

Foundation User Manual



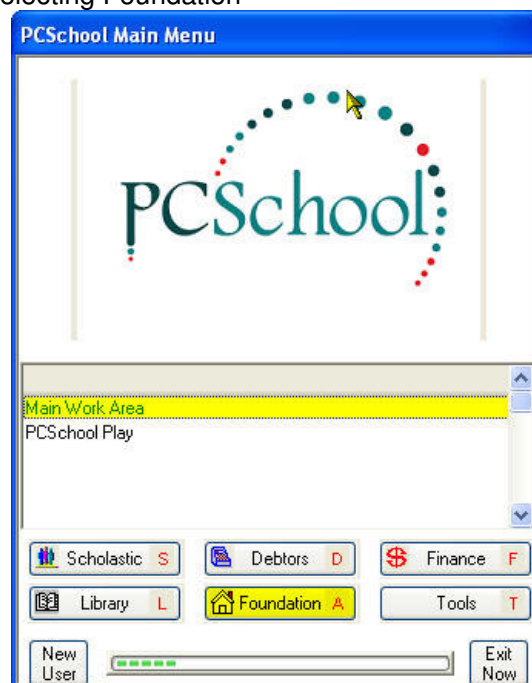
Introduction

Educational Institutions are seen as a centre piece of the community with relationships in every area being developed. To assist the college in managing these relationships PCSchool has developed the foundation module. The foundation module is designed to track and manage relationships through improved communications, pledge tracking, activity allocation and mail merge. The Foundation Module can be used as; a better communication tool, a pledging utility, or merged with your existing Alumni members.

It is up to you to decide how you wish to use Foundation Module.

The Foundation Module can be accessed via either;

- The Main Menu by selecting Foundation



- Or from any Module by clicking on the Foundation (House) Icon on the toolbar.

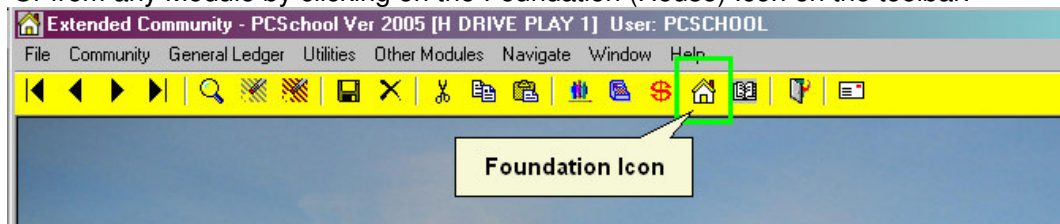


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Prerequisites

Several Areas need to be set up prior to entering information into the Foundation Module. When creating new codes, once established, they should not be deleted. You can add to the codes needed.

- Adding new Codes through Maintenance View.
- Create Identities
- Set up of Foundation Activity Codes

Create New Maintenance Codes

Path: Utilities → Maintenance View

The Maintenance File is used throughout PCSchool to define code types and descriptions. In Foundation the Maintenance File is used to manage the codes assigned to each view.

Do not delete any files that are already entered as they may be used by other Areas of PCSchool. To add a new Code scroll to the bottom line, tab to the next line, enter your unique Code and a description, Tab off the line to save it.

You must refresh the view by clicking on the Foundation Module icon before the new “Code Types” can be used.

ALUMREL – Relationship Description

Code	Description
BR	Brother
Contact	Contact
DA	Daughter
DAD	Father
DG	Daughter
Employee	Employee
Employer	Employer

ALUMSTAT – Used to identify categories in Alumni

Code	Description
D	Director
F	Friend
G	General

FOUNDSTAT – Used to indicate level of gifting

Code	Description
BRONZ	BRONZE
GOLD	GOLD
PLAT	PLATINUM
SILVER	SILVER

ALUMNOTE – Note categories

Code	Description
GEN	GENERAL
LATE	Late Payment

ALUMHIST

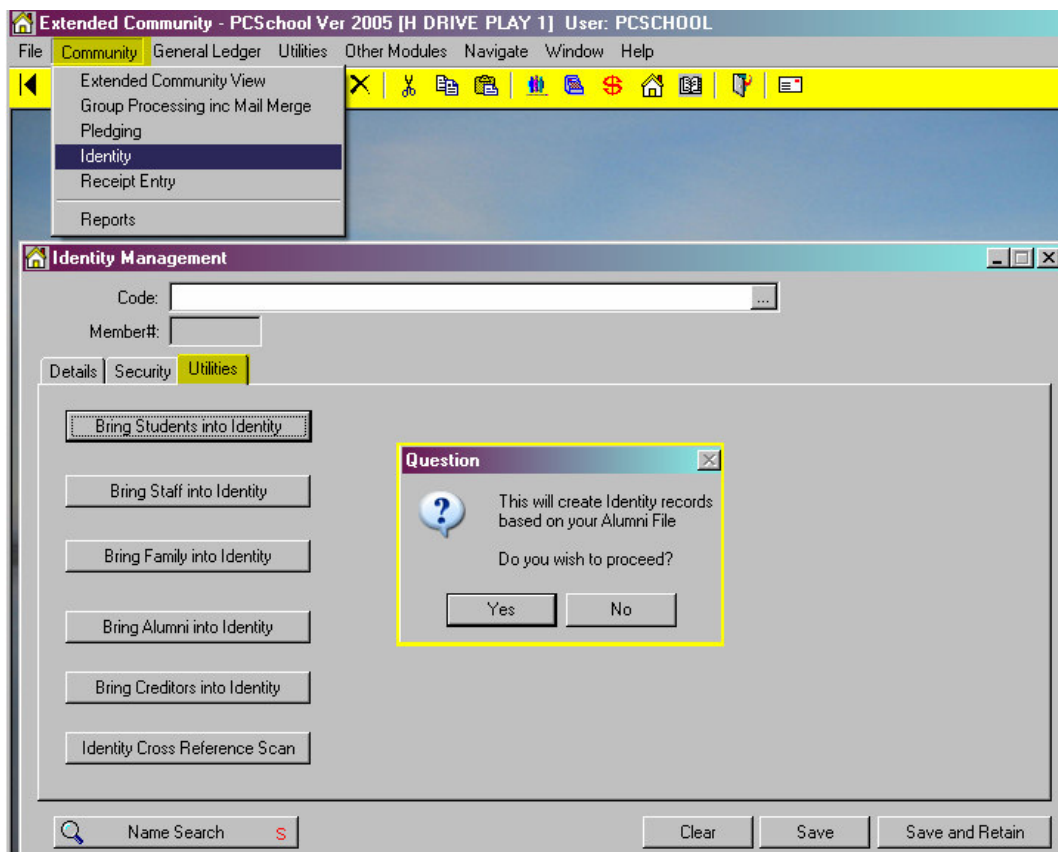
Code	Description
BB	Basketball
DR	Doctor
LAW	Lawyer
NB	Netball
PREF	Prefect
RL	Rugby League
RU	Rugby Union

Creating Identities

The Foundation module creates an **identity record** for all Foundation members. To use your existing Alumni records for creating Foundation members, you will need to generate the identity records (assuming you have Alumni records to start with). If you are not using your Alumni records the Foundation module will create a new identity record when you create a new member.

Convert Current Records

Path: Community → Identity → Utilities



Once you have brought a group in or transferred Students from the Scholastic Module you can check to make sure the code is Unique to avoid Duplication.

Identity Management

Code: WILSON CHA
Member#: 7494

Details Security **Utilities**

Bring Students into Identity
Bring Staff into Identity
Bring Family into Identity
Bring Alumni into Identity
Bring Creditors into Identity
Identity Cross Reference Scan

Name Search S

Clear Act. S

Identity Cross Reference

Code: WILSON CHA # 7494

Surname: Wilson Given: Charlette

Home Ph: 03 455 0300 Bus Ph:

Mobile: Email:

Address:

Identity Match Up - Select to Re-Assign

#	Source	Code	Name	Data	Select
7494	ALLIM	WILSON CHA	Charlette Wilson	04 349 4953 90 Hooker	<input type="checkbox"/>
7494	STUD	WILSON CHA	Charlette Wilson	Born 20/01/1991 Ph: 04	<input type="checkbox"/>

Possible Duplicates - Re-number if required - Select and alter #

#	Source	Code	Name	Data	Select

Output destination: ☒ Print to Window ☐ Export to File ☐ Import

Export File Settings: File Name: IdentityScan.txt

Re-assign Re-Number

Test On

Surname + Given ☒
Home Phone ☒
Code ☒
Street Address ☐
Email ☐

Scan Cancel

Check for Duplicate codes.

- Click on Identity Cross Reference.
- The members brought in will display in the top grid the # must be unique to the member..
- Duplicate # codes will be listed in the bottom grid.
- Change the # Code of the new member to a new # code.

Creating New Members

Path: Community → Extended Community View → Community

The Community view allows you to work with individual members of the foundation.

The screenshot shows the 'Extended Community View' window. The 'Community' tab is selected. The form displays details for a member named Chris Simpson. The 'Status Alumni' dropdown is set to 'Friend', and the 'Foundation' dropdown is set to 'BRONZE'. Two 'Maintain Code Files' pop-ups are shown, one for 'FOUNDSTAT' and one for 'ALUMSTAT'. The 'FOUNDSTAT' pop-up shows a table with codes BRONZ, GOLD, PLAT, and SILVER. The 'ALUMSTAT' pop-up shows a table with codes D, F, and G. The bottom of the window contains buttons for 'Name Search', 'Clear All', 'Save and Clear', 'Save and Retain', and 'Exit View'.

To enter a new Foundation member manually, the following steps are required.

- Click the **"Clear All"** button to clear the screen of any existing foundation member's record.
- Enter a unique code for the new member in the **"Code:"** field. PCSchool recommends Surname, space then the First Initial.
- Enter relevant information for the new member and save the member's record by clicking the **"Save"** button at the bottom of the screen

Foundation Activity Codes

In order to track the activities of Foundation members, you need to set up the activity codes. Activity Codes are grouped into categories, once established they should not be changed as relating records may exist.

Path: Community → Extended Community View → Create Activity Codes

PCSchool provides seven different categories for you to work with, they are:

- General
- Associations
- Occupation
- Organisation
- Mailing
- School History
- Sports

How you use the Categories is up to you.

To add a new Activity Code follow the steps below;

•	Select the Category for the new activity.
•	On the next free line in the grid enter the activity Code description.
•	Click Save when finished.

Adding 'Relationship' Members

Relationships within the Foundation module are used to show linkage and associations between Foundation members. The Relationships function can define a contact person within a Foundation or Alumni group. Families who have a long history with the College can be traced and acknowledged.

Create Relationships

Path: Community → Extended Community View → Relationships

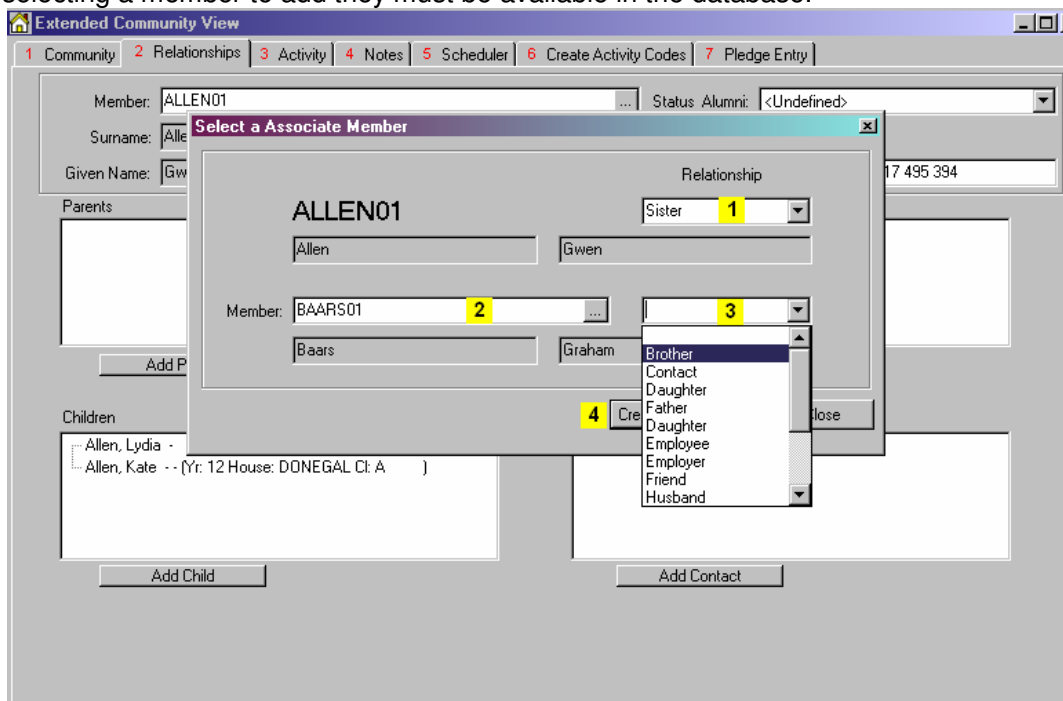
Relationships are created to provide linkages between Foundation members, blood relative's associates and the College. This allows the college to tailor foundation activities accordingly.

The screenshot shows the 'Extended Community View' window with the 'Relationships' tab selected. The member profile for 'ALLEN01' (Gwen Allen) is displayed. The 'Associates' section lists: Allen, Brent - Sister - (Reg'n: 0 Class of 0), Anglesey, Rong Ling - Friend, Allen, John - Wife - (Reg'n: 0 Class of 0), and Anderson, Robert - Friend. The 'Children' section lists: Allen, Lydia and Allen, Kate - (Yr: 12 House: ...). The 'Contacts' section lists: ...n, Kandice - Contactor. A central yellow box with the text 'Click one of the Add buttons' has arrows pointing to 'Add Parent', 'Add Associate', 'Add Child', and 'Add Contact' buttons. A callout box labeled 'Select a Member' points to the member selection dropdown.

Follow the steps below to start assigning relationships;

- Select a Foundation Member to work with.
- Click the Corresponding Add button to select a member.

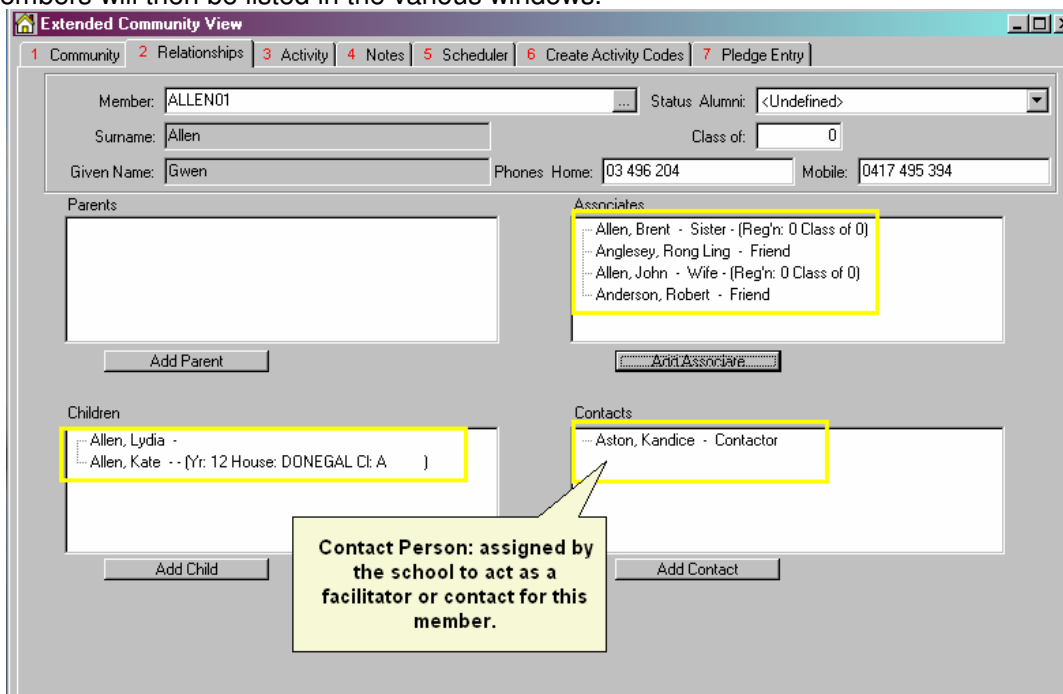
When selecting a member to add they must be available in the database.



Follow the steps below when adding other members to the main member;

1.	Select your relationship to the person.
2.	Select the member from the drop down list.
3.	Select the member's relationship to you.
4.	Click Create Relationship.

The Members will then be listed in the various windows.



Working with Relationships

Once a Relationship has been created you can highlight a member's name and the following options will be displayed:

- **“Add”** another relationship
- **“Remove”** existing relationship
- **“Edit”** relationship description
- **“Show”** selected relationship

Selecting **Show** will bring up the highlighted members details instead of the currently selected member. To bring the previous member back select them from the appropriate Add box and select Show.

The screenshot shows the 'Extended Community View' window with the following details:

- Member:** ALLEN01 (Status: Alumni: <Undefined>)
- Surname:** Allen
- Given Name:** Gwen
- Class of:** 0
- Phones:** Home: 03 496 204, Mobile: 0417 495 394
- Parents:** (Empty list with 'Add Parent' button)
- Children:**
 - Allen, Lydia -
 - Allen, Kate - (Yr: 12 House: DONEGAL Cl: A)
('Add Child' button)
- Associates:**
 - Allen, Brent - Sister - (Reg'n: 0 Class of 0)
 - Anglesey, Rong Ling - Friend
 - Allen, John - Wife - (Reg'n: 0 Class of 0)
 - Anderson, Robert - Friend
- Contacts:**
 - Aston, Kandice - Contactor
('Add Contact' button)

Below the 'Associates' list, a yellow box highlights four buttons: 'Add Associate', 'Remove Associate', 'Edit Rel Desc', and '<--- Show'. An arrow points from the 'Anderson, Robert - Friend' entry to the 'Add Associate' button.

Allocating an Activity to a Member

Path: Community → Extended Community View → Activity

Once the activities have been created they can be added to members.

Extended Community View

1 Community | 2 Relationships | 3 Activity | 4 Notes | 5 Scheduler | 6 Create Activity Codes | 7 Pledge Entry

Member: ALLEN01
Surname: Allen
Givenname: Gwen

Category: ALL

Code >>	Category	Short Comment	Date From >>	Date To >>
Testing	MAILINGS	testing mailing list	23/08/2007	23/08/2007
Wedding Anniversary	GENERAL	Married 1967	11/09/2007	11/09/2007
Tennis	SPORTS	Likes to play Tennis	11/09/2007	11/09/2007

Comment:

Clear Act. | Save Act. F2 | Delete Act. | Clear All F5

To add activities to a member follow the instructions below;

1.	Select a Member
2.	Optional; Select a Category to shorten the Code List.
3.	Select an Activity Code.
4.	Enter a short description.
5.	Tab off the line to save or click Save.

Creating Notes

Path: Community → Extended Community View → Notes

Use the Notes view to record information against a member's record.

The screenshot displays the 'Notes' view in the PCSchool software. At the top, a navigation bar includes tabs for Community, Relationships, Activity, Notes (highlighted), Scheduler, Create Activity Codes, and Pledge Entry. Below the navigation bar, the member information for 'ALLEN01' (Gwen Allen) is shown. A 'Display Order' section allows selection between 'Date' (selected) and 'Category'. A table of notes is visible, with columns for Date, Category, Who, and Note. A 'Maintain Code Files' dialog box is open, showing the 'ALUMNOTE' category selected. The dialog box includes fields for Code Types, Type, Description, and Comment. The 'Code Master File' section shows a table with codes GEN (GENERAL) and LATE (Late Payment). The bottom of the interface features buttons for 'Clear Note', 'Save Note F2', 'Delete Note', and 'Clear All F5'.

To add notes follow the steps below;

1.	Select a Member.
2.	You can select to view the Notes by date or category order.
3.	The date will default – can Edit.
4.	Select the Category.
5.	Who will default to the person logged onto PCSchool.
6.	Enter the Note information.
7.	Tab off the line to Save or click Save.

Scheduled Events and Alerts

Path: Community → Extended Community View → Scheduler

The Scheduler is used to keep a record of future events. If an event is tagged with an Alert you can run the process 'Show Current Alerts' to receive a list of upcoming events. You do not need a Member selected to view the Alerts.

Adding Scheduled Events

You can add scheduled events, if Alert is ticked and a date entered you can view the events alert and receive the alert couple of days in advance.

Date >>	Short Description	Anniversary	Alert	Alert Every			Next Alert...	Finalised
				Days	Months	Years		
29/07/2007	Testing 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	2	0	29/08/2007	<input type="checkbox"/>
27/08/2007	Anniversary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	1	27/08/2008	<input type="checkbox"/>
27/08/2007	Testing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	0	31/08/2007	<input type="checkbox"/>
30/11/2007	Xmas get together	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0	1	30/11/2007	<input type="checkbox"/>
28/08/2007	Fete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10			7/09/2007	<input type="checkbox"/>
2	3	4	5		6		7	8

To add scheduled events follow the steps below;

1.	Select a Member.
2.	Select the Date of the Event. If you wish to receive an alert for this Event the same date must also be entered in Next Alert.
3.	Enter your description for the Event.
4.	If this is Event is an anniversary tick the Anniversary box.
5.	Optional; if you want receive an Alert prior to the Event, Tick the Alert box.
6.	You have the option of selecting the Time Periods between Alerts, select either; <ul style="list-style-type: none"> • Days; enter the number of Days between Alerts. • Months: enter the number of Months between Alerts. • Years: enter the number of Years between Alerts.
7.	If you tab to Next Alert it will default to the Time Period of; Days, Months or Years selected for the Alert. This date can be edited.
8.	If the Event is Recalculated through the process below a tick will be placed in this box.
9.	Tab off the line to Save or click Save on the bottom toolbar.

Showing Scheduled Events

When you View the Scheduled Events you can tag them as finished or update them to the next schedule time frame.

The screenshot shows the 'Schedule Alerts' window. The main table has columns: Member, Alert, Short Description, Date Next Trigger >>, and Finalise. It lists two alerts for member ALLEN01: 'Testing' (triggering on 28/08/2007) and 'Testing 2' (triggering on 29/08/2007). Below the table is a 'Comment' field and buttons for 'Delete Schedule', 'Recalculate Alert Dates', 'Exit', and 'Save'. At the bottom is a 'Pledge Plan' table with columns: Code >>, Date >>, Category >>, Action, and Target (\$). On the right, a 'Show Current Alerts' panel shows a list of dates with checkboxes for 'Next Alert' and 'Finalised'.

Member	Alert	Short Description	Date Next Trigger >>	Finalise
ALLEN01	<input checked="" type="checkbox"/>	Testing	28/08/2007	<input type="checkbox"/>
ALLEN01	<input checked="" type="checkbox"/>	Testing 2	29/08/2007	<input type="checkbox"/>

Code >>	Date >>	Category >>	Action	Target (\$)

Next Alert	Finalised
29/08/2007	<input type="checkbox"/>
27/08/2008	<input type="checkbox"/>
28/08/2007	<input type="checkbox"/>

To update the scheduled Events follow the steps below.

1.	The date of the next scheduled Event.
2.	Click the button to show the Current Scheduled Alerts.
3.	Schedule window for today's Alerts.
4.	This Date will update once the Dates have been Recalculated.
5.	Place a tick in this box if the Event is finalised. You will receive no more Alerts if ticked.
6.	Click this button to update the dates of the Alerts to the next scheduled Event.

Creating a Program Plan and Pledge

Path: Community → Pledging

The “Pledging View” allows you to create and manage foundation groups and pledges.

Create the Program

A Program must be created and a Plan added to add to members.

The screenshot shows the 'Foundation Pledge View' window with the 'Pledge Details' tab selected. The 'Code' field is 'TESTING', 'Name' is 'Chris Testing this Module', 'Ledger Account' is 'COLLEGE', 'Entity' is 'Your School Name', and 'Account' is '390'. The 'Save Program' button is highlighted. The 'Program Detail' section shows 'Total Promised', 'Total Given', 'Target', and 'Target To Date' all at 0.00. The 'Program Plan' section contains an empty table with columns 'Date >>', 'Category >>', 'Action', and 'Target (\$)'. At the bottom, the 'Clear' button is highlighted.

To create a Program follow the steps below;

1.	Click Clear.
2.	Enter the new unique Code.
3.	Enter a description for the Code.
4.	Select the Entity to be used.
5.	Select the Ledger Code you will be using for this Pledge.
6.	Click Save Program to Save the Code.

Adding the Program Plan Details

Once the Plan has been saved, define milestones for the selected Program.

The screenshot shows the 'Alumni Pledge View' window with two tabs: 'Program Control File' and 'Pledge Details'. The 'Pledge Details' tab is active.

Program Detail

Code: ARTROOM
 Name: Art Room Renovations
 Ledger Account: COLLEGE Play School
 Account: 390 0 Other Income - Support Groups

Program Detail summary:

Total Promised:	1000.00
Total Target amount:	400.00
Target:	11000.00
Target To Date:	0.00

Program Plan:

Date >>	Category...	Action	Target for Action	Target (\$)
31/08/2004	FUNCTION	Market Stall		1000.00
30/10/2004	REMINDER	Send Pledge reminders		0.00
31/05/2005	TARGET	Target amount to be raised by this date		10000.00

Buttons: Save Program, Save, Clear, Delete Selected Plan.

Annotations:

- Select Category (Preset within program) points to the 'Category...' column header.
- Describe action required points to the 'Action' column.
- Target for Action points to the 'Target for Action' column.

To enter milestones follow the steps below;

•	Enter a Date for the Milestone.
•	Select the Category appertaining to this Milestone.
•	Enter your description.
•	Enter the estimated Target.
•	Target; Calculates the Target Amounts

Pledging Details – Volume Allocation

The Pledge Details view allows you to create and manage Pledging Groups, you can select Affiliates from the Associate Relationships to add to the Group and create Payment Plans for the Group.

Step 1 Create the Giving Plan.

Foundation Pledge View

Program Control File | Pledge Details

Giving#: 1

Plan Code: TESTING 2 Chris Testing this Module

Director: ALLEN01 3

Group Name: Allen Family and Friends 4

Comment: 5

Save Clear Delete

Summary:

6 Promised Total: 500.00

Given Total: 0.00

Overdue To Date: 0.00

Pledge Members / Affiliates:

Member >>	Date joined >>	Status
ALLEN01	24/08/2007	
ALLEN02		A
ALLEN03		A
ANDERSON R		A
ANGLE01		A
BELL02	24/08/2007	A

Select affiliates from defined relations

Giving Plan:

Date >>	Promise	Given	Balance	Status
24/08/2007	50.00	0.00	50.00	
24/09/2007	50.00	0.00	50.00	
24/10/2007	50.00	0.00	50.00	
24/11/2007	50.00	0.00	50.00	
24/12/2007	50.00	0.00	50.00	
24/01/2008	50.00	0.00	50.00	
24/02/2008	50.00	0.00	50.00	

Auto Create Payment Plan Delete Payment Plan

To create a giving plan follow the steps below;

1.	Click new to create a new Pledge or select an existing Pledge.
2.	Select the Plan this group will be pledging to.
3.	The Director will default from the Main Member selected.
4.	Optional; enter a Name for the Group.
5.	Optional; freeform for entering your comments.
6.	Provides a running total for this Pledge Plan.

Step 2 Add the main Member and any Associates.

The screenshot shows the 'Foundation Pledge View' window. The 'Pledge Details' tab is active. Fields include: Giving# (4), Plan Code (TESTING), Director (ALLEN01), Group Name (Allen Family and Friends), and Comment. Financial totals show Promised Total: 500.00 and Given Total: 0.00. A 'Save' button is present. Below the details is a table for 'Pledge Members / Affiliates'.

Member >>	Date joined >>	Status
ALLEN01	24/08/2007	
ALLEN02		A
ALLEN03		A
ANDERSON R		A
ANGLE01		A
BELL02	24/08/2007	A

Below the table is a button labeled 'Select affiliates from defined relations'. An arrow points from this button to the 'Select Related Members' dialog box. The dialog has two panes: 'Related Member List' and 'Selected Members'. The 'Related Member List' contains: Allen, Brent - Sister; Anglesey, Rong Ling - Friend; Allen, John - Wife; and Anderson, Robert - Friend. The 'Selected Members' pane contains: Allen, John - Sister; Allen, Brent - Sister; Anderson, Robert - Sister; Anglesey, Rong Ling - Sister; and Bell, Gary - Sister. A 'Finish' button is at the bottom right of the dialog.

To add members follow the steps below;

1.	Select the Main Member who will become the Director.
2.	Click to open the Affiliates window.
3.	Double click to Add Affiliates.
4.	This is the list of members for this Pledge.
5.	Click Finish, the Affiliates will have a Status of A.
6.	Other Members can be added to this Pledge.

Step 3 Create a Pledge Plan

The screenshot shows the 'Foundation Pledge View' window with the 'Pledge Details' tab selected. The main form contains fields for Giving#, Plan Code, Director, Group Name, and Comment. To the right, summary statistics are displayed: Promised Total (500.00), Given Total (0.00), and Overdue To Date (0.00). Below the main form are 'Save', 'Clear', and 'Delete' buttons. An 'Auto Create Payment Plan' dialog box is open in the foreground, showing fields for Payment Freq (Monthly), Payment Start Date (24 Aug. 2007), Payment Amount (50.00), and Total to Pay (500.00). It has 'Auto Create Payment Plan' and 'Close' buttons. In the background, a 'Giving Plan' table is visible, listing dates from 24/08/2007 to 24/02/2008 with columns for Promise, Given, Balance, and Status. A yellow box highlights the 'Auto Create Payment Plan' button in the dialog, and another yellow box highlights the 'Auto Create Payment Plan' button in the main window's bottom bar.

Auto Create Payment Plan

Payment Freq: Monthly **2**

Payment Start Date: 24 Aug. 2007 **3**

Payment Amount: **4** 50.00

Total to Pay: **5** 500.00

6 Auto Create Payment Plan Close

1 Auto Create Payment Plan Delete Payment Plan

7

8

Date >>	Promise	Given	Balance	Status
24/08/2007	50.00	0.00	50.00	
24/09/2007	50.00	0.00	50.00	
24/10/2007	50.00	0.00	50.00	
24/11/2007	50.00	0.00	50.00	
24/12/2007	50.00	0.00	50.00	
24/01/2008	50.00	0.00	50.00	
24/02/2008	50.00	0.00	50.00	

To create a pledge for the selected members follow the steps below;

1.	Click to Create a Payment Plan.
2.	Select the Frequency of the Payment.
3.	Select the Date for the first Payment.
4.	Enter the Amount for each instalment this group will be paying.
5.	Enter the Total Amount that this group will be paying.
6.	Click to create the Payment Plan.
7.	Payment will be listed.
8.	Shows the Total amount pledged by this group.

Pledge for Individual Members

Path: Community → Extended Community View → Pledge Entry

Single Pledge

Once Programs are created individual members can be tied to the program via Pledge Entry.

1 Community 2 Relationships 3 Activity 4 Notes 5 Scheduler 6 Create Activity Codes 7 Pledge Entry

Member: BAARS01
Surname: Baars
Givenname: Graham

Code >>	Name	Date >>	Promise	Given	Balance	Status
SPORTS	New Sports Centre	30/10/2007	500.00	0.00	500.00	

Plan Code: SPORTS

Add Single Pledge **Add Multi - Payment Plan**

Date: 30 Oct, 2007
Amount: 500.00

Auto Create Payment Plan

Add Pledge

To add a single pledge to an individual member follow the steps below;

1.	Select a Member.
2.	Select a Plan Code.
3.	Select a date for the Payment.
4.	Enter the Amount.
5.	Click Add Pledge.
6.	The single Pledge will be created.

Add a Multi Payment Plan

Multi payment plans can be created also.

Extended Community View

1 Community 2 Relationships 3 Activity 4 Notes 5 Scheduler 6 Create Activity Codes 7 Pledge Entry

Member: BELL05

Sum

Given

Code: SPOR

Payment Freq: Bi Monthly

Payment Start Date: 30 Sep. 2007

Payment Amount: 100.00

Total to Pay: 1000.00

Auto Create Payment Plan

Close

Plan Code: SPORTS

Add Single Pledge

Date: / /

Amount: 0.00

Add Pledge

Add Multi - Payment Plan

Auto Create Payment Plan

Date >>	Promise	Given	Balance	Status
30/09/2007	100.00	0.00	100.00	
30/11/2007	100.00	0.00	100.00	
30/01/2008	100.00	0.00	100.00	
30/03/2008	100.00	0.00	100.00	
30/05/2008	100.00	0.00	100.00	
30/07/2008	100.00	0.00	100.00	

To add a multi payment plan to an individual member follow the steps below;

1.	Select a Member.
2.	Select the Plan Code.
3.	Click to create.
4.	Select the Payment frequency.
5.	Select the start date.
6.	Enter the Amount for each payment.
7.	Enter the Total of the Pledge.
8.	Click to Create the Payments.
9.	Lists the payments and dates.

Group Processing

Path: Community → Group Processing Inc Mail Merge

Group Processing allows group allocation to tagged members with various Foundation attributes. Within this view you can create groups by tagging via selected Criteria. Once the groups are created you can create by groups; a Mail Merge document for Word, send Emails, Allocate Activities, Schedule Alerts and add Notes.

This view is divided into two sections “Criteria” and “Allocation”. Each section has various options to define the allocation required.

- Criteria; is used for creating Groups of Members, you can use any of the following methods;
 - Selection Criteria
 - Giving History
 - Group Tag
 - By Activity
 - Tag Alumni
- Allocation; is used for working with the created groups in;
 - Mail Merge
 - Schedules and Alerts
 - Notes
 - Activities
 - Exporting (Emerge)

Creating a Group

Groups must be created before allocating Activities.

Selection Criteria

You can select members by using various filters.

Select by any or all of the following;

1.	Member Code	Select all the members within a Code range.
2.	Enrolled	Select all the members who Enrolled within a Date range.
3.	Departed	Select all the members who Departed within a Date range.
4.	Status	Select all the members with a selected Status Code range.
5.	Class of	Select all the members who belong to a Class of (Enter Year).
6.	Order Records By	Check the appropriate radio box for the output order.
7.	Check Boxes	You can select to view or not view various information.

Giving History

You can select which Pledge Plans you wish to tag members for. You also have several optional filters for further defining your selection criteria.

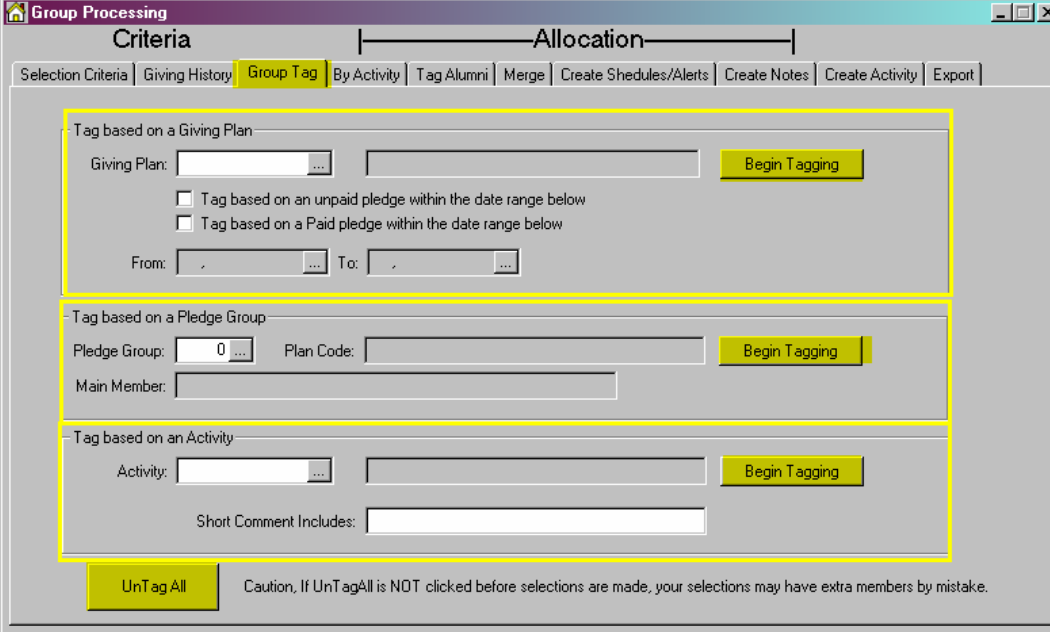
The screenshot shows the 'Group Processing' window with the 'Criteria' tab selected. The window contains a list of Pledge Plans on the left (1) and various filter options on the right. The filters include date ranges for Pledge Date (2), Date Joined (3), Date Paid (4), Promise Total (5), and Given Total (6). There are also checkboxes for 'Tag if not fully paid' (8) and 'Tag Directors Only' (8). A 'Consolidate by' section (7) has radio buttons for 'Giving Plan' and 'Member'. At the bottom, there is a 'UnTag All' button and a 'Tag Based on Selection' button (9).

Select one Pledge Plan or several, all other filters are optional;

1.	Pledge Plans	Double Click to remove – Refresh Table to start again.
2.	Pledge Date	Select members who Pledged within a date range.
3.	Date Joined	Select members who Joined within a date range.
4.	Date Paid	Select members who Paid within a date range.
5.	Promised Total	Select members who Promised a \$ value within a range.
6.	Given Totals	Select members who have Given a \$ value within a range.
7.	Consolidate By	Select to Consolidate by the Giving Plans or by Member Codes.
8.	Radio Boxes	Tag as required.
9.	Tag Based on Selection	Click to create the group, you will be asked to Untag All first within this process, answer yes to continue.

Group Tag

Within this View you can create groups by; Giving Plan, Pledge Group or Activity.



Group Processing

Criteria | **Allocation**

Selection Criteria | Giving History | **Group Tag** | By Activity | Tag Alumni | Merge | Create Schedules/Alerts | Create Notes | Create Activity | Export

Tag based on a Giving Plan

Giving Plan: **Begin Tagging**

☐ Tag based on an unpaid pledge within the date range below

☐ Tag based on a Paid pledge within the date range below

From: To:

Tag based on a Pledge Group

Pledge Group: Plan Code: **Begin Tagging**

Main Member:

Tag based on an Activity

Activity: **Begin Tagging**

Short Comment Includes:

UnTag All Caution, If UnTagAll is NOT clicked before selections are made, your selections may have extra members by mistake.

Select one of the options below for creating a Group;

•	Giving Plan	Created in Pledging – Program Control Files
•	Pledge Group	Created in Pledging – Pledge Details
•	Activity	Created in Extended Community View – Create Activity Codes
•	UnTag All	Once the option is selected click UnTag All to remove any tags already in place.
•	Begin Tagging	Click to create the new group.

By Activity

Groups can also be created by Activities that have already been allocated to them.

The screenshot shows the 'Group Processing' window with the 'By Activity' tab selected. The 'Criteria' section on the left has a 'Category' dropdown set to 'MAILINGS'. Below it, the 'Available Activities' list shows 'List A', 'List B', 'List C', 'List D', 'List E', and 'Testing' (highlighted). The 'Allocation' section on the right has a 'Tag if one of' list with '... Testing'. To the right of this is a 'Base selection on below' section with checkboxes for 'Student', 'Care Giver', 'Teacher', 'Alumni', and 'Foundation' (checked). A 'Begin Tagging' button is at the bottom right.

To create a list from Activities use the information below;

•	Select a Category.
•	Highlight an Activity.
•	Click the Arrow buttons to add or remove the highlighted activity.
•	Use the radio buttons to further filter the members for tagging.
•	Click Begin Tagging – you will be asked to untag all before starting, answer yes.

Tag Alumni

Within this view you can tag individual members who may or may not be connected in other ways.

Member Code	Mailing Title	Enrolled	Departed	Status	Class Of	Newsletter	Tag
ALLEN01	Mrs G Allen				0		<input checked="" type="checkbox"/>
ALLEN02	Mr J Allen				0		<input checked="" type="checkbox"/>
ALLEN03	Mr BJ & Mrs RF Allen				0		<input checked="" type="checkbox"/>
ANDERSON R					0		<input type="checkbox"/>
ANGLE01	Mrs KD Anglesey				0		<input checked="" type="checkbox"/>
ARORA R					0		<input type="checkbox"/>
ARORA01	Dr V & Dr P Arora				0		<input checked="" type="checkbox"/>
ASTON01	Mrs P C Aston				0		<input type="checkbox"/>
BAARS01	Mr P & Mrs G Baars				0		<input type="checkbox"/>
BAE01	Mr Tony Ahn				0		<input type="checkbox"/>
BAYLY01	Mr GD & Mrs JE Bayly				0		<input type="checkbox"/>
BEAVE01	Mrs D M Beaver				0		<input type="checkbox"/>
BELL H L	Miss Hariette Bell	01/02/2003	03/12/2004		2004		<input type="checkbox"/>
BELL02	Mr GA & Mrs RJ Bell				0		<input type="checkbox"/>
BELL05	Mr P & G Bellamy				0		<input type="checkbox"/>
BENNE03	Mr P & Mrs K Bennett				0		<input type="checkbox"/>
BILB01	Mr S & Mrs R Bilby				0		<input type="checkbox"/>
BILBY01	Mr P B & Mrs F M Bilby				0		<input type="checkbox"/>
BIRD02	Dr B M & Mrs Y J Bird				0		<input type="checkbox"/>

UnTag All Tag All

Tagging individual members;

- Click Untag All prior to starting to clear any previous tags.
- Tag Members to be included in the Group.

Allocating information to Tagged Members

Once the selection of members has been made you can allocate activities to the tagged members.

You may wish to create a:

- Word Merge document containing members' details and information
- Schedule an alert and apply it to all members of a foundation plan
- Create a note to attach to tagged members
- Create an activity to be applied to all tagged members
- Export the tagged members to Emerge for emailing to those with email addresses.

Merge

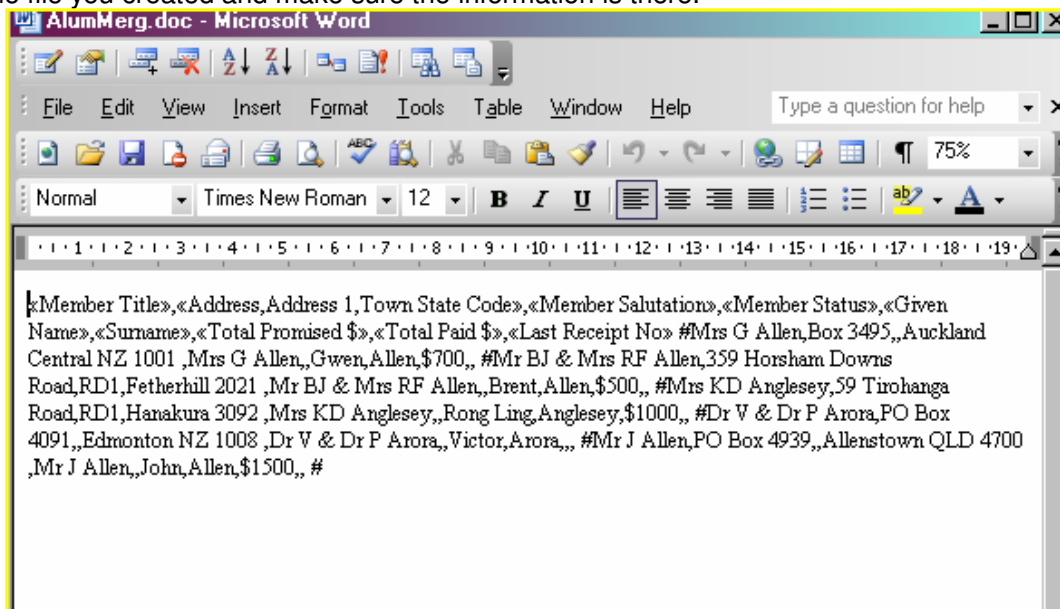
The Merge view can be used with Word to create your mail merge documents.

The screenshot shows the 'Group Processing' window with the 'Allocation' tab selected. The 'Merge' sub-tab is active. The interface includes three lists: 'Available Fields' (with a 'Select All' button), 'Selected Fields' (with a 'Deselect All' button), and 'Plan Codes To Display' (with a 'Refresh Table' button). At the bottom, there are settings for the export file (File Name, File Type, Apply combo extension), date restrictions (Restrict Totals to Pledge Date From/To), a checkbox for 'Base Totals on Directors Only', and 'Create' and 'Exit View' buttons. Numbered callouts 1 through 10 point to these specific elements.

To create a document for sending to word follow the steps below;

1.	Double click to add Available Fields .
2.	Click Select All if you want to have all Available Fields.
3.	Double click to remove Selected Fields .
4.	Click Deselect All to remove all Selected Fields.
5.	Double click to remove Plan Codes .
6.	Click Refresh Table to bring in all Plan Codes.
7.	Click on the selection box and save the file where you will be able to find it.
8.	Optional; Select the dates From and To.
9.	Tick if this is to be created for the Directors (Main Member) only.
10.	Click Create to begin creating the document.

Find the file you created and make sure the information is there.



Word Merge

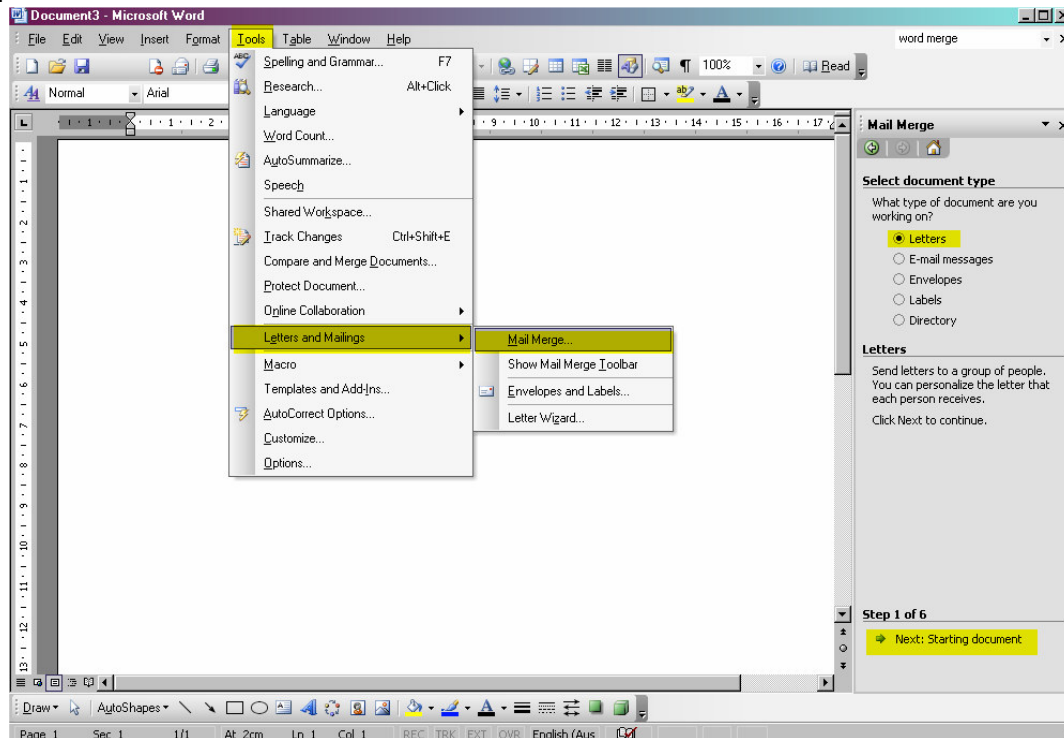
It is not the intention of PCSchool to give instructions on any Program other than PCSchool, the following information is an brief overview only of how to complete the Merge. For further information refer to Word Help.

Open a New Word document.

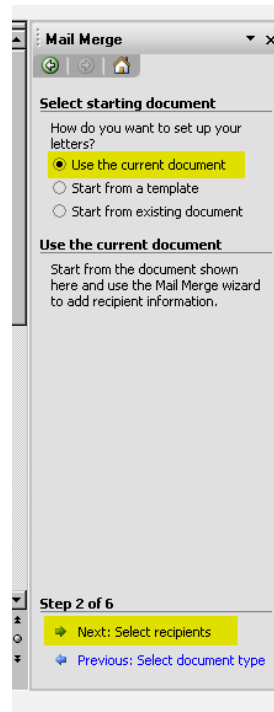
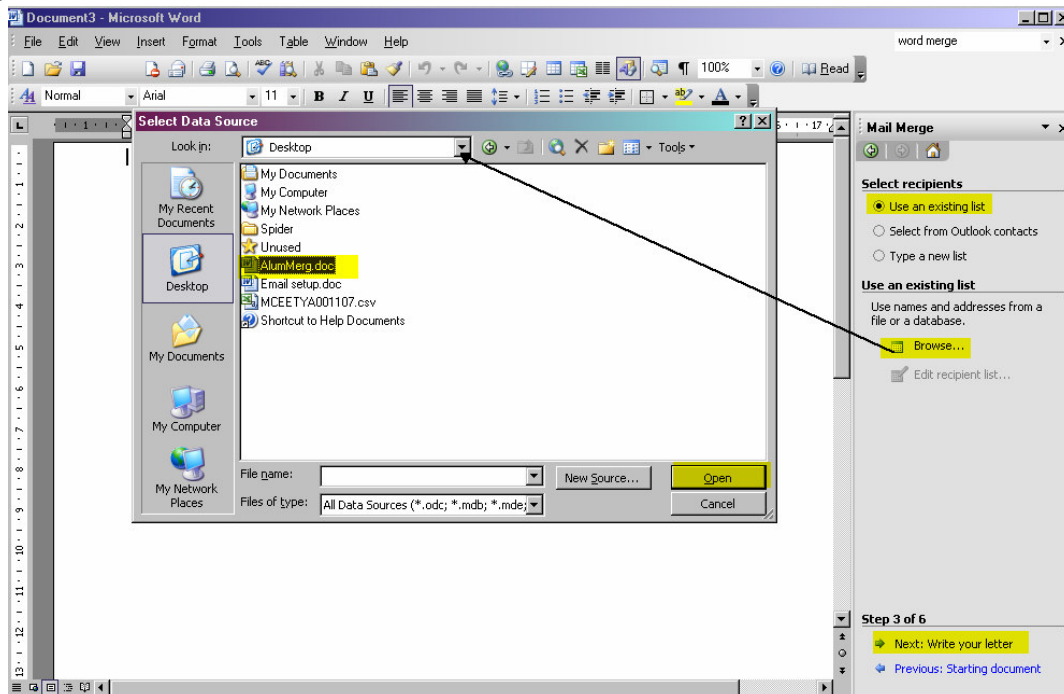
Path: Word → Tools → Letters and Mailing → Mail Merge

Word has 6 steps for the merge with various selections. The selections here are to create a simple document.

Step 1



- | | |
|---|----------------|
| • | Select Letters |
| • | Click Next |

Step 2**Step 3-1**

- Find the document and Open it.

Step 3-2

This will initiate the window below.

Header Record Delimiters

Data fields must be separated from each other by a character called a field delimiter. Similarly, data records must be separated by a record delimiter. Use the lists below to select the appropriate delimiter.

Field delimiter: ,

Record delimiter: #

Preview:

«Member Title»,«Address,Address-1,Town- State- Code»,«Member-Salutation»,«Member-Status»,«Given- Name»,«Surname»,«Total-Promised:\$»,«Total-Paid- \$»,«Last-Receipt-No»: #Mrs-G-Allen-Box-3495..Auckland..

OK Cancel

- Select the comma as a Field Delimiter.
- Select the # as a Record Delimiter.
- Click OK.

Step3-3

This will initiate the window below.

Mail Merge Recipients

To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge.

List of recipients:

	Surname	Given_Name	Address	Member_Title	Address_1
<input checked="" type="checkbox"/>	Allen	Gwen	Box 3495	Mrs G Allen	
<input checked="" type="checkbox"/>	Allen	Brent	359 Horsha...	Mr BJ & Mrs RF Allen	RD1
<input checked="" type="checkbox"/>	Anglesey	Rong Ling	59 Tirohang...	Mrs KD Anglesey	RD1
<input checked="" type="checkbox"/>	Arora	Victor	PO Box 4091	Dr V & Dr P Arora	
<input checked="" type="checkbox"/>	Allen	John	PO Box 4939	Mr J Allen	

Select All Clear All Refresh

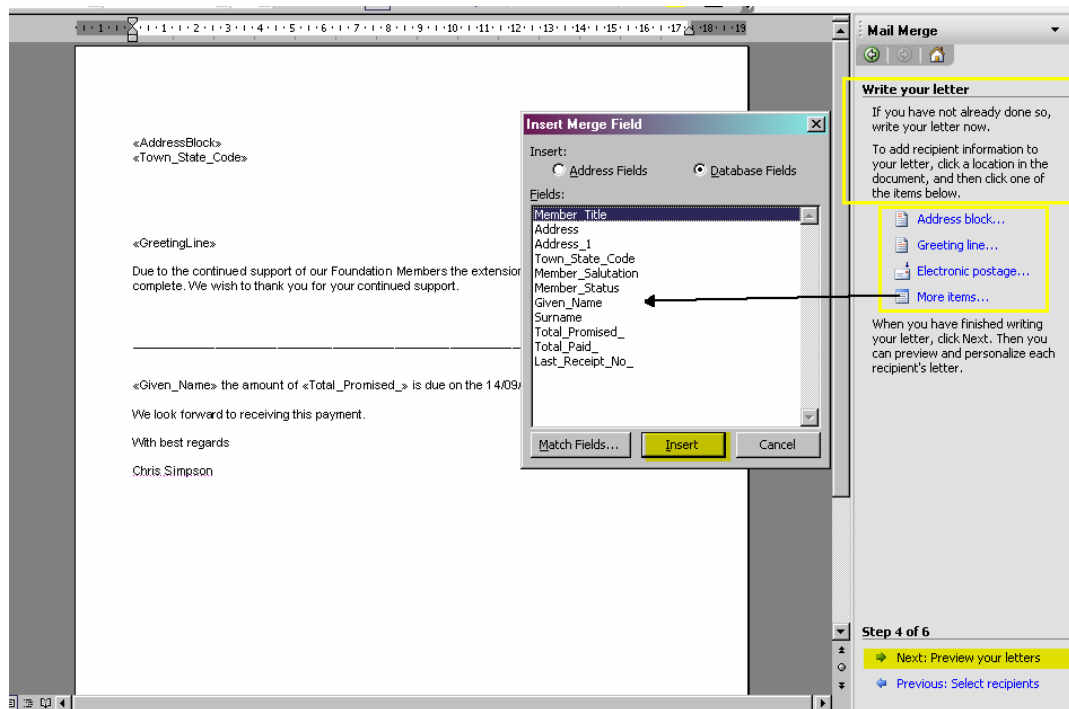
Find... Edit... Validate

OK

- | | |
|---|---------------------------------------|
| • | When finished in this window click OK |
| • | Click on next in the Word document. |

Step 4

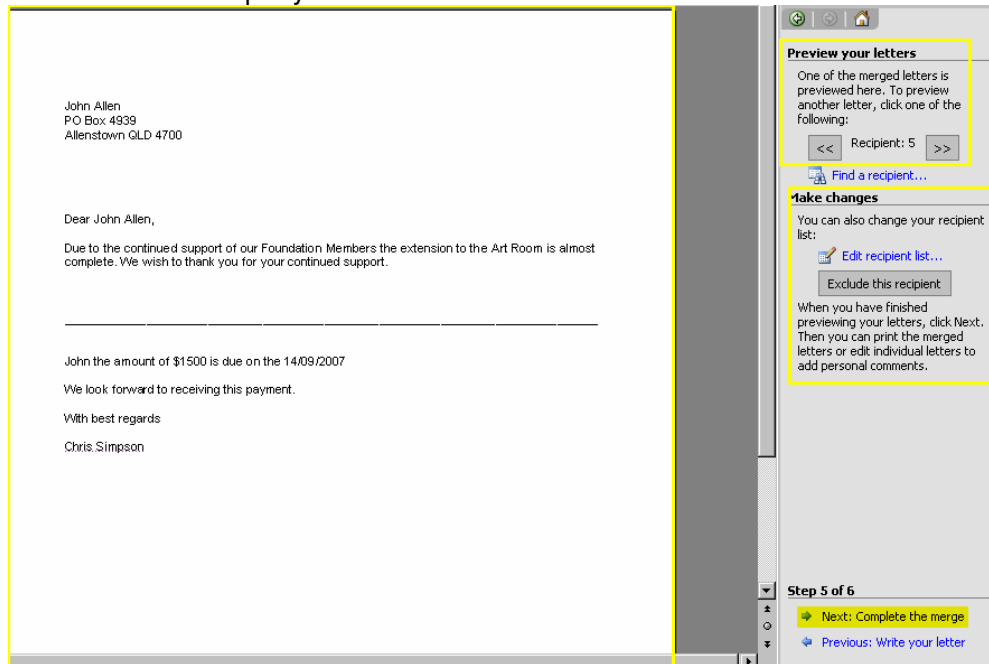
Read the instructions for writing your letter.



- Once the letter is complete click Next.

Step 5

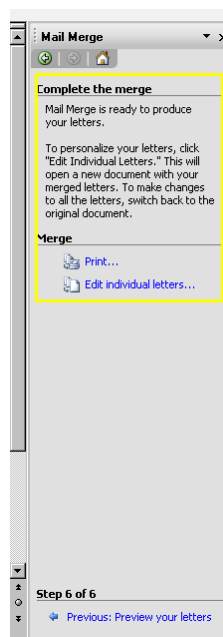
The details will be filled in as per your selection.



•	This is a preview of the letter if any information is incorrect use the Previous button to rectify.
•	Recipients can be removed from the Merge document.
•	When finished click OK.

Step 6

You can print or edit the letters in this window.



For further information on Word Mail Merge please read Word Help. The above Word Merge Help was created from reading Word Help.

Create Schedules and Alerts

This duplicates the features of the Schedules and Alerts in the Extended Community View except this view will add the Alert by volume to tagged members.

To create Schedules and Alerts follow the steps below;

1.	Select the Date for the Event.
2.	Enter a short description of the Event.
3.	If this is an Anniversary check the appropriate box.
4.	If this is an Alert Check the Box to activate the Alert Options.
5.	Optional; if the alert is to be repeated enter the Time Period.
6.	Entering the date of the Event will trigger as Alert prior to this date.
7.	Optional: Freeform area for your comment.
8.	Tick if you will not be working with the same group.
9.	Click Begin to start the process.

Create Notes

This duplicates the features of Create Notes in the Extended Community View except this view will add the Note by volume to the tagged members.

The screenshot shows the 'Group Processing' window with the 'Create Notes' tab selected. The window has a menu bar with 'Criteria' and 'Allocation'. Below the menu bar are buttons: 'Selection Criteria', 'Giving History', 'Group Tag', 'By Activity', 'Tag Alumni', 'Merge', 'Create Schedules/Alerts', 'Create Notes' (highlighted), 'Create Activity', and 'Export'. The main area contains fields for 'Date' (30/08/2007), 'Category' (Late Payment), 'Note' (Payment Overdue), 'Who:' (empty), and a 'Comment' text area. At the bottom are a 'Begin' button and a checkbox 'UnTag when done'.

To add a note follow the steps below;

1.	Select a Date.
2.	Select a Category.
3.	Enter a Description.
4.	Optional; Enter a comment.
5.	Check if you will not be working the same Members.
6.	Click Begin.

Create Activity

This duplicates the features of the Activity tab in the Extended Community View except this view will add the Activity by volume to tagged members.

The screenshot shows the 'Group Processing' window with the 'Criteria' tab selected. The window contains the following elements:

- Category:** MAILINGS (1)
- Code:** Testing (2)
- Short Comment:** Chris Testing the field (3)
- Date From:** 30/08/2007 (4)
- Date To:** 6/09/2007 (5)
- Comment:** (6)
- Buttons:** (8) Begin, (7) ☐ UnTag when done

To add an activity follow the steps below;

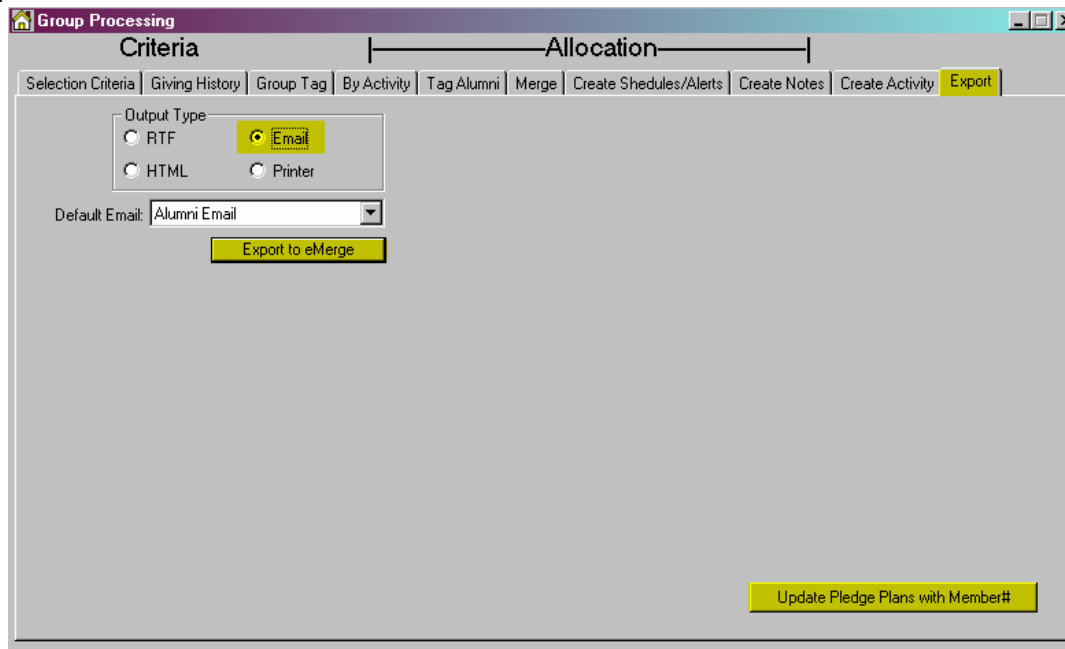
1.	Select a Category
2.	Select an Activity Code.
3.	Enter a Description.
4.	Select a Date from.
5.	Select a Date to.
6.	Optional; Enter a comment.
7.	Tick if you will not be working with this group again.
8.	Click Begin.

Export

Providing email addresses are entered you can use emails for keeping in touch with your tagged Members. The Member# is the common link with the emerge.

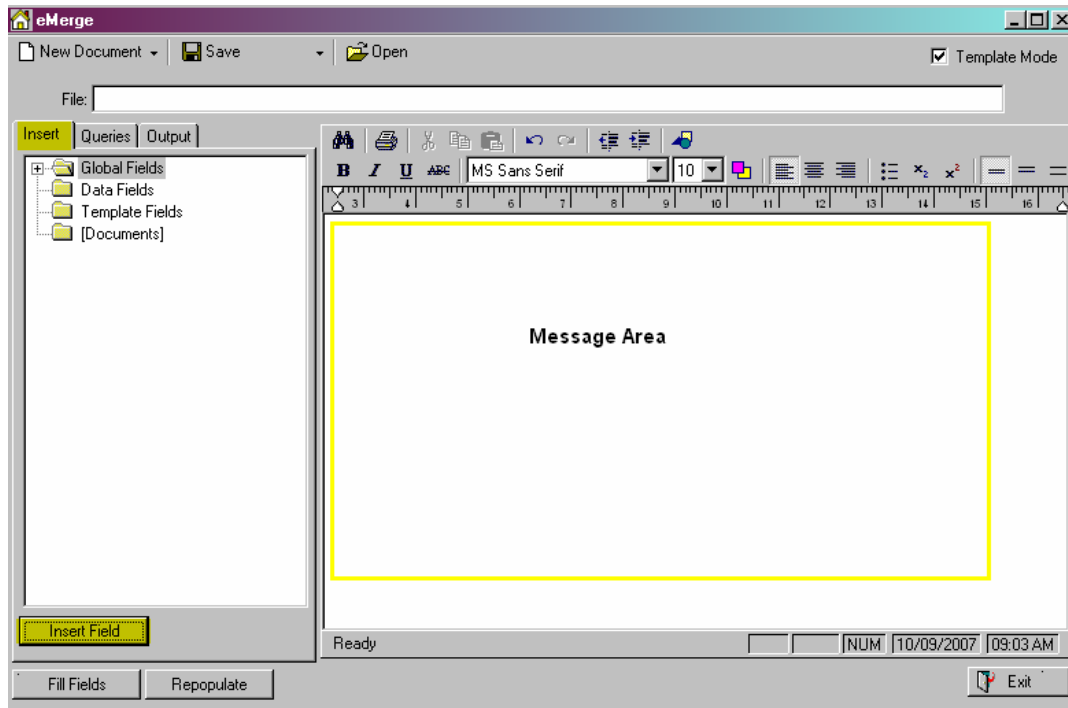
Follow the 7 Steps to crate emails.

Step 1



To export the tagged members to and email document follow the steps below;

•	Click Update Pledge Plans with Member#.
•	Select the Output Type of Email.
•	Click Export to Emerge.

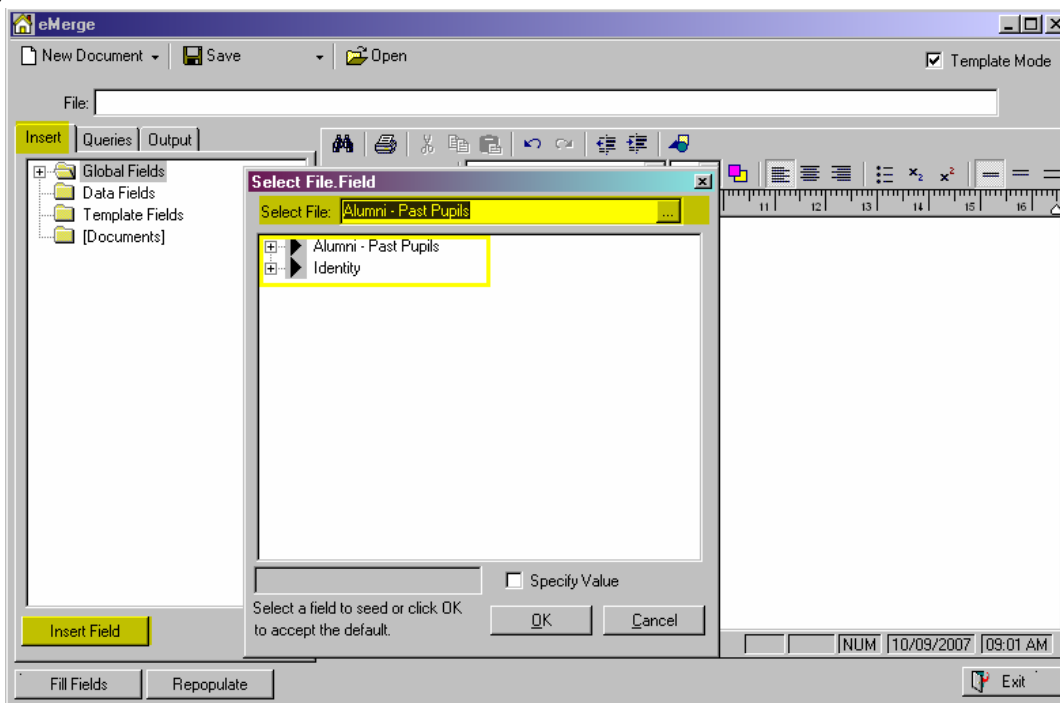
Step 2

Follow the steps below to start creating the document;

- Go to the Insert tab.
- Click inside the Message Area and the place where the first line of the message is to start.
- Click on Insert Field.

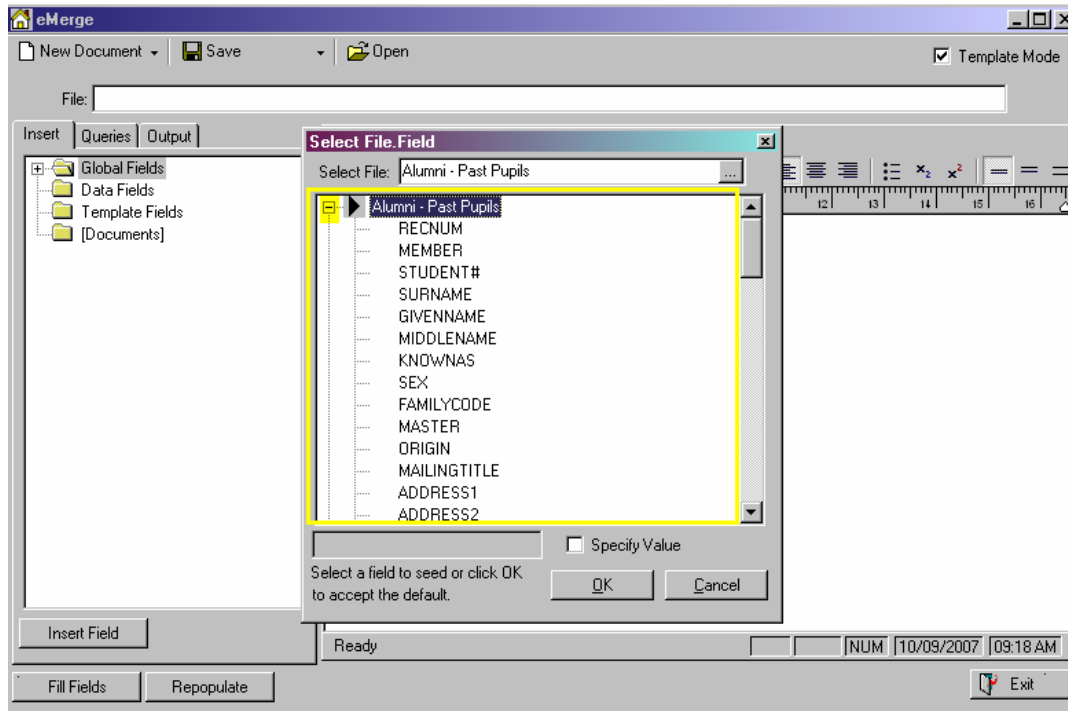
When **selecting the main file** for emerge you need to know what information you are trying to send. If it just a letter then File 60 – Alumni Past Pupil will give you the address details if you are looking to include other information you may need to search the files from 301 to 310. You must have a Member# or Student # in the list for recognition.

Step 3



To view the available fields follow the steps below;

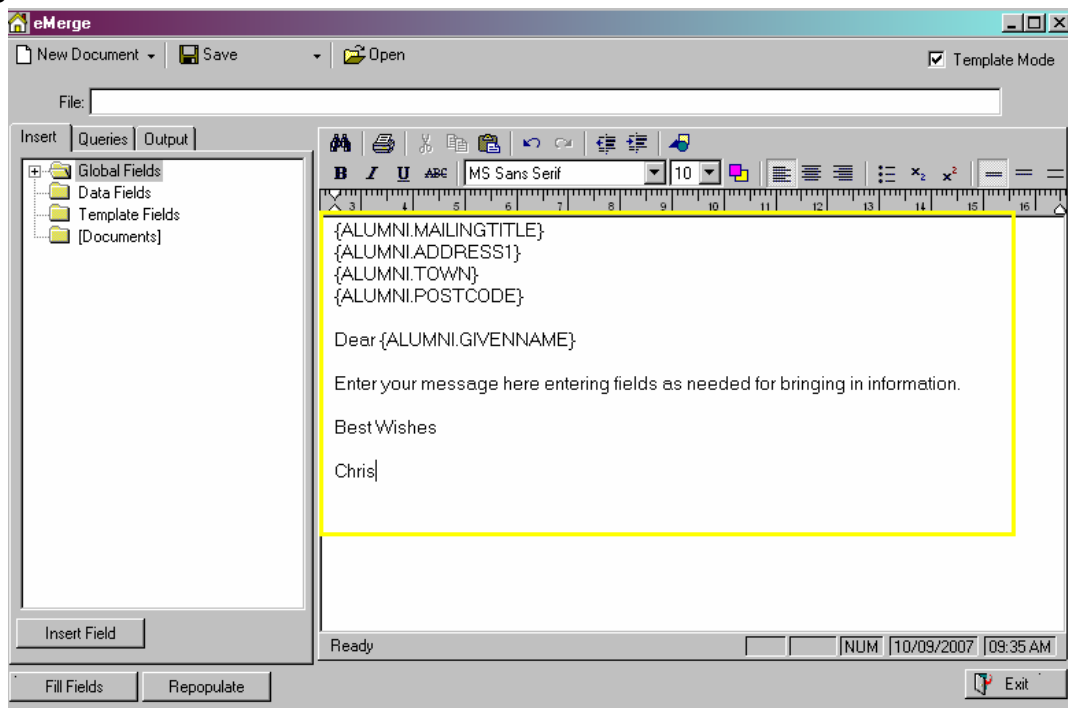
- | | |
|---|---|
| • | Select the appropriate file. |
| • | Click on the + to expand the information. |

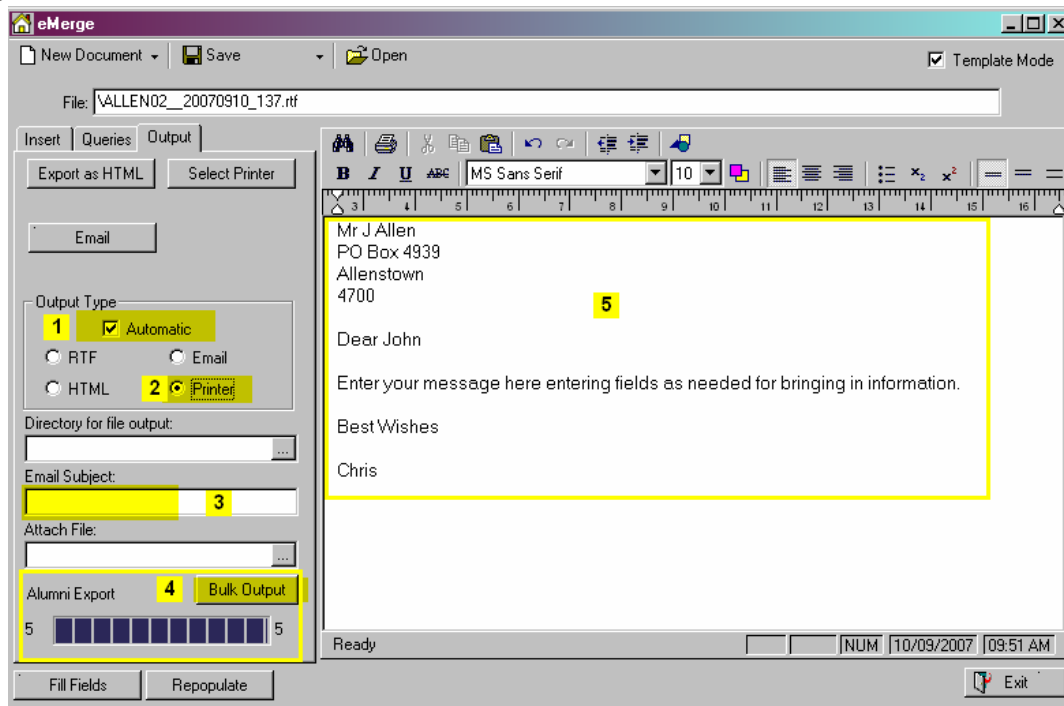
Step 4

You must select each field then re-click the space to enter the next line;

- Highlight a field and click OK to place in the message.
- In the Message area go the next place where you want information.
- Go back to Insert Field and select another field for entry.

Continue writing your email and entering the appropriate fields.

Step 5

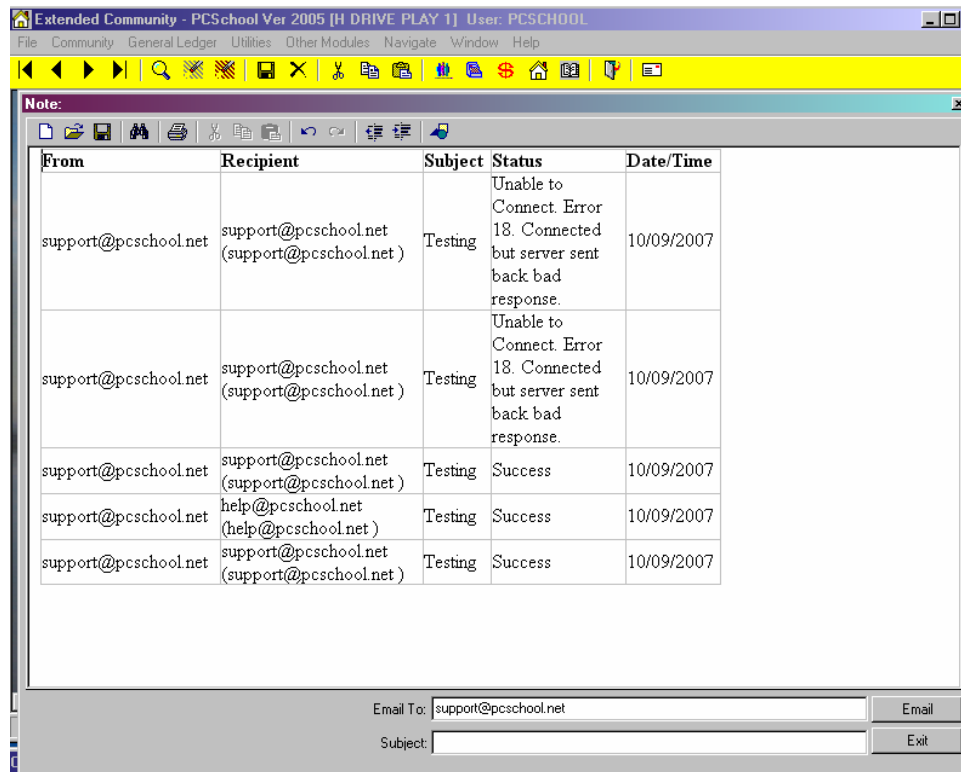
Step 6

To create the emails follow the steps below;

1.	Leave the Tick in Automatic.
2.	Select printer. This will allow all emails to be sent and will print a copy for any member who has no email entered.
3.	Enter a Subject for the Emails.
4.	Click Bulk output to populate the fields and send the emails.
5.	The email will be filled in for each member, and any members without emails will be printed for posting.

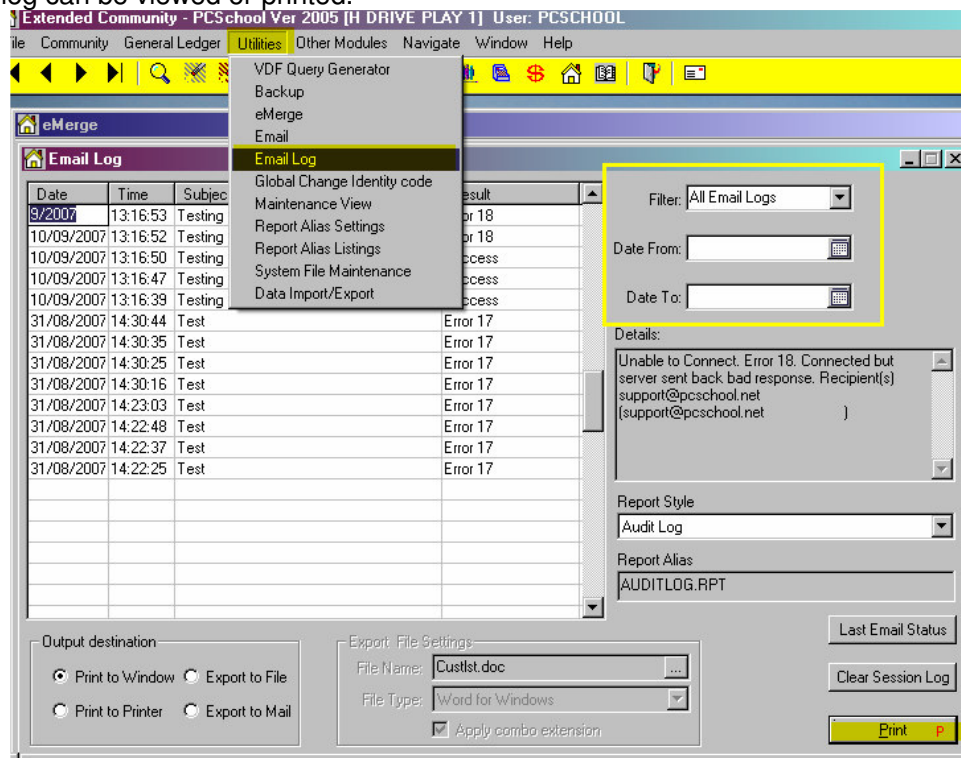
Once the emails have been sent you will receive a list of successful emails and an Email Log can be viewed or printed.

Step 7



Path: Utilities → Email Log

The email log can be viewed or printed.



Receipting in the Foundation Module.

In order to receipt to the foundation a pledge must exist within the foundation. To create a receipt for the pledged amount, follow the instruction in the PCSchool Help Files under Debtor View.

The only variation to these instructions is entering the Foundation pledge receipt details in the foundation tab page.

Receipt Entry

Batch No: 13 Date: Mon - Sep 10, 2007 Pd: 5 May 2005 Def. Bank: 1 AutoLoad

Desc: Foundation Receipting Finalised No: 642278

Total \$0.00 UnApplied: \$0.00 Journals: 0.00 School Working Account

Rec No	Date >>	Famkey >>	From whom	Purpose of Payment	Amount	Unapp...	Sub \$	Journal
0			Click New Receipt to Create	System Line - Do not use	0.00	0.00	0.00	0.00
195	Sep 10, 2007		Gwen Allen	Foundation Receipting	0.00	0.00	0.00	0.00

3 APPLY TO: Sundry 4 Holding/Home Stay Dep. 5 Ledger 6 Debtors 7 Voluntary 8 Foundation

Id >>	Account name	Amount	By...	From	Bank...	Town >>	Card number	Ref Desc
1	School Working Account	100.00	G	Gwen Allen				

Save Deposit Sub Deposit Clear Deposit Delete Deposit Auto Apply Debtors

Finalise Batch Unfinalise Batch Clear Batch Validate Batch

New Receipt
☐ Auto
☐ Manual
 Delete Receipt
 Reprint
 New Printer
 Printing Options:
☐ No ☐ Receipt
 Exit View

Once the batch and receipt details have been entered, select the "Foundation" tab. Select the member's code to which the receipt applies, enter the amount received and check the "Apply" box to complete the receipt entry.

Receipt Entry

Batch No: 13 Date: Mon - Sep 10, 2007 Pd: 5 May 2005 Def. Bank: 1 AutoLoad

Desc: Foundation Receipting Finalised No: 642278

Total \$100.00 UnApplied: \$100.00 Journals: 0.00 School Working Account

Rec No	Date >>	Famkey >>	From whom	Purpose of Payment	Amount	Unapp...	Sub \$	Journal
0			Click New Receipt to Create	System Line - Do not use	0.00	0.00	0.00	0.00
195	Sep 10, 2007		Gwen Allen	Foundation Receipting	100.00	100.00	0.00	0.00

3 APPLY TO: Sundry 4 Holding/Home Stay Dep. 5 Ledger 6 Debtors 7 Voluntary 8 Foundation

Member: ALLEN01 Allen Gwen

Plan	Date	Balance	Apply \$	Apply
TESTING	24/08/2007	50	50	<input checked="" type="checkbox"/>
OVERSEAS	24/09/2007	200	0	<input type="checkbox"/>
TESTING	24/09/2007	50	50	<input checked="" type="checkbox"/>
TESTING	24/10/2007	50	0	<input type="checkbox"/>
TESTING	24/11/2007	50	0	<input type="checkbox"/>
TESTING	24/12/2007	50	0	<input type="checkbox"/>
TESTING	24/01/2008	50	0	<input type="checkbox"/>

Yet to Apply 0

Create Pledge

Finalise Batch Unfinalise Batch Clear Batch Validate Batch

New Receipt
☐ Auto
☐ Manual
 Delete Receipt
 Reprint
 New Printer
 Printing Options:
☐ No ☐ Receipt
 Exit View

Finalise the Receipt Batch as per the Instruction in the Debtors View help files.

Reports

Reports can be created for the various areas of the Foundation. Filters are available within each tab to assist in printing only the information required. You will need to go through the reports to find those best suited to your situation.

The screenshot shows the 'Community Report Views' window with the 'Member' tab selected. The window contains various filter fields and options for generating a report.

Community Report Views

Member | Giving Plan | Activity | Notes | Scheduler

From Member: [Text Box] ...

☐ To Last Member or: [Text Box] ...

Date Enrolled From: [Text Box] ... To: [Text Box] ...

Departed From: [Text Box] ... To: [Text Box] ... Class Of: [Text Box] 0

Status: All [Dropdown] Foundation Status: All [Dropdown]

Region: [Text Box] ☐ Newsletter Recipients only

Report Style: Alumni Listing in Alpha Order [Dropdown]

Report Alias: ALMEMB1.RPT [Text Box]

Output destination:

☒ Print to Window ☐ Export to File

☐ Print to Printer ☐ Export to Mail

Export File Settings:

File Name: Custlst.doc [Text Box] ...

File Type: Word for Windows [Dropdown]

☒ Apply combo extension

Print [Button]

Exit View [Button]