

Campaign and Receipt Lookup Tables

The purpose of this discussion is to provide a quick review of Lookup Tables you will need to create a Campaign as well as record transactions and donations through the Receipt Maintenance window.

All of the fields listed below are included in the Q-Xpress selections for Receipting Amount Payment Method Date where Include Dollar Amounts is checked.

For each of the tables listed below, it is important to note the message at the bottom of the window of entries.

Changes to these values will be reflected in existing records means changing any entry will modify the value wherever the value is used. Table entries that are in use on the database cannot be removed but can be modified.

Changes to these values will not affect existing records means the values when no longer in use can be removed from the table as the text of the field has been saved in the records where the table entry was used.

We will begin with the Campaign as it provides default values when the campaign is selected through the Receipt Maintenance window.

Campaign Type and Campaign Code

The Campaign Type defines the kind of Ask, the Campaign Code defines how the donor responds.

Clutter is created when no thought is put into how transactions and donations are entered. It impacts reporting and decision making so understanding this area is critical to a well-defined donor management system.

Campaign Type

This is a two-character code that represents the ASK. There needs to be representation for campaigns created by donors. These situations happen when outside a formal ASK donations are given to a charity.

These situations might include: UN - unsolicited donations, TP - Third Party donations, MM - In Memory donations, HN - In Honour of donations and BQ - Bequests.

Campaigns that the charity might initiate may be DM - Direct Mail, EQ - Equipment campaigns, MG - Major gifts, FG - Foundation Grants, and more. The type of campaign that is run annually or for special requirements.

Capital Campaigns have special handling and @EASE does it better than any other application.

Campaign Code

This is a three-character code that defines how the donor has responded. It may also provide timing as in the case of campaigns run by fiscal quarter.

Standards we use in the program include DON for one time donations, D01 - D04 for Donations run by quarter, SPS - Sponsors, AUC - Auction Donations for resale, REV - non-charitable Cash, SLS - sale of auction donations, GIK for gift-in-kind to the charity for its use, TCK for tickets, REG for registrations, PRT for Participants. Other codes can be added but we recommend care as clutter can prevail and unnecessarily.

Standards should be adhered to when additional codes are added to reflect an event clutter begins to envelop the organization.

There is documentation on how to handle all forms of campaigns for the best possible reporting.

The case of In Memory of individual In Honour of campaigns use numbers to identify unique campaigns. Each new fiscal year these campaigns use a number code starting with '001' with consecutive numbers added as more campaigns are required. These codes are NOT added to the Lookup table but are managed by keying in the required value. Once an In Memory campaign has been created, it may receive donations in subsequent years as the deceased is remembered.

Letter Field

For clients who are sending out a letter or when no letter is required, this field should always be populated. It can be used with MS Word to ensure the right thank you letter is sent out with a hard copy receipt. (Hard copy means a paper copy whether on a pre-printed form or a PDF.)

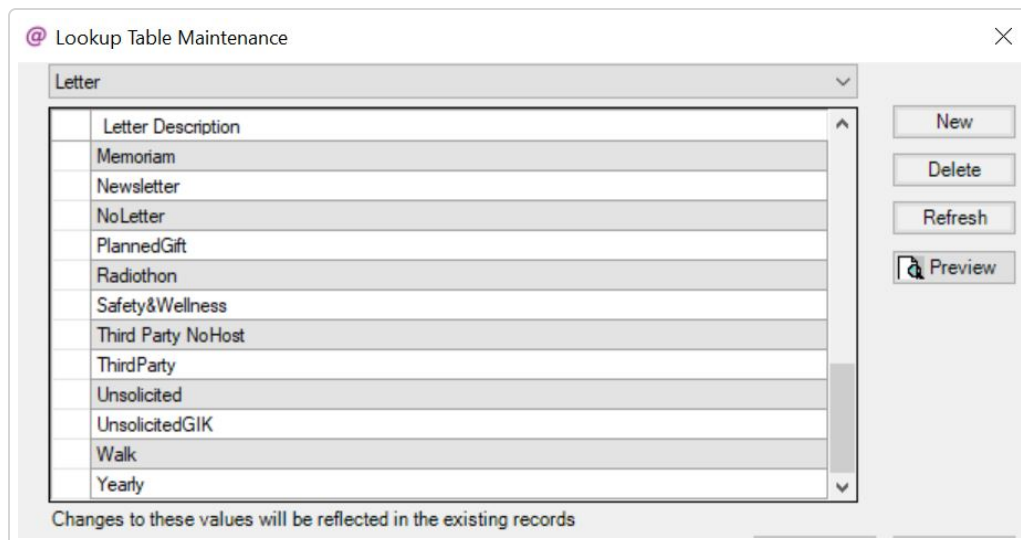
Where no letter is required we recommend using **NoLetter**. Note we use capital letters between the words and no spaces as when used with a Word Merge, it must be 100% identical. A **NoLetter** value would include campaigns where no receipt is issued like grants, sponsorships, purchases, gift-in-kind (and auction) donations, or cash revenue items.

For monthly campaigns either Fixed Length or On-going, we recommend the use of **Yearly** so that letters do not get printed along with a batch of donations which include a yearly gift but that do not receive letters.

The Letter code will determine which thank you letter will be used. Letters of different types will use different fields when a batch of transactions is exported through Q-Xpress.

Setting up standards for different types of campaigns for general donations as well as for specific appeals will be useful.

Memoriam, InHonour, DMSpring, DMXmas, and ThirdParty are a few. These would pair with the letters being sent out and allow other fields to be included.



Breakout Code

The Breakout Code or Fund is how donations will be allocated through the accounting system.

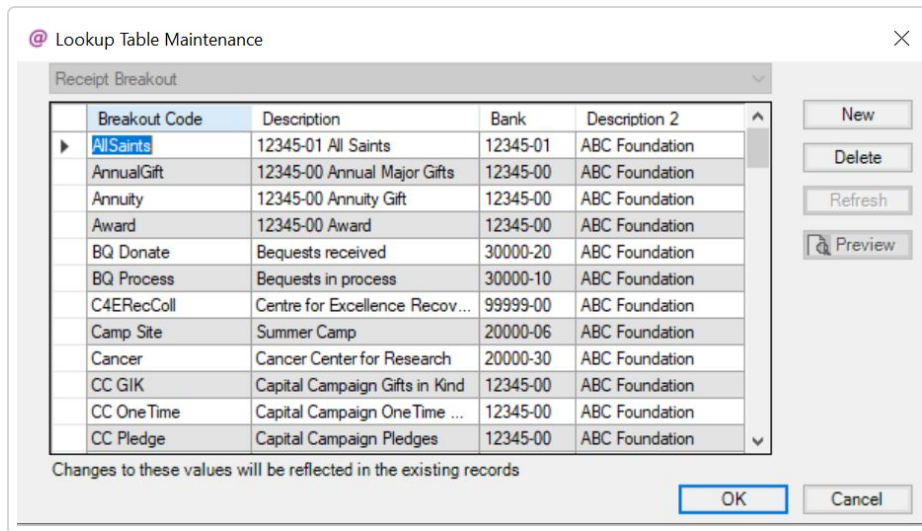
The Breakout Code is 10 characters with a

We recommend **NEVER** using a value of **Designated** as it is better to be more specific. It would be difficult to have a conversation with a donor only to thank them for their Designated donation ... and what was that designated to?

Where donations are non-designated we suggest using the type of campaign. Non-designated donations are often pooled to a fund for charitable donations. The question may come up which asks, how was this fund populated?

The Bank column is used for the General Ledger Fund.

The BO Code, Description, and Description 2 are exported when Q-Xpress Receipting selections are requested with Include Dollar Amounts checked.



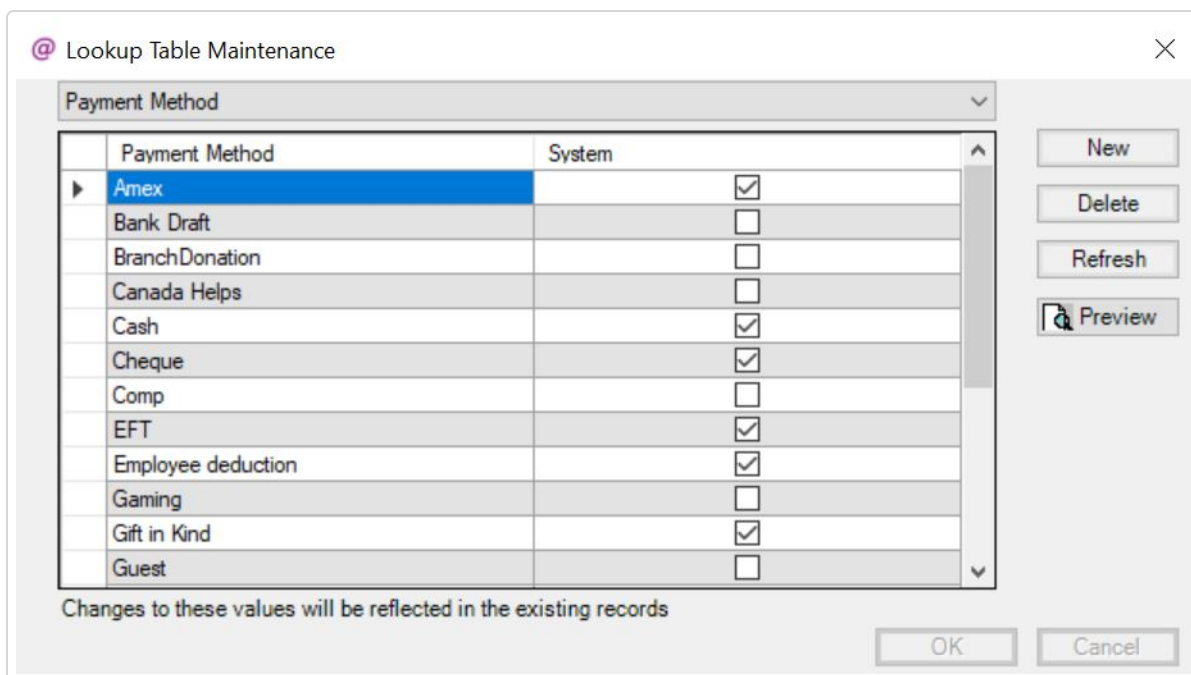
Payment Method

There are set payment methods in @EASE. Found in the Lookup tables the set methods are shown with a Checkmark. They cannot be removed or altered. Checkmarks cannot be added to user-defined entries.

Amex, Cash, Cheque, EFT, Employee deduction, Gift in Kind, Mastercard, Pledge, and Visa are the system payment methods.

Pledge is used to hold a record in waiting. For example, a table purchase for a gala, the payment has not yet arrived but a table has been requested. Pledge is also used for Grant Requests, where the record awaits a decision but has been entered into @EASE to inform the development team that a request has been made.

Other payment methods can be added. For example, we use COMP for a complimentary event ticket, GUEST for a guest ticket, Gaming to identify gaming money. These additions can be useful when locating donations from a given source.



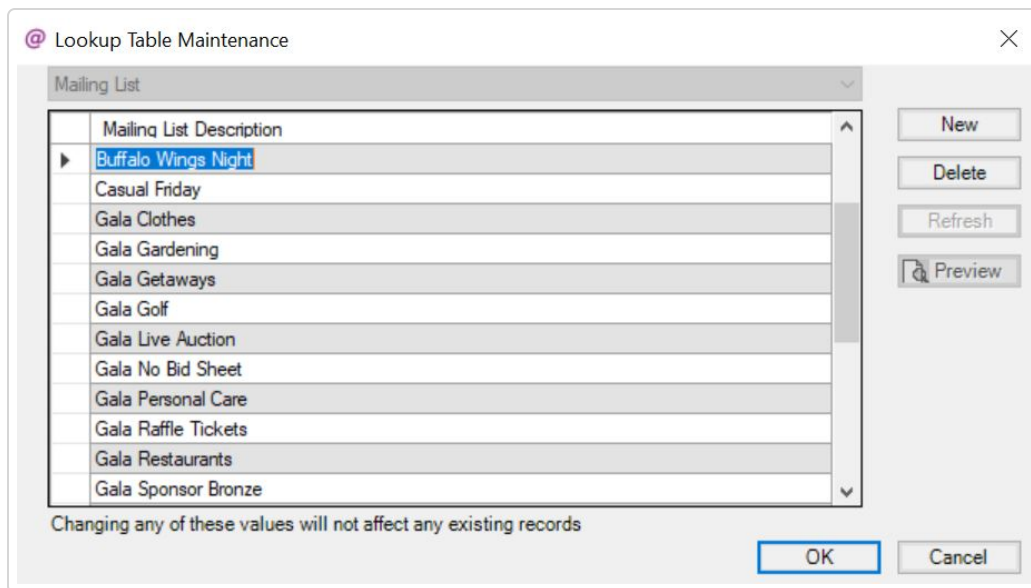
The Batch Report shows each donation/transactions payment method. Totals for the Batch will display the number of donations by **Payment Method** and the total dollar amount.

Mailing List

Initially, the mailing list field was used to identify a direct mail donation from a list purchased by a charity. List A brought in X number of donations etc.

As a 50 character field, the Mailing List provided great opportunities. The Mailing List field uses the Campaign Prospect Report found under Donor Receipting Reports. It displays the Mailing List field value, the number of donations or transactions associated with the code, and the number of dollars collected by the receipt date given.

The Mailing List field is useful for special events to identify sponsorship levels, the name of third party campaigns, to identify categories for silent or live auction sales for a few. The Mailing List value is exported for all Receipt selections where Include Dollar Amounts is check making is useful for thank you letters.



Here is a sample report for all Third-Party donations between fiscal 2019 and 2021.

Mail List	Responses	Amount	Average Donation
Attended past event	2	\$30.00	\$15.00
Buffalo Wings Night	1	\$25.00	\$25.00
Casual Friday	2	\$1,020.00	\$510.00
Christmas Fundraiser	1	\$15.00	\$15.00
Email	2	\$30.00	\$15.00
Robbie McDonald	1	\$20.00	\$20.00
Rotary Fundraiser	1	\$25,000.00	\$25,000.00
Support our Hospital	1	\$25.00	\$25.00
Vol	2	\$30.00	\$15.00
Zoom Fundraiser	3	\$650.00	\$216.67
Total	16	\$26,845.00	

Managing Campaigns and gift/transaction entry is very important to a charity. When naming strategies are consistent, the opportunity for comparative reporting is enhanced. Below is an example of Direct Mail campaigns for Quarter 4 from 2001 - 2021. What made this report do-able is the naming convention used.

Campaign Listing with Total Dollars

Fiscal Year from 2000 to 2021

Campaign	Rcnzd	Campaign Description	Fiscal Year	Total Campaign	Total Count	Corporate \$	Corporate In Kind	Private \$	Private In Kind	Registration
2001DMD04	No	2001 Direct Mail Campaign Fall	2001	1,870.00		1,375.00	0.00	495.00	0.00	0.00
2002DMD04	No	2002 Direct Mail Campaign Fall	2002	5,705.00		4,705.00	0.00	925.00	75.00	0.00
2007DMD04	No	2007 Direct Mail Campaign Fall	2007	4,175.00		2,475.00	0.00	1,700.00	0.00	0.00
2011DMD04	No	2011 Direct Mail Campaign Fall	2011	380.00		0.00	0.00	380.00	0.00	0.00
2011DMD04	No	2011 Direct Mail Campaign Fall	2012	1,055.00		60.00	0.00	995.00	0.00	0.00
2011DMD04	No	2011 Direct Mail Campaign Fall	2016	2,000.00		0.00	0.00	2,000.00	0.00	0.00
2015DMD04	No	2015 Direct Mail Campaign Fall	2015	1,835.00		820.00	0.00	1,015.00	0.00	0.00
2015DMD04	No	2015 Direct Mail Campaign Fall	2016	101.00		0.00	0.00	101.00	0.00	0.00
2015DMD04	No	2015 Direct Mail Campaign Fall	2017	100.00		0.00	0.00	100.00	0.00	0.00
2017DMD04	No	2017 Direct Mail Campaign Fall	2018	25.00		0.00	0.00	25.00	0.00	0.00
2019DMD04	No	2019 Direct Mail Campaign Fall	2019	6,664.00		3,266.00	0.00	3,398.00	0.00	0.50
2019DMD04	No	2019 Direct Mail Campaign Fall	2020	43.00		0.00	0.00	42.50	0.00	0.50
2020DMD04	No	2020 Direct Mail Campaign Fall	2020	7,227.00		0.00	0.00	7,227.00	0.00	0.00
2021DMD04	No	2021 Direct Mail Campaign Fall	2021	230.00		0.00	0.00	230.00	0.00	0.00
Total				31,410.00	14	12,701.00	0.00	18,633.50	75.00	0.50

Check out the Analytical Reports and Reports sections of the documentation.

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