using the result to print labels and make exports would lead to multiple letters to donors that had made more than one gift over $100. Many donors would perceive this as wasteful; in this case, they would be right. Performing the search from the donor module is the remedy for this situation, since the search returns only a single record, regardless of how many of a donor's gifts meet your amount criteria.

Conducting the Amount search from the donor module has 2 other desirable features. One is the capacity to find donors who have given any of the gift types (donations, pledges or memberships) in an amount range. For example, you may wish to mail to everyone in the database that has given over $100 as either a donation or a pledge. While you could perform an amount search in the donation module, and another search in the pledge module, and print labels and perform exports from each of those modules, the resulting mailing would be in two separate sets, each one sorted by zip code. It is usually easier and less expensive to send a single mailing. Another problem is that duplicates would be sent to donors who had made donations *and* pledges of over $100, and to donors who had made more than one donation over $100, and to donors with more than one pledge over $100. For all these reasons, and to eliminate the duplicate effort of searching, exporting and printing labels twice, performing the amount search from the donor module is the best solution.

Amount Searches in the Donor Module

This search allows you to specify that the amount criteria be matched against any combination of donation, pledge, pledge payment and/or membership records:

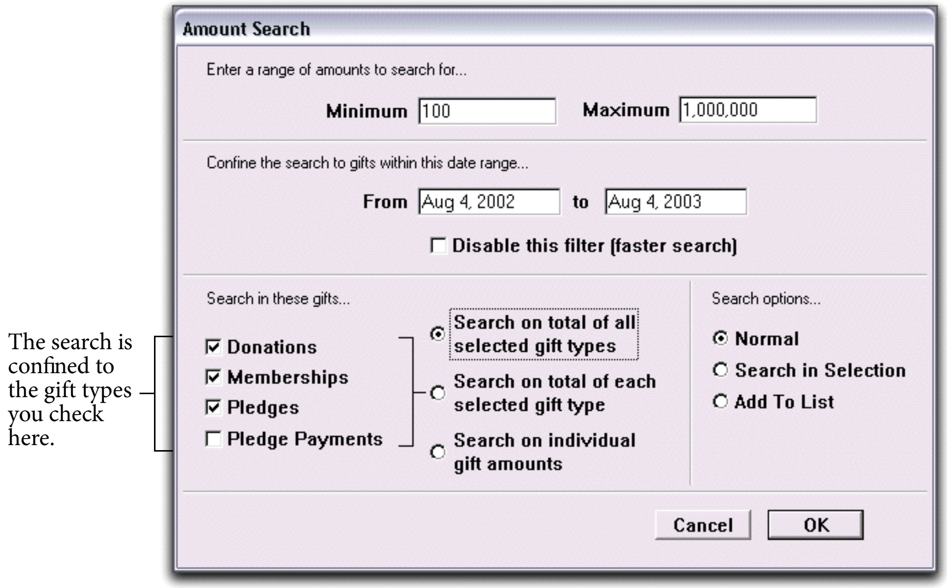


Figure 12.2 Amount search dialog in the Donor Module

In addition to the amount range and Search Options, this dialog offers the following capabilities:

- ♦ Date Range. The search limits its scope to gifts bearing a date within the range you specify here. To speed up the search, use the checkbox to turn off this feature when you want the search to take place on all gifts, irrespective of their date.
- ♦ Gift Types. These checkboxes limit the scope of the search to the gift types with a checkmark. When more than one gift type is turned on, FUNDimensions performs an OR search for each one: for each donor, if the criteria for any one of the selected gift types match the search criteria, the donor record is included in the search results. To illustrate, refer to the example in Figure 12.4, “Search for Zero Amount, example 2a”. Since all 3 gift type checkboxes are on, FUNDimensions will include the donor record in the search results if any one of their gifts meets the amount and date criteria in the upper sections of the dialog. In contrast, an AND search would require at least one gift in *each* of the gift types to match the amount and date criteria before a donor record would be included in the search results.
- ♦ “Search on…” radio buttons. The radio button labeled “Search on total of each gift type” will cause each donor’s donations, memberships or pledges to be totaled together, and that total matched against the amount criteria. For example, you might perform a search from the donor module for donations of $250 or higher,

with Search on Individual Gift Amounts (lower radio button) turned off. Before the search, the list is:

Name	Amount
Jones	100
Smith	150
Smith	200
White	150
Brown	250

The list after the search will be:

Name	Amount
Brown	250

If Search on total of each gift type is on (middle radio button), the search returns these results:

Name	Amount
Smith	because 150+200 = 350
Brown	250

When you use Search on total of each gift type, a separate total is calculated and compared for each gift type you select (i.e. one total for donations, one total for memberships and/or one total for pledges). In the example above, this means Smith would not appear in search results if her two gifts were made as one donation and one pledge, even if the Donation and Pledge checkboxes were on in the search dialog.

In contrast, using Search on total of all selected gift types (upper radio button) will add all the selected gift types together and compare that sum to the amount criteria for the search. This means that Smith would appear in the search results, whether her 2 gifts were both donations, both pledges, or one of each. If only one gift type is selected, this option and Search on totals of each gift type are functional equivalents.

This search is used to locate donors who should receive year-end letters. See “Year-End Letters” on page 127.

Hint: Reports that calculate and display a single total for each gift type and/or all gift types are possible using Advanced Reports. For an example, see “Donors By Gift Amount” on page 177. The Donor Detail and Donor Summary reports also offer these options; see “Donor Detail Report” on page 155 and “Summary Report” on page 158.

Searches for Zero Amounts

In the amount search for the donor module, using zero in the maximum and/or minimum fields of the amount search allows you to:

- locate donors without any gifts, or
- locate donors without gifts of specific donation, pledge and/or membership types,
- or, locate donors without gifts in a specific date range.

This thorough implementation of zero amounts in FUNDimensions is especially useful for generating solicitation lists that omit donors who recently made a gift. It is also useful for targeting special appeals designed for lapsed donors and or prospective donors.

A zero entry in the minimum field is interpreted as:

> Include in the search results, any donor records without gifts in the date range specified, and for the gift types specified.

When the maximum amount field is zero, Fundimensions requires a zero entry in the Minimum field too. A zero entry in the maximum field is interpreted as:

> Include in the search results, only donors without gifts in the date range specified, and without the gift types specified.

As an example, the configuration in Figure 12.3 below would be interpreted as "find donors without donations or pledges in the period January 1, 1998 to December 31, 1999; also find donors *with* individual donations or pledges of $100 or less in the same time period":

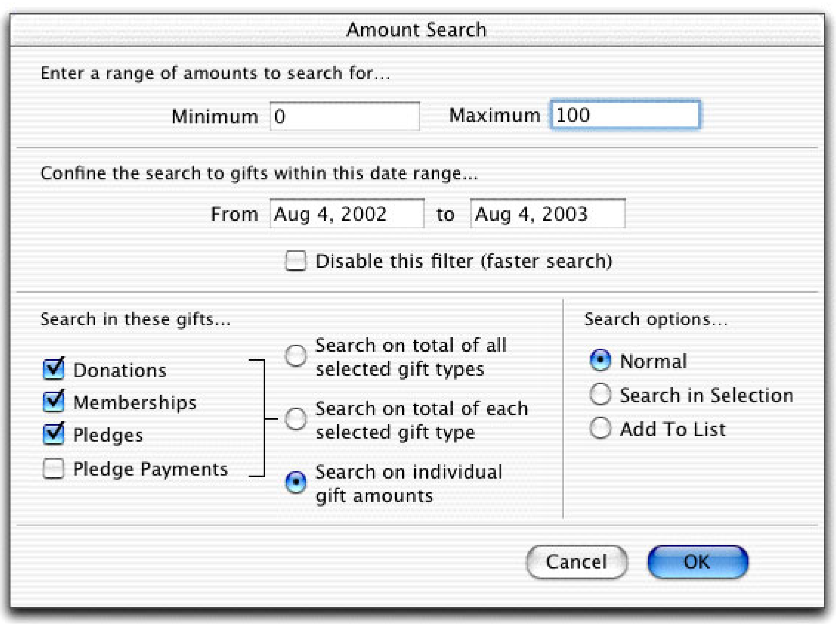


Figure 12.3 Search for Zero Amount, example 1

In another example, a user of the software wants to remove everyone who has made any very recent gift (in the last 60 days) and everyone who has made a fairly large gift somewhat less recently, say in the last 6 months. This is being done prior to producing a mailing, with the intention that recent donors, and somewhat less recent but larger donors, not receive the mailing. Working around February 29th, 2000, she followed this procedure:

1 From the Donor List View, she located all the donors who have made a very recent gift, by configuring the Amount Search dialog like this:

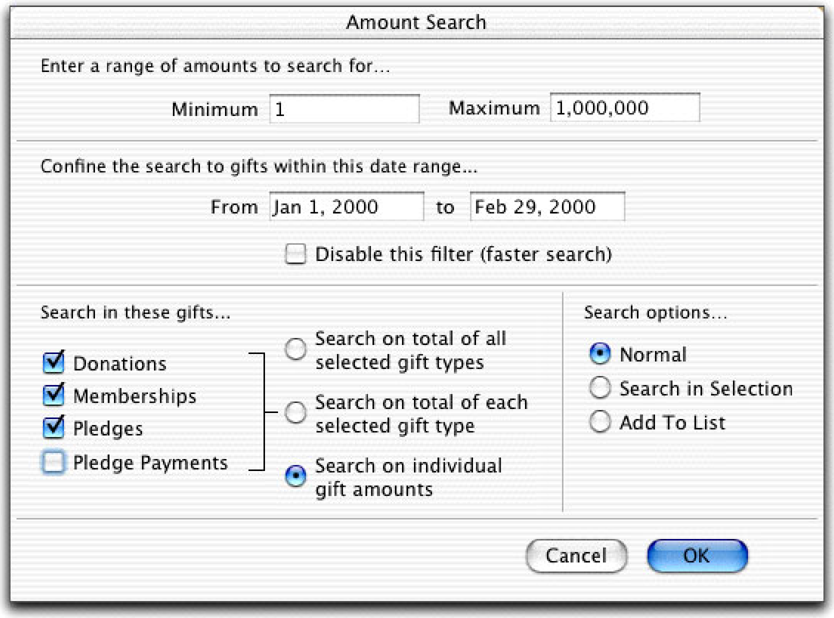


Figure 12.4 Search for Zero Amount, example 2a

2 Now she adds to the list those donors with larger gifts of the last 6 months. She prefers to perform this search on the total of each donor's gifts in that time period, believing that more accurately represents her intentions to locate large

donors. And, she sets the Search Options to “Add to List” because she wants to accumulate these search results with those of the previous search:

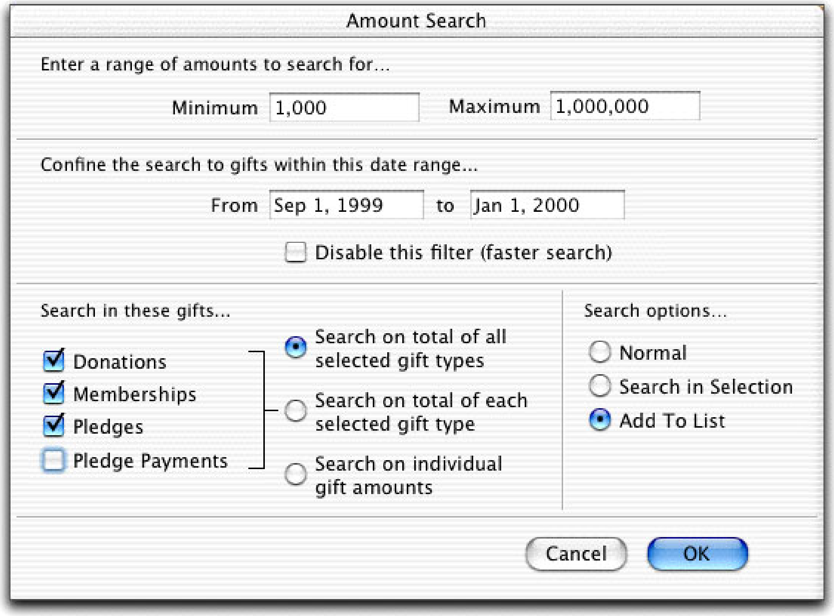


Figure 12.5 Search for Zero Amount, example 2b

Having located all the donors she wishes to omit from her mailing, she chooses Records>Invert Selection to get her mailing list. From here, she uses FUNDimensions to generate mailing labels and an export for her mail merge.

You can use this search to locate prospects i.e. donor records without attached gifts. To locate donor records without any attached gifts, do this:

1 Bring the Donor/Prospect List View to the front.

2 Choose Amount from the Find menu.

3 Enter zero in both the Minimum and Maximum fields.

4 Turn on the checkboxes labeled Donations, Memberships and Pledges and the radio button labeled Search on total of each gift type.

5 In the Search Options section, select Normal.

6 Click the Search button.

The amount search performs “or” searches when more than one of the Donations, Memberships or Pledges checkboxes is turned on. This means that donor records meeting the minimum or maximum amounts for *any* of the gift types will be returned in the search results. The results might not be what you expect; to illustrate, consider this example:

Name	Donation Amount	Pledge Amount
Jones	100	
Smith	150	
White	150	
Brown	250	
Black		150

The amount search is selected from the donor module and configured this way:

7 Minimum and maximum amount: both at zero

8 Search Options: Normal

9 Search in these gifts: Donations = on, Memberships = off, Pledges = on

10 Search on totals of these gifts: on

You might expect *none* of the records to be returned by the search, because all the donors have made a gift. In fact, *all* the donor records are returned by the search. This is because an "or" search returns the records with a donation amount of zero, *or* a pledge amount of zero. To perform an "and" search, break up the search into two parts. In the first part, search only in donations:

11 Minimum and maximum amount: both at zero

12 Search Options: Normal

13 Search in these gifts: Donations = on, Memberships = off, Pledges = off

14 Search on totals of these gifts: on

Now, conduct a second amount search in pledges, limited in scope to those records found by the search above. Use these settings:

15 Minimum and maximum amount: both at zero

16 Search Options: *Search in Selection*

17 Search in these gifts: *Donations = off,* Memberships = off, *Pledges = on*

18 Search on totals of these gifts: on

The results of these two queries will be a list of donor records with no donations *and* no pledges.

For finding donors who have made gifts, but have not made a gift within some specified time period, see the Lapsed Donor search described on page 326.

Queries in Gift Modules

In the Donation, Membership, and Pledge Payments list views, the Amount search presents a dialog where you may enter minimum and maximum values for the search. The gift records returned from the search will have amounts that fall on or between the values entered.

Amount queries can be combined with the Date search to produce lists based on both amount and date criteria. For example, criteria of "donations of $100? to 5000 made in the last 12 months" could be accomplished with a combination of amount and date queries.

The Amount search dialog for the Pledge module has radio buttons labeled Search in Amounts, Search in Balances, and Search in Payment:

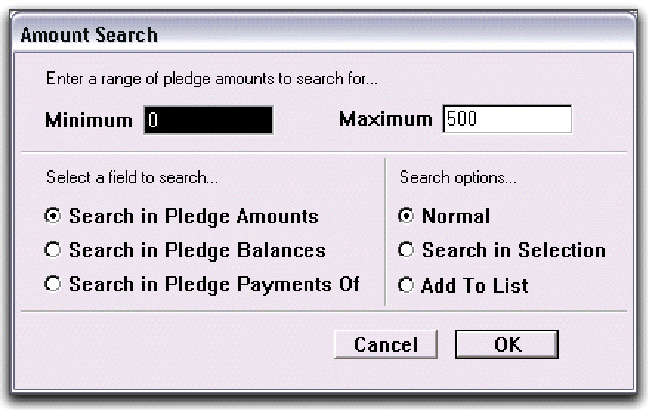


Figure 12.6 Pledge Amount Search dialog

Select one of these choices to search one of these fields:

- Search in Amounts queries in the Pledge Amount field.
- Search in Balances queries in the Pledge Balance field.
- Search in Payment queries in the Pledge Payment field.

An advantage of conducting amount queries in the gift modules instead of the donor module is significantly faster performance. The slowest amount search is usually from the donor module, with Search in Totals of these Gifts turned on.

Campaign, Method, Fund, & Membership Class

These search commands locate records based on their contents in the Campaign, Method, Fund† or Membership Class fields. They are available in all modules except the Keywords module. Each command presents a dialog box containing a popup menu with the possible choices, Normal, Add To List and Search in Selection buttons, a Cancel button, and a Search button. When selected from the Donors module, the Campaign, Method and Fund queries also offer checkboxes to direct the search to any combination of the donation, membership or pledge modules. The Membership Class search offers a checkbox to limit the search results to current members (based on the Membership Expires field of the Membership record).

To locate records with no value (empty) in a field, choose Not Assigned from the popup menu in the search dialog.

Date

Refer to “Date Search dialog” on page 110 for this section.

This search command is available from all the modules except the Keywords module. It queries for gift records having dates between or on the “Beginning On:” and “Ending On:” dates. These dates should be entered in the MM/DD/YY format used throughout FUNDimensions, i.e. “12/30/01”. Clicking the Search button begins the search.

To search for a single date, type the date into the first field, then use the DELETE key to empty the second field, or make both fields the same value. For other shortcuts in date entry, see “Date Entry” on page 49.

In the Donors module, this search will be performed in gift records and return those donors who made gifts within the date range you specified for the search. The search dialog in this module has additional checkboxes to restrict the search to any combination of donations, memberships or pledges. Many of the special attributes of the Amount search for the Donors module, described above, also apply to the date search for the Donors module. This includes the feature that donors with multiple gifts in the date range will still appear only once in search results, while a search in the gift module would have resulted in a record for each gift in the range.

In gift modules, this search can be used with the List Statistics command in the Output menu to produce revenue reports for any day or other time period. See the example on page 110.

The date search in the Memberships module is modified to allow searching on date paid, expiration date, and to allow limiting the search to lapsed members. See “Finding a Membership” on page 110 and the example in “Renewals Needed” on page 333.

† The Category, Type and Volunteer items may be changed through the Administrator dialog. See page ix.

Duplicates

This command queries the current selection‡ of donor records for possible duplicates using any one of six rules:

- ♦ Two records bearing the same last name and first initial may be found as possible duplicates.
- ♦ Two records with identical entries in the Company field may be found as possible duplicates.
- ♦ Two records with the same combination of Address Line 1 and Postal Code may be found as possible duplicates.
- ♦ Two records with the same Home Phone or Work Phone number may be found as possible duplicates.
- ♦ Two records with the same email address may be found as possible duplicates.

Choosing Duplicates from the Find menu produces a dialog where you can choose any of the six rules:

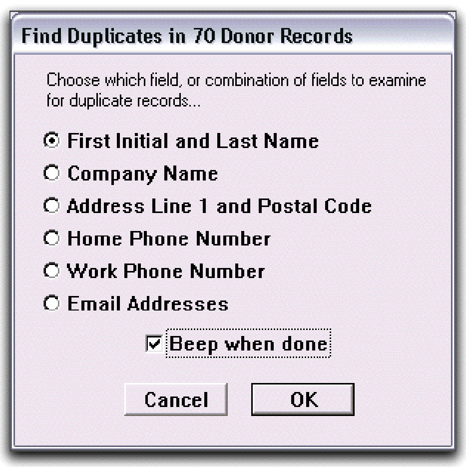


Figure 12.7 Duplicates Search Window

After identifying possible duplicates, the results are sorted to place each pair of possible duplicates adjacent to each other in the Donor List View.

For an example of using this search, see page 141.

The duplicate search will not delete or merge any records; this is left for you to do manually. Use Record>Delete Record to delete records if you are viewing them in the Donor Input Window, or Record>Delete Highlighted to delete records in the Donor List View. If you see the alert shown in "Deletion dialog for linked records" on page 296 when deleting duplicates, you will have to decide whether to consolidate related donation, pledges, notes and membership records.

‡ If you want to search the entire database for duplicates, be sure to precede this search with Records menu>Show All. See "Selecting Records" on page 55 for more information.

If you find that certain record pairs routinely appear in the results of this search by mistake (i.e. they match the search criteria for duplicate records but they are not really duplicates and you want to leave both records in the database), you can instruct FUNDimensions to omit that pair from future duplicate search results. See "Designate As Not Duplicates" on page 302 for instructions.

Duplicate queries can take considerable time, but you can continue to work in other modules and windows if you open at least one other window before initiating the duplicate search. You will need the other window to click on so you can escape the donor list view while the duplicate search is in progress. The search displays its progress in a message window; in most phases of the search you can cancel the operation by pressing ESCAPE.

Giving Frequency

This search locates donors with a gift count falling with a range you specify. You also specify a date range; in order to be counted, a gift must fall within that date range. You can substitute any number for the integers in these examples:

- find donors who have given only 1 time to your organization
- find donors who made one pledge and fulfilled it, but never made another pledge (in conjunction with the Advanced search); see detailed example below.
- find donors making 2 or more gifts in the last year
- find donors making 3 or more gifts at any time in the database
- find donors who have renewed their memberships at least 4 times

This search is made from the donor module by choosing Find>Giving Frequency. The following dialog appears:

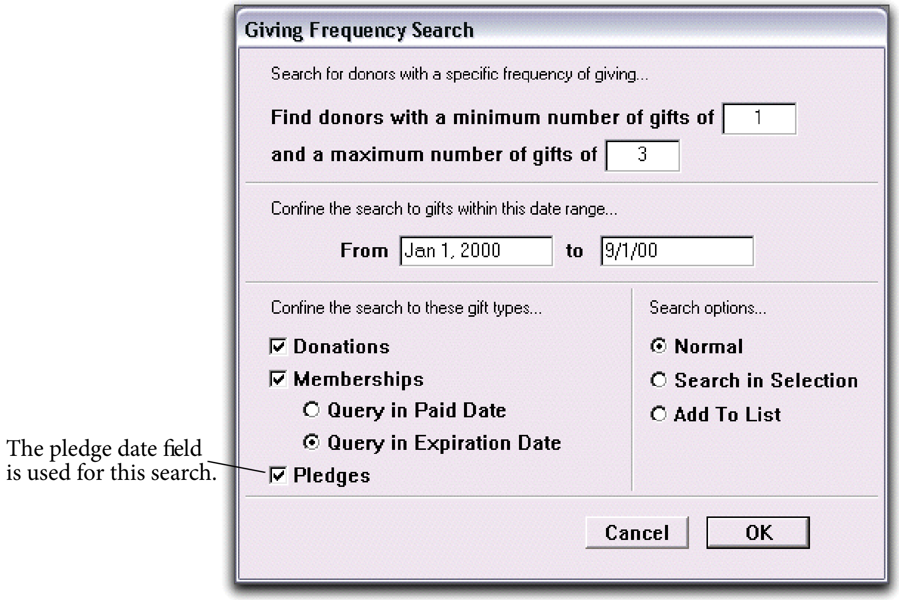


Figure 12.8 Giving Frequency Search dialog

This dialog is separated into four sections by lines:

1 The top section lets you specify a minimum and maximum number of gifts. Only donors who have made a number of gifts in this range will be returned by the search.

2 The next section lets you specify a date range. Only gifts falling within this range will be counted for the number of gifts you specify in #1 above.

3 In the lower left, you may specify which gift types will be considered for the number of gifts you specify in #1 above. When you select the membership gift type, you can specify whether the paid date or expiration date will be used in the date range criteria you specify in #2 above.

4 In the lower right, you may specify which donors will be included in the search, and how the search results will appear. See the page 308 for information on how to use these buttons.

To locate donors with one and only one fulfilled pledge, follow the procedure below.

5 From the Donor List View, choose Find>Giving Frequency. The dialog depicted above appears.

6 In the dialog, execute the following settings:

- minimum number of gifts: 1
- maximum number of gifts: 1
- Since this example does not specify a date range, enter any date prior to the oldest gift in your database in the From field.

- ❑ Enter the current date in the To field.
- ❑ Donations and Memberships checkboxes off; Pledges checkbox on
- ❑ In Search Options, turn on the Normal radio button.
- ❑ Click the Search button.

7 At the conclusion of this search, choose Find>Advanced. The Search Editor appears:

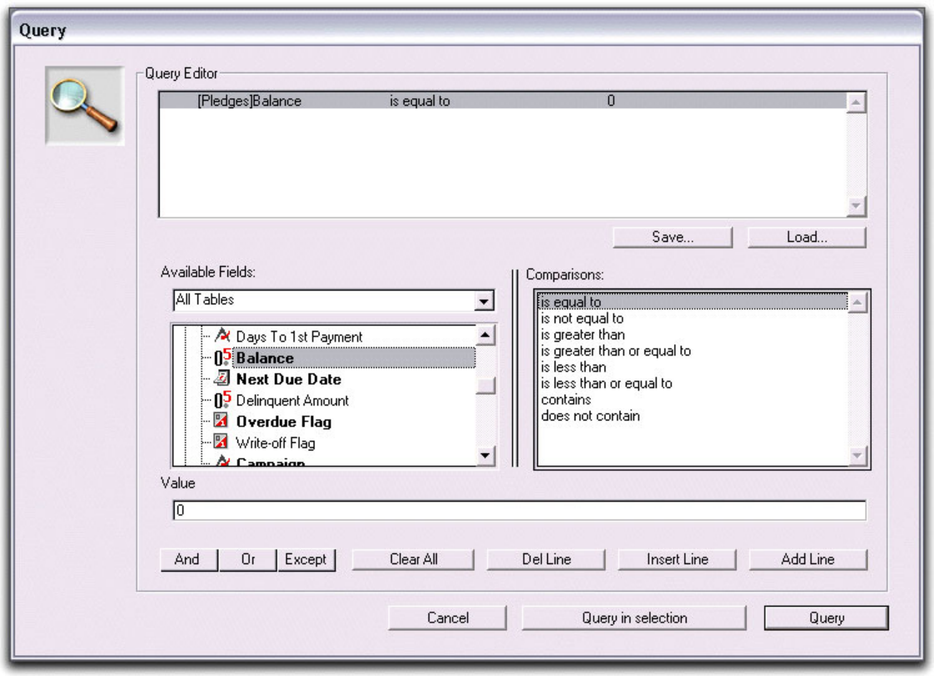


Figure 12.9 Search Editor, configured to locate fulfilled pledges

8 Configure the search as shown in the diagram above by following this procedure:

1. In the Available Fields popup menu, choose All Tables.
2. Click the disclosure triangle next to Pledges in the list underneath the popup menu. In the list of pledge fields, select Balance by clicking once.
3. FUNDimensions completes the search criteria with default values of "is equal to" and "0", which happen to be the correct values for this example. Click the button labeled Search in Selection; do not click the button labeled Search.
4. The results of this search complete the example by reducing the set of donors who made one and only one pledge, to those with one pledge having a zero balance, i.e. a fulfilled pledge.

By modifying the search above you could produce a separate list and separate letter for lapsed pledgers who had more than one fulfilled pledge in your database.

Hint: While the Fulfilled search (available in the Pledge module, see "Fulfilled" on page 330) would more easily return the fulfilled pledges that the procedure described above, it would return multiple records for donors with more than one fulfilled pledge. This makes it impossible to meet the criteria of "donors with only one pledge". It is also inferior for constructing a mailing list, because you usually want to send only one piece of mail to each donor. Therefore, even if you choose criteria without a limit on the number of fulfilled pledges, you should probably use steps 4 and 5 above to generate a mailing list for soliciting renewals to pledges.

The very specific results of this search allow you to customize a unique letter for donors with a single fulfilled pledge. If you would like to include information from the pledge record, such as the pledge amount, fund where the money was applied, name of the solicitor who contacted the donor, etc., you could do this with a custom export from the Report Editor. A template for the Report Editor is included with the software; it is named "Export Donors With Pledges.4QR" on Windows, and "Export Donors With Pledges" on Mac, and will be located in the Report Templates folder in the Fundimensions folder on your computer. This export template is designed only for use with donors who have made one and only one pledge, as determined by the search described above.

To use the template to create an export that includes information from both the donor record and pledge record, do this:

9 Perform the numbered sequence above to generate the correct list of donor records.

10 Choose Output>Advanced Reports.

11 In the Advanced reports window, choose Export, then select the template named "Donors With Pledges" or similar, included with the FUNDimensions program in the folder hierarchy FUNDimensions/Report templates/Exports,.

12 Click the Export to Disk button. The standard Save dialog appears; name the file and click Save. The export is complete.

The table below lists the fields in the export:

Table 12.1 Export Fields for Giving Frequency example

Export Field	Comment
Label Line 1	use in recipient header of letter
Label Line 2	″
Address	″
Address 2	″
City	″
State	″
Postal Code	″
Letter Salutation	use after Dear in the letter
Pledge Amount	use in the letter to thank the donor for a specific amount
Pledge Date	use in the letter to refer to the date of their pledge
Gift List 3	use in the letter to refer to the purpose or application of the gift
Solicitor	use in the letter to refer to the Solicitor who contacted the donor to solicit the gift, or to refer the donor to a specific contact person in your organization

Keyword, Category, Type, Volunteer & Solicitor

These menu commands will present a dialog box to search for donor records containing a specific keyword, donor category, donor type, volunteer, or solicitor assignment. After selecting the command from the menu, use the popup menu to choose the keyword, category, type, etc. you want to locate. Finally, click the Search button.

When you rename the category, type and volunteer fields the new names appear in the menu after the first relaunch of the software (see “Setup” on page 268). Therefore, these menu items may appear with names other than Category, Type and Volunteer.

Except for the Solicitor search, these commands are available only in the Donors module.

The Keyword search offers an additional option for setting the search criteria: in addition to a list of keywords, you can type a string of characters, and FUNDimensions will find all donors having that string in any part of any keyword. For example, you might have three keywords: “Gala-2005”, “Gala-2006” and “Gala-2007”. If you want to find all the donors with any of these keywords, you type “Gala” as your search string (as shown below), and FUNDimensions returns all donors having one or more keywords assigned to them, having “Gala” somewhere in the keyword.

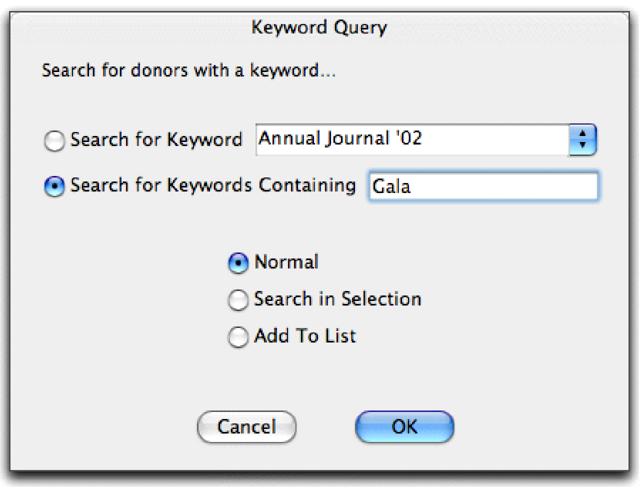


Figure 12.10 Keyword Search window

Lapsed Donors

A lapsed donor search is used to locate donors who have not made a gift to you in a specified period of time. You can decide that a donor is lapsed if they have not given to you this year, in the last 12 months, or any other period you choose. This search is also know to fundraisers as a SYBUNT ("Some year, but unfortunately not this") search. It aids fundraising by identifying donors who have given in some previous period but not in a current period, producing a list of donor prospects. In set theory, lapsed donor queries are a form of the difference operation; all the donors in one set (who gave during the period "x") but not in another set (those who gave in this year or some other period).

This search can also be used in reverse to locate new donors by using the Advanced pane explained later in this section.

Because the lapsed search can have many variations and may be inherently complex, FUNDimensions offers it in an easy form, with only basic options to choose from, and in an advanced form, where you can access additional options. The figure below shows the choices available in the easy form, which is what you will see when you choose Lapsed from the Find menu:

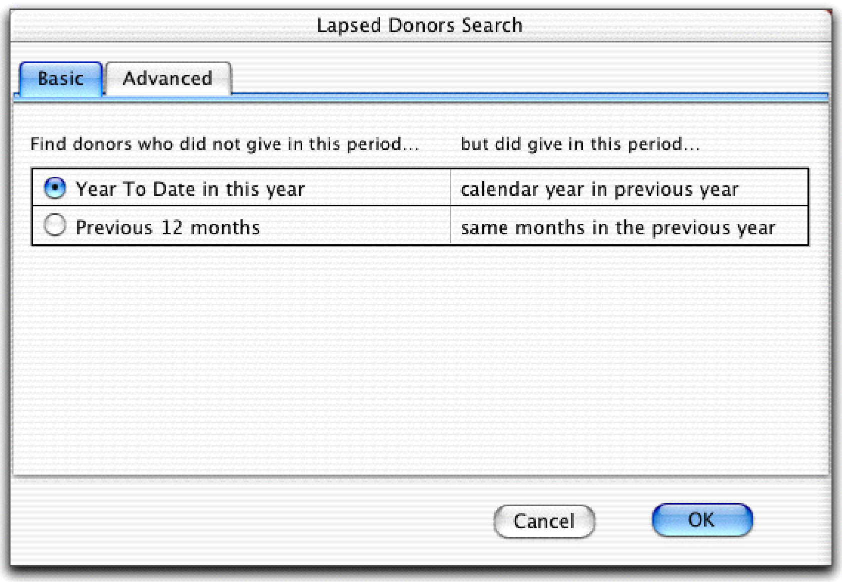


Figure 12.11 Lapsed Search dialog (Fewer Options)

The choices in this pane are specific combinations of Year to date and twelve month periods, known as LYBUNT ("Last year but unfortunately not this") queries. You choose by clicking one of the radio buttons. The first option uses the formula:

- donors who did not give in (January 1ST of current year to current date)
- donors who did gave in (January 1ST of last year to Dec. 31ST of last year)

The second option uses the formula:

- ♦ donors who did not give in (current date – 1 year to current date)
- ♦ donors who did gave in (current date – 2 years to current date – 1 year)

All dates above are inclusive.

If you click the Advanced tab, this pane appears:

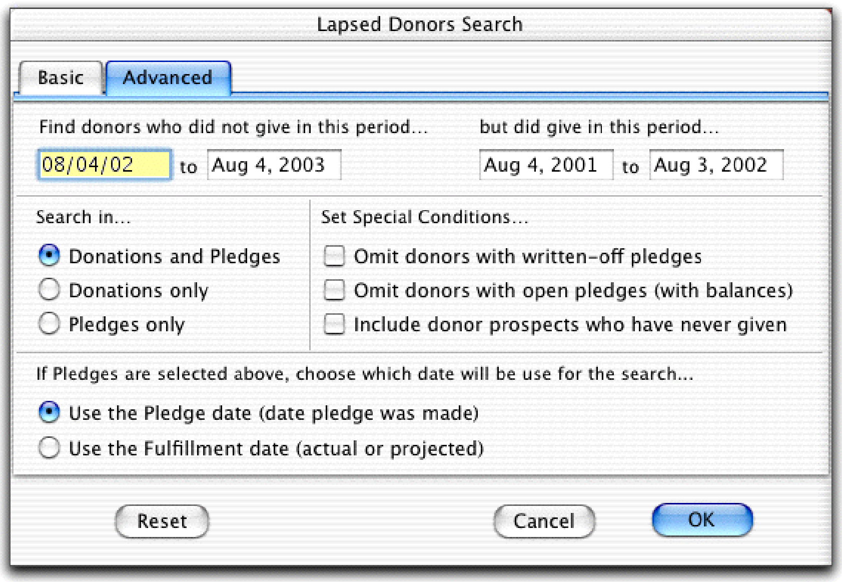


Figure 12.12 Lapsed Search dialog (More Options)

This pane lets you do 4 things that you cannot do in the Basic pane:

- ♦ Choose the exact dates for the "did not give" and "did give" periods, instead of using fixed dates in the "Fewer options" dialog. You can also do a reverse LYBUNT search to return a list of new donors. A typical formula for this reverse type of search is: donors who did not give in (current date – 1 year to current date – 10 years), but donors who did gave in (current date to current date + 1 day – 1 year). This search will never allow the two periods to overlap. That is the reason for adding one day to the second period in this example. If you enter overlapping periods and click the Search button, an alert will appear and the cursor will be placed in one of the conflicting fields for correction.
- ♦ Limit your "did not give" and "did give" queries to donors with donations, donors with pledges or donors with either donations or pledges. Queries made from the Fewer options dialog default to donors with either donations or pledges, but will use whatever setting is made here.
- ♦ Designate which date in pledges will be used in the queries. FUNDimensions takes more time to complete the search when using the fulfillment date, but you may decide that it provides the best candidates for new pledges. This option is provided for those users who prefer fulfillment date as their benchmark. In typical LYBUNT queries, this option will have the same effect as turning on "Omit donors with open pledges" in the checkbox area below. In this case, using the checkbox instead

of the fulfillment date option will result in a faster search. *Note:* To locate pledges fulfilled within any specific date range, use the Fulfilled search. See “Fulfilled” on page 330 for more information.

- Omit or include certain donor groups from the search results. A checkbox lets you eliminate donors with written-off pledges from the list returned by the search. You may also block donors with open pledges, if you think they may not like being asked for another gift while they have an open pledge. The last checkbox adds all donor records without any donations or pledges attached to them to the list returned by the search.

Settings in the Advanced pane are used in queries made from within the basic pane, except for date ranges. (The Fewer options search always uses one of the radio button-selected date sets.) This means, for example, that if you select “Donations only” in the Advanced pane, then return immediately, or at a later time, to the Basic pane and conduct a search, that search will use the Donations only setting. To return settings to their default settings, click the Reset button in the Advanced pane.

Settings you make for this search are remembered the next time the dialog appears, even when the program has been quit. Separate settings are remembered for each user that appears in the password dialog.

This search does not support the Search in Selection and Add to List options. Take this into account when planning a series of queries that will include Lapsed Donors. Usually, performing the Lapsed Donors search before other queries will produce the desired results.

Keyboard shortcut: to bypass the Fewer Options dialog and go directly to the More Options dialog, hold down the ALT key on Windows or the OPTION key on Macintosh when choosing Lapsed Donors from the Find menu.

Membership Status

This search is enabled only for the Donor and Membership modules. It locates donor or membership records meeting one of the following criteria:

- Member is current (i.e. expiration date is after the current date).
- Member is current, and has a specific number of renewals:
  - Current 1st-time member (donor has a single current membership, with no renewals).
  - Current 2nd-time member (1 current membership, and one prior membership, i.e. has renewed once).
  - Current 3rd-time member (1 current membership and 2 prior memberships, i.e. has renewed twice).
  - and so on, up to Current 10th-time member.
- Member is lapsed (has at least one membership, but has no memberships with an expiration date later than the current date).

- Member is lapsed, and has a specific number of (non-current) renewals:
  - Lapsed 1-time member (donor has a single, lapsed membership).
  - Lapsed 2-time member (donor has 2 lapsed memberships).
  - and so on, up to Lapsed 10-time member.

You may find these categories of members useful in targeting appeals, investigating the make-up of your membership, spotting trends in recruiting and retention, or identifying lapses for remediation.

If you need to locate members by expiration or dues paid date, use the Date search instead (page 319). Using the Search in Selection and Add to List functions (page 308), you can combine the Member Status search with searches on other criteria.

To perform this search, do Find>Member Status from the Donor List View, Donor Input Window, Membership List View or Membership Input Window. Choose search criteria from the pull-down menu, set the Normal, Search in Selection and Add to List radio buttons as desired (see page 308 for information about these buttons), and click Search.

Relationships

The Relationship search is available from the donor module to locate donors who belong to a specific relationship or who are designated to be of a specific constituent type in one or more relationships. While in the donor module, choosing Relationships from the Find menu produces this dialog:

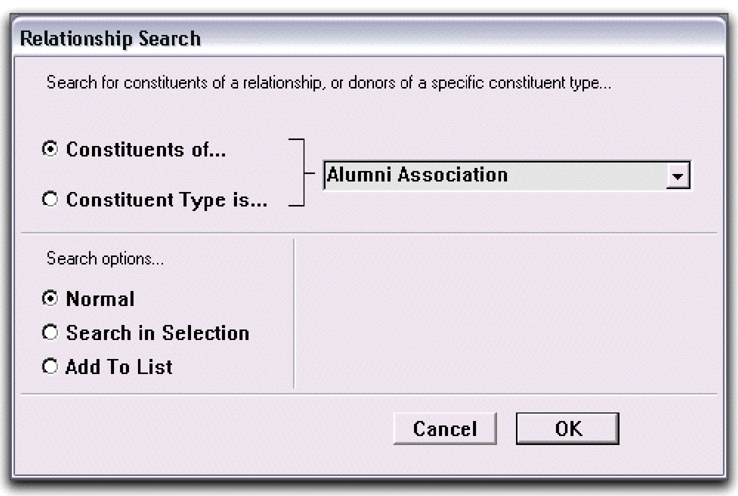


Figure 12.13 Relationship search dialog

In the upper section of this window, click a radio button to search for donors in a specified relationship (the Constituents of… button) or donors who have a specific constituent type within one or more relationships (the Constituent Types… button). Then choose either a relationship name or a constituent type from the popup menu.

Use the Search Options buttons as described in “Normal, Add To List and Search in Selection” on page 308, then click Search to perform the search.

The Find All item in the popup menu allows you to find all donor with any assigned relationship (when the Constituents of… button) or all donors with any assigned Constituent Type (when the Constituent Types… button is selected).

You can use this search to locate constituents of a specific type within a relationship. For example, you may be tracking constituents of “Organization X”, with some of the constituents tagged as “Members” and others tagged as “Officers”. First, perform a search for the relationship (using the Constituents of… radio button and choosing “Organization X” from the popup) with the Normal search option. Follow this by performing a search for the Constituent Type (either Officers or Members) with the Search Options set to “Search in Selection”.

Fulfilled

This search is enabled only for the Pledges module. It locates pledge records within a date range you specify, which were fulfilled (paid off) within that range. The dialog is similar in appearance to that used for the Date search in other modules. Simply fill in the earliest and most recent fulfillment dates you want, set the Normal, Add to List, and Search in Selection radio buttons as desired (see page 308 for information about these buttons) and click Search.

Note: This search function is duplicated in part by the Amount search, which allows you to find pledges having a zero balance. However, this special Fulfilled search lets you locate pledges with a zero balance *according to a date range of fulfillment.* This should be useful in following up recently-completed pledges to thank the donor for their completed gift and solicit a renewal.

Hints: To locate pledges with a zero balance by some date range of *pledge date* (the date a pledge was made), you would use a combination of the Amount and Date queries, with Search in Selection turned on in the second search. To generate a listing of unfulfilled pledges, perform an Amount search for a balance of zero, then do Records>Invert Selection.

Overdue

This menu command, available only in the Pledges List View, locates overdue pledges and displays them in the list view. The command will present a dialog box offering search options and sort options. See Figure 4.5, “Overdue Search dialog” on page 114.

The first search option is to limit the search results to pledges overdue by at least a specified number of days. This permits pledges overdue less than the number of days entered to be excluded, providing a grace period which can save mailing costs and extend your ability to customize letters to overdue pledgers.

Other search options are Search in Selection and Add To List. See page 308 for information on these items.

The Sort options are Sort by time overdue, Sort by Delinquent, and No sort. The first choice puts the most recently-become-overdue pledges (i.e. the least overdue) at the top of the list and the longest-overdue pledges at the bottom; use this to identify pledges that have recently become overdue, and which may therefore benefit from prompt attention. The second choice will place the pledges with the largest amount overdue at the top of the list.

Hint: You may inspect each listed pledge, or records in any list view, and remove records you select from the list, with the following steps. This might be useful prior to exporting and printing labels, to allow you to manually examine and exclude some pledges, to omit pledges from an export which have been overdue a very long time, or otherwise do not warrant further mailings, especially at one end of a list sorted with one of the options in this search:

1 Double click the first record in the list to open the input window.

2 Step through each record using the navigation buttons located in the button bar of the input window.

3 When you come to record that you want removed from the list, return to the list view and highlight it—then return to the input window and resume stepping through records, repeating step 2 and this step until all records are highlighted in the list view that need to be removed. Hold down the Control key on Windows or the Command key on Macintosh when clicking on records to permit multiple records to be selected.

4 Use the Records>Hide Highlighted to remove them from the list.

At the conclusion of this search a dialog is displayed that summarizes the search results. See Figure 4.6, “Overdue Search report” on page 115. If there are no records found, you get a message stating that—otherwise the dialog will display the number of records overdue and the total amount overdue, i.e. the sum of the delinquent amounts in each found pledge. Be aware that these calculations are only for the records found in the search, and so will be affected by the search criteria, such as Search in Selection and number of days overdue entered in the search dialog.

Pledge records with the Writeoff box checked will never appear in the results of an overdue search.

Next Payment Due Date

This search locates pledges with the next payment due within a specified date range. See “Next Payment Due Date Search” on page 116.

Payment Type

This search locates gift records according to their payment type, which refers to the method of payment. For example, you could use this search in combination with a date search to locate all the donations made by Visa in the previous month, to prepare for processing their credit cards. This command presents a dialog box containing a popup menu with the possible choices, Normal, Add To List and Search in Selection buttons, a Cancel button, and a Search button. The command is available only in the donation, membership and pledge payment modules.

A report that sorts gifts by payment form and displays a subtotal for each form is available; see "Print List" on page 150.

Recognitions Needed & Thank Yous Needed

These commands will conduct a search of donation, membership, pledge or pledge payment records, and return the records for which "Thank You sent" or "Recognition sent" has not been checked. Because it is expected that you will be exporting these records for use with a variety of thank you note templates or recognition products, the search is usually confined to those records bearing a specific Thank You Note type or Recognition Product, as entered in a gift input window. This allows a separate export for each template you use or gift that you send. FUNDimensions can also locate all records with these boxes unchecked, regardless of the entry in the Thank You Type or Recognition Product field.

After selecting the command from the menu:

1 Use the popup menu to choose the Thank You type or Recognition Product.

2 Check the Add To List radio button if you want records currently in the List View included with the results of the search; leave it unchecked to replace the contents of the List View with those found in the search.

3 Check the Search in Selection radio button to confine the search to records already listed (if desired) or leave it unchecked to search all records in the module. This option is not available if you initiate the search from the Input Window.

4 Finally, click the Search button to perform the search, or click Cancel to return to the List View.

This search returns records meeting both of two criteria: the Thank You type or Recognition Product you select in the popup, and that Thank You sent or Recognition Sent checkbox is off for the record. To disregard the first of these criteria, choose Find All from the popup menu. This will return all records with the Sent checkbox off, regardless of the Thank You Type or Recognition Product.

For more information on acknowledging gifts, see "Basic Gift Acknowledgements" on page 119.

Hint: Before beginning this search, you may wish to narrow the list of records down by searching for gifts within a certain date range or with a particular Campaign, Method or Fund** designation, i.e. search for all the donations made in the last month and/or all those who made a pledge in response to a certain brochure. This is useful for further customizing your thank you notes to reflect not only Thank You type (as may appear in that field of the gift record), but also when the gift was received or what means was effective in soliciting the gift. Alternately, you can design

** The Category, Type and Volunteer items may be changed through the Administrator dialog. See page ix.

a general-purpose template that uses the exported fields to reference a campaign, method and/or fund.

Renewals Needed

This search helps you find memberships that are about to expire, or have expired. In conjunction with the export and label functions of FUNDimensions, this search will help you contact these members or ex-members and ask for their renewal or other gift. You initiate this search by selecting Find>Renewals Needed while the Membership List View is the active window. It queries the Membership Expiration and in the 1ST and 2?6 Renewal Notice Sent fields of membership records.

This search filters its results to eliminate membership records if the donor has renewed or has membership records with expiration dates subsequent to the date range you enter for the search. This is slightly different from using the date search with the "Find Only Lapsed Donors" option, as illustrated in the example below.

Max Schreck has the following three membership records:

- expires December 31, 2000
- expires December 31, 2001
- expires December 31, 2002

When a Renewals Needed search is performed with the date range "December 1, 2001" to "December 31, 2001", none of Max Shreck's records appear in the search results. This is because there is a subsequent membership record, i.e. the membership expiring December 31, 2002. Max Shreck is only returned when:

- you perform a Renewals Needed search for a date range that includes December 31, 2002, or
- you perform a Date search whose range includes one or more of the expiration dates in his membership records, and the Find Only Lapsed Memberships check is On, and you are performing the search after December 31, 2002 (i.e. membership is expired), or
- you perform a Date search whose range includes one or more of the expiration dates in his membership records, and the Find Only Lapsed Members checkbox is Off, and you are performing the search before December 31, 2002 (i.e. membership is current).

Because of the filtering, you can confidently use the search results for mailings and other efforts, knowing that you are not wasting time and expense in soliciting renewals from members who have already renewed, and that your personalized letters are referencing only their most recent membership information.

The range of expiration dates permits you to locate memberships that have expired or will expire within a specific time period. For example, you could find memberships that will expire in more than 5 but less than 60 days, or those memberships that expired last month. If you want to limit search results to a single date, make sure the second field is either blank, or that it has the same date as the first field. You can empty the second field of its contents by tabbing to it, then typing the DELETE key.

Membership records can record the sending of first and second renewal notices by means of checkboxes in the Membership Input Window (see page 17 for an example of this window). The Renewals Needed search is designed to let you locate those members who have or have not received a first or second notice. You use the upper set of three radio buttons to locate records based on any of the three rational combinations possible with the 1ST and 2?6 Renewal Sent checkboxes located in the Membership Input Window. This can be used to generate separate lists for those who have received previous notices, so that you can send different letters to those who have received no previous notice, those who have received one previous notice, and those who have received two or more notices

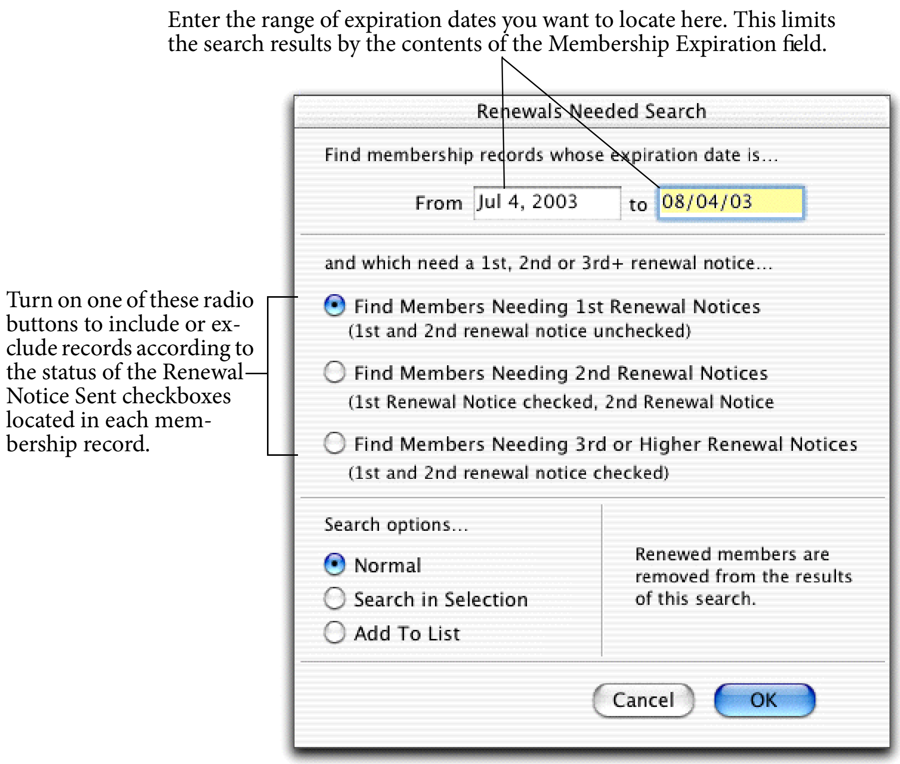


Figure 12.14 Renewals Needed search dialog

To locate all expired or all unexpired members, use the Date search instead of this search.

For more information about renewal notices, see , “Managing Memberships” on page 377.

Advanced

This command presents a Search Editor with powerful search capabilities beyond what the other search commands offer. Queries designed here can be saved and retrieved for later use using the Save and Load buttons in the dialog. *Additional documentation is available for the Search Editor. Please email or call technical support for a* URL *to download this documentation.*

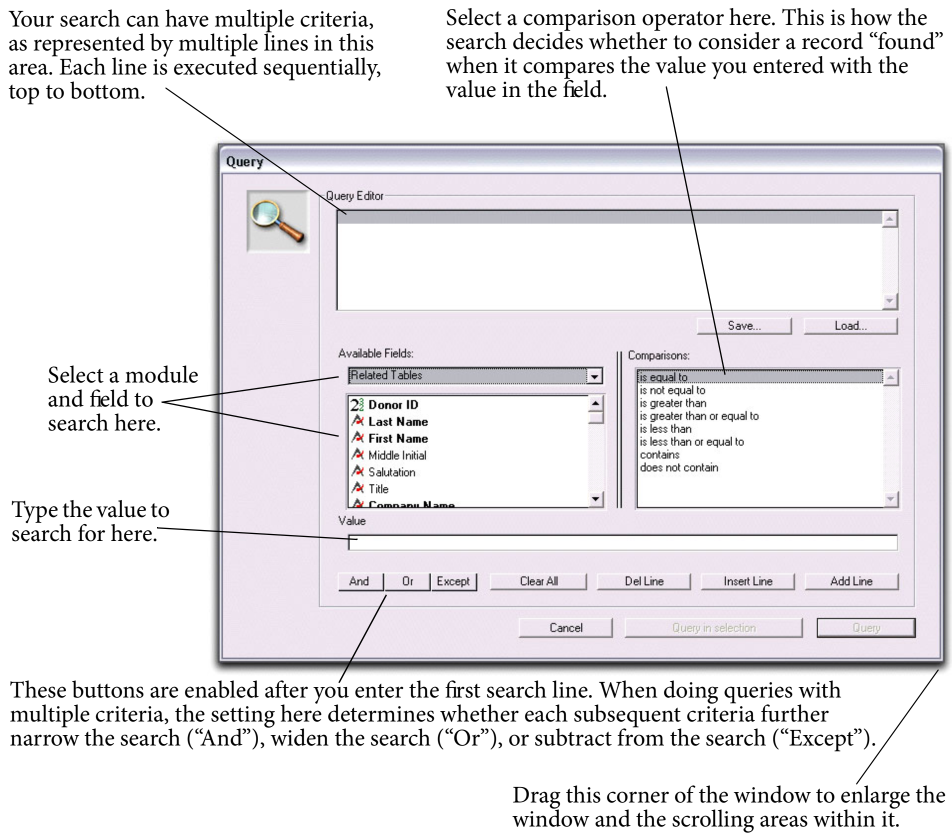


Figure 12.15 Search Editor

There are three especially important capabilities this search offers:

- ♦ Queries can be conducted in most fields of the database. These include fields inaccessible from other queries, such as the Date Created fields in all records, the Pledge Frequency field in the Pledges module, and others.
- ♦ A series of queries can be entered in the editor and saved as a single search. Even though you might be able to perform the same series of queries with the standard search commands, it is easier and more reliable (i.e. repeatable) to construct the search in the editor and save it.
- ♦ Cross-module queries can be made. This means that the results of a search in one module can be projected onto another table, so that the search results appear as a list of records related to those in which the search was made. To use this feature, you conduct the search from the module where you want the results to appear. For

example, suppose you want to email all the donors who have made “In Kind” donations. If you used the Payment Form search from the Find menu in the Donations module, you would encounter two problems:

- There is no way to get email addresses from the Donations module. The only module that supports email output is the Donor module.
- The search would produce multiple listings for those donors who had made more than one In Kind gift. You want to send only one email to each of them.

The solution is to conduct an search from the Donors module using the Report Editor. For this example, bring the Donor List View to the front, then choose Find > Advanced and configure the editor as shown below.

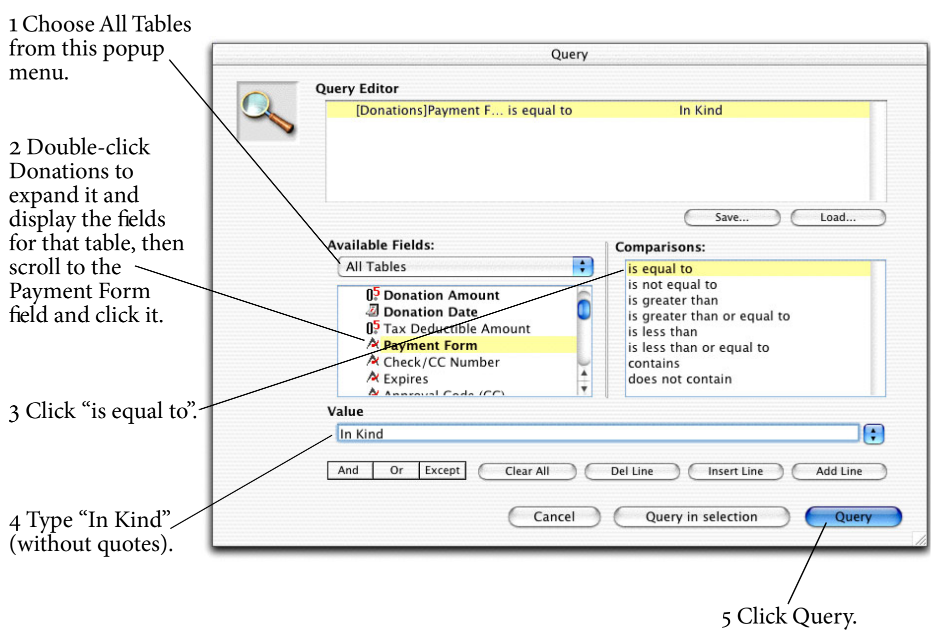


Figure 12.16 Search Editor example #1

When searching for a credit card number, you should enter the number *without spaces* in the Report Editor.

You could limit the results to donors in your home state by clicking the Add Line button, then following the steps in the diagram below:

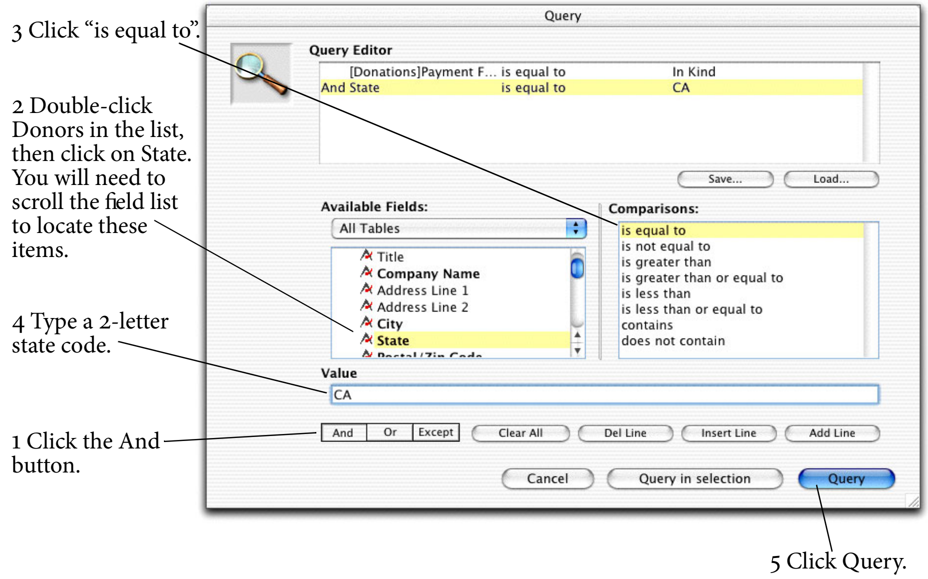


Figure 12.17 Search Editor example #2

The examples above show the search editor being used to perform queries in 2 modules, and returning the results into one module. Although a search is performed in donation records, the contents of Donation List View, if open, are unaffected.

You can search for records with nothing in a particular field, (a.k.a. a null value, or empty string) e.g. donation records with no campaign, or donor records with an empty "Country" field. Just specify the field and comparison as you normally would, and leave the Value field empty.

Using a "wildcard" in a search means you specify some characters to appear in the field you are searching on, but leave other characters ambiguous. For example, you might wish to locate all the donor records with an phone number beginning in 505, or all the donor records with a last name starting in "M" and ending in "y", or all the donation records with a campaign entry ending in 2007. To perform a wildcard search, just type the @ character before, after or in between the values you wish to specify. For the examples above, you would enter search values of "505@", "M@y" and "@2007" respectively.

CHAPTER

13

Output Menu

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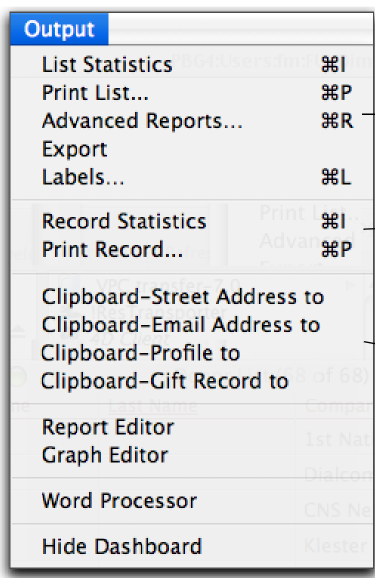


Items in this section are enabled only when a List View is frontmost, except "Labels", which is also available in Input Windows.

Items in this section are enabled only when an input window is frontmost.

Items in this section copy information from the database to your computer's clipboard.

Figure 13.1 Output menu

The Output menu groups all commands for the transfer of information from your database to the screen, printer, clipboard or to a disk file. You'll use this menu to generate exports for mail merge and labels for envelopes, for summaries to your accounting software, for internal reports to those responsible for soliciting gifts, and many other purposes.

Menu commands exist for producing various printed and on-screen reports. To facilitate use of database information in other software, there are menu items to copy data to your computer's clipboard. Exports may be made through the command by that name, or you may construct custom export formats with your choice of fields and calculated items. Finally, several of the commands offer graphing.

You may choose from built-in reports, some with options for customization; or you may use Editors to create your own reports, starting from scratch, from a template you build, or from the collection of templates provided with the program.

List Statistics

These commands provide instant reports on your screen. The reports contain commonly-needed sums and other calculations. You can use a search by date followed by the List Statistics command to find out the total amount you raised for any time period, making them useful for accounting. This command is explained in detail in "List Statistics" on page 146.

This command is supplemented by capabilities in the Dashboard window, which can display continuously-updated statistics such as month-over-month, year-over-year, and other statistics. See "Dashboard" on page 33 and "Hide/Show Dashboard" on page 369.

Print List

This command will print the record(s) in a List View. The command is not available in the Keywords or Relationships module. In input windows, use the Print Records command instead.

A Print Options dialog appears when you use this command; see Figure 7.5, "Print Options dialog, Donor Module" on page 151. Depending on the specific module and window type, this offers choices to sort by, and display subtotals for Campaign, Method, Fund, or Payment Form fields, or to print reports in Listing, Detail, or Summary format.

See "Print List" on page 150 for more on using this command and for samples of the available reports. For information on using this command in conjunction with the Event Manager, see "Printing Reports" on page 227 and "Printing Tickets" on page 229.

Advanced Reports

Advanced Reports offers over one hundred different graphs, exports and printed reports. Most of these are generated from a template provided with the software; the templates may be edited using the Report Editor, providing you with flexibility ranging from choice of fonts, the order in which columns appear, and the formulas used to calculate data. For example, the dates in a formula could be changed to display only those gifts in a date range of interest to you.

A description and sample report of each Advanced Reports item is in "Advanced Reports" beginning on page 164.

The reports listed in the Advanced Reports window differ for each module. Therefore, you must open the list view corresponding to the records you want to print. Before creating the report, you can specify a specific set of records to use for the report by performing a search or using manual selection techniques. For more information, see “Selecting Records” on page 55.

Creating an Advanced Report

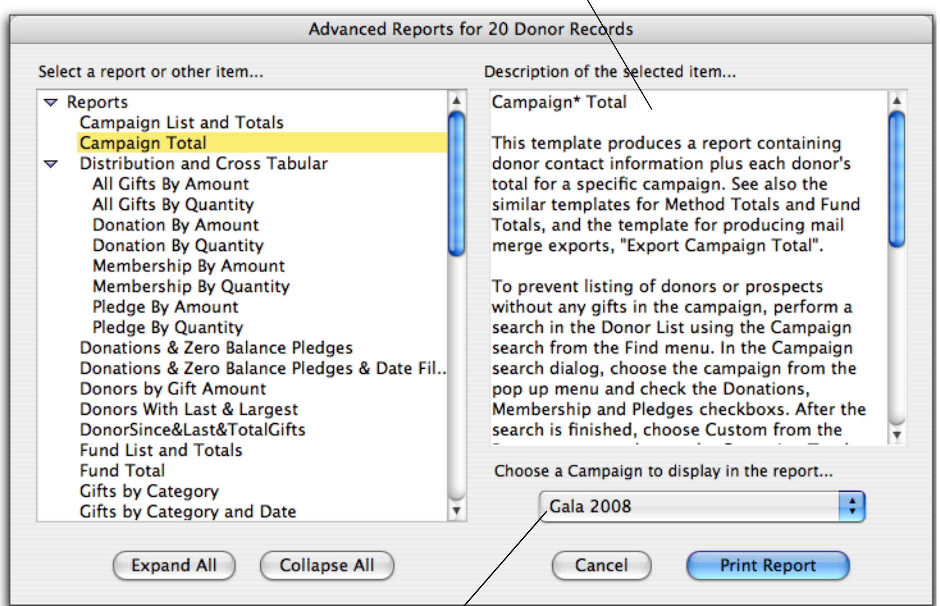
To create an advanced report, do this:

1 Display the records to include in the report by opening the List View for them. For example, to create a report listing donations, open the Donation List View by choosing File>Donations.

2 If you want your report to include only some of the records in the List View, perform searches or use manual selection techniques so that only those records you want to appear in the report are in the List View. See “Selecting Records” on page 55 for more help with this step.

3 Choose Output>Advanced Reports. The Advanced Reports dialog window appears, as in this example:

This area displays help for the item you select in the list on the left.



Pull-down menu for easily configuring the Campaign Total, Method Total, and Fund Total reports. This menu is disabled for other reports.

Figure 13.2 Advanced Reports window

4 Reports are grouped in categories of Reports, Graphs and Exports. To see the reports available for one of these categories, click the plus sign (Windows) or the disclosure triangle (Macintosh).

5 Select a report by clicking on it. A description of the report appears at the right.

6 Click the Print, Configure, Make Graph, or Export to Disk button to create the report. If you click the Make Export button, FUNDimensions asks you where to create the export file on your hard disk. Certain other reports will display a configuration dialog before printing.

Shortcut: Double-click a report, export or graph, instead of the procedures in step 5 and 6.

You can navigate the list of reports in the Advanced Reports window with the mouse or the arrow keys on your keyboard:

- ♦ the up and down arrows move the selection
- ♦ the right arrow expands a sub-list
- ♦ the left arrow collapses a sub-list
- ♦ the ENTER key creates the selected report
- ♦ the ESCAPE key closes the Advanced Reports window without making a report

Editing Advanced Reports

Most advanced report items may be edited to change both the information they display and the formatting. To edit a template, do this:

1 In the Advanced Report window, click on the name of the report you want to edit. You can use steps in “Creating an Advanced Report” on page 341 above to browse the available templates. In the description area, note the path name of the template you want to edit.

2 Close the Advanced Reports window, if it is open. Choose Output>Report Editor.

Choose File>Open. Locate the report template you want to edit by navigating to the correct folder, as indicated in the path name you noted in step 1. A general description of report template directories is:

- ❑ Templates for the Donor module are in FUNDimensions folder/Report Templates folder/Donors folder.
- ❑ For templates for other modules, substitute the module name for “Donors folder” in the item above.

3 Edit the report, then save it with File>Save. For instructions on editing reports, see“Report Editor” on page 361.

4 The next time you run the report from the Advanced Reports menu command, the report is created with your changes.

You can also create brand new reports. Skip step 1, and in step 2 choose File>New. When you are finished creating the report, save it to the correct folder using the rules described in the next section.

Customizing the Advanced Reports listings

Because this command constructs the list of available reports by scanning certain folders on your disk for templates, you may add templates of your own creation and make them available through the Advanced Reports command. For example, using the Report Editor, you might create a report that counts and sums the gifts by Postal Code for last month. Since you want to run the report every month, you add it to the Reports folder located in FUNDimensions/Report Templates/Donors folder. The next time you need the report, you choose the Advanced Reports command, and your report is listed among the other reports. To create the report, select the report and click Print.

If you have created a template for the purpose of exporting to a disk file or creating a graph, add the template to the folders by those names, instead of the Reports folder. For example, you create a template to perform a custom export from the Donations Module. To have the template appear under a list of Exports in the Advanced Reports window, you drop the template file in the folder "FUNDimensions/Report Templates/Donations/Exports." If the Export folder is not present inside the Donations folder, you should create it.

Reports may also be removed from display by deleting their templates from the appropriate folder. This will reduce the number of items in the list of available reports, making it easier to locate those you need and reducing the possibility of error in selecting a report. However, several specific reports are stored internally by the software and cannot be removed from the list.

FUNDimensions will attempt to display a description and help for a template highlighted in the Advanced Reports window. The text of this description and help must be located in a text file, which may be created using the Notepad program (Windows) or TextEdit (Mac OS X), included with your computer operating system. In order for FUNDimensions to associate the text file with the correct template, the file name should be identical to the report name, but with a suffix of ".txt", and the text file must reside in the same folder as the template.

The text file is not required. If its missing, not named according to the rule above, or not located in the same folder with the template, the description area in the Advanced Reports window will display an error message when the report is selected.

You may open any of the text files, including those supplied with the software, and edit them to add your comments, reminders, etc. Your changes show up the next time the report is selected in the Advanced Reports window.

You may change the name of a report as it appears in Advanced Reports by changing the name of the template on your disk. This done using the standard techniques for editing file names under your computer's operating system. If you change the name of a report template in this way, remember to make a corresponding change to the name of the text file containing the template's help.

Export

Exporting creates a tab-delimited text file containing data from each record in a list view. When exporting from one of the List Views containing gift information, the export also contains data from the related donor record, such as the mailing address.

Exported data may be used to generate personalized form letters, copy information to other databases, or to create custom-formatted reports in desktop publishing programs. Exported data can also be used in spreadsheet software, where various analyses may be performed, although FUNDimensions' reports will meet most of these needs. Finally, you can use exported data to generate mailing labels using word processing or spreadsheet software, although FUNDimensions has built-in label printing that meets most of these needs.

Donor records with the Do Not Mail checkbox turned on may be omitted from the export. Donor records with the Do Not Email or Do Not Call checkboxes turned on will have their email addresses or phone numbers listed as "Suppressed" in exports. For more information, see "Do Not Mail, Do Not Email, Do Not Call Checkboxes" on page 57.

The procedure for exporting is slightly different for each of the five modules. To use the export function from the **Donors module**, follow these steps:

1 Select the records you wish to export by placing them in the list view. You may wish to locate the records you want using a query from the Find menu. See "Selecting Records" on page 55 if you need help selecting records. (To export all records, do Records>Show All. If the Show All command is disabled, all records are already in the list.)

2 Choose Output>Export.

3 The standard Save dialog appears. Type in a name for your text file. Select the folder you wish to save it to, then click Save.

4 A thermometer appears informing you of the export progress. You may continue to work in other modules while the export takes place. When the thermometer disappears, the text file will be on your hard drive.

5 A dialog will indicate the number of records you exported, and how many were in the list but not exported because they were blocked by the Omit Mailing flag.

To export from the **Donations, Memberships, Pledges, Pledge Payments and Notes modules**:

6 Select the records you wish to export by placing them in the list view. You may wish to locate the records you want using a query from the Find menu. See "Selecting Records" on page 55 if you need help selecting records. (To export all records, do Records>Show All. If the Show All command is disabled, all records are already in the list.)

7 Choose Output>Export.

8 The standard Save dialog appears. Type in a name for your text file. Select the folder you wish to save it to, then click Save, or cancel the export with the Cancel button.

9 A dialog below reports the results of the export. A reminder is included to check off the Mark Sent flag for your Thank You note and/or recognition product, if that is the purpose of the export. Choose Records>Mark Sent flags. to do this; see "Mark Sent Flags" on page 303 for more information.

Figure 13.3 Export Report example

To export from the **Event Manager**, see "Exporting Registrations" on page 231 and "Exporting Tickets" on page 230.

For an example of exporting overdue pledges for reminder notices, see page 115.

Exports attempt to use special hidden fields to speed up the export process. In certain circumstances, because of locked records these fields may not be up to date, and so the export process will use the "regular" fields instead. This ensures accuracy but will extend the time required for the export to complete. Therefore, it is normal for exports to occasionally take significantly longer than average to complete.

The Householding feature may be used to combine records containing the same mailing address into a single export record, preserving separate records in the database while reducing your mailing costs; see "Householding" on page 139 for more information.

Each record in the text file is separated by a carriage return character, and each field in a record is separated by a tab character. This format is called a tab-delimited text file and is a standard for use with word processors to perform merges in form letters. The format is also compatible with spreadsheet programs such as Microsoft Excel®, where you can to perform very sophisticated calculations, detailed reports and graphing using the data in gift records.

Files exported from FUNDimensions may not be double-clickable to open in Excel. To open an export file in Excel, do this:

10 Working in FUNDimensions, perform the export as directed on page 344.

11 Launch Microsoft Excel®.

12 In Excel, do File menu>Open.

13 In the Open dialog window, choose Show>Text Files (on Macintosh) or Files of Type>Text Files (on Windows; suffix of .txt). (If you don't do this step, the export file will not appear in the file listing, even though it is present on the disk.)

14 Locate the export file in the folder where you saved it in FUNDimensions. Click on it, then click the Open button.

15 Excel's Import Wizard starts up. Usually, the default values in this Wizard are correct for importing FUNDimensions exports, so just click the Finish button.

16 Your export file opens in a new Excel spreadsheet.

The instructions above may vary in different versions of Excel®. Consult Excel's documentation or online help for more information.

Your export will be sorted by postal code unless this is turned off or set to last name sorting in the Preferences dialog. See "Export/Labels" on page 265 for more information. Since mailing labels are sorted the same way, your personalized letters should print in the same order as your labels, facilitating the assembly of your mail pieces. You can change the sort order of an export file using Microsoft Excel®.

In addition to the exports described in this section, you can create exports using the Report Editor. This has the advantage of allowing you control over which fields are exported and the sequence of fields in the export. You can also accommodate special formatting requirements to make the export files more compatible with other databases. These might include the addition of quotes around each field, setting field contents to all uppercase, limiting field length, including calculated fields, and other items. See page 365 for more information.

A header containing the field names is the first record of every export file. Word processors can use this header to allow you to place fields into your letters with field names instead of field numbers. As a further aid, the following table indicate the sequence of fields when exporting from each module. (See also Table 5.1, "Export Fields for 2nd Thank You Recipient Exports" on page 125 and Table 5.3, "Fields in Year-End Letter Exports" on page 131.)

This page intentionally blank. Table 13.1 starts next page.

Table 13.1 Export Fields (except 2nd Thank You Recipient, Event Manager and Year End Letter Exports)

Field No.	Donor module	Donation module	Membership module	Pledge module-no overdue data	Pledge module-overdue data[2]	Pledge Payment module	Notes Module
1	Label_Salutation 1	Label_Salutation 1	Label_Salutation 1	Label_Salutation 1	Label_Salutation 1	Label_Salutation 1	Last name
2	Label_Salutation 2	Label_Salutation 2	Label_Salutation 2	Label_Salutation 2	Label_Salutation 2	Label_Salutation 2	First name
3	Address_Line 1	Address_Line 1	Address_Line 1	Address_Line 1	Address_Line 1	Address_Line 1	Salutation
4	Address_Line 2	Address_Line 2	Address_Line 2	Address_Line 2	Address_Line 2	Address_Line 2	Company
5	City	City	City	City	City	City	Donor ID
6	State	State	State	State	State	State	Note Date
7	Postal_Code	Postal_Code	Postal_Code	Postal_Code	Postal_Code	Postal_Code	Author
8	Country	Country	Country	Country	Country	Country	Subject
9	Letter salutation	Letter salutation	Letter salutation	Letter salutation	Letter salutation	Letter salutation	Note
10	Salutation	Salutation	Salutation	Salutation	Salutation	Salutation	
11	First name	First name	First name	First name	First name	First name	
12	Middle initial	Middle initial	Middle initial	Middle initial	Middle initial	Middle initial	
13	Last name	Last name	Last name	Last name	Last name	Last name	
14	Title	Title	Title	Title	Title	Title	
15	Company	Company	Company	Company	Company	Company	
16	Donor ID	Donor ID	Donor ID	Donor ID	Donor ID	Donor ID	
17	Home Phone	Donation ID	Membership ID	Pledge ID	Pledge ID	Pledge ID	
18	Work Phone	Gift amount	Gift amount (dues)	Gift amount	Gift amount	Pledge Payment ID	
19	Fax Phone	Gift date	Gift date	Gift date	Gift date	Amount Due	
20	Cell Phone	Tax Deductible Amount	Tax Deductible Amount	Tax Deductible Amount	Tax Deductible Amount	Amount Paid	
21	Email	Non-Tax Deductible Amount	Non-Tax Deductible Amount	Non-Tax Deductible Amount	Non-Tax Deductible Amount	Date Paid	
22	User-defined 1[1]	Gift List 1[1]	Gift List 1[1]	Gift List 1[1]	Gift List 1[1]	Pledge Amount	
23	User-defined 2[1]	Gift List 2[1]	Gift List 2[1]	Gift List 2[1]	Gift List 2[1]	Scheduled Payment Amount	
24	User-defined 3[1]	Gift List 3[1]	Gift List 3[1]	Gift List 3[1]	Gift List 3[1]	Pledge Balance	
25	User-defined 4[1]	Solicitor	Solicitor	Solicitor	Solicitor	Gift List 1[1]	
26	User-defined date	Recognition Product	Recognition Product	Days to 1st payment	Days to 1st payment	Gift List 2[1]	
27	Year of Birth	Note	Membership Class	Frequency of Payment	Frequency of Payment	Gift List 3[1]	
28	UserList_1[1]	Match To[5]	Membership expiration	Payment amount	Payment amount	Solicitor	
29	UserList_2[1]	Gift Sequence Number[6]	Note	Recognition Product	Overdue Amount	Payment Note	
30	UserList_3[1]	Gift Sequence (Ordinal)[7]	Dues Sequence Number[6]	Note	Due since	Gift Sequence Number[6]	
31	Solicitor	Gift Sequence Number	Dues Sequence Number (Ordinal)[7]	Gift Sequence Number[6]	Balance	Gift Sequence (Ordinal)[7]	

Table 13.1 Export Fields (except 2nd Thank You Recipient, Event Manager and Year End Letter Exports)

Field No.	Donor module	Donation module	Membership module	Pledge module-no overdue data	Pledge module-overdue data[2]	Pledge Payment module	Notes Module
32	Gift Total [4]	Gift Sequence Number (Ordinal)	Total Membership Dues for Donor	Gift Sequence (Ordinal)[7]	Total Paid to Date	Gift Sequence Number	
33	Total Gift Count	Total Gifts for Donor	Member Since [10]	Gift Sequence Number	Amount of Last Payment	Gift Sequence Number (Ordinal)	
34	Donor Since[8]	Total Gift Count	Total Gifts for Donor	Gift Sequence Number (Ordinal)	Date of Last Payment	Total Gifts for Donor	
35	Membership Dues Total[11]	Gift Total Year To Date	Total Gift Count	Total Gifts for Donor	List of Payment Amounts & Dates	Total Gift Count	
36	Member Since [10]	Gift Count Year To Date	Member for X Years (rounded down)[9]	Total Gift Count	Note	Gift Total Year To Date	
37	Gift Total Year To Date	Gift Total Last Year	Member for X Years (Ordinal-rounded down)[9]	Gift Total Year To Date	Gift Sequence Number[6]	Gift Count Year To Date	
38	Gift Count Year To Date	Gift Count Last Year	Member for X Years (rounded up)[9]	Gift Count Year To Date	Gift Sequence (Ordinal)[7]	Gift Total Last Year	
39	Gift Total Last Year	Donor Since[8]	Member for X Years (Ordinal-rounded up)[9]	Gift Total Last Year	Gift Sequence Number	Gift Count Last Year	
40	Gift Count Last Year	Donor for X Years (rounded down)[9]		Gift Count Last Year	Gift Sequence Number (Ordinal)	Donor Since[8]	
41	Householded Records[3]	Donor for X Years (Ordinal-rounded down)[9]		Donor Since[8]	Total Gifts for Donor	Donor for X Years (rounded down)9	
42		Donor for X Years (rounded up)[9]		Donor for X Years (rounded down)9	Total Gift Count	Donor for X Years (Ordinal-rounded down)[9]	
43		Donor for X Years (Ordinal-rounded up)[9]		Donor for X Years (Ordinal-rounded down)[9]	Gift Total Year To Date	Donor for X Years (rounded up)[9]	
44		Match To		Donor for X Years (rounded up)[9]	Gift Count Year To Date	Donor for X Years (Ordinal-rounded up)[9]	
45				Donor for X Years (Ordinal-rounded up)[9]	Gift Total Last Year		
46					Gift Count Last Year		
47					Donor Since[8]		
48					Donor for X Years (rounded down)[9]		
49					Donor for X Years (Ordinal-rounded down)[9]		
50					Donor for X Years (rounded up)[9]		
51					Donor for X Years (Ordinal-rounded up)[9]		

Footnotes appear next page.

Table 13.1 Footnotes

1 Names of these fields can be changed; see “Preface” on page ix. The header row of the export will contain the field name as it is set in your database.

2 Access this export by choosing Output Menu > Advanced Reports and choosing from the Export list.

3 This is a count of records with identical addresses combined into a single mailing. See “Householding” on page 119.

4 The Gift Total field is the sum of all donations and pledges for the donor. When householding is turned on, this is the total gift amount for all the donors in the household. See “Householding” on page 119.

5 The contents of the Match To field.

6 The chronological order of this gift or dues for the donor, e.g. if this is the donor’s third gift, the Gift Sequence Number is 3. For exports of donations and pledges, memberships are not included in this number. For exports of memberships, only memberships (dues payments) are included in this number (not donations or pledges).

7 Same as 6 above, except in ordinal (“word”) form for use in the body of a letter to the donor. Complies with rules for informal writing, i.e. 1-10 are spelled out (first, second, third, etc.), higher numbers have suffixes (11th, 22nd, etc.)

8 The 4 digit year of the donor’s first (oldest) gift. When householding is turned on, this is the year of the oldest gift for the entire group of records in the household. See “Householding” on page 119.

9 Number of years, rounded up, since the donor’s first donation, membership or pledge.

10 The 4 digit year the donor began membership. When householding is turned on, this is the year of the oldest membership for the entire group of records in the household. See “Householding” on page 119. Any lapse of membership exceeding five years (i.e. a gap of more than five years between the expiration date of a dues payment, and the paid date of the succeeding dues payment) will re-set this value.

11 The total dues paid by the donor for all their memberships. If Householding is turned on, this is the total dues for all the donors in the houshold.

Exporting for Address Correction

You can use the export process described above (for the donor module: see page 344) to submit a file to a third-party address correction service, then import the corrected addresses back into your FUNDimensions database.

Tip: turn Householding **off** when exporting for address correction. This will ensure every record in the database is subjected to the address correction process. For more information on Householding, see “Householding” on page 139. For instructions on turning householding off, see “Householding” on page 139.

For instructions for importing the corrected addresses, see “Import Address Corrections” on page 279.

Exporting the Database as XML Files

You can export the entire database, including user preferences and data otherwise inaccessible, by using Export Entire Database as XML, located in Output>Advanced Reports. See “Export Entire Database as XML” on page 178.

Exporting FUNDimensions to Another Database

If you are exporting your Fundimensions data to another database because you are dissatisfied with FUNDimensions, please contact the publisher and let them know what was lacking in the product or service. Thank you.

The procedures described in this section will export keywords, relationships and the multiple addresses which FUNDimensions can store for each donor. Each of these exports is briefly described below.:

- Keywords Export. To perform this export, do File>Keywords, then choose Output>Export. The list of keywords and keyword notes are exported as a tab-delimited text file. This data comprises the keyword table.
- Keyword Join Table Export. To perform this export, do File>Keywords, then choose Output>Advanced Reports. Choose Keyword Join Table from the exports theme (note the export description that appears at right) and click Export to Disk. This export is a list of the Keyword/Donor ID Foreign Key pairs that make up the "join" table in the many-to-many structure between the donor table and the keyword table. Additional fields are included in the export to extend its usefulness to general reporting, but only the Keyword and Donor ID are contained in the Keyword Join table. A header row in the export labels each field; open the export in a spreadsheet to view these labels and the exported data. See also "Keyword Join Table" on page 195.
- Relationships export. To perform this export, do File>Relationships, then choose Output>Export. The relationship names, relationship IDs and relationships notes are exported as a tab-delimited text file. The data comprises the Relationships table.
- Relationships Join Table. To perform this export, do File>Relationships, then choose Output>Advanced Reports. Choose Relationship Join Table from the exports theme (note the export description that appears at right) and click Export to Disk. This export is a list of the Relationship ID/Donor ID Foreign Key pairs that make up the "join" table in the many-to-many structure between the donor table and the relationships table. Other fields from the Relationships Join Table in this export are Constituent Type, Constituent Note, and Primary Status. Additional fields in the export are not from the Relationships Join Table but are included to extend the application of this export to meet certain reporting needs: these fields are donor name, company name, and relationships note. A header row in the export labels each field; open the export in a spreadsheet to view these labels and the exported data. See also "Relationship Join Table" on page 205.
- Address Table. To perform this export, do File>Donors. Generate the selection of records you want to export, or do Records>Show All to export everything. Then, do Output>Advanced reports, choose Address Table from the exports theme (note the export description that appears at right) and click Export to Disk. This exports the contents of the Addresses table, where the addresses appearing in the Address pane of the Donor Input Window are stored.

Together with the primary exports described in the sections above (starting at "Export" on page 344), these exports allow you to export all your donor and gift information out of FUNDimensions as tab-delimited text files, an industry-standard, human-readable format. Alternately, you can export the entire database in a single step as XML files. See "Exporting the Database as XML Files" on page 350.

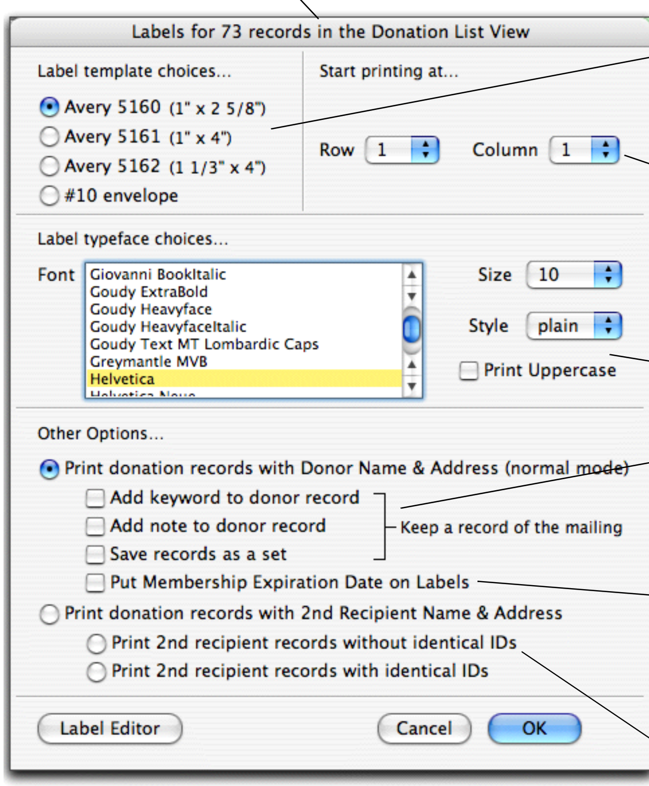
Labels

This section provides details of the options and dialog boxes that result from using the Label command. See “Printing Labels” on page 142 for the basic procedure for printing labels.

You can print labels for any module except Keywords and Relationships. When a list view is the active window, the Label command produces a label for each record in the list, subject to rules for the Omit Mailing flag in donor records (“Do Not Mail Flag in Exports & Label Printing” on page 139) and the householding function to combine records with identical addresses into a single mailing (“Householding” on page 139). If an Input Window is frontmost, a label is printed for only that record.

You can also print a label for any single donor or gift record by right-clicking (CONTROL-clicking on Macintosh) on it in a List View and choosing Print Label from the contextual menu. A screen-shot of this menu appears in “Contextual Menu in Donor List View” on page 94. Selecting the menu command produces the following dialog box:

The title bar confirms the number of records for which labels will be printed, and the window that contains them.



Select a template or opt to use the label editor (button at lower left of window).

For Avery® label templates, choose a row and column for the first label; this allows you to print to label sheets that have been partially used.

Select typeface characteristics.

Select from among 3 ways to record and track your mailing.

Include the latest membership expiration date, if the recipient is, or has been a member; works only when using one of the Avery® options above.

Create labels for 2ˆÎ thank you recipients; see “Printing 2nd Recipient Mailing Labels” on page 126. Selecting these options disables the Label Editor button (lower left).

Figure 13.4 Label dialog

In the first section, you can select a built-in Avery® template, a standard business envelope, or the Label Editor. When a built-in label template is chosen, popup menus are available to start printing anywhere on the label sheet. Numbers in the menu correspond to label rows and columns, starting at the top left of the sheet.

The built-in Avery templates (first 3 radio buttons) all use the Label Line 1, and Label Line 2 fields in the Donor records as the contents of the first two lines of the label. The complete layout of built-in templates is shown here:

Table 13.2 Layout for Built-In Label Templates

Label Row	Field Used*
1	Label Line 1
2	Label Line 2
3	Address
4	Address 2
5	City, State Zipcode
6	Country

* The fields listed here appear in the Contacts tab of the Donor Input Window; see "Donor Input Window, Contact pane" on page 6.

In addition to the fields listed above, the donor's membership expiration date will appear in the lower right corner of labels if the appropriate checkbox is turned on in the Label dialog window (Figure 13.4). This feature is available for the Avery® label options only; it does not work for #10 envelopes or the label editor. The date will be that of the latest expiration date for all membership records associated with the donor, and will be printed even if the latest expiration date is one for an expired membership.

If any line in a label or on an envelope is empty, FUNDimensions moves up subsequent fields so that no blank lines appear on the labels.

If you do not want to use the field layout above, you can print labels using the Label Editor. This editor allows you to include any fields, in any order, on any size label stock. See "Label Editor" on page 355 for information on using this option. The label editor option is not available (Label Editor button is disabled) when you select the radio button to print labels for 2nd recipients (see Figure 13.4 above). If you need custom labels in this situation, you can export the records and use third-party software.

After clicking OK in the Label dialog, the standard Page Setup and Print dialogs appear. Settings in these dialogs are important to printing successfully on the special sizes and weights of label and envelope stock. You may need to consult your printer documentation for correct settings. *Tip:* When printing labels, to prevent clipping of text or page breaks at the wrong place, choose "Maximum" in your Print dialog, if that option is available. In some printer software, there is an option in the Page Setup (Mac) or Print Setup (Windows) to choose a larger print area. Chose the larger print area when printing labels, i.e. use "US Letter", not "US Letter-Small".

A section of the label dialog offers popup menus for choosing font, font size and font style in your labels. A checkbox lets you to force label text to print in all upper-case characters.

Use the last section of the label dialog to keep a record of your mailing. The result is an easy way to locate donors who have received specific correspondence. You may attach a keyword and/or note record to each donor record, for every record that had a label printed, or save the set of records to disk. A record excluded by the Omit Mailing flag will not receive a keyword or note, or be saved in the set. Before using the option to save a set, acquaint yourself with their limitations and the guidelines for naming them; this information is located in the sections for the Save Set and Load Set menu commands, beginning on page 303. Using the checkbox to save a set after printing labels is the same as choosing Records>Save Set.

If any of these are checked, you will receive an appropriate dialog for selecting a keyword, entering a note, or naming and saving a disk file after the Print dialog for the labels. You can also create a new keyword at that time if the keyword you want is not yet entered in the database. Notes can be created by pasting text from the clipboard, enabling you to place the text of word processor correspondence into a note without re-typing it.

When printing from the Donations, Memberships, or Pledges List Views, the radio button labeled "Print (gift module) records with 2nd Recipient Name and Address" is enabled. This permits generation of a mailing to acknowledge a named donor, survivor for a memorial gift, or other person or organization besides the actual contributor. See "Printing 2nd Recipient Mailing Labels" on page 126 for more information.

Your labels will be sorted by postal code unless this is turned off or set to last name sorting in the Preferences dialog. See "Export/Labels" on page 265 for more information. Since exports are sorted the same way, your personalized letters should print in the same order as your labels, facilitating the assembly of your mail pieces.

You can have FundDimensions analyze zip code groupings for easier bundling of bulk mail. To do this, use the Gifts By Postal Code report (in the Donor Module; see "Gifts By City, Postal Code, State, or Country" on page 186) or Postal Code and All Gifts (in gift modules; see "City, Postal Code, State or Country & All Gifts, Campaign, Method, or Fund" on page 168) from the Advanced Reports menu command,

You can print a list of each record that had a label printed by doing Output>Print List immediately after printing labels. *Hint:* If you prefer this report to be in the Listing format for donor records (see example at "Listing Report" on page 160) but you are printing labels from a gift module, attach a keyword in the Label dialog, then search for that keyword in the Donors module and print the list. If its only purpose was to enable printing of the list, you can then delete the keyword from the Keywords module. Doing so will help to keep your keyword list as short as possible.

Label Editor

If you select the Label Editor radio button, the typeface options in the Label dialog do not apply, since the editor has its own typeface selections. Other functions in the Label dialog work as described with the editor.

To use the label editor, click the Label Editor button and the OK button in the Label dialog. This dialog appears:

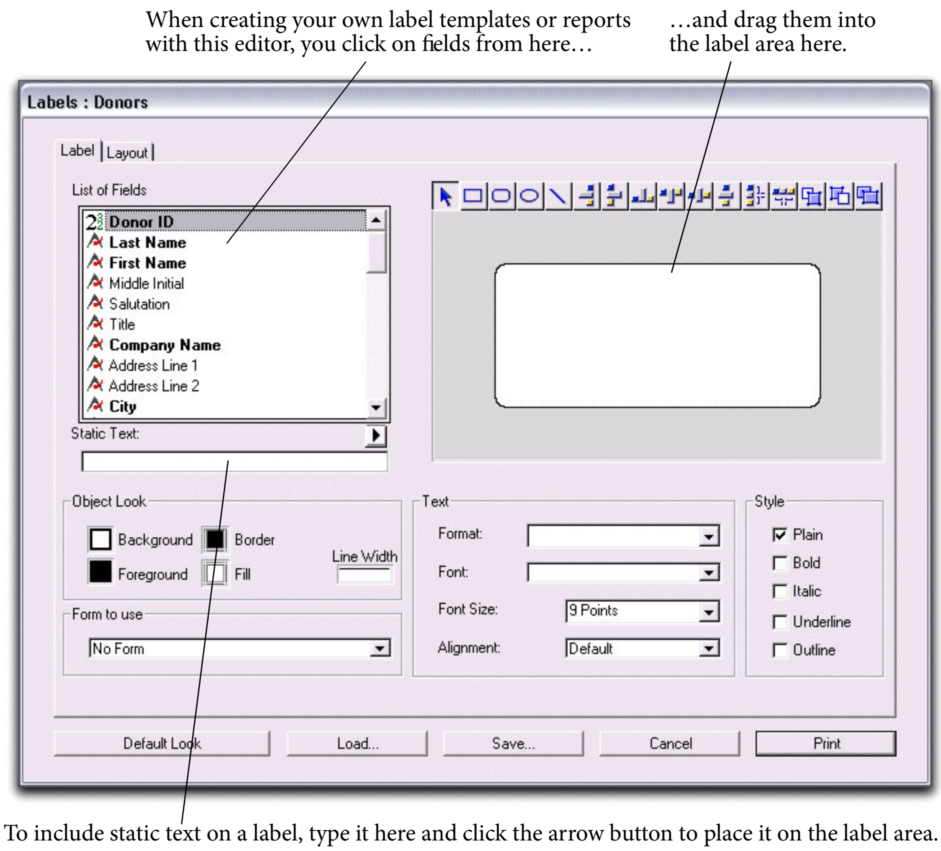


Figure 13.5 Creating a label template in the Label Editor

The editor lets you can create and save a template, or load a template from disk. FUNDimensions ships with several template files, located in the Label and Envelope Templates folder. To use a template file, click the Load button in the label editor and use the standard Open dialog to locate and open the template. You will then be returned to the label editor, which will show the label layout. It may be edited prior to printing. You can also use this editor to set up templates for envelopes, membership cards and place cards.

A second pane of the editor allows you to control how labels appear on the label sheet or other paper stock. Click the Layout tab to display this part of the editor:

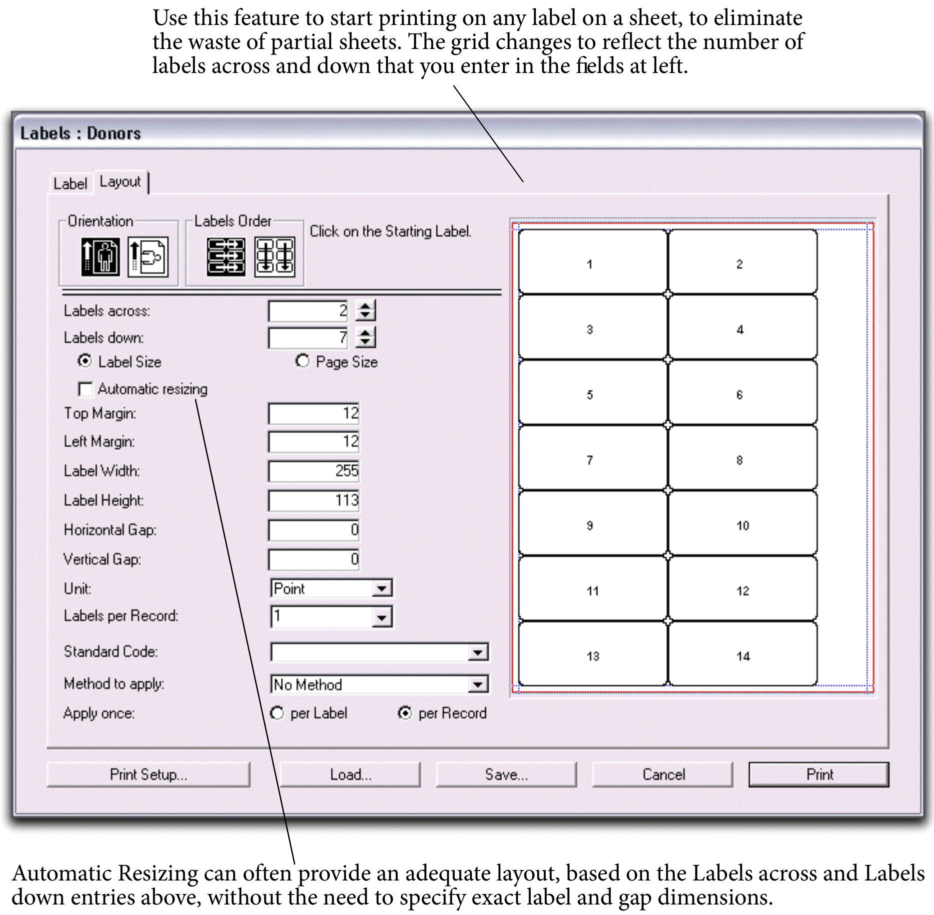


Figure 13.6 Label Editor, Layout pane

Click the Print button to exit the Label Editor and enter the standard Print dialog. Adjust settings here if needed and click Print to send your job to the printer. The Print dialog offers the option to preview your job on the screen before printing, and to print only specific pages of the job for test purposes. If you are unfamiliar with them, refer to your system software and printer documentation for more information on the Print and Page Setup dialog boxes.

When using the Label Editor, be prepared to experiment to arrive at a label solution that works for you. When editing template files, we suggest you work on a copy of the file, not the original template.

The Label Editor can be used to create simple reports on non-label stock. Although you will usually want to use the Report Editor to design reports, the Label Editor is unique in allowing you to place fields from a record underneath one another (i.e. as rows) instead of the strict column format of the Report Editor. Contrasting advantages of the Report Editor include an easy, drag and drop interface for creating columns, automatic column width adjustment and sorting, and the ability to make calculated columns and rows based on formulas.

Record Statistics

This command displays an informational dialog for a single record, and is explained in “Record Statistics” on page 149.

Print Record

This command prints a single record and is explained in “Print Record” on page 160.

Clipboard-Street Address to

This command is available from the List Views and Input Windows in the Donor module and in gift modules. It copies the name and street address from donor records and places it on the clipboard of your operating system. The results of this command can be viewed by choosing Edit menu>Show Clipboard, and the results can be pasted into any document that accepts text, such as a word processing document. If you are unfamiliar with “copy and paste,” please consult documentation for your operating system or a tutorial for general computer operation.

If you intend to use this command as part of a procedure to generate mail, be advised that the Do Not Mail checkbox is ignored when using this command. This might result in sending unwanted mail. To avoid this problem, use the Export menu command instead. See “Export” on page 344.

To use the command, choose Output>Clipboard—Street Address to from the Output menu, or right-click (CONTROL-click on Macintosh) on a row in a List View (Refer “Contextual Menu in Donor List View” on page 94 to view an instance of this command in a contextual menu). The exact results depend on the module and window type which is frontmost when the command is selected:

- From the Donor List View, the clipboard contains the name and address of each donor record.
- From the Donor Input Window, the clipboard contains the name and address of the current donor.
- From a gift module List View, the clipboard contains the name and address of the donor record corresponding to the current selection of gifts.
- From a gift module Input Window, the clipboard contains the name and address of the single donor record corresponding to the current gift.
- From a contextual menu, the clipboard contains the name and address of the donor record.

On the clipboard, a return separates each address line, and a double return separates each donor.

You have the option to include phone numbers in the clipboard, through an option in Preferences. To turn this option on, choose File>Preferences. Click the General tab, then turn on the checkbox labeled “Phone Numbers in Clipboard—Street Address to.” (See page 262 and Figure 10.2)

Donor records with their Do Not Call checkboxes turned will not have their phone numbers listed on the clipboard. Donor records with their Do Not Email checkboxes turned on will not have their email addresses listed on the clipboard. For more information, see “Do Not Mail, Do Not Email, Do Not Call Checkboxes” on page 57.

Large clipboards can result from using this command; if this causes of out-of-memory errors, remove some records form the list and try again. Instead of using the Clipboard—Street Address to command for a large number of donors, you can make clipboards for a segment of your list, paste the result, then return to FUNDimensions and copy other segments of the list. Here is a example in which this problem is solved:

1 Carol performs a search for all the donors in California. Several thousand donor records are returned from the search, appearing in the Donor List View.

2 Upon choosing Clipboard-Street Addresses to from the Records menu, she gets an out-of-memory message.

3 She chooses the Show Clipboard command from the Edit menu, and sees that some addresses are there, but doubts that they are all there because of the error message.

4 She closes the Clipboard window. Back in the Donor List View, she chooses Show By List Position from the Records menu. (For more information about this command, see “Show by List Position” on page 298.)

5 In the Show By List Position dialog box, Carol enters half the number of records as are in the Donor List View and indicates “Beginning of the List”, as shown here:

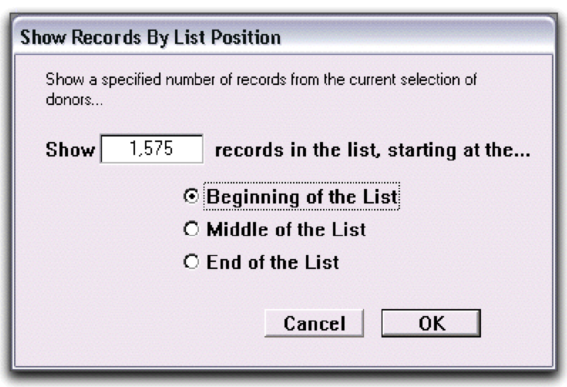


Figure 13.7 Show Record By List Position for memory management

6 She clicks OK. Now, there appears only the first half of the original list of California donors.

7 She chooses the Clipboard-Street Addresses to command again. No error message appears this time, and she pastes her clipboard in the other program. Returning to FUNDimensions, Carol repeats these steps, but using the “End of the List” option in the dialog shown above.

It also reduces memory requirements to not include the phone numbers, extensions and email address, if you do not need them, by turning off the feature in the Preferences dialog (see instructions above and “General Preferences” on page 261).

Another option for large lists is to perform an export and use the text file generated by the export as the source for addresses, instead of the clipboard. For information on this option, see “Export” on page 344.

If password security is turned on, only users with printing privileges will be able to use this menu command.

Clipboard-Email Address to

This command is available from the List Views and Input Windows for the donor module and all gift modules. In List Views, it works like the “Clipboard—Street Address to” command described above, except that the clipboard is filled with the email addresses of the donors. This allows you to generate mass email. To send email to everyone in the Donor List View, do this:

1 In FUNDimensions, choose Records>Clipboard—Email Address to.

2 Open any email program, and create a new, empty message.

3 Click in the To, CC, or BCC field of the message, and choose Edit menu>Paste. The email addresses placed on the clipboard in FUNDimensions appear in the message.

When used from a List View in a gift module, the command finds email addresses in all the donor records corresponding to the current selection of gifts, and places them on the clipboard.

When used from an Input Window, the command places a single address on the clipboard, which is the address in the donor record. If the command is disabled, it is because the email address field in the donor record empty.

It is poor etiquette to send unsolicited email, and doing so may cause your internet service provider to reprimand you or terminate your account, so we suggest that you be sure your recipients have “opted-in” to receive your messages. You can prevent email addresses from being used, even if they are inadvertently entered, by use of the Do Not Email checkbox; see.

If password security is turned on, only users with printing privileges will be able to use this menu command.

Clipboard-Profile to

This command is available from the Donor List View and the Donor Input Window. It copies the name, address and a summary of the donor’s history to the clipboard. You may then paste this information into a word processor or other software.

To use this command from the Donor List View, do this:

1 Locate the donor record you want to apply the command to in the Donor List View.

2 Right-click (CONTROL-click on Macintosh) on the row and choose Clipboard—Profile to from the contextual menu.

To use this command in the Donor Input Window, do this:

3 Open a donor record in the Donor Input Window. For help with this step, see “Donor Input Window” on page 5.

4 Choose Records>Clipboard—Profile to.

5 Switch to your word processor or other software. In a document, click where you want the donor information to appear.

6 Choose Edit>Paste.

You may view the contents of the clipboard from within FUNDimensions by choosing Edit>Show Clipboard.

If password security is turned on, only users with printing privileges will be able to use this menu command.

Clipboard-Gift Record to

This command is available from any Gift Input Window. It copies the name of the donor and the information in a gift record to the clipboard. You may use this command to quickly generate a receipt or thank you letter to a single donor in your word processor.

To use this command from a Gift List View, do this:

1 Locate the gift record you want to apply the command to in the Donation, Membership, Pledge, or Pledge Payment List View.

2 Right-click (CONTROL-click on Macintosh) on the row and choose Clipboard—Profile to from the contextual menu.

To use this command from a Gift Input Window, do this:

3 Open a gift record in a Donation, Membership, Pledge or Pledge Payment Input Window. For help with this step, see “Windows” on page 2.

4 Choose Records>Clipboard—Gift Record to.

5 Switch to your word processor or other software. In a document, click where you want the gift information to appear.

6 Choose Edit>Paste.

You may view the contents of the clipboard from within FUNDimensions by choosing Edit>Show Clipboard.

If password security is turned on, only users with printing privileges will be able to use this menu command.

Report Editor

This command displays the Report Editor, where an infinite variety of reports may be designed, printed and saved for future use. The report you design or select will be made for whatever records are contained in the List View for the frontmost module. The command is disabled in Input Windows.

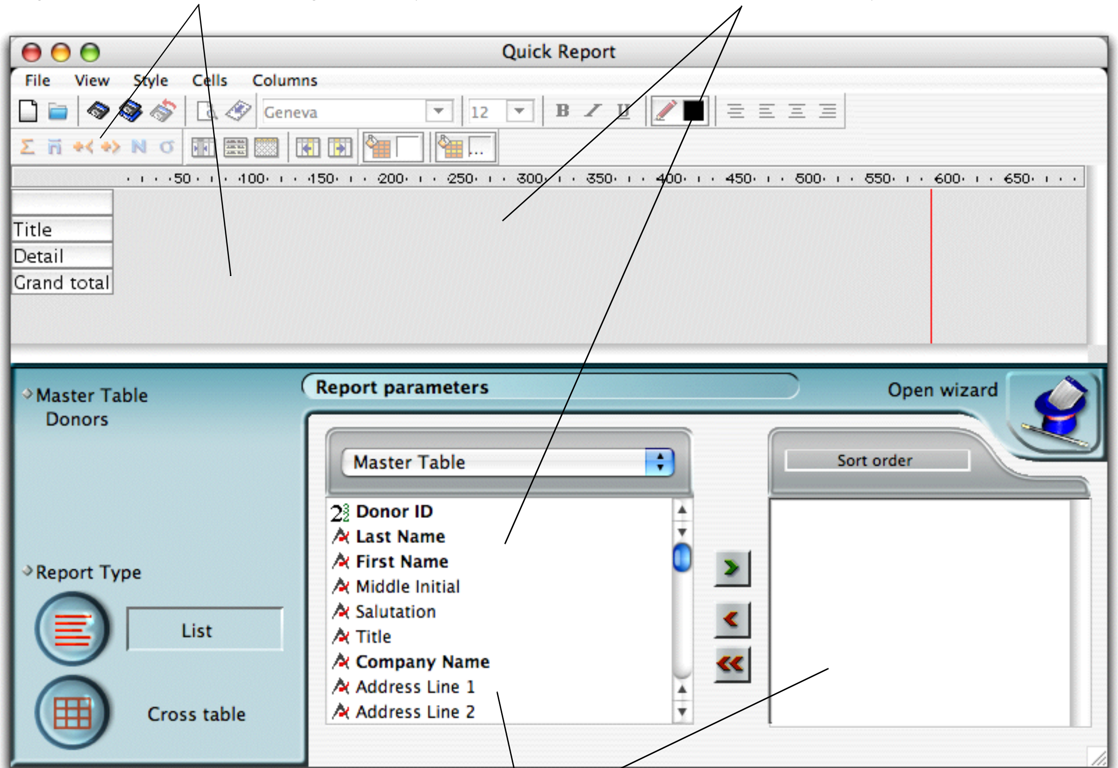
Additional documentation is available for the Report Editor. Please email or call technical support for a URL *to download this documentation.*

To get correct results when using the Report Editor, you must be in the correct module before the Report Editor menu item is selected. The templates included with FUNDimensions are placed in named folders indicating the correct module. Text files in those folders explain the correct use of each template.

This image of the Report Editor describes some of the key areas and procedures for creating and editing reports:

You can select rows here and turn on the functions in the Cell group to include sums, averages, etc. in your report.

Drag fields from this list to the top row of the report area to set up the columns for your report.



Drag any field from this list to the sort list to sort the report on that field. The field must also appear in the report itself (upper area).

Figure 13.8 Report Editor

You can set up headers and footers for custom reports by choosing Page Setup from the File menu while in the editor and clicking OK. A dialog box appears where you can enter text for headers and footers, control header and footer size and set font and size. Page Setup also allows you to set a wide page orientation to include more columns in your reports.

To use the report templates of your own or those included with the program, do this:

1 Place the records to include in your report into a List View.

2 Choose Output>Report Editor.

3 Choose Open from the File menu and navigate to your templates folder A folder is provided with installations of FUNDimensions entitled “Report Templates”. Locate the desired report in the standard Open dialog and open it.

4 Optional: choose File>Headers and Footers to edit headers and footers.

5 Optional: to change font characteristics, click a column and choose items from the Font and Style menus.

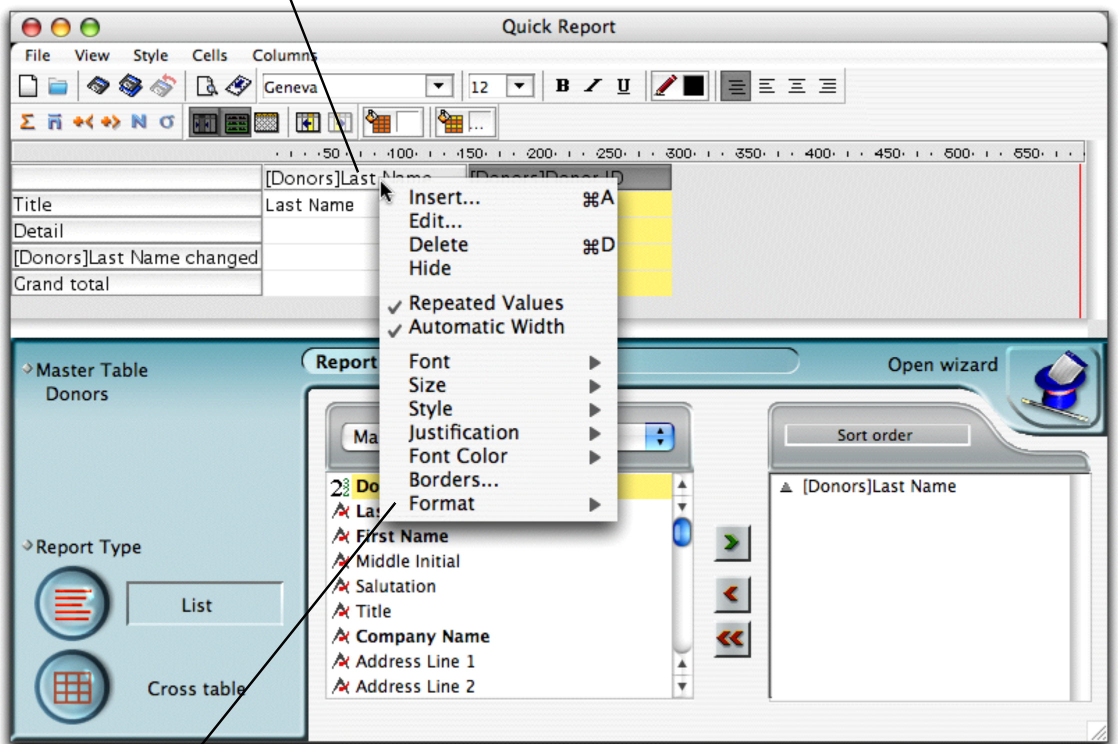
6 Choose File>Print.

Save reports you design in this editor for later use with File>Save menu in the editor. *Note:* when saving reports on Windows, limit your file name to 31 characters, including the “.4QR” suffix. Reports saved without respecting this length may not open properly.

These reports can be customized. You can change the sort order, font, size and style of typeface for each column, and control the format used to display values. For example:

- You can elect to omit cents from a column containing money values, and control the use of dollar signs and commas in the amounts.
- You can let the editor calculate the correct column width when it prints the report, or manually drag the dividers to set a width.
- You can use standard menu commands for text formatting after selecting the column, and enter value formats by typing the correct codes in the detail cell for the column you want to modify.
- Alternately, you may use the contextual menu that appears when you click and hold the mouse button anywhere in a column except the detail cell, as shown below:

This example was produced by right-clicking (may require control-clicking on Macintosh) and the mouse over this area.



Contextual menu, so-called because it's contents may change depending on the object on which you right-clicked to invoke it.

Figure 13.9 Contextual Menu in Report Editor

Formula Editor

Formulas enable you to include the results of calculations in your report, or to use the results of functions provided in FunDimensions. Reports do not have to include formulas, but they significantly extend the capabilities of the Report Editor. Choose Edit Column from the popup or Edit menu to add, delete or change the formulas used to calculate the values that appear in the columns. This opens the Formula Editor window:

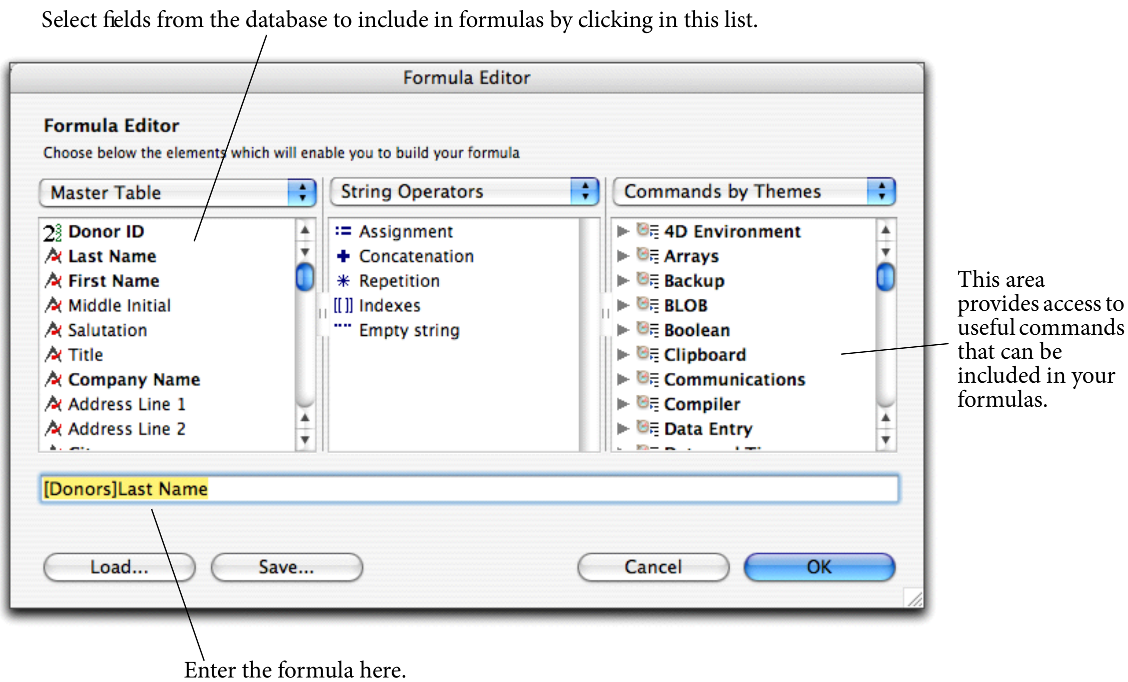


Figure 13.10 Formula Editor

You can place formulas in hidden (i.e. non-printing) columns and use the result of your formulas in other columns. Select a column to hide, then choose Hide Column from the Edit menu. To un-hide a column, select the column and choose Show Column from the Edit menu.

While a comprehensive documentation of the Formula Editor is outside the scope of this manual, many examples are available in the sample report templates that are included with FunDimensions and available separately from the web site. You can save formulas from a template using the Load button and retrieve the formula into another template using the Save button. Formulas and complete report templates can be provided to you from FunDimensions' technical support services.

Setting Formats in the Report Editor

You will often want to format numbers and dates in your report templates. For numbers, this usually consists of including commas and currency symbols. For dates, this consists of selecting among various presentations, such as 02/29/05 or February 29, 2005.

The format must be entered in the detail or break cell of the column you want formatted.

You can set currency formats in either of 2 ways:

- ♦ FUNDimensions maintains 2 standard currency formats, using the currency symbol* entered in the Administration window.: <>currency_style_with_cents and <>currency_style_no_cents. Type these into the Detail or Break cell with a less-than followed by a greater than character, and be sure to include the underscores.
- ♦ Select a currency format by right-clicking (control-clicking on Mac) in the column header, and choosing Format>Numeric from the menu. Choose a number format from the options displayed. It is also possible to type one of the formats in the menu directly into the report editor.

To format dates, right-click (control-click on Mac) in the column header, and choosing Format>Date from the menu. Choose a date format from the options displayed. It is also possible to type one of the formats in the menu directly into the report editor.

Exporting from the Report Editor

Because FUNDimensions offers you the option to output a custom report to a disk file instead of a printer, you can use the report editor to make custom *exports*, and transfer the results into other software for further formatting or processing (see page 345 for information on opening the file in Microsoft Excel®). To send a report to a disk file, do File>Print Destination and select the Disk File option from the submenu. Then print in the normal fashion; a text file will be created with the name and disk location of your choosing. The delimiters (special characters used to mark the separations between fields and records in the file) can be changed in the dialog that appears to save the file; values are displayed and altered using standard ASCII codes. The default values use tabs between fields and returns between records.

Exports made this way will not remove records with Do Not Mail checked for the donor, but it is possible to use the query editor to remove them (see “Advanced” on page 335 for information on the query editor). This must be done prior to opening the Report Editor.

In addition to printer and disk file output, the Report Editor can also create graphs by doing File>Print Destination and select the Graph item from the submenu. See the example on page 368.

A variety of reports are contained in the Report Templates folder, installed with FUNDimensions. As well as being useful in themselves, they serve as examples of the capabilities of the Report Editor.

* This can be a symbol such as $, or a 3 letter code such as USD. See page 269.

Graph Editor

This command displays a graph editor where an variety of graphs may be designed, saved and printed. You can also make many modification to a graph after it is displayed using commands in the graph window's mini-menu; see Figure 13.13, "Chart example".

Memory permitting, you can have up to 6 graphs displayed simultaneously.

The Chart Editor appears with tab controls to select from its 3 panes:

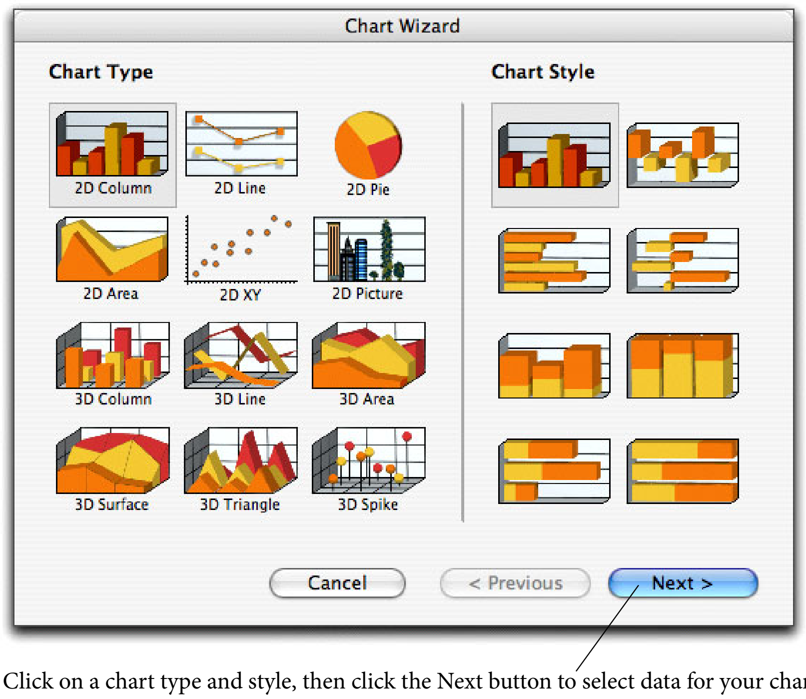
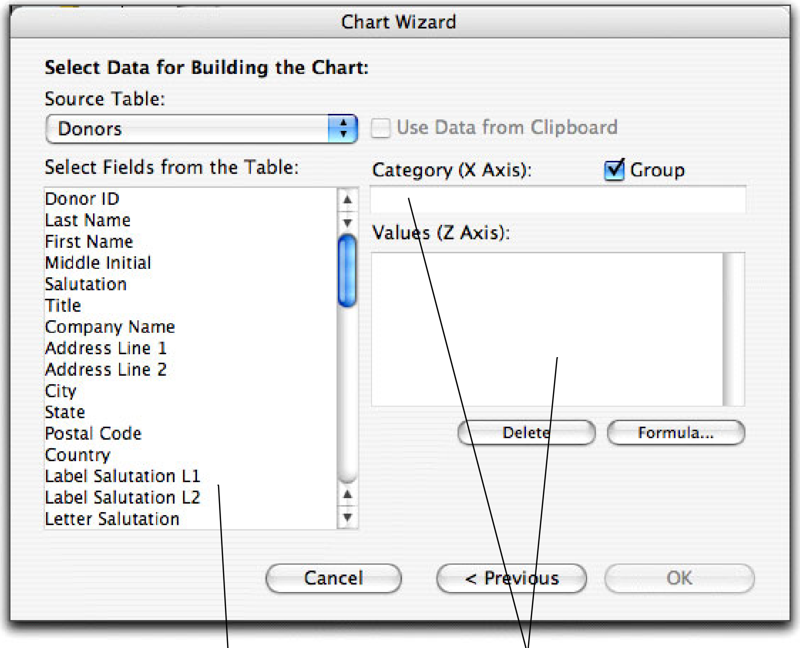


Figure 13.11 Chart Editor, Chart Type pane

The Chart Type pane is used to select from a variety of 2D and 3D chart types.

The Chart Style pane is used to control the orientation of bars, and other attributes unique to each chart type you select in the Chart Type pane.

Clicking the Next button takes you to another pane, where you specify which fields you want to use as data sets. Some fields will not work in some axes, or will not work when plotted against other fields; experiment to determine compatible field assignments. This is an example of the Data Selection pane when the Graph Other command is used from with the Donors module, and a 2D chart type is selected from Chart Type pane of the editor:



Drag fields from the list here…into either axis field here.

Figure 13.12 Chart Editor, Data Selection pane

If an axis field will not accept the field you drop onto it, try dragging the field to the other axis. FUNDimensions needs at least one axis with a numeric value to plot your chart; in 2D charts this must be the Y axis. Examples of working field choices here are:

Table 13.2 Example Field Choices for Donors Module Graphs

X axis	Y axis	Results
User List 1	Donor ID	Distribution of donors by category[1]
State	Donor ID	Distribution of donors by state
Title	Donor ID	Distribution of donors by title

1. The Category designation may be changed through the Administration window. See page ix.

When choosing the Graph Other command from the Donations module, these examples work to produce graph:

Table 13.3 Example Field Choices for Donations Module Graphs

X axis	Y axis	Results
Campaign[1]	Donation Amount	Distribution of donation amount by campaign
Campaign	Donation No.	Distribution of quantity of donations by campaign
Solicitor	Donation Amount	Distribution of donation amounts by solicitor

1. The Campaign designation may be changed through the Administration window. See page ix.

The tables above are meant to provide a starting point for experimentation; many more field combinations are possible, but not all will work. Some field combinations will work in one axis order but not when the X-Y or X-Y-Z assignments are reversed. Graphing on a date field usually does not produce the desired results, because the dates will not be grouped by month or other period, but will include a chart object for every date in the data set. The Graph by Date item in Advanced Reports is provided to work around these limitations of the editor; see page 188. You may also produce charts using other software, such as Microsoft® Excel, by exporting data from FUNDimensions. See "Export" on page 344.

The Graph Editor is intended for advanced users or those who do not mind experimenting to get results. A useful and easy-to-design graph type is the pie chart; you might start your experimentation there.

Clicking OK in the Graph Editor produces the graph. The chart below was produced with the settings in the first row of Table 13.3 above:

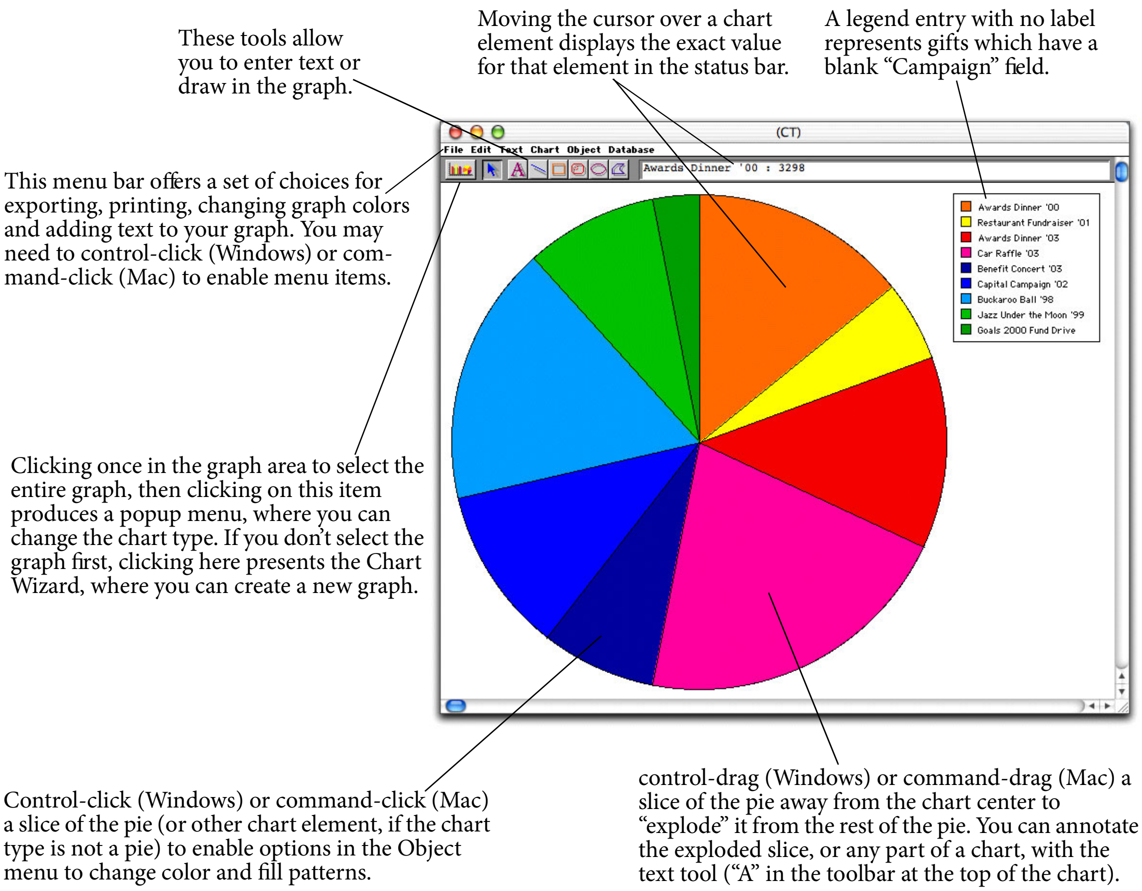


Figure 13.13 Chart example

FUNDimensions produces pie charts with a color-coded legend. It is better design to place the legend titles directly on the pie wedges. After displaying a pie chart, you can accomplish this goal by following these steps:

1 Chose Chart > Values…from the menu above the chart.

2 In the Values dialog window, set the Position popup menu to Inside. Set the Display popup menu to Category, or try Category and Percent.

3 Click OK.

Graphs can also be created from the Report Editor. This allows for the use of formulas that would be difficult or impossible to implement with the Chart Wizard. Report templates for use in making graphs must contain at least one sorted column and one break level; a break occurs whenever the value changes in the sorted column, and any formulas in the break level will run at that time. Refer to the example below.

To create a chart using a template provided with FUNDimensions, follow these steps:

4 Bring the Donor List View to the front by clicking on it or choosing File>Donors.

5 Choose Output>Report Editor.

6 Choose File>Open. Open the file named “Gifts by Category” in the following approximate folder hierarchy: FUNDimensions application program/Report Templates/Donors/Graphs.

7 The first column of the report is sorted. Since a break level is present, the SUM function runs whenever the Donor Category value changes.

Word Processor

The word processor is an optional FUNDimensions feature. Until it is installed, the Word Processor menu command, is disabled. For more information, see “Word Processor” on page 379.

Hide/Show Dashboard

This menu item is a toggle that displays or closes the Dashboard window, unless your access privileges disallow such access.† If the Dashboard is already open, choosing this menu item closes the Dashboard window; if the Dashboard is closed, this menu item opens the window on your screen. There may be a short delay before the Dashboard window appears as the data is gathered and calculations made.

The Dashboard is a report of fundraising amounts for various periods, unsent thank you letters, memberships nearing or past expiration, and pledges nearing or past completion. For information about dashboard content and features, see “Dashboard” on page 33.

There are several options for configuring the dashboard, including a way to configure it to open automatically at when the program is started, reducing the need to use this menu command; see “General Preferences” on page 261.

† Only users with “Clipboards, Reports and Printing” privileges can access the Dashboard. See “Access” on page 270.

APPENDIX

1

Designing Your Database

This document is intended for the administrator or other persons involved in the initial setup of a FUNDimensions database. It describes the factors and considerations for customizing fields and lists.

Design Strategy

Purpose of Design

You design your database to provide access to the records you want through the query functions of FUNDimensions, and to provide you the reports you want. Most of the design necessary to do this is built into FUNDimensions, but there are some aspects of the program that need to be customized to your specific organization in order to work at their best.

Characteristics of FUNDimensions

Classification involves designating the attributes of entities recorded in your database. In FUNDimensions, a distinction is made between attributes of a gift, and attributes of a donor. For example, participation in a campaign by making a gift is recorded as an attribute of the gift, and is usually not recorded directly in the donor record. It is possible to query gift records for those belonging to a specific campaign, and then locate the corresponding donor records, and browsing donor records reveals this information, so this method does not impose unnecessary limitations. Additional information that may be stored as an attribute of a gift and not an attribute of a donor is contribution to a specific purpose, fund or goal; and response, in the form of a gift, to a specific mailing, telethon, email announcement or other specific communication. You may not need to track campaign, communication methods and/or fund, or you may use another nomenclature, so FUNDimensions lets you change the labels for these gift fields to something else. Whatever the labels, in designing your database you should make a clear distinction between attributes of gifts and attributes of donors, and choose label fields accordingly.

Within donor records, several different classification techniques are available to you. Each technique has specific advantages and disadvantages that make it most suitable for recording certain kinds of donor attributes. Consider these items that might need to be recorded in your database:

- Spouse name. This information needs to be entered in a standard text field.
- Event attendance. A keyword should be created for each event, and the keyword assigned to each donor or prospect record that attended. It should not be a standard text field as used for spouse name, because:
  - It takes too long to type the event name over and over in each donor record.
  - Spelling, nomenclature and typing irregularities will make queries unreliable.
  - There would have to be a text field for every event, or events would have to be combined in one field; either option would make browsing, searching and reporting difficult or impossible.
- Ranking of major, intermediate or minor donor status. This should be picked from a list like events above, but in this instance you want only one of the three ranks assigned. The ideal data entry method would force users to pick just one item from a list of the three—a limitation you would not want to impose for recording event attendance.
- Friends, relatives and associates. Like event attendance above, there is a need here to link a donor record to many other items. There are some unique problems with tracking relationships, however:
  - You may change the name of linked donor at a later time; it would be nice if the relationship link updated to reflect this change automatically.
  - A donor may be associated with not just none other person, but with one or more groups of people; it would be advantageous to display the members of related groups, and the names of the groups, from within the donor record. This kind of display will permit you the best understanding of a donor's relationships and connections.

There are many more examples that could be cited, but those listed illustrate the several kinds of classification needs that FUNDimensions meets:

- Simple text or date fields with conventional keyboard entry (as in the spouse name example above).
- Simple text fields with data entry performed by picking a single item from a list (as in the major/intermediate/minor example above).
- A list of items and terms associated with each donor record. Data entry to this list is performed by picking from another list (as in the event attendance example above).
- A list like that above, but with display of the other donors associated with each item that appears (as in the relationships example above).

In conjunction with the classification techniques described above, the queries in FUNDimensions will permit you to generate lists of records with specific characteristics. With reports and graphs, you will be able to gather information on and compare these records in helpful ways. General categories include:

- Comparison of fundraising efficiency of various campaigns and communication techniques.
- Mining for best prospects by discerning most frequent donors, largest donors, most recent/least recent donors, lapsed donors, fulfilled pledges, and overdue pledges.
- Identification of donors affiliated by employment at the same company, membership in the same organization, committee or board, or connected by family relationships.

Think Output

As you develop a classification scheme for your database, you will want to consider the types of output that will be needed during the life of the database. The following list is not comprehensive but can serve to start the brainstorming process:

- Newsletters
- Analysis of fundraising efficiency
  - Campaigns
  - Communication techniques
- Accounting reports
  - Funds directed to specific projects and/or accounts
  - Items purchased or given away
- Strategic targeting of appeals
  - Frequent vs. infrequent donors
  - Recent vs. lapsed donors
  - Large vs. small donors
  - Donors trending toward larger or more frequent gifts
  - Donors with special interests or concerns
- Gift acknowledgements
  - Mailing labels
  - Exports for mail merge letters; you will probably want to send different templates according to the amount of the gift
  - Premiums (aka recognition products)

In developing a classification scheme, write down and include the items necessary to meet your output expectations.

Notice the Obvious

You may want to incorporate obvious attributes of people and gifts, regardless of whether these attributes are involved in output. Obvious characteristics will vary from organization to organization, but might include:

- Clients or customers
- Persons involved in governance or management of your organization
- Associates of affiliated organizations

More About Keywords

Keywords are used to place donors in multiple, overlapping categories. These categories may be event attendance, interests, inclusion in mailings, responses or any groupings you find helpful or useful.

Keywords are used for the important function of classifying and grouping your donors. The specific classifications will vary for each organization, but typical ones would be for newsletter mailing lists, event attendance, receipt of a specific fundraising solicitation, source of the donor (i.e. purchased mailing list, referral, etc.), member-ship in committees within your organization, etc. In addition to keywords, there are four choice list-based fields located in donor records (see "Choice List Data Entry" on page 50). These are used for general, non-overlapping grouping of your donors, while keywords are for more specific or overlapping classifications. This is because choice lists allow for assignment of only one item from the list, while a donor record can have an unlimited number of keyword assignments.

Keywords can be used to group donors in any way you wish. As an example, you could assign certain donors "Quarterly Newsletter". Later, when the search features were used to locate donors having that keyword, you would quickly have the correct list from which to print mailing labels. Another way to use this feature is tagging new mailing list records; after importing a batch of new records into the Donors module, the new records will be the only ones appearing in the Donors List view. Create a new keyword, such as "Imported Aug.'94", in the Keywords module, then assign the keyword to the imported donor records. Keywords may also be used to designate which donors participated in a particular event, are to be called in a telethon, and so forth. You usually would *not* use keywords to designate participation in campaigns, donors making gifts in response to specified communication or making gifts for a specified purpose, because these items are attributes of gift records. There is no need to duplicate the same information in gift records and keywords, and this practice can lead to various problems in maintaining your database.

More About Donor Choice Lists

The field labels of Category, Type and Volunteer can be changed, allowing you to choose the way you want to structure and classify donors and prospects. For example, if you do not have volunteers you can rename the Volunteer list to something more useful to you—perhaps "Board Status". You could also rename a field just because you prefer a different nomenclature; for example, "Class" instead of "Type". The Solicitor field *cannot* be renamed. For help on how to rename fields, see "Setup" on page 268.

The category, type and volunteer lists (or their renamed equivalents) can be configured with any kind of information you like, but they should be exclusive classifications because each donor record may have only one item from each list. The keyword feature allows more flexible assignment of classifications because you can assign as many keywords as you like to each donor, but searches on keywords are slower, and the ability to assign multiple items from a list can sometimes allow for incorrect data to be entered, when use of a choice list field would prevent these errors. For example, in tracking past board status versus present board status, a choice list field would prevent the error of assigning a donor as both past and present board members by forcing the data entry person to choose one or the other. In addition, using keywords in this situation would require separate delete-keyword and add-keyword operations when a donor passed from present to past board member, but a choice list would require only a single operation to change the status.

A typical way to use the category list is to assign a giving status with items in the list being descriptions of giving amounts; major, intermediate, minor, prospect, etc. The type list could consist of levels of estimated likelihood of giving, and a time frame, such as; hot-long term, hot-short term, normal, cool, and unknown. Take a little time to consider how to classify donors for these lists. Use of the lists is optional and may be postponed. When you do decide to use the feature, batches of donor records can be assigned to Category and Type in a single step; see "Assign Other" on page 299.

For the volunteer field, you might have a choice list for volunteers with items for phone help, letter writing, event helper, etc. A search can generate a list of people who have volunteered for specific tasks, or who have special skills.

The solicitor field allows you to assign an agent to a donor. Using this feature allows you to group and sort reports by solicitor (see "Solicitor and Campaign Totals" on page 206), compare performance, and create tickler reports for each solicitor of overdue or completed pledges for follow ups.

See also "Choice List Data Entry" on page 50.

Design Guidelines

Out of an understanding of the principles, concepts and limitations referred to above, you complete the design of your database by performing the actions listed below. Some of these items you'll want to configure before the database is used:

- Enter keywords and relationships you know will be needed in their respective modules: see "Creating Keywords" on page 90 and "Creating Relationships" on page 91. Other keywords and relationships can be entered anytime.
- Choose labels for the following fields, using terms that denote the way you intend to use them. For instructions on editing these field names, see "Setup" on page 268.
  - User-defined 1-4; these are standard keyboard-entry fields holding up to 45 alphanumeric characters
  - User-defined date; this field uses standard keyboard entry
  - Donor Choice Lists 1-3; these have default names of Category, Type and Volunteer, but you can and should change these to reflect the kinds of information to be stored there; remember that these fields require users to pick one and only one item from a list, or they can be left blank; separate lists are maintained for each of these fields. For instructions on editing these field names, see "Setup" on page 268.
  - Gift Lists 1-3; these have default names of Campaign, Method and Fund, but you can and should change these to reflect the kinds of information to be stored there. Like the Donor Choice Lists above, these fields require users to pick one and only one item from a list. During data entry, they may be left blank, or the database can be configured to require an entry* before a new gift record is saved.
- Set up choice lists with items you know will be needed. Items can be added or deleted in these lists anytime. If choice list fields in gift records have been designated as mandatory, users will have to select an item from the corresponding list before they can save a new gift record. See "Setup" on page 268.
- *If items are duplicated within or between keywords, relationships or choice lists, there is probably a mistake in the design of your database; either reconsider your design, or contact technical support for advice.*

* through the Administrator window, see "Setup" on page 268

APPENDIX

2

Managing Memberships

This section suggests ways to use and combine features of FUNDimensions in managing membership expirations and renewals. Its aim is to show you some ways to enhance your workflow by using the software's capabilities to their fullest.

Several tasks are required when managing a membership database, beyond data entry of new and renewed membership records:

- identify memberships coming up for renewal and mail or otherwise communicate a solicitation to renew
- identify memberships that have lapsed and mail or otherwise communicate a solicitation to renew
- identify memberships that have been renewed and prevent a solicitation to renew
- perform reporting that includes statistics for renewal rate, first time members and lapsed members

FUNDimensions offers the following tools for achieving those tasks:

- searches to locate memberships expiring in a specific future time frame, or that have already expired
- tracking of solicitations to renew
- searches that locate memberships based on receipt or non-receipt of a specific solicitation to renew
- the Date and Renewals Needed queries used in the examples below automatically check the records they find to determine if a renewal has been made and remove the record from the results if a renewal was made (the Date search requires that a checkbox be turned on for this to occur).
- a List Statistics command to provide you with statistics; it can also compare statistics for one set of members to another set

The rest of this section will examine a possible workflow for the first two tasks above. These are intended as suggestions only, and modfications and elaborations will be required for your specific situation. We assume you use mail to solicit renewals, but the procedures could be altered to work with phone calls or email.

Task 1: Identify memberships coming up for renewal and mail a solicitation to renew

This task may involve finding donors well in advance of their expiration and separately locating those whose expiration is imminent. In our example, we make the assumption that you send renewal notices on a monthly basis, and that you want to send out renewal letters to all donors with memberships expiring next month and mark them "2?6 renewal notice sent", while sending a first renewal notice to those memberships expiring in 2?3 months. For this task, you do both jobs the same way, instructing FUNDimensions in separate expiration data ranges to generate the different lists:

1 From the Membership List View, choose Find>Renewals Needed.

2 Set up the search dialog as follows: in the date fields, 1st of next month to the last day of next month; Normal; Find if the 2?6 renewal notice is unchecked. Perform the search.

3 Generate your mailing with the Export and Labels commands.

4 Mark the membership records as "2?6 Renewal Notice Sent" with the Mark Sent flags command in the Records menu, or check the appropriate item in the Labels dialog to do this after labels are printed.

5 To accelerate the search for the next sequence, choose Records>Invert Selection.

6 Choose Find>Renewals Needed.

7 Set up the search dialog as follows: in the date fields, 1st of (the current month+2) to the last day of the same month; Search in Selection; Find if the 1st renewal notice is unchecked. Perform the search.

8 Generate your mailing with the Export and Labels commands.

9 Mark the membership records as "1st Renewal Notice Sent" with the Mark Sent flags command in the Records menu.

Task 2: Identify memberships that have lapsed and mail a solicitation to renew

Now we assume you want to locate memberships that expired last month and mail them a letter.

1 Choose Find>Date.

2 Set up the search dialog as follows: dates, 1st of last month to the last day of the same month; Normal; Membership Expiration; Find only lapsed members. Perform the search.

3 Generate your mailing with the Export and Labels commands.

APPENDIX

3 Word Processor

The word processor is an optional FUNDimensions feature, available only in the client-server edition. This appendix is intended to provide basic configuration and usage information. A detailed user manual for the word processor is available upon request to technical support.

Database-Word Processor Integration

One of the best reasons to use the word processor is easy access to information in the database. Compared to using a stand-alone word processor, this saves several steps in creating mail merge letters, and offers the convenience of doing the entire task without leaving FUNDimensions.

To try out this integration, begin by opening the word processor from the module containing the data you want to merge. For example, if you want to insert data from the pledge module, open the Pledge List View, then open the word processor. To insert fields from your database in the document, click in the letter where you want the data to appear. In the menu located within the word processor window, choose Insert>4D Expressions. This window appears:

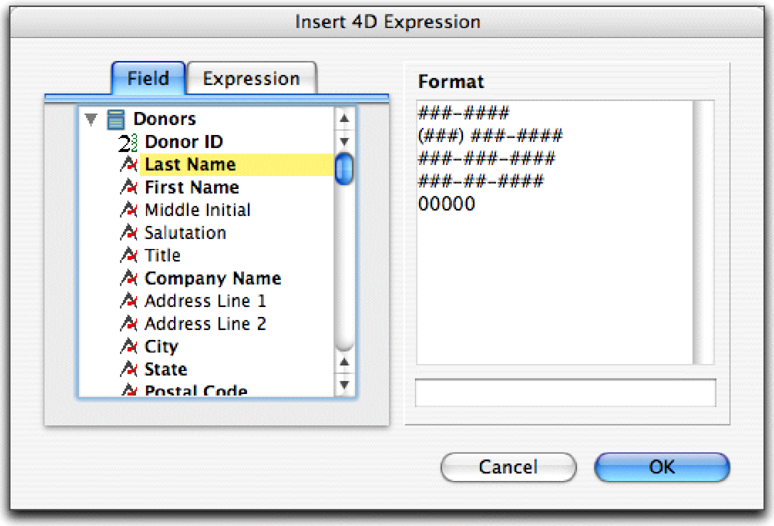


Figure A3.1 Inserting a field in the word processor

Simply select the field you want from the dialog and click OK. To print the letter, chose Print Merge from the File menu.

Although you can insert fields from any table, not all fields will work as expected. If you opened the word processor from a gift module, you can successfully use data from that module and from the donor module.

To format money amounts and dates, first choose the field containing the money amount, then select a format from the Format area at the right of the window. Finally, click OK to accept your selection. For example, the selection below would format positive money amounts with commas and a dollar sign. Negative amounts would be preceeded by a minus sign:

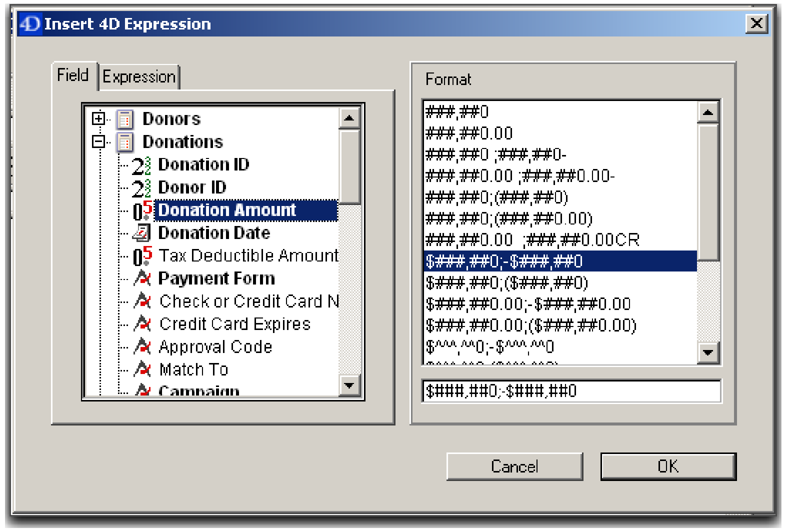


Figure A3.2 Formatting money amounts in the word processor

Formatting dates is accomplished by selecting a date field, then one of the date formats at right:

The Long date format produces a date like Saturday, January 17, 2009. The Month Day Year format produces the same thing with, but without the day of week.

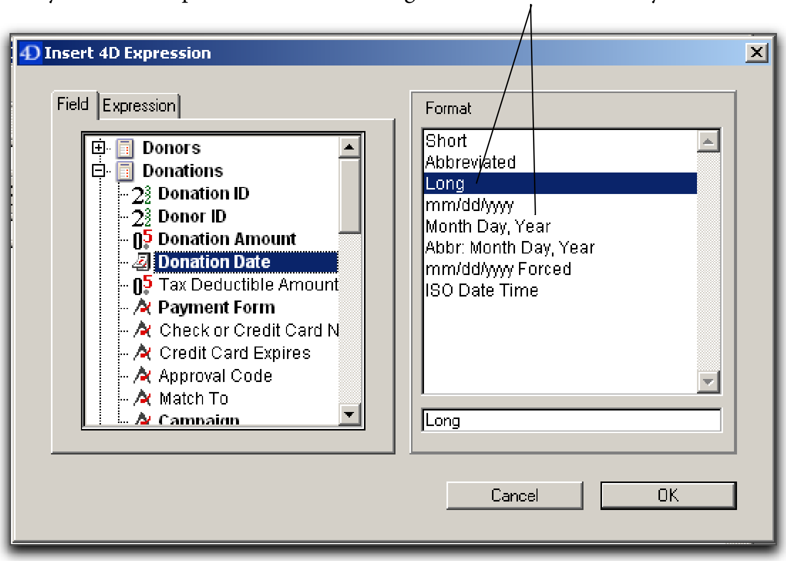


Figure A3.3 Formatting date amounts in the word processor

The selection of records used to create the merge will be those records in the selection at the time you choose Print Merge from the word processor's File menu. This is identical to the way reports and exports work, where the contents of the List View are used to create the report or export. Here is a scenario for sending thank you notes:

1 You enter the Donations module (File>Donations) and perform a search for records needing thank you notes (Find>Thank Yous Needed). This reduces the records in the list to only those needing an acknowledgement letter.

2 You open the word processor. At this point any merge letter you print (File>Print Merge) will use the data from the list of donations, i.e. those donations found by the search above.

In the Print Merge dialog, you would be sure to choose Donations in the dialog, even if some of the data in the letter, such as name and address, was from the Donor module:

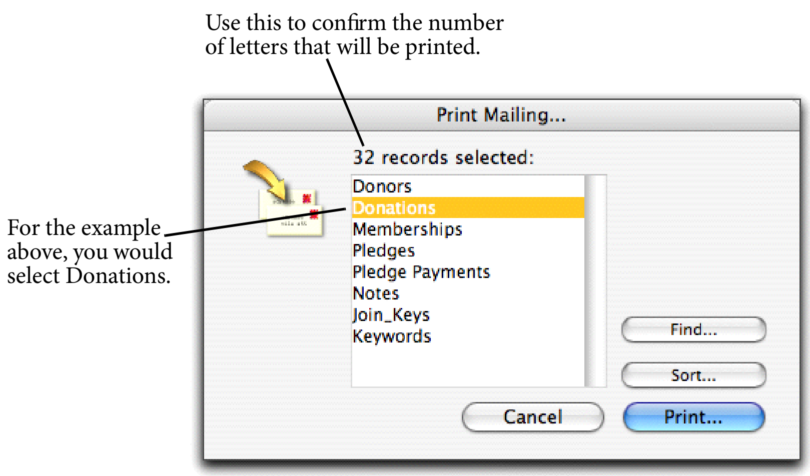


Figure A3.4 Print Merge dialog window

You can switch between the word processor and other windows. Therefore, you can use searches or manual techniques to adjust the selection of records that will be printed anytime before sending the job to the printer.

Templates

You may establish templates that can be reused in many mail merge jobs, saving you the time of creating letters each time. You may also establish a template to be opened automatically for each donor and gift module when the word processor is opened.

- To create a template, write you letter in the word processor, then choose Save As... from the File menu. In the dialog box, choose "4D Write template" from the Format list, then save your document.
- To use a template, open the word processor, then choose Open from the File menu. Locate the template you want to use and open it. When you open a template, the word processor actually opens a copy of the template. In this way, you may edit the letter without altering the template.
- To modify a template, open as above, make the changes, then overwrite the old template by saving the new template with the same name and location.

- To set a template to be used initially when the word processor is opened, chose File>Preferences from the main menu. Click the Word Processor tab, and use the Set... buttons to designate a template for any or all modules. Close the Preferences window. The next time you open the word processor, FUNDimensions will automatically open the template you designated for that module.

APPENDIX

4

Keyboard Shortcuts

Keyboard shortcuts, also know as Accelerators, can improve your efficiency in FUNDimensions by speeding the performance of tasks and easing the physical strain associated with using mice. Separate tables are provided for Windows and Mac.

Table A4.1 Windows Keyboard Shortcuts

Where	What	How
Dialogs	OK, Search or other highlighted button	Enter or Return
	Cancel	Escape
	Date Entry	see Input Windows below
	Search Again button	CONTROL-G
	Radio buttons and checkboxes	From upper left corner, down to bottom of column, then to next column of controls and down, etc.: CONTROL–(number key, 1-zero) for the first set of 10, and SHIFT–CONTROL–(number key 1-zero) for the second set of 10
	Buttons in List/ Record Statistics	CONTROL–C for Copy to Clipboard; CONTROL–P for Print
	Ignore button in duplicate alert during new donor entry	CONTROL–I
	Advanced Reports dialog	CONTROL-R
	Hierarchical List in Advanced Reports dialog	up/down arrows move through list; left arrow collapses an expanded sub-list; right arrow expands a collapsed sub-list
	Tabs	Switch tabs in windows that have them (Preferences and Administration dialogs) with CONTROL+ALT Left Arrow, or CONTROL+ALT Right Arrow.
Choice List Editor	Move between area for typing a new item, and the list of items	TAB key
	Select an item in the list	UP/DOWN arrow keys, then ENTER key to assign to record
Password Log-in	Selecting user name/entering password	Use the up/down arrow keys to select your user name, then Tab to place the insertion point in the password field. Type your password and the Enter key to log on.
Input Windows	Moving from field to field	TAB key
	Checkboxes	Tab to move from checkbox to checkbox, then space bar to toggle the setting
	Choice Lists	Up/Down arrow keys to select, Enter key to assign selection and close choice list.
	Date Entry	Type the characters below directly in a date field. ❑ Current date: t ❑ Increment by 1 day: + ❑ Decrement by 1 day: - (hyphen) ❑ First Day of current month: m ❑ Last day of current month: h ❑ First day of year: y ❑ Last day of year: r ❑ If year or month are omitted, dates are auto-completed with the current year and month, e.g. typing “12/10” auto-completes to 12/10/current year, and typing “10” auto-completes to current month/10/current year.
	Duplicate a donor record	CONTROL–D in Donor Input Window

Table A4.1 Windows Keyboard Shortcuts

Where	What	How
Input Windows (continued)	Create a new donor, keyword, relationship, event or note	CONTROL–N creates a new record of same type you are currently viewing
	Open a second instance of an input window (useful to compare two records)	Double-click in the List View as usual to open the first record; then ALT-double-click in the List View to open the second record
	Close box	CONTROL–W
	Tabs	Switch tabs in windows that have them with CONTROL+ALT Left Arrow, or CONTROL+ALT Right Arrow.
List Views	Show All (restore all records to list view)	CONTROL-J
	Open a highlighted record	ENTER or RETURN; only works if there is a single highlighted record
	Close box	CONTROL–W
	Create a new donor, keyword, relationship, event or note	CONTROL–N
Calendar	Print	CONTROL–P
	New Event	CONTROL–N
	Delete Event	delete (after selecting an event)
	Use Clipboard to move or duplicate events.	Cut: CONTROL–X. Copy: CONTROL–C (after selecting event) Paste: CONTROL–V. (after selecting day)
File menu	Choosing modules	CONTROL–(number key)
	Close	CONTROL–W
	Quit	CONTROL–Q
Edit menu	Menu items	Cut: CONTROL–X. Copy: CONTROL–C Paste: CONTROL–V. Select All: CONTROL–A.
Records menu	Menu items	New: CONTROL–N Show All: CONTROL–G Sort: CONTROL–T Assign/Remove Keyword: CONTROL–K
Find menu	Menu items	Basic search: CONTROL – F
Output menu	Menu items	Print List, Print Record: CONTROL–P; List Statistics or Record Statistics: CONTROL–I
	Print List or Print Record	CONTROL–P
	Advanced Reports	CONTROL–R

Table A4.2 Macintosh Keyboard Shortcuts

Where	What	How
Dialogs	OK, Search or other highlighted button	ENTER or RETURN
	Cancel	ESCAPE
	Search Again button	COMMAND-G
	Radio buttons and checkboxes	From upper left corner, down to bottom of column, then to next column of controls and down, etc.: COMMAND–(number key, 1-zero) for the first set of 10, and SHIFT–COMMAND–(number key 1-zero) for the second set of 10
	Bypass Print Options dialog when using Print command in File menu	Hold down the OPTION key when selecting Print from the File menu
	Buttons in List/ Record Statistics	COMMAND–C for Copy to Clipboard; COMMAND–P for Print
	Ignore button in duplicate alert during new donor entry	COMMAND–I
	Advanced Reports dialog	COMMAND-R
	Hierarchical List in Advanced Reports dialog	up/down arrows move through list; left arrow collapses an expanded sub-list; right arrow expands a collapsed sub-list
	Tabs	Switch tabs in windows that have them (Preferences and Administration dialogs) with COMMAND+OPTION Left Arrow, or COMMAND+OPTION Right Arrow.
Choice List Editor	Move between area for typing a new item, and the list of items	TAB key
	Select an item in the list	UP/DOWN arrow keys, then ENTER key to assign to record
Password Log-in	Selecting user name/entering password	Use the up/down arrow keys to select your user name, then Tab to place the insertion point in the password field. Type your password and the Enter key to log on.
Input Windows	Moving from field to field	Tab key
	Checkboxes	Tab to move from checkbox to checkbox, then space bar to toggle the setting
	Choice Lists	Up/Down arrow keys to select, Enter key to assign selection and close choice list.
	Close box	COMMAND–W
	Duplicate a donor record	COMMAND–D in Donor Input Window
	Create a new donor, keyword, relationship, event or note	COMMAND–N creates a new record of same type you are currently viewing
	Open a second instance of an input window (useful to compare two records)	Double-click in the List View as usual to open the first record; then OPTION-double-click in the List View to open the second record

Table A4.2 Macintosh Keyboard Shortcuts

Where	What	How
Input Windows (continued)	Date Entry	Type the characters below directly in a date field. ❑ Current date: t ❑ Increment by 1 day: + ❑ Decrement by 1 day: - (hyphen) ❑ First Day of current month: m ❑ Last day of current month: h ❑ First day of year: y ❑ Last day of year: r ❑ If year or month are omitted, dates are auto-completed with the current year and month, e.g. typing "12/10" auto-completes to 12/10/current year, and typing "10" auto-completes to current month/10/current year.
	Close box	COMMAND–W
	Tabs	Switch tabs in windows that have them with COMMAND+OPTION Left Arrow, or COMMAND+OPTION Right Arrow.
List Views	Show All (restore all records to list view)	COMMAND-J
	Open a highlighted record	ENTER or RETURN; only works if there is a single highlighted record
	Close box	COMMAND–W
	Create a new donor, keyword, relationship, event or note	COMMAND–N
Calendar	Print	COMMAND–P
	New Event	COMMAND–N
	Delete Event	delete (after selecting an event)
	Use Clipboard to move or duplicate events.	Cut: COMMAND–X. Copy: COMMAND–C (after selecting event) Paste: COMMAND–V. (after selecting day)
File menu	Choosing modules	COMMAND–(number key)
	Close	COMMAND–W
	Print (Report Editor only)	COMMAND–P
Edit menu	Quit	COMMAND–Q
	Menu items	Cut: COMMAND–X. Copy: COMMAND–C Paste: COMMAND–V. Select All. COMMAND–A.
Records menu	Menu items	New: COMMAND–N; Show All: COMMAND–G; Sort: COMMAND–T; Assign/Remove Keyword: COMMAND–K
Find menu	Basic search	COMMAND–F
Output menu	List Statistics or Record Statistics	COMMAND–I
	Print List or Print Record	COMMAND–P
	Advanced Reports	COMMAND–R

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Reader Notes

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