Team Approach 5.0.1
Managing Corporate Gifts, Major Gifts, and Grants

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About the Corporate Gifts, Major Gifts, and Grants Module

Cultivating Donors for a Specific Project
Cultivating a Donor Without Identifying the Project
Meeting Your Organization's Structure
Major Donor Account Overview Screen

Cultivating Donors for a Specific Project

You can use the Corporate Gifts, Major Gifts, and Grants module to identify all of the accounts you want to solicit for a project, i.e., for a particular fundraising objective, and record your progress with these accounts. The Corporate Gifts, Major Gifts, and Grants module includes screens that enable you to perform the following tasks.

- Create a project to represent the objective of your solicitation, e.g., a capital campaign project
- Assign the project to each account you want to solicit for the project, i.e., link an account you want to solicit to the project
- Research each account
- Create a diary entry of your initial interaction with each account
- Update the account diary for each account with additional interactions, e.g., each conversation, letter, fax
- Create ticklers to remind yourself or other staff members of tasks to complete to cultivate each account
- View the progress of all of your accounts based on the project and update selected information for each

Cultivating a Donor Without Identifying the Project

The Corporate Gifts, Major Gifts, and Grants module also enables you to identify an account you want to solicit without identifying the project. Even if you aren't sure which of your organization's fundraising objectives will appeal most to an account, you can identify the account as one you want to solicit and record your progress with the account. You can perform the following tasks to cultivate donors without initially identifying the project.

- Ensure that a project has been created in Team Approach® (TA) for each of your organization's fundraising objectives. You eventually will link each account to the project(s) you decide are best suited to each account
- Research each account you are considering approaching even though you are not yet sure for what project(s)
- Create a diary entry of your initial interaction with each account
- Update the account diary for each account with additional interactions. If, while cultivating the account, you discuss one or more specific projects, you can record each project as a topic covered during that interaction. When you add a project to an interaction, TA checks to see if the account is linked to the project. If the account isn't, TA creates the link for you.
- Create ticklers to remind yourself or other staff members of tasks to be done to cultivate each account
- View the progress of all of your accounts based on the project and update selected information for each

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Managing Corporate Gifts, Major Gifts, and Grants

Meeting Your Organization's Structure

TA's Corporate Gifts, Major Gifts, and Grants module accommodates different organizational structures such as the following.

- Your organization assigns responsibility to one staff member for a project such as one staff member handles cultivation of all gifts for a project.

- Your organization shares among staff members the responsibility for a project such as staff put together "packages" of projects based on donor interest.

For each of your organization's corporate gift, major gift, and grant fundraising objectives (a project in TA):

- You can view the progress of all of the accounts being cultivated for a particular project on the Work with Accounts for a Project screen. You can also view the total pledges and gifts to date for the project on the Project Code Entry screen and the individual gifts from an account for a particular project on the Giving History Summary and Giving History Detail screens. With this information, if multiple staff members are cultivating different accounts for the same project, your staff can view an accurate picture of their progress and their ability to reach the financial goal of the project.

- You can view for a particular account, the project(s) for which the account is being solicited on the Account Diary Entry screen: Projects view. You can also view all interactions with that account on the Interaction History screen. With this information, if an account is being cultivated for multiple projects by multiple staff members, you can use TA to communicate efficiently with your coworkers and optimize your strategies for cultivation of the donor. For example, two staff members are working with the same account, one for a capital campaign gift and the other for an underwriting gift. By being aware of how the account is being cultivated by your organization as a whole, your staff can optimize the timing of the asks or coordinate a joint meeting if the account indicates that working with both staff members at the same time is best for the account.

Major Donor Account Overview Screen

This is an optional screen that could be helpful for those who deal primarily with major donors and planned giving accounts. It works the same as the default Account Overview screen except for the following:

- Instead of the Benefits block, it contains an Account Projects block that displays the projects with which the donor or prospect is associated, along with the stage of each account project. From this block you can zoom to the Account Project Entry screen.

- Instead of the <Merge> and <Projects> buttons, this screen has <Ratings> and <Planned Gifts> navigation buttons.

If you don't need to see the Benefits block and you work primarily with major donors or planned gifts, then consider using this Account Overview screen as your default view. To reset the default: You (or the system administrator) can access the User Preference Administration operation (Entry tab) and set Preferred Account Overview Screen.

Projects

Overview of Projects

Creating a Project

Entering Project Information

Master Projects

Finding a Project

Linking an Account with a Project

Overview of Projects

A project represents the objective of a solicitation. You assign a project code to each project. The project establishes the scope of the request made to the donor. Once project codes are set up (using the Project Code Entry screen), you can link accounts to the project and identify it as a prospect by using the Account Project Entry screen. The Status field in the Account Project Entry screen permits you to track the stage of the account in relation to the project.

When you create a project you link an activity type (either renewable or non-renewable) to the project.

For example, you can create a project to represent a capital campaign to fund an outreach center. Or, you can create a project to represent "soliciting" companies to join as matching gift companies. The first example entails the actual solicitation of donations. The second example entails soliciting an organization's involvement with yours.

In addition, you can identify whether a project is one to which donations can or cannot be posted, i.e., a nonfinancial project. For example, a project to solicit companies to join as matching gift companies is a nonfinancial project. Your organization wants to track its progress, but you won't post money to the project. See "Identifying a Nonfinancial Project".

Usually, you solicit the donor for one donation to a project while you solicit the donor for multiple gifts for membership activity types.

See Also:

Project Activity Type

The Link Between a Project and a Source Code

Project Activity Type

In TA, the activity type is the broadest area for which you raise funds when you categorize all of the money raised for your organization such as underwriting, capital campaign, and annual giving. When you associate an account with a project on the Account Project Entry screen, TA looks at the account for an account activity record in the activity type associated with the project. TA automatically creates an account activity record for the account if none exists for the activity type to which the project is assigned. When TA creates the account activity record, TA sets the status of the record to "P" for prospect. In this way, TA ensures that an account identified as a prospect for a project is also identified in TA as a prospect for the activity type to which the project is assigned.

For example, you create the outreach center project, which you assign to the Capital Campaign activity type. You then associate a set of accounts with this project. For each account, TA checks to see if the account already has a Capital Campaign account activity record. If no account activity record exists, TA creates it with the status of prospect.

If the account activity record already exists, TA does not create another one or the existing one.

The Link Between a Project and a Source Code

Every transaction requires a source code in TA. The source code indicates the solicitation by which your organization received the donation. Your organization can assign a project to one or more source codes. If the project does not default based on the source code, a user can enter it when the transaction is added: on the Batch Detail Entry screen, press the [F10] key from the Source Code field to access the Source Information window. You can enter the project by pressing the [F9] key and selection from the list.

Note: TA does not include nonfinancial projects in the list of projects from which you can choose. See "Identifying a Nonfinancial Project."

Creating a Project

For each project your organization identifies, you need to create a project record by completing the following steps.

1. Select the Project Code Entry screen in the Corporate Gifts, Major Gifts, and Grants module from the Main Menu. From the Find Projects window or from an existing record on the Project Code Entry screen, click <New> to access the Create New Project window.

2. On the Create New Project window, enter the code for the project and the activity type to which the project should be assigned. The project code can be up to 20 characters in length. You can press the [F9] key from the Activity Type field to select from the list of your organization's activity types.

3. Click <Create> or press the [Enter] key.

- Enter fields on the tab pages according to your organization's business practices. See Entering Project Information for more information.

Using the Attachments tab: Use this tab if you want to link proposals, or letters, or any file that pertains to the project. See Attaching and Viewing a File Stored Outside of TA if you need further information on this feature.

Using the Attributes tab: You must contact TSI if your organization wants to set up project attributes. You can use this tab if your organization needs to define additional information that you want to track such as deadlines or features of the project that you want to be able to query and report on. You can query on project attributes and output the information as well. This tab will not have any fields to enter if your organization has not set up project attributes.

Entering Project Information

Description of the Project

Enter a description of the project in the Description field. This description displays in the list of values where the user can select a project (such as on the Account Project Entry or Account Diary screens, Source Information at gift entry or source code setup.) You can enter up to 40 characters for the description.

Start and End Dates of the Project

You can enter the date on which you start to ask for gifts for the project in the Start Date field. You can enter the date on which you stop asking for gifts for the project in the End Date field. Enter these dates in the format MM/DD/YY where "MM" is the month, "DD" is the day, and "YY" is the year.

Note: The start and end dates are for information only. TA does not use this information in any processing, e.g., to prevent a gift from being posted to the project if the gift date is after the project's end date.

See Also:

Specifying the Purpose, Program, Division, and Fund for a Project

Financial Information for the Project

Marketing and Budget Information

Identifying Staff Contacts for the Project

Linking Interests to the Project

Specifying the Purpose, Program, Division, and Fund for a Project

The Purpose of the Project

You can narrow the scope of the project by assigning a particular purpose to the project. Press the [F9] key from the Purpose field to see the list of purposes from which you can select.

Note: Your organization creates purposes on the Purpose Code Entry screen.

The Program Related to the Project

If the project is associated with a specific program, enter that program in the Program field. To view a list of programs, you must enter at least the first letter of the program code and press the [F9] key. TA displays the programs that begin with the letter(s) you entered.

The Division and Operating Unit for the Project

If the project is associated with a division that will receive the funds from the project (e.g., the division that produces the program or is responsible for the lecture series for which the money is being solicited), enter the division. You can specify the operating unit within the division if needed. To view the list of codes for each field, press the [F9] key.

Note: TA composes the list of values for both the Division and Operating Unit fields from the codes your organization entered on the Department Code Entry screen.

The Fund for the Project

If your organization uses fund accounting, you can enter the fund for which the project is associated. Press the [F9] key to view the list of funds for your organization.

Note: When you enter the source code for a donor's gift or pledge and press the [F10] key from the Source Code field, TA displays the Source Information window. If you enter a project in the Project field, TA automatically sets the Fund field to the fund associated with the project. See "The Link Between a Project and a Source Code".

An Event for the Project

You can also associate an event with the project. Press the [F9] key to view the list of events for your organization.

Financial Information for the Project

TA displays the following in the Financial Information block (Financial tab) of the Project Code Entry screen.

- Goal amount
- Total expected amount
- Total pledge amount
- Total payment amount
- Pledge amount still needed to reach the goal
- Payment amount still needed to reach the goal
- Non Financial? checkbox

See Also:

Entering the Goal for the Project

Identifying a Nonfinancial Project

Entering the Goal for the Project

You can enter the financial goal amount for the project in the Goal field. If you add the project to a master project, TA uses the goal amount for the project to calculate the goal amount for the master project. See "Master Projects".

Viewing the Total Expected Amount, Pledge and Payment Totals, and Amounts Still Needed

TA sets the Total Expected Amount field to the total of the expected amounts on all account project records associated with the project. If the project is a master project, TA sets this field to the sum of the Total Expected Amount fields on the sub-projects. The Total Expected Amount field is a display-only field that you cannot update.

As pledges and payments are entered for a project, TA automatically updates the total amount pledged and the total amount paid for the project. In addition, TA automatically updates the pledge amount needed to reach the goal and the payment amount needed to reach the goal. The Total Pledge Amount, Total Payment Amount, Pledge Difference, and Payment Difference fields are display-only fields that you cannot update.

See the Entering an Account's Transactions and Benefits chapter for information on entering a transaction for a project.

Identifying a Nonfinancial Project

You can create both financial and nonfinancial projects in TA. A financial project is one that raises money for your organization, i.e., a solicitation. A nonfinancial project is a project to increase participation, e.g., to persuade a group of companies to become matching gift companies.

You can mark the Non Financial? checkbox to indicate that a project is a nonfinancial project that should be excluded from transactions. You cannot post donations to a project for which the Non Financial? checkbox is marked. If you mark the Non Financial? checkbox for a project

- you cannot assign the project to any source code.
- you cannot enter the project in the Project field on the Source Information window. If you press the [F9] key from the Project field to associate a project with the gift or pledge, TA displays only those projects for which the Non Financial? checkbox is not marked.

See "The Link Between a Project and a Source Code".

Marketing and Budget Information

When you create a new project record in TA, you must enter the activity type to which the project applies on the Create New Project window. TA displays the activity type for the project in the Marketing Structure block (Financial tab); you cannot change it.

If the project is associated with a particular activity and campaign within the activity type, you can enter that information in the Marketing Structure block. Press the [F9] key from the Activity field to view the list of activities associated with the activity type for the project. Press the [F9] key from the Campaign field to view the list of campaigns associated with the activity you enter.

Budget Information

You can enter the budgeted amount and date of the budget for the project. Enter the budget date in the format MM/DD/YY where "MM" is the month, "DD" is the day, and "YY" is the year.

Identifying Staff Contacts for the Project

The Project Code Entry screen includes the following fields to identify staff members associated with the project.

- Primary Solicitor
- Account Manager
- Additional Solicitor
- Additional Staff
- Steward

Press the [F9] key from each field to view the list of brief names from which you can select.

Note: TA compiles the list of brief names for each field except the Additional Staff field by selecting the brief names for which the Solicitor brief name function is set to "A" for active. TA compiles the list of brief names for the Additional Staff field by selecting brief names for which the Employee brief name function is set to "A" for active. See the Managing Account Information chapter for more information on brief names.

You do not have to enter the staff contact information when you create the project. You can enter the staff contact information on the account project records when you associate the project with the accounts you want to solicit. See "Entering Staff Contact Information".

If many or all of your major gift staff are responsible for a project, you can leave the Primary Solicitor field blank on the project and on the individual account project records. When you enter an account's gift or pledge, you can zoom to the Source Information window on the Batch Detail screen and identify the primary solicitor in the Solicitor field. See the Entering an Account's Transactions and Benefits chapter for more information on the Source Information window.

Linking Interests to the Project

You can link interests to a project so that an interest is automatically created or updated when an account gives money to the project. From the Project Code Entry screen, click <Interests> to associate an unlimited number of interests with the project. Press [F9] from the Code field to select the interest from the list of values.

When a transaction is entered for an account for the project, TA automatically creates an interest or updates the hits if the interest already exists. The interest is linked to the name specified on the transaction.

Master Projects

You can create a master project in TA to group a set of projects. For example, your organization has several projects as part of its capital campaign. You create a project record for each sub-project of the capital campaign, but you also want an overall project to represent the capital campaign, i.e., the master project. The master project structure enables you to see pledge and payment totals for each sub-project of the capital campaign as well as the pledge and payment totals for the capital campaign itself.

See Also:

Building a Master Project

Deleting a Project from a Master Project

Indicating That Gifts Should Not Be Posted to a Master Project

Building a Master Project

For each project you want to include in a master project, you must enter the project into TA first (i.e., create a project record for the project and enter all of the appropriate information for the project). See "Creating a Project" for information on creating a project. To create the master project, complete the following steps.

1. Create a project record for the master project on the Project Code Entry screen. When you create the project, TA sets the Project Type field to "Project." You cannot manually change the project type.

2. Enter the information describing the master project.

   Note: You do not need to enter the goal for the master project. TA sets the Goal field on the master project to the sum of the goal amounts for each project you add to the master project.

3. Click on the Subproject tab to access the Projects block.

4. From the Projects block, press the [F9] key to view the list of projects for your organization. Select the project that should be added to the master project and click <OK>. When you add the first project to the Projects block, TA sets the Project Type field to "Master Project."

5. To add an additional project to the master project, click in the Project field in the next line of the Projects block and enter the code for that project.

TA includes the following information in the Projects block for each project you add to the master project. Project code, Project description, Goal amount, Status

See Also:

Changing the Status of a Project Within a Master Project

Changing the Goal Amount for a Project Within a Master Project

Changing the Status of a Project Within a Master Project

You can change the status of a project in the Projects block. Press the [F9] key from the Status field to view the list of statuses.

Note: Changing the status in the Projects block does not update the status of the project itself. The status in this block indicates the status of the project as a subproject within the master project.

Changing the Goal Amount for a Project Within a Master Project

You cannot change the goal amount for a project from the Projects block. To change the goal amount for a project, access the project on the Project Code Entry screen and enter the new goal amount in the Goal field. TA updates the goal amount in the Projects block for the master project and updates the Goal field on the master project.

Deleting a Project from a Master Project

You can delete a project from the Projects block for a master project. Highlight the appropriate project in the Projects block and press the [Shift] [F6] key combination.

Note: If you delete every project from the Projects block for the master project, TA changes the project type of the master project back to "Project."

Indicating That Gifts Should Not Be Posted to a Master Project

TA includes a system preference that indicates whether you can post gifts to a master project. You can set the Allow Gifts to Master Projects? system preference to "N" for no if your organization does not want gifts and pledges posted to a master project (i.e., gifts and pledges must be posted to a subproject of the master project, and not directly to the master project). TA references this system preference in the following situations.

- When you enter a transaction on the Batch Detail Entry screen. If your organization set the Allow Gifts to Master Projects? system preference to "N" for no, you cannot enter a master project in the Project field on the Source Information window.

- When you enter an interaction on the Account Diary Entry screen. If your organization set the Allow Gifts to Master Projects? system preference to "N" for no, TA does not include master projects in the list of projects from which you can select on the Account Diary Entry screen. See "The Project Related to the Interaction".

- When you create an account project record. If your organization set the Allow Gifts to Master Projects? system preference to "N" for no, TA does not include master projects in the list of projects that you can link to an account. See "Linking an Account with a Project".

- When you create a master project. If your organization set the Allow Gifts to Master Projects? system preference to "N" for no, you cannot enter one or more projects in the Projects block for a project to which money has been posted (i.e., you cannot make the project a master project).

Note: The Allow Gifts to Master Projects? system preference is set during installation and then cannot be changed from the System Preference Administration screen in Team Approach®. If you want to change it, contact TSI.

Finding a Project

Follow the steps listed below to find an existing project on the Project Code Entry screen.

1. From the Main Menu select the Project Code Entry screen in the Corporate Gifts, Major Gifts, and Grants module. TA displays the Find Projects window.

2. Enter the code of the project you want to find. You can press the [F9] key to view the list of your organization's projects.

3. Click <Find> or press the [Enter] key.

Note: If you are already viewing a project on the Project Code Entry screen and want to find a different project, press the [F3] key or click <Find> on the toolbar and follow steps 2 and 3 above.

Linking an Account with a Project

You can link an account manually (one account at a time) or you can link multiple accounts at once by running a query with the Create Prospect update procedure. Query and update procedures are tasks that are usually reserved for advanced TA users. In general, the query should contain the criteria you want to use to select the prospects for the project. For example, you might create a query to select all major donors with confirmed interests in volunteering and in public affairs for an outreach center capital campaign project. With this query, you set up the Create Prospect update procedure to run to create an account project record for the outreach center capital campaign project for each account selected by the query.

See Also:

Manually Creating an Account Project Record

Finding Existing Account Project Records

Manually Creating an Account Project Record

You can link an account with a project by using the Account Project Entry screen. To create an account project record, complete the following steps.

Note: These steps assume that you just logged on to TA, i.e., you do not have a current account.

1. From the Main Menu select the Account Project Entry screen in the Corporate Gifts, Major Gifts, and Grants module. TA displays the Find an Account window.

2. Find the account to which you want to assign the project.

   - If one or more account projects exist for the account, TA displays the first of those records on the Account Project Entry screen. All account project records for the account appear in the List Block in the lower right corner of the screen.

   - If no account projects exist for the account, TA displays a message that enables you to find another account, to create an account project record for the account with which you are working, or to exit the screen.

3. Click <New> on the Account Project Entry screen or on the message. TA displays the Create New Account Project window.

4. Enter the project code on the Create New Account Project window. Press the [F9] key from the Project field to select a project from the list of projects for your organization.

5. Click <Create>.

Note: If you want to create an account project record for a different account, press the [F6] key to create a new record. In the Create New Account Project window you can change the Account ID and the Project field to link a different account with any project.

See Also:

Automatic Creation of the Account Activity Record if None Exists
Entering Ask and Expected Gift Information
Entering Rating Information
Entering Staff Contact Information
Viewing Pledge and Marketing Information
Tracking the Stage for an Account
Attaching and Viewing a File Stored Outside of TA

Automatic Creation of the Account Activity Record if None Exists

When you associate an account with a project, TA looks for an account activity record in the activity type associated with the project. TA automatically creates an account activity record for the account if none exists for the activity type to which the project is assigned.

For example, you create an outreach center project that you assign to the Capital Campaign activity type. You then associate a set of accounts with the project. For each account, TA checks to see if the account already has a Capital Campaign account activity record. If no record is found, TA creates one with the status of "P" for prospect.

See "Project Activity Type".

Entering Ask and Expected Gift Information

You can enter the ask amount, the date on which you asked the donor for the gift, the amount you expect to receive from the donor, and the date on which you expect the gift from the donor. Enter the ask and expected dates in the format MM/DD/YY where "MM" is the month, "DD" is the day, and "YY" is the year.

You can enter the proposal number of the proposal you send to the account to solicit the gift. Press the [F9] key to view the list of proposals for your organization. Enter the date the proposal was submitted in the format MM/DD/YY where "MM" is the month, "DD" is the day, and "YY" is the year. You can include a note about the proposal if needed.

Entering Rating Information

You can enter the following rating information for the account project record.

- The priority of the account within the project, e.g., highest
- The internal rating (e.g., top 10 prospects) and internal rating date
- The external rating (e.g., $10,000 - $49,999) and external rating date

Enter the internal and external rating dates in MM/DD/YY format, where "MM" is the month, "DD" is the day, and "YY" is the year.

The internal rating represents your staff's overall rating of the account's likelihood to give to the project. Often, the internal rating is based on individual ratings done by your staff, i.e., each staff member rates the likelihood of the account giving to your organization as a whole or to a particular activity type, e.g., underwriting. You can keep a record of the ratings done by your staff on the Prospect Rating Entry screen.

The external rating represents the overall rating by the account's peers of the account's likelihood to give to the project. Often, the external rating is based on individual ratings done by the account's peer group, i.e., each peer rates the likelihood of the account giving to your organization as a whole or to a particular activity type, e.g., underwriting. You can keep a record of the ratings done by the account's peer group on the Prospect Rating Entry screen.

Note: Your organization controls the codes you use for the internal and external ratings. You can change these codes or add to them as needed using the Rating Code Entry screen.

See "Rating Information".

Entering Staff Contact Information

You can change staff contact information that defaults from the project, if necessary.

TA compiles the list of brief names for each contact field except the Additional Staff field by selecting the brief names for which the Solicitor brief name function is set to "A" for active. TA compiles the list of brief names for the Additional Staff field by selecting the brief names for which the Employee brief name function is set to "A" for active.

See the Managing Account Information chapter for more information on brief names.

Note: If many or all of your major gift staff are responsible for a project, you can leave the Primary Solicitor field blank (on the project and on the individual account project records). When you enter an account's pledge or gift, you can zoom to the Source Information window on the Batch Detail Entry screen and identify the primary solicitor in the Solicitor field.

Viewing Pledge and Marketing Information

You can view selected information for the account's most recent transaction associated with the project. This information includes the pledge number, the pledge amount, and the total payments to date of the pledge.

Note: Usually, you solicit the donor for one donation to a project unlike your annual giving program, for which you solicit multiple gifts from the donor.

You can view the marketing information for the account project record (Detail tab). When you create a project record on the Project Code Entry screen, you must identify the activity type for the project, and you can identify the activity and campaign. TA defaults the information you enter on the project record to the account project record. If you did not enter the activity and campaign on the project record, you can enter it on the account project record.

Tracking the Stage for an Account

The Stage field indicates at what point in the cultivation cycle the account is for the project. TA defaults the Stage field to "ID" for identification when you create a new account project record. As you work with the account, you should update this field accordingly. You can update this field from page one of the Account Diary Entry screen when you create an entry that reports a change in the stage. The Account Diary Entry screen enables you to create an entry for each contact (i.e., interaction) you have with the account. See "Creating an Interaction (Account Diary Entry)".

Note: Do not confuse the Stage field with the Status field. The Stage field indicates the stage of the account within the project, e.g., the account is in the research stage for the project or the account is in the pending stage because you have asked the account for a gift to the project but the account hasn't responded. The Status field represents the status of the account project record itself. The Status field can be set to "A" for active, "I" for inactive, or "D" for delete. For example, if you create an account project record in error, you can set the status to delete so that the record is deleted when your organization runs delete processing.

You can enter comments to explain the stage for an account project record. Press the [F10] key from the Stage field to access the Stage Comments window.

How TA Updates the Stage Field for Gifts and Pledges

TA automatically updates the Stage field on an account project record when the account makes a gift or pledge to the project. When you enter a transaction for a project on the Batch Detail Entry screen, TA updates the stage field as follows:

- TA sets the Stage field to "PL" for pledged when you enter a pledge for the project (i.e., the transaction type is "PL" for pledge).
- TA sets the Stage field to "GV" for gave gift when you enter a gift for the project (i.e., the transaction type is "GF" for gift) or a pledge payment (i.e., the transaction type is "PP" for pledge payment).

See the Entering an Account's Transactions and Benefits chapter for information on entering a transaction on the Batch Detail Entry screen and associating the transaction with a project.

Finding Existing Account Project Records

When you access the Account Project Entry screen, TA searches for existing account project records for the current account, i.e., the account with which you are working.

Note: If you don't have a current account, TA displays the Find an Account window to enable you to select the account with which you want to work.

If your current account has existing account project records, TA displays the first of those records on the Account Project Entry screen. All account project records for the account appear in the List Block in the lower right corner of the screen. You can select the account project record you want to update and change any of the information that defaulted from the project or enter the remaining project information for the record.

If the account project record you want does not exist, you can create it by clicking <New> on the toolbar to access the Create New Account Project window. See "Manually Creating an Account Project Record".

To view the account project records for a different account, press the [F3] key or click <Find> on the toolbar. TA displays the Find an Account window to enable you to search for the account. If the account doesn't have any account project records, TA displays a message that enables you to find another account, to create an account project record for the account with which you are working, or to exit the screen.

Major Donor Research Information

Financial Information
Education Information
Relationship Information
Interest Information
Charitable Giving Information
Rating Information
Other Account Research Screens

Financial Information

Accessing the Financial Research Entry Screen

You can access the Financial Research Entry screen to view or update a financial research record for the current account in one of the following ways.

- You can select the Financial Research Entry screen from the Corporate Gifts, Major Gifts, and Grants module on the Main Menu.
- You can click <Research> on the Account Overview screen or on the Account Diary Entry screen.

Different Views of the Financial Research Entry Screen

TA contains three views of the Financial Research Entry screen. The view that TA displays depends on the account category of the account with which you are working.

If the Account Category is	The Financial Research Entry view is
Corporate	Corporate
Individual	Individual
Foundation	Foundation/Agency
Government	Foundation/Agency
Other	Foundation/Agency

Note that you can attach an outside file to the financial research record.

See Also:

Creating a New Financial Research Record
Individual Account Financial Information
Corporate Account Financial Information
Foundation or Agency Account Financial Information

Creating a New Financial Research Record

You can create multiple financial records for an Individual account. You may want to create one per person, e.g., if the account is for a husband and wife, you can create one record for his financial information and a separate one for hers. You may want to create one record per business associated with the account or per property owned by the account.

For a non-Individual account, you can create only one financial research record.

You can create a new financial research record by completing the following steps.

1. From the Main Menu select the Financial Research Entry screen in the Corporate Gifts, Major Gifts, and Grants module. TA displays the Find an Account window if you do not have a current account.
2. Find the account to which you want to add a financial record. If no records exist, TA displays a message asking you to find a new account, create a new record, or exit the screen.

   Note: If a financial record exists for an individual account, TA displays the record on the Financial Research Entry screen.
3. Click <New> on the toolbar or click <New> on the message. TA displays the Create New Financial Record window.
4. TA defaults the account's name in the Name field on the Create New Financial Record window if you are creating the first financial record for the account. If one or more financial research records exist for an individual account, TA defaults the Name field to the name associated with the record currently displayed on the Financial Research Entry screen. Press the [F9] key to view the list of names within the account if you need to change the name.
5. Click <Create>.

Note: If the application cursor is in the Business or Foundation field, you do not access the Create New Financial Record window when you click <New> on the toolbar. You access the Create New Account window. See "Entering the Business Specifics for the Financial Record".

You can also access the Financial Research Entry screen from the Account Overview screen and the Account Diary Entry screen. To create a financial research record from either screen, click <Research> and continue with steps 3-5 above.

Individual Account Financial Information

For Individual accounts (i.e., the account category is "I" for Individual/Family), you can create multiple financial research records. You might create multiple financial research records for an Individual account to represent different businesses in which the account has a significant interest (e.g., stockholder or corporate officer), different pieces of property that the account owns, or different names within the account (e.g., separate financial research records for a husband and wife).

You can view the following information on an Individual account's financial research record.

- The name for which the financial research record applies
- Business specifics for the individual (e.g., stock information)
- Total net worth information
- Property information
- Foundation information
- Relationships
- Charitable giving information

Entering the Name for Which the Financial Record Applies

When you create a financial research record, you can specify the name to which the record applies. If the financial record applies to the account as a whole, TA displays in the Name field the account's name line followed by the text "(Account").

You can associate the financial record with a particular name within the account. From the Name field, press the [F9] key to view the names within the account. You can highlight a name and click <OK>.

See Also:

Entering the Business Specifics for the Financial Record
Entering Stock Specifics for an Individual Account
Total Net Worth and Property Information
Foundation Information
Relationship Information (Financial Research)
Charitable Giving Information (Individual Accounts

Entering the Business Specifics for the Financial Record

You can create a financial research record to record a significant interest that an individual has in a business (e.g., owner, CEO, or major stockholder). You can enter the following information for the individual.

- Business name. Press the [F9] key to view the list of businesses. If the business does not exist in TA, press the [F6] key from the Business field to access the Create New Account window and create an account for the business.

- Product(s) of the business

- Retired checkbox and retired date, entered in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year

- Compensation amount, in whole dollars, and the fiscal period of the compensation

- Stock value, based on the price per share and the total of direct and indirect shares, and the valuation date. Enter the valuation date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year. TA calculates the value by multiplying the number of shares by the price per share. You can overwrite the stock value that TA calculates. You can also enter the stock value without entering the price per share and number of shares.

Note: To include a business in the list of businesses you can associate with an account, your organization must create an account in TA for that business with an account type that maps to the Corporation account category. You must assign a brief name to the account, i.e., assign the brief name to the account as a whole on the Account Overview screen.

When you enter a business in the Business field, you can create a relationship between the Individual account (i.e., the current account) and the business. TA displays the message "Create a relationship between the current account and this business?" Click <Yes> to access the Relationship Entry screen to create a relationship between the current account and the business.

Entering Stock Specifics for an Individual Account

You can create a financial research record to track an individual's stock holdings. You can enter the following information for the individual's holdings.

- Ticker. The ticker symbol for the stock held by the individual. Press [F9] to view the list of ticker symbols.

  Note: To include a company in the list of ticker symbols you can associate with an Individual account, access the Ticker Symbol Entry screen, and create the ticker symbol.

- Company. This name defaults when you enter a Ticker Symbol. If the Ticker Symbol does not yet exist in your system, you can enter the company name in this field.

- Number of direct and indirect shares held by the individual, and price per share for the stock. The price per share is formatted to include four decimal places.

- Stock value, based on the price per share and the total of direct and indirect shares, and the valuation date. Enter the valuation date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year. TA calculates the value by multiplying the number of shares by the price per share. You can overwrite the stock value that TA calculates. You can also enter the stock value without entering the price per share and number of shares.

- Number of vested and non-vested shares and expiration dates for each of those types of shares.

Total Net Worth and Property Information

You can enter the total net worth of the individual or of the account and assign a rating to indicate the range of the individual's net worth. For example, you enter a net worth of $10,000,000 and enter the net worth rating code "A1" to indicate a total net worth range of $10,000,000–$50,000,000.

Note: To use the Total Net Worth Rating field, your organization must set up rating codes on the Net Worth Rating Code Entry screen.

You can enter the account’s total liquid assets and total household income.

You can enter the following information for property held by the Individual account.

- Property description
- Property value, in whole dollars
- Valuation date, entered in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year
- Size of property (number of acres)

Foundation Information

If the Individual account has a private foundation, you can enter the following information on the financial research record.

- The name of the foundation. Press the [F9] key to view the list of foundations stored in TA, i.e., accounts assigned to the account category of "F" for foundation. If the foundation does not exist in TA, press the [F6] key to access the Create New Account window and create an account for the foundation. See the Managing Account Information chapter for more information on creating accounts.
- The foundation’s assets, in whole dollars

When you enter a foundation in the Foundation field, you can create a relationship between the Individual account (i.e., the current account) and the foundation. TA displays the message "Create a relationship between the current account and this foundation?" Click <Yes> to access the Relationship Entry screen to create a relationship between the current account and the foundation. See the Managing Account Information chapter for more information on creating relationships.

Relationship Information (Financial Research)

TA displays the following information about an Individual account’s relationships in the Related Accounts block.

- Relationship type
- The name line for the related account or name
- Relationship status (e.g., "A" for active)

Note: If the relationship applies to the account as a whole, TA displays in the Name field the account’s name line followed by the text "(Account)."

The Related Accounts block includes all relationships for the account (i.e., relationships for the account as a whole and relationships for specific names within the account).

From the Related Accounts block, you can press the [F10] key to access the Relationship Entry screen. From this screen, you can update information for existing relationships or add new ones. When you exit the Relationship Entry screen, you return to the Financial Research Entry screen.

Charitable Giving Information (Individual Accounts)

TA displays the following information about an Individual account's charitable giving in the Donations to Other Organizations block.

- The name of the recipient. This can be another account in TA or a Code that represents the charity.
- The date of the donation.
- The amount range of the donation.

You enter information about an Individual account's charitable giving on the Other Charitable Giving Entry screen. See "Charitable Giving Information".

Corporate Account Financial Information

Corporate accounts (i.e., accounts assigned to the account category "C" for Corporation) can have only one financial research record. With corporate accounts, you can track information such as stock information and the company's financials, officers and board members, and marketing and charitable giving information.

See Also:

Business Sector Information

Stock Information and Company Financials

Corporation Relationships

Charitable Giving Information and Interests (Corporate Accounts)

Marketing Information (Corporate Accounts)

Company Specifics

Business Sector Information

You can enter the following about a corporation in the financial research Information record.

- Market segment, e.g., banking, consumer goods. Press the [F9] key to view the list of market segments.
- Business segment, i.e., the demographic or ethnic group with which the business is associated. Press the [F9] key to view the list of business segments.
- Standard Industrial Classification (SIC) code, which identifies the industry to which the business belongs. Press the [F9] key to view the list of SIC codes.
- Number of employees
- Whether the corporation requires a purchase order

Your organization can update the market segment and business segment lists.

Stock Information and Company Financials

You can enter the following information about the corporation's stock.

- Date of closing, entered in MM/DD/YY format, where "MM" is the month, "DD" is the day, and "YY" is the year
- Price of stock (to four decimal places)
- Stock exchange on which the stock is traded

- High and low price for the year (to four decimal places)
- Year of the annual report on file in YY format, e.g., "98" for 1998

You can enter the following information about the company financials.

- Year for which the financial information applies in YYYY format, e.g., "1998"
- Date on which your organization obtained the financial information in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year
- Total net worth
- Total net worth rating. Press the [F9] key to view a list of net worth rating codes for your organization.

  Note: To use the Total Net Worth Rating field, your organization must set up rating codes. In a future release, TA will include a Net Worth Rating Code Entry screen to enable your organization to set up its total net worth rating codes. For information on setting up these codes in the current release, contact TSI.

- Revenue
- Net income
- Total assets
- Total charitable donations

Enter revenue, net income, total assets, and total charitable donations in whole dollars.

Corporation Relationships

Officer and Board Member Relationships

TA displays the corporation's officers and board members in the Officers and Board Members block. This block displays relationships assigned to the Executive/Company Relationships relationship category, e.g., President to Organization.

Note: Each relationship type maps to one relationship category. When you select the relationship type, TA sets the relationship category. The relationship category enables your organization to analyze or select donors by category, e.g., Executive/Company relationships.

From the Officers and Board Members block, you can press the [F10] key to access the Relationship Entry screen. From this screen, you can update information for existing relationships or add new ones. When you exit the Relationship Entry screen, you return to the Financial Research Entry screen.

Company Relationships

TA displays the corporation's related companies in the Affiliated Companies block. This block displays relationships assigned to the Relationships Between Organizations relationship category, e.g., Parent Company to Subsidiary Company.

Note: Each relationship type maps to one relationship category. When you select the relationship type, TA sets the relationship category. The relationship category enables your organization to analyze or select donors by category, e.g., Executive/Company relationships.

From the Affiliated Companies block, you can press the [F10] key to access the Relationship Entry screen. From this screen, you can update information for existing relationships or add new ones. When you exit the Relationship Entry screen, you return to the Financial Research Entry screen.

Charitable Giving Information and Interests (Corporate Accounts)

TA displays the following information about the corporation's charitable giving in the Donations to Other Organizations block.

- The name of the recipient
- The year of the donation
- The amount of the donation

You enter information about a corporation's charitable giving on the Other Charitable Giving Entry screen. See "Charitable Giving Information".

To view information about the company's interests, click <Page 2> to access the second page of the Financial Research Entry screen. TA displays the corporation's interests in the Primary Interests block. This block does not display interests assigned to a specific contact for the account.

Note: You cannot update a corporation's interests from this block.

Click <Research 1> to return to the first page of the Financial Research Entry screen.

Marketing Information (Corporate Accounts)

Click <Research 2> to access page two of the Financial Research Entry screen. You can enter the following free text information about the corporation in the Marketing Information block:

- marketing objectives
- underwriting interests
- products distributed
- problems at company
- activities and goals

You can also enter the following information:

- Deadline date and note
- Meeting date and note
- Advertising budget, in whole dollars
- Year of advertising budget in YYYY format, e.g., "1998"

Enter the deadline and meeting dates in MM/DD/YY format, where "MM" is the month, "DD" is the day, and "YY" is the year.

Click <Research 1> to return to the first page of the Financial Research Entry screen.

Company Specifics

Click <Page 2> to access the second page of the Financial Research Entry screen. You can enter the following company specifics.

- Date the company was established in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year
- Federal Tax identification number
- Month in which the corporation's fiscal year ends, e.g., "06" if the corporation's fiscal year ends in June

Click <Page 1> to return to the first page of the Financial Research Entry screen.

Foundation or Agency Account Financial Information

If the account is a not an Individual account or a Corporate account (i.e., the account category is "F" for Foundation, "G" for Government, or "O" for Other), TA displays the Foundation/Agency view. These accounts can have only one financial research record each.

See Also:

Foundation Specifics
Foundation Financials
Foundation Relationships
Grants to Other Organizations
Marketing Information (Foundation Accounts)
Giving Classifications and Interests

Foundation Specifics

You can enter the following information for the account.

- Give-in states, i.e., the states in which the foundation or agency gives grants. Press the [F9] key to view the list of states. You can enter more than one state.
- Year of the annual report your organization has on file in YY format, e.g., "98" for 1998
- Year of the foundation guidelines your organization has on file in YY format, e.g., "98" for 1998
- Date the foundation was established in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year
- Federal Tax ID number
- Month in which the foundation's fiscal year ends, e.g., "06" if the foundation's fiscal year ends in June
- Whether the foundation accepts applications for grants
- Whether the foundation preselects organizations for grants, i.e., the foundation has a predetermined list of organizations to which it gives money
- Market segment, e.g., healthcare, politics. Press the [F9] key to view the list of market segments.

Foundation Financials

You can enter the following financial information for the foundation.

- The year for which you have financial information in YYYY format, e.g., 1998

- The date on which you obtained the financial information in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year
- Total assets, in whole dollars
- Total net worth
- Total net worth rating. Press the [F9] key to view a list of net worth rating codes for your organization.

  Note: To use the Total Net Worth Rating field, your organization must set up rating codes. In a future release, TA will include a Net Worth Rating Code Entry screen to enable your organization to set up its total net worth rating codes. For information on setting up these codes in the current release, contact TSI.

- Total grants paid, in whole dollars
- Grant range (i.e., the high and low grant amounts) for the applicable year

Foundation Relationships

Officers and Board Members

TA displays the account's officers and board members in the Officers and Board Members block. This block displays relationships assigned to the Executive/Company Relationships relationship category, e.g., Trustee to Organization.

Note: Each relationship type maps to one relationship category. When you select the relationship type, TA sets the relationship category. The relationship category enables your organization to analyze or select donors by category.

From the Officers and Board Members block, you can press the [F10] key to access the Relationship Entry screen. From this screen, you can update information for existing relationships or add new ones. When you exit the Relationship Entry screen, you return to the Financial Research Entry screen.

Affiliated Companies

TA displays the foundation's related companies in the Affiliated Companies block. This block displays relationships assigned to the Relationships Between Organizations relationship category, e.g., Foundation to Organization.

Note: Each relationship type maps to one relationship category. When you select the relationship type, TA sets the relationship category. The relationship category enables your organization to analyze or select donors by category.

From the Affiliated Companies block, you can press the [F10] key to access the Relationship Entry screen. From this screen, you can update information for existing relationships or add new ones. When you exit the Relationship Entry screen, you return to the Financial Research Entry screen.

Grants to Other Organizations

TA displays the following information about the foundation's grants in the Grants to Other Organizations block.

- The name of the recipient
- The year of the grant
- The amount of the grant

You enter information about a foundation's grants on the Other Charitable Giving Entry screen. See "Charitable Giving Information".

Marketing Information (Foundation Accounts)

Click <Research 2> to access page two of the Financial Research Entry screen. You can enter the following marketing information for the foundation.

- Marketing objectives
- Underwriting interests
- Products distributed
- Problems at foundation
- Activities and goals
- Deadline date and note
- Meeting date and note

Enter the deadline and meeting dates in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.

Click <Research 1> to return to the first page of the Financial Research Entry screen.

Giving Classifications and Interests

Click <Page 2> to access page two of the Financial Research Entry screen. TA displays classifications assigned to the Giving classification category in the Giving Classifications block.

Note: Each classification code maps to one classification category. The Giving classification category groups classification codes that describe the subject areas, regions, or population groups to which a donor gives money. TA is delivered with standard Giving classifications that your organization can change as needed.

TA displays the interests the foundation has expressed in the Primary Interests block. This block does not display interests assigned to a specific contact for the account.

You cannot update a foundation's classifications or interests directly from page two of the Financial Research Entry screen. Click <Page 1> to return to the first page of the Financial Research Entry screen.

See "Interest Information".

Education Information

Accessing the Education Entry Screen

You can access the Education Entry screen to view or update an education record for the current account in one of the following ways.

- You can select the Education Entry screen from the Corporate Gifts, Major Gifts, and Grants module on the Main Menu.
- You can click <Education> on the Account Overview screen.

If the current account has existing education records, TA displays the first of those records on the Education Entry screen. All education records for the account appear in the List Block in the lower right corner of the screen. You can select the education record you want to update or view by highlighting that record in the List Block.

If the current account does not have any education records, TA displays a message that enables you to find another account, create a new record for the current account, or exit the screen.

See Also:

Creating a New Education Record

Additional Information on the Education Entry Screen

Viewing the Education Records for a Different Account

Creating a New Education Record

To create a new education record from the Education Entry screen, complete the following steps.

1. Press the [F6] key or click <New> on the toolbar. TA displays the Create New Education Record window.
2. Enter the name for which the education record applies. TA defaults the account's name in the Name field on the Create New Education Record window if you are creating the first education record for the account. If more than one education record exists for the account, TA defaults the Name field to the name associated with the education record currently displayed on the Education Entry screen. You can press the [F9] key from the Name field to view the list of names within the account.
3. Click <Create> or press the [Enter] key to create the new education record.

You can create multiple education records for each name within the account, e.g., an undergraduate school record and a graduate school record.

Additional Information on the Education Entry Screen

For each education record, you can enter the following information.

- The name of the person who attended the school. Press the [F9] key to view the list of names within the account.
- The school attended. Press the [F9] key to view the list of schools.
- The degree awarded. Press the [F9] key to view the list of degrees.
- The major. Press the [F9] key to view the list of majors.
- The year of graduation (YOG)
- The year in which the person first enrolled and the year in which the person completed his or her last course (Date Entered and Date Left)
- Comments

In addition, you can attach an outside file to the education record.

Your organization can update the school list, degree list, and major list. Enter dates in YYYY format, e.g., 1998.

Note: If you don't know the particular person who attended a particular school but you know that someone in the account attended the school and you want to record the information, you can create an education record for the account as a whole, i.e., assign the account's name to the record. Once you find out who attended the school, you can change the name to that of the person who attended the school.

Viewing the Education Records for a Different Account

To view the education records for a different account, press the [F3] key or click <Find> on the toolbar. TA displays the Find an Account window to enable you to search for the account. If the account doesn't have any education records, TA displays a message that enables you to find another account, to create an education record for the account with which you are working, or to exit the screen.

Relationship Information

Accessing the Relationship Entry Screen

You can access the Relationship Entry screen to view or update a relationship for the current account in one of the following ways.

- You can select the screen from the Corporate Gifts, Major Gifts, and Grants module on the Main Menu.
- You can zoom from the Relationships block on the Account Overview screen or the Financial Research Entry screen.

If the current account has existing relationship records, TA displays the first of those records on the Relationship Entry screen. All relationships for the account appear in the List Block in the lower right corner of the screen. You can select the relationship record you want to update or view by highlighting that record in the List Block.

If the current account does not have any relationships, TA displays a message that enables you to find another account, create a new relationship for the current account, or exit the screen.

See Also:

Creating a New Relationship

Viewing the Relationships for a Different Account

Creating a New Relationship

You can create multiple relationships for the account and for each name within the account. See the Managing Account Information chapter for an explanation of how to create a relationship.

Viewing the Relationships for a Different Account

To view the relationships for a different account, press the [F3] key or click <Find> on the toolbar. TA displays the Find an Account window to enable you to search for the account. If the account doesn't have any relationships, TA displays a message that enables you to find another account, to create a relationship for the account with which you are working, or to exit the screen.

Interest Information

Accessing the Interest Entry Screen

You can access the Interest Entry screen to view or update an interest for the current account in one of the following ways.

- You can select the screen from the Corporate Gifts, Major Gifts, and Grants module on the Main Menu.
- You can click <Interests> on the Account Overview screen or the Account Diary Entry screen.

If the current account has existing interest records, TA displays the first of those records on the Interest Entry screen. All interests for the account appear in the List Block in the lower right corner of the screen. You can select the interest record you want to update or view by highlighting that record in the List Block.

If the current account does not have any interests, TA displays a message that enables you to find another account, create a new interest record for the current account, or exit the screen.

See Also:

Creating a New Interest

Viewing the Interests for a Different Account

Creating a New Interest

You can create multiple interests for the account and for each name within the account. See the Managing Account Information chapter for an explanation of how to create an interest for an account or for a name within an account.

Viewing the Interests for a Different Account

To view the interests for a different account, press the [F3] key or click <Find> on the toolbar. TA displays the Find an Account window to enable you to search for the account. If the account doesn't have any interests, TA displays a message that enables you to find another account, to create an interest for the account with which you are working, or to exit the screen.

See the Managing Account Information chapter for information on searching for an account using the Find an Account window.

Charitable Giving Information

Accessing the Other Charitable Giving Entry Screen

You can access the Other Charitable Giving Entry screen to view or update a record for the current account in one of the following ways.

- You can select the screen from the Corporate Gifts, Major Gifts, and Grants module on the Main Menu.
- You can click <Charities> on the Account Overview screen.

If the current account has existing charitable giving records, TA displays the first of those records on the Other Charitable Giving Entry screen. All charitable giving records for the account appear in the List Block in the lower right corner of the screen. You can select the record you want to update or view by highlighting that record in the List Block.

If the current account does not have any charitable giving records, TA displays a message that enables you to find another account, create a new record for the current account, or exit the screen.

See Also:

Creating a New Charitable Giving Record

Additional Information on the Other Charitable Giving Entry Screen

Viewing the Charitable Giving Records for a Different Account

Creating a New Charitable Giving Record

To create a new charitable giving record, complete the following steps.

1. Press the [F6] key or click <New> on the toolbar. TA displays the Create New Charitable Giving Record window.

2. Enter the name for which the charitable giving record applies. TA defaults the account's name in the Name field on the Create New Charitable Giving Record window if you are creating the first charitable giving record for the account. If more than one charitable giving record exists for the account, TA defaults the Name field to the name associated with the record currently displayed on the Other Charitable Giving Entry screen. Press the [F9] key to view the list of names within the account.

3. Press the [F9] key to view the list of charitable organizations. This list of values displays brief names (if the charity is set up as an account with a brief name) or codes that represent charities.

4. Click <Create> or press the [Enter] key to create the new charitable giving record.

You can create a charitable giving record for each time the account makes a donation to another charity. Therefore, the account can have multiple records representing multiple gifts to one charity or single gifts to multiple charities.

Additional Information on the Other Charitable Giving Entry Screen

For each charitable giving record, you can enter the following information.

- The name of the person who gave the gift. Press the [F9] key to view the list of names within the account.

- The name of the organization that received the gift. Press the [F9] key to view the list of charitable organizations.

- The amount range of the gift.

- The date of the donation. This can be entered as the month and year, just the year, or the exact gift date.

- Text fields that describe the donation. These fields include Description, Reason, and Source of Info.

In addition, you can attach an outside file to the charitable giving record.

Viewing the Charitable Giving Records for a Different Account

To view the charitable giving records for a different account, press the [F3] key or click <Find> on the toolbar. TA displays the Find an Account window to enable you to search for the account. If the account doesn't have any charitable giving records, TA displays a message that enables you to find another account, to create a charitable giving record for the account with which you are working, or to exit the screen.

See the Managing Account Information chapter for information on searching for an account using the Find an Account window.

Rating Information

Accessing the Prospect Rating Entry Screen

You can access the Prospect Rating Entry screen from the Corporate Gifts, Major Gifts, and Grants module on the Main Menu.

If the current account has existing prospect rating records, TA displays the first of those records on the Prospect Rating Entry screen. All prospect rating records for the account appear in the List Block in the lower right corner of the screen. You can select the record you want to update or view by highlighting that record in the List Block.

If the current account does not have any prospect rating records, TA displays a message that enables you to find another account, create a new record for the current account, or exit the screen.

See Also:

Creating a New Prospect Rating Record

Additional Information on the Prospect Rating Entry Screen

Viewing the Rating Records for a Different Account

Creating a New Prospect Rating Record

To create a new prospect rating record, complete the following steps.

1. Press the [F6] key or click <New> on the toolbar. TA displays the Create New Rating Record window.
2. Enter the name for which the prospect rating applies. TA defaults the account's name in the Name field on the Create New Rating Record window if you are creating the first prospect rating record for the account. If more than one prospect rating record exists for the account, TA defaults the Name field to the name associated with the record currently displayed on the Prospect Rating Entry screen. Press the [F9] key to view the list of names within the account.
3. Enter the brief name of the person who submitted the rating. Press the [F9] key to view the list of raters.
4. Click <Create> or press the [Enter] key to create the new rating record.

You can create a rating record for each time a staff member or a peer of the account rates the account for the likelihood of the account giving to your organization.

See Also:

Creating Multiple Ratings for an Account

Creating Multiple Ratings for an Account

TA enables you to create multiple prospect ratings for an account and for the names within an account for the following reasons.

- To create prospect ratings for the account as a whole or for specific names within the account
- To create prospect ratings for different raters for your organization
- To create prospect ratings for different activity types

For example, for a specific rater, you can create different rating records to represent the account's likelihood to give to capital campaign, underwriting, annual giving, and your organization as a whole. For this rater, you would create four ratings records. For the fourth record, the rating of the account's likelihood to give to your organization as a whole, you would set the Activity Type field to "*" for cumulative giving which represents giving to your organization, not to a particular activity type. If the account represents a husband and wife, you can have the rater rate the husband's likelihood to give to capital campaign and have the rater also rate the wife's likelihood to give to capital campaign, i.e., the account would have two rating records for capital campaign.

Additional Information on the Prospect Rating Entry Screen

For each rating record, you can enter the following information.

- The name of the person rated, e.g., the account as a whole or a person within the account. Press the [F9] key to view the list of names within the account.
- The brief name of the rater. Press the [F9] key to view the list of brief names.

Note: To include a person in the list of raters, the person's name must be stored in TA. Your organization must assign a brief name to the person on the Name Entry screen and set the status of the Solicitor brief name function to "A" for active. See the Managing Account Information chapter for information on assigning a brief name to a person.

- The date of the rating in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year
- The familiarity of the rater with the account. Press the [F9] key to view the codes your organization has set up to identify a rater's familiarity with an account or a name within an account.
- The rating, e.g., top ten prospects, $10,000 - $49,000. Press the [F9] key to view the list of ratings.
- The priority of the rating, e.g., highest. Press the [F9] key to view the list of priorities.
- The activity type to which the rating applies, e.g., Capital Campaign, Underwriting. Press the [F9] key to view the list of your organization's activity types.
- Rating comments

Your organization can update the rater, rating, priority, and familiarity lists. In addition, you can attachan outside file to the record.

Viewing the Rating Records for a Different Account

To view the rating records for a different account, press the [F3] key or click <Find> on the toolbar. TA displays the Find an Account window to enable you to search for the account. If the account doesn't have any rating records, TA displays a message that enables you to find another account, to create a rating record for the account with which you are working, or to exit the screen.

See the Managing Account Information chapter for information on searching for an account using the Find an Account window.

Other Account Research Screens

In addition to the screens listed above, you can use the following screens to research an account.

- Account Activity screen
- Classification Entry screen
- Giving History Summary and Giving History Detail screens
- Benefits Awarded screen

Account Diary

Overview of the Account Diary Entry Screen
Creating an Interaction (Account Diary Entry)
Restricting Access to an Interaction
Marking an Interaction as a Warning
Follow-up Action: Marking an Interaction as a Tickler
Response Information
Viewing an Account's Interactions, Gifts, and Projects

Overview of the Account Diary Entry Screen

The Account Diary Entry screen is one way to log contact between your organization and an account. While you can create interaction records using other screens such as the Customer Service Entry or Inquiry & Referral View screens, the Account Diary Entry screen was designed to record contact with corporate and major donor accounts. On the Account Diary Entry screen, you can:

- Create interactions for an account;
- Navigate to an account's financial research or a list of projects with which the account is associated
- On <Page 2> you can view source code, source analysis code, acknowledgement, or event information if the interaction represents a solicitation, acknowledgement, or an event-related contact.
- As with the other screens from which you can create interactions you can view and update account information such as names, addresses
- attach an outside file to the interaction.

Creating an Interaction (Account Diary Entry)

To create an interaction for an account, access the Account Diary Entry screen from the Corporate Gifts, Major Gifts, and Grants module. If you have a current account, TA searches for existing interactions for the account. If you do not have a current account, TA displays the Find Interactions window.

- To create a new interaction, click on the <New> from the Find Interactions window or from the Account Diary Entry screen.
- TA displays the Create Interaction window

1. Specify the Account ID for which you want to create an interaction. You can press [F9] to access the Find an Account window or enter the Account ID directly into the **Account** field.

2. Enter the **date** on which the interaction occurred (which may or may not be the date on which you are creating the interaction). Enter the date in MM/DD/YY format.

3. Enter the **Interaction Category** and **Type**. (This information might default depending upon how your User ID is set up.)

   You can select the interaction category and the interaction type in one of two ways.

   - You can select the interaction category first. When you press the [F9] key from the Interaction Type field, TA displays the list of the interaction types assigned to the interaction category you selected. From this list, select the interaction type.
   - You can select the interaction type first. When you select the interaction type, TA sets the interaction category (i.e., each interaction type is assigned to only one interaction category).

   Note: Your organization can assign a default interaction category to each user, and TA defaults that interaction category on the Create Interaction window. You can change the value that defaults.

4. Enter the technique for the interaction. The technique describes the method and direction of the communication, e.g., "CF" for call from account. You can press the [F9] key to view the list of techniques. Your organization can add techniques as needed.

   Note: Your organization can assign a default technique to an interaction type. You can the value that defaults.

5. TA defaults the status to "C" for complete. The other statuses are "O" for open and "D" for delete. Set the status to open when you or another staff member needs to complete some task(s) to handle the interaction.

6. Click <Create> to create the interaction.

7. On the Account Diary Entry Screen, enter a description of the interaction in the Summary field.

Note: You should always enter a brief description of the interaction in the Summary field. TA displays the summary line on the Interaction History screen, and if you do not enter the summary, you are less able to understand the meaning of the interaction.

See Also:

Entering Project or Program Information
Recording a Document Associated with the Interaction
Associating an Event with an Interaction
Associating the Interaction with an Activity Type
Entering Account Information for the Interaction
Entering the Solicitor Associated with the Interaction

Entering Project or Program Information

On the Account Diary Entry screen, you can enter more information about the interaction, such as what program or project the interaction is related to and you can update account information for this particular interaction or for the account itself.

See Also:

The Program Related to the Interaction
The Project Related to the Interaction

The Program Related to the Interaction

For PBS organizations, you can enter a program code on the Account Diary Entry (or Customer Service Entry) screen if the interaction is related to a program. Non-PBS organizations with telethons can use the Program field to indicate the program during which the telethon occurs. From the Program field, access the list of programs these ways.

- You must enter at least the first letter of the program code and then press the [F9] key. Or you can enter a key word or phrase and press [Alt] [F9] and TA displays a list of values with programs for which the program code begins with the letter(s) you entered or where the word displays in the description field.
- For example, assume that the program "The Three Tenors" is stored in TA and the code is "3TENORS." If you don't know the code, you can enter "three" and press [Alt] [F9] to have TA display the list of values with "The Three Tenors" included.

Note: You enter the program when an interaction concerns a comment about a program, as opposed to fundraising for a program. If the interaction is related to a project and the program is associated with that project, you do not have to enter the program in the Program field. When you enter the project associated with the interaction in the Projects block, TA associates the interaction with the program on the project record.

The Project Related to the Interaction

You can enter one or more project(s) associated with the interaction in the Projects block on the Account Diary Entry screen, e.g., projects discussed during the interaction. Press the [F9] key to view the list of projects for your organization. You can identify the stage for the account for that project in the Stage field. Press the [F9] key to view the list of account project stage codes.

Note: If an account project record does not already exist for the project you associate with the interaction, TA creates the account project record. When you update the stage of an account project on the Account Diary Entry screen, TA copies that stage to the Stage field for the relevant account project record.

Press the [F10] key from the Projects block to access the Account Project Entry screen.

See "Linking an Account with a Project".

When TA Defaults a Project to an Interaction

When you create an interaction for an account, TA finds the account's most recent interaction for which you are responsible (i.e., the Staff field on the interaction is set to your user name). TA copies the project(s) noted on this interaction to the interaction you are creating. The only projects TA does not copy to the new interaction are the projects with the stage set to refused or dropped.

Deleting a Project from an Interaction

You can delete a project from an interaction if the project should not be associated with the interaction. Highlight the project in the Projects block and press the [Shift] [F6] key combination.

Recording a Document Associated with the Interaction

On page two of the Account Diary Entry screen, you can enter information for a document associated with the interaction, i.e., the application in which the document is stored and the document name. For example, if an interaction represents a letter to an account, you can indicate the word processing application used to create the letter and the letter's file name.

Associating an Event with an Interaction

You can associate an event with the interaction from the Account Diary Entry screen by clicking <Page 2> and entering the event in the Event field. Press the [F9] key to view the list of events for your organization.

You can also indicate the account's role in an event by clicking <Page 2> and zooming from the Event field to the Event Participation window. For more information on events, see the Managing Events and Volunteers chapter.

Associating the Interaction with an Activity Type

You can associate the interaction with an activity type on the Account Diary Entry screen by clicking <Page 2> and entering the activity type in the Activity Type field.

Your organization should determine when, if at all, to assign the activity type to the interaction, i.e., what are your organization's rules or business practices in this area. Your organization may find it helpful to have staff assign the activity type so that any staff member can see all interactions for the activity type. This practice may be helpful if your organization has multiple active projects for an activity type, e.g., multiple underwriting projects, and the account is being solicited for two or more of them.

Note: If you associate a project with an interaction, TA automatically sets the Activity Type field to the activity type for the project. If your organization decides to assign activity types to interactions based on certain rules, your organization needs to determine how to handle an interaction during which you discuss multiple projects with an account and the projects are associated with different activity types. By default, TA sets the activity type to the one associated with the last project you enter in the Projects block. See "The Project Related to the Interaction".

Entering Account Information for the Interaction

A block of account information appears in the lower left corner of the Account Diary Entry screen. This block of information identifies the name, address, and telephone number associated with the interaction. For example, if you create an interaction for a corporate account, you can indicate the name, address, and telephone number for the specific contact at that corporation with whom you interacted.

See Also:

Entering Information Associated with the Interaction

Updating Account Information While Entering an Interaction

Entering Information Associated with the Interaction

An interaction can apply to the account as a whole or to an individual within the account. If the interaction applies to the account as a whole, TA displays in the Name field the account's name line followed by the text "(Account)." If the interaction applies to a name within the account (i.e., a person), TA displays the name's name line in the Name field.

When you create a new interaction for an account, TA finds the account's most recent interaction for which you are responsible (i.e., the Staff field on the interaction is set to your user name). TA copies the name, address, and telephone number noted on this interaction to the interaction you are creating. You can change it. Press the [F9] key to view the list of names, addresses, or telephone numbers within the account.

Note: If you are not responsible for any existing interactions for the account, TA sets the Name field to the account's name line and the address and telephone number to the account's preferred address and preferred telephone number. When you enter a different name in the Name field, TA sets the address and telephone number to the name's preferred information. You can change it.

Updating Account Information While Entering an Interaction

You can update a name, an address, or a telephone number from the Account Diary Entry screen. Press the [F10] key from the field you want to update to access the corresponding information entry screen (i.e., Name, Address, or Telephone). For example, to update an account's address, you can press [F10] from the Address field to access the Address Entry screen. When you exit the entry screens, you return to the Account Diary Entry screen.

Entering the Solicitor Associated with the Interaction

You can enter the brief name of the solicitor associated with the interaction in the Solicitor field on the Account Diary Entry screen. Press the [F9] key from the Solicitor field to view the list of brief names from which you can select.

Restricting Access to an Interaction

You can indicate that only certain staff members can view an interaction by marking the interaction as confidential on the Account Diary Entry screen. When a user who does not have access to confidential interactions accesses the interaction (e.g., on a screen or report), TA displays the word "Confidential" in the Summary and Comments fields.

TA determines if a user has access to confidential interactions by looking at the Confidential Interaction Restriction user preference.

Note: The Restrict to Department? checkbox on page two of the Account Diary Entry screen will be implemented in a future release of TA.

Marking an Interaction as a Warning

You can create a warning based on an interaction. TA displays this warning for anyone who accesses the account from anywhere in TA. To mark an interaction on the Account Diary Entry screen as a warning, complete the following steps.

1. Enter the text of the warning in the Comments field.
2. Click <Page 2>.
3. Mark the Warning? checkbox.
4. If appropriate, enter the date on which the warning should expire in MM/DD/YY format, where "MM" is the month, "DD" is the day, and "YY" is the year.

TA then displays as the warning the text you entered in the Comments field. For example, if a particular major donor should always be handled by a specific staff member, you can create an interaction with this information and mark it as a warning, leaving the expiration date blank. When the donor calls your organization and a staff member starts to create an interaction, either on the Account Diary Entry screen or the Customer Service Entry screen, TA displays the warning text and the staff member knows to transfer the call to the staff member specified in the warning.

Note: TA displays the warning when you access the account from any screen in TA. TA does not reference the warning information when you select the account in a query.

Follow-up Action: Marking an Interaction as a Tickler

By entering the Tickler fields (Action, Tickler Start and Due Date) you can make any interaction an 'open tickler' to capture follow up that you might want to be reminded of. You can delegate follow-up tasks to any user in TA by entering their user ID in the Staff field. To view your open ticklers access the Open Ticklers screen or run the Open Tickler Listing report. Click here for descriptions of each tickler field.

Response Information

Entering the Response for an Interaction

If you need to manually update an existing interaction on the Account Diary Entry screen with response information, complete the following steps.

1. Find the interaction (see "The Find Interactions Window").
2. Click <Page 2> to access the second page of the Account Diary Entry screen.
3. Enter the response category, e.g., "INVRESP" for an invitation response.
4. Enter the response type, e.g., "ACCEPT" for an acceptance of the invitation.
5. Enter the response date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.

The response category groups responses with similar purposes. The response category can be used for analysis. The response type refers to the nature of the response, e.g., an acceptance to an invitation. Each response type is assigned to one response category.

Selecting the Response Category and Response Type

You can select the response category and the response type, as appropriate, in one of two ways.

- You can select the response category first. When you press the [F9] key from the Response Type field, TA displays the list of the response types assigned to the response category you selected. From this list, select the response type.
- You can select the response type first. When you select the response type, TA sets the response category (i.e., each response type is assigned to only one response category). Using this approach, you see all of the response types.

When you enter the response date, enter in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.

Viewing Response Transaction Information

If the response is to a solicitation interaction, you can press the [F10] key from either the Response Category or Response Type fields to access the Response Transaction window. TA displays the following transaction information that applies to the response in this window, if applicable.

- Total amount pledged

- Pledge count
- Total soft credit amount pledged
- Soft credit pledge count

See Also:

How TA Sets the Response Date for an Interaction

How TA Sets the Response Date for an Interaction

TA automatically sets the Response Date field on the Account Diary Entry screen for interactions that represent a solicitation. When you process a batch in TA, the Post Gift Batches procedure updates the interaction that represents the solicitation; the procedure sets the Response Date field to the gift date of the transaction. TA identifies the appropriate interaction to update by finding the interaction with the same source and Account ID as the transaction.

Note: Interactions that represent solicitations are generally created through the Create Interaction update procedure, not manually on the Account Diary Entry screen.

See the Entering an Account's Transactions and Benefits chapter for more information on entering and processing batches in TA.

Viewing an Account's Interactions, Gifts, and Projects

From the Account Diary Entry screen, you can view a complete list of interactions for the account, the account's giving history, and any projects that are associated with the account.

See Also:

The Find Interactions Window

Viewing Projects with Which an Account Is Involved

Viewing Gift and Interaction History for an Account

The Find Interactions Window

The Find Interactions window enables you to enter the criteria for selecting a set of interactions that you want to view or update. You can access the Find Interactions window in the following situations.

- You access the Account Diary Entry screen and you don't have a current account, i.e., an account with which you are working. TA automatically displays the Find Interactions window.
- You have an interaction displayed on the Account Diary Entry screen and want to look at a different set of interactions. Click <Find> on the toolbar to access the Find Interactions window.
- You have one or more interactions displayed on the Interaction History screen and want to look at a different set of interactions. Click <Find> on the toolbar to access the Find Interactions window.
- You have one or more interactions and transactions displayed on the Gift and Interaction History screen and you want to view only interactions on this screen. Click <Find> on the toolbar to access the Find Interactions and Transactions window. On the Find Interactions and Transactions window, mark the Interactions option button. By marking this option button, TA displays the Find Interactions window.

For information about search criteria for the Find Interactions window, see Finding Interaction in the Viewing Transactions, Benefits, and Interactions chapter.

Viewing the Interaction History

You can view all of the interactions for an account by clicking <Interactions> on the Account Diary Entry screen. TA displays the Interaction History screen.

Viewing Projects with Which an Account Is Involved

You can view all of the projects with which the account is involved by clicking <Projects> on the Account Diary Entry screen. TA displays the Account Diary: Projects view. You can view the following information for each project with which the account is involved.

- Project code and description
- Primary solicitor for the account project record
- Account manager for the account project record
- Ask amount targeted for the account
- Start Date (i.e., the date on which the account project record was created)
- Stage of the account project record (e.g., identification)

You can update each account project record from the Account Diary: Projects view by highlighting the project and pressing the [F10] key. TA displays the Account Project Entry screen with the project you selected. When you exit the Account Project Entry screen, TA returns you to the Account Diary: Projects view.

From the Account Diary: Projects view, click <Diary> to return to the first page of the Account Diary Entry screen. If you exit the Account Diary: Projects view, you return to the Main Menu.

Viewing Gift and Interaction History for an Account

You can view all of the transactions and interactions for an account by clicking <History> on the Account Diary Entry screen. TA displays the Gift and Interaction History screen.

See Structure of the Gift and Interaction History Screen in the Viewing Transactions, Benefits, and Interactions chapter for a detailed description of the Gift and Interaction History screen.

The Find Interactions and Transactions Window

You can select a different set of transactions and interactions to view on the Gift and Interaction History screen by clicking <Find> on the toolbar. TA displays the Find Interactions and Transactions window.

Selecting a Group of Accounts to Research or Update

Using the Work with Accounts for an Activity Screen
Using the Work with Accounts for a Project Screen

Using the Work with Accounts for an Activity Screen

The Work with Accounts for an Activity screen enables you to find a group of accounts based on account activity information. You can view or update selected account information for each account from this screen.

Accessing the Work with Accounts for an Activity Screen

You can select the Work with Accounts for an Activity screen from the Corporate Gifts, Major Gifts, and Grants module on the Main Menu.

See Also:

Selection Criteria (Work with Accounts for an Activity Screen)
Selected Accounts (Work with Accounts for an Activity Screen)
Updating Additional Account Information (Work with Accounts for an Activity Screen)

Selection Criteria (Work with Accounts for an Activity Screen)

When you use the Work with Accounts for an Activity screen, you identify the criteria you want TA to use to find a group of accounts. An account must meet each criterion you enter to be included in the list of accounts.

At minimum, you must enter an activity type and current activity to select a group of accounts. From the Activity Type field, you can press the [F9] key to view the list of activity types for your organization. From the Current Activity field, you can press the [F9] key to view the list of activities associated with the activity type you entered in the Activity Type field.

Note: When you access the Work with Accounts for an Activity Screen, TA defaults the activity type to the one assigned to your user name, if a default activity type is assigned. You can change the activity type, if needed.

You can also enter one or more of the following:

- The status for the account activity record for the activity type, e.g., lapsed. Press the [F9] key to view the list of status codes for the current activity you entered.
- The expiration date for the account activity record. Enter the date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.
- The giving level for the account activity record. Press the [F9] key to view the list of giving levels for the current activity you entered.

Press the [F3] key or click <Find> on the toolbar to find the accounts that meet the criteria you entered.

Selected Accounts (Work with Accounts for an Activity Screen)

TA displays the following information for each account.

- The Account ID and account alpha name
- The current activity
- The status for the account activity record
- The expiration date for the account activity record
- The giving level for the account activity record
- The date of the most recent gift made to the activity type
- The amount of the most recent gift made to the activity type

Updating Additional Account Information (Work with Accounts for an Activity Screen)

From the Work with Accounts for an Activity screen, you can access account-based screens to view or update account information. To view or update information for a particular account, complete the following steps.

1. Highlight the account in the list of accounts that match the criteria you entered.

2. Click in the Destination field (i.e., the field represented by the question mark, "?").

3. Press the [F9] key or click <List> on the toolbar to view the list of selected account-based screens.

4. Highlight the name of the screen you want to access and click <OK>.

TA displays the screen you chose. When you are finished viewing or updating information on the screen, you can click <Exit> on the toolbar to return to the Work with Accounts for an Activity screen.

See the Managing Account Information chapter for information on the account-based screens not described in this chapter.

Using the Work with Accounts for a Project Screen

The Work with Accounts for a Project screen (Corporate Gifts, Major Gifts, and Grants module) in the enables you to find a list of accounts based on account project information. From this screen you can:

- You can enter any field at the top of the screen (Project, Primary Solicitor, Event, etc.) to get a list of accounts that match your search. For example, if you enter Primary Solicitor, TA displays a list of all the accounts that are associated with the Solicitor on any account project record. You can use multiple fields to further filter the list of accounts. For example, use the **Project** and the **Stage** fields to limit accounts that have a particular stage within a project. TA displays only accounts linked to the project with the particular stage.

  The fields that you can use to find accounts are set up on the Project Code Entry screen and default on the Account Project Entry screen where you can edit or customize information based upon the account. (The only field not available on both screens is Event, which only available on the Project Code Entry screen). When you use the Work with Accounts for a Project screen, you are finding account project records. If you do not find an account that you expect, it means that either the account is not linked to the project (no account project record) or that information is not on the account project record.

- Click **<Find>** to refresh the list of accounts that are displayed. If you change any of the fields at the top of the screen, you must click <Find> to update the list.

- Click **<New>** to link any account with any project. TA displays the Create New Account Project record.

- Use the **Go to** field to navigate to selected account-based screens such as Classification Entry or Account Diary Entry. Press [F9] to select a screen to navigate to. You can add new information or edit existing records. You return to the Work with Accounts for a Project screen when you exit the account-based screen.

- Use the **Order By** field to determine the sort order of the accounts that are listed. By default TA lists the accounts by alphabetical order. You can sort by multiple levels by selecting multiple values in the list. For example, if you select Account Manager and Stage, TA displays accounts first by stage for each account manager (alphabetically).

  The order options are: Alpha name, Primary solicitor and Account manager (alphabetically by brief name), Priority (from highest to lowest priority), Project (alphabetically by project code), Stage (alphabetically).

Corporate and Major Gifts Reference Information

Control Code Tables

System Preferences (Corporate and Major Gifts, and Grants)

Control Code Tables

The following table identifies the fields affected by code tables your organization sets for the Corporate Gifts, Major Gifts and Grants module.

Field Name	Table Name
Business Segment	Business Segment
Degree	Degree
Division	Department
External Rating	Rating
Familiarity	Rater Familiarity
Fund	Fund
Give-in States	State
Interaction Category	Interaction Category
Interaction Type	Interaction Type
Internal Rating	Rating
Major	Degree Major
Market Segment	Market Segment
Operating Unit	Department
Priority	Priority
Proposal Number	Proposal
Rating	Net Worth Rating
Rating	Rating
Response Category	Response Category
Response Type	Response Type
School	School
SIC Code	SIC
Stage	Stage
Technique	Technique

System Preferences (Corporate and Major Gifts, and Grants)

The following table lists each system preference that affects the Corporate Gifts, Major Gifts, and Grants module and the related section in this chapter. See the Setting System Preferences chapter for an explanation of the system preference.

System Preference	See
Allow Gifts to Master Projects?	Indicating That Gifts Should Not Be Posted to a Master Project