TABLE OF CONTENTS

Version 4.0

INTRODUCTION

E.L.E.C.T. Fundraising is a campaign contribution tracking tool that allows you to:

- Track contributors and their donations
- Track other types of receipts (e.g., loans, in-kind contributions)
- Track payees and their expenses
- Quickly send Thank You letters for donations received
- Generate reports detailing amounts received and spent
- Quickly generate D-2 reports to submit to the State both printed and electronically

E.L.E.C.T. Fundraising is designed for maximum ease of use while providing critical information and tools to track campaign receipts and expenditures.

For options to:	See:
Getting started	Chapter 1
Select activities from the Main Screen	Chapter 1
Enter Contributor information	Chapter 2
Enter and edit pledges	Chapter 3
Enter and edit receipts; convert pledges to receipts	Chapter 4
Enter and edit payees	Chapter 5
Enter and edit expenditures	Chapter 6
View repayments of loans	Chapter 7
View the status of your funds; enter Committee information	Chapter 8
Send Thank You letters; send out mailings	Chapter 9
Print Contributor lists, expenditures, deposits, D-2 reports, Schedule A-1	Chapter 10
Enter and edit events, contributor types, payee types, expense types, user-defined fields; change your password; change print setup for reports; add and edit committees, salespeople, beneficiaries	Chapter 11
Back up and compact the database	Appendix 1
Read helpful tips	Appendix 2
Learn about printing and previewing	Appendix 3
See field descriptions	Appendix 4

INSTALLATION

1. Insert E.L.E.C.T. Fundraising - Disk 1 into your floppy drive (or the CD-ROM into your CD-ROM Drive).

2. In Program Manager, select File then select Run. (In Windows 95, select Start and then Run.)

3. Type a:setup (or b:setup if the disk is in drive b). For CD-ROM type d:setup (or replace d with the letter of your CD-ROM drive).

4. Use all the default settings that E.L.E.C.T. Fundraising suggests to you during the setup. If you put the files in some other location, the program will not run.

   If you cannot use the defaults, please contact ELECT, Inc. at 773-281-9512.

5. Insert the next diskette when the setup program asks for it.

The setup program will build a group of icons for E.L.E.C.T. Fundraising. Some of them are used only for maintenance (See Appendix 1.)

If you need to place the data file (funddata.mdb) anywhere except c:\elect (the default directory during installation), please add the following line to the [Run-Time Options] section in the c:\windows\fund.ini file: *Funddata=<path>* with no spaces and no ending backslash. (Replace *<path>* with your path.) In addition, you must change the path of the funddata.mdb file in the Compact_Restore funddata.mdb icon. (Call 773-281-9512 if you need help with this.) If you have moved the data file from c:\elect, delete it from the c:\elect directory.

ENHANCING PERFORMANCE

There are some settings you can change on your computer to speed up the performance of E.L.E.C.T. Fundraising.

The minimum requirements to run E.L.E.C.T. Fundraising are a 486/66 computer with 8MB of RAM. Anything faster than this will cause the program to run more quickly.

Set up a permanent swap file. To do this in windows 3.1, or 3.11,

1. Open the *Main* program group in Program Manager.
2. Double-click on *Control Panel*.
3. Double-click on *386 Enhanced* icon.
4. Click on *Virtual Memory*.
5. Click on *Change*.
6. Under New Swapfile Settings, select *Permanent*.
7. In the New Size box, type in the Recommended Size.
8. Click both 32-bit access boxes at the bottom of the screen. (Your computer may not support 32-bit access, if so the boxes will be dimmed.)

9. Click *OK*.

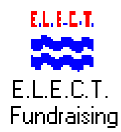
10. Click the button to re-start Windows for the changes to take effect.

If you have a line for smartdrv.exe in your autoexec.bat or config.sys file, make the following change to the second number at or near the end of the line. It probably reads something like 2048 1024.

- If you have 8MB of RAM, change the second number (e.g., 1024) to 128.
- If you have 12MB of RAM, change the second number to 256.
- If you have 16MB of RAM, change the second number to 512.

RUNNING E.L.E.C.T. FUNDRAISING

To start E.L.E.C.T. Fundraising, double-click on the E.L.E.C.T. Fundraising icon:



You will then be asked for a Logon Name and a Password.

1. Type **MANAGER** for the Logon Name.
2. Type **MANAGER** (case-sensitive) for the Password. You can change your password inside the program (see Chapter 11 - Maintenance).

CHAPTER 1 -- GETTING STARTED

This chapter briefly describes the capabilities of E.L.E.C.T. Fundraising and the first steps you should take when starting the program.

MAIN SCREEN

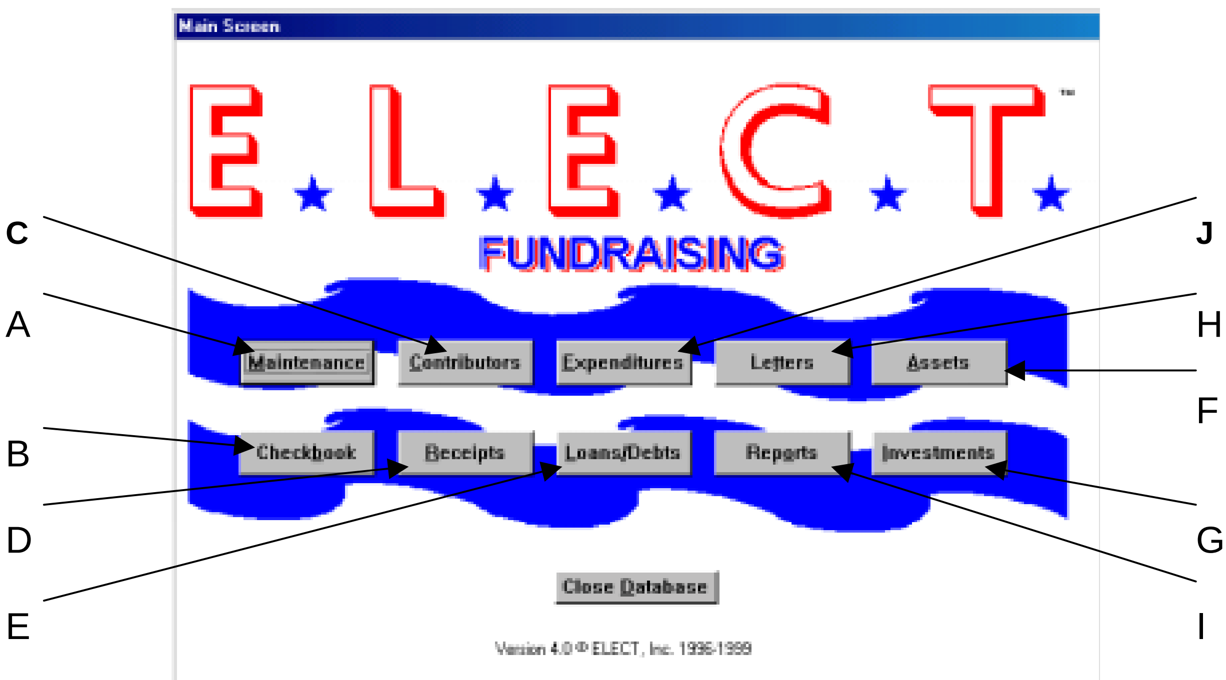


Fig. 1

Maintenance
Click the Maintenance button (Fig.1 - A) and the Maintenance Selection screen (Fig.2) appears. From this screen, you can can

- Enter a list of events that will populate drop-down lists on the screens. For more information, refer to the Events section in Chapter 11 -- Maintenance.
- Enter a list of contributor types that will populate drop-down lists on the screens. For more information, refer to the Contributor Types section in Chapter 11 -- Maintenance.
- Enter a list of payee types that will populate drop-down lists on the screens. For more information, refer to the Payee Types section in Chapter 11 -- Maintenance.
- Enter a list of expense types that will populate drop-down lists on the screens. For more information, refer to the Expense Types section in Chapter 11 -- Maintenance.

- Work with user-defined fields. For more information, refer to the User-Defined Fields section in Chapter 11 -- Maintenance.

- Change your password. For more information, refer to the Changing Your Password section in Chapter 11 -- Maintenance.

- Enter and edit information about your political committee. For more information, refer to the Committees section in Chapter 11 -- Maintenance.

- Enter a list of salespeople that will populate drop-down lists on the screens. For more information, refer to the Salespeople section in Chapter 11 -- Maintenance.

- Enter a list of beneficiary types that will populate drop-down lists on the screens. For more information, refer to the Beneficiaries section in Chapter 11 -- Maintenance.

- Backup data to delimited text files. For more information, refer to the Backup to Text section in Chapter 11 – Maintenance.

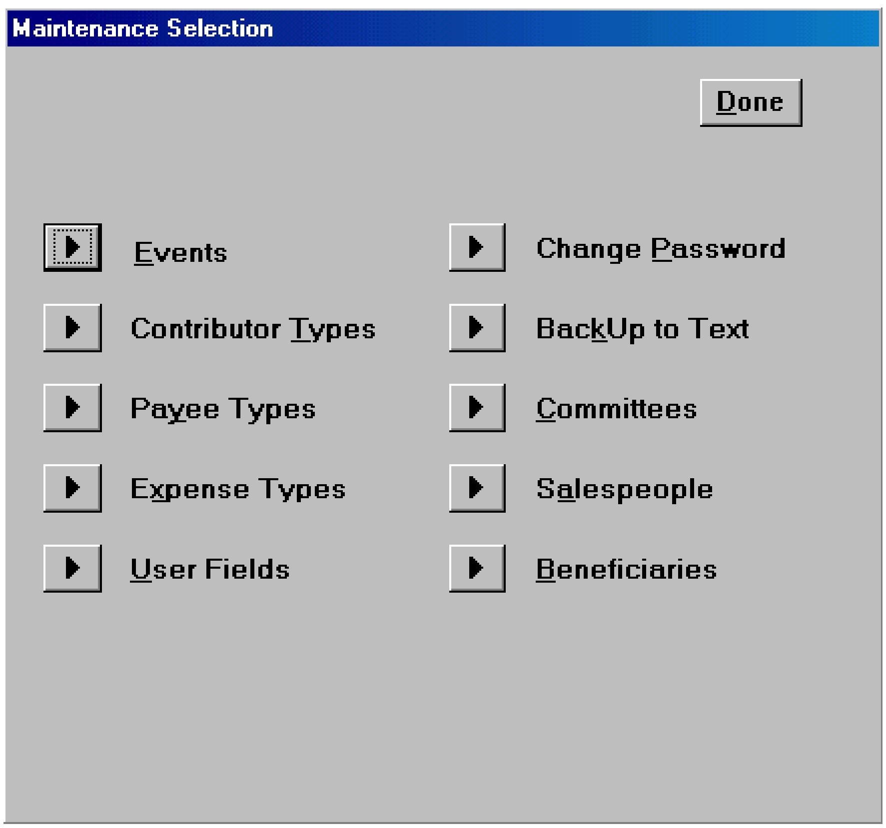


Fig. 2

Checkbook
Click the Checkbook button (Fig.1 - B) to open a screen where you can enter information about your political committee and view your checkbook balance. For more information, refer to Chapter 8 -- Checkbook.

Contributors
Click the Contributors button (Fig.1 - C) to open a screen to enter information about contributors. In addition, you can view recent donations, enter information into user-defined fields and user-defined checkboxes, add new pledges and add new receipts for a specific contributor. For more information, refer to Chapter 2 -- Contributors.

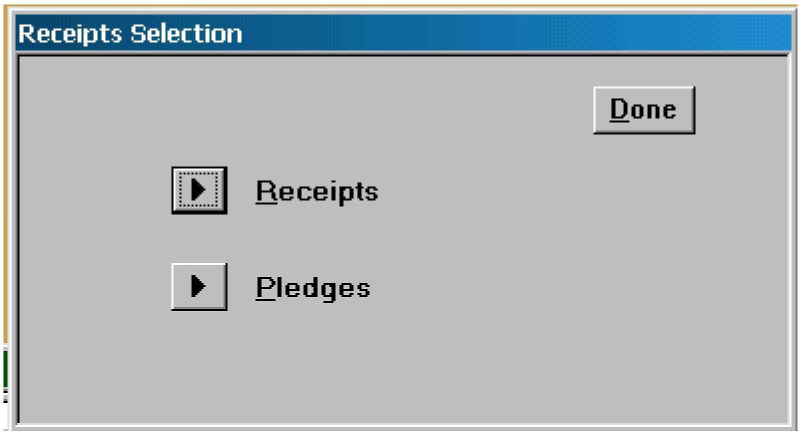


Fig. 3

Receipts
Click the Receipts button (Fig.1 - D) to open the Receipts Selection screen (Fig.3). From this screen you can

- Review a list of receipts
- Review a list of pledges

For more information, refer to Chapter 4 -- Receipts.

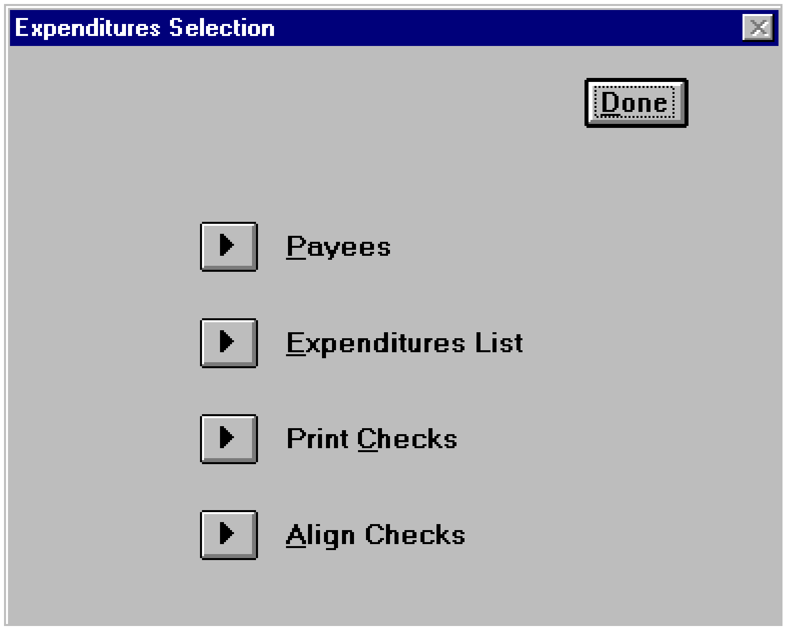


Fig. 4

Expenditures
Click the Expenditures button (Fig.1 - E) to open the Expenditures Selection screen (Fig.4). From this screen you can

- View, edit and add new payees
- View and edit a list of expenditures
- Print checks
- Align checks in the printer

For more information, refer to Chapter 6 -- Expenditures.

Loans
Click the Loans button (Fig.1 - F) to open a screen where you can

- View the balance of loans received and loans made

For more information, refer to Chapter 7 -- Loans.

Fig. 5

Letters
Click the Letters button (Fig.1 - G) to open the Letters/Mail Labels Selection screen (Fig.5). From this screen, you can

- Create your own form letters
- Send Thank You letters
- Produce mailing labels, form letters, envelopes or export mailing information to a word processor

For more information, refer to Chapter 9 -- Letters and Mail Labels.

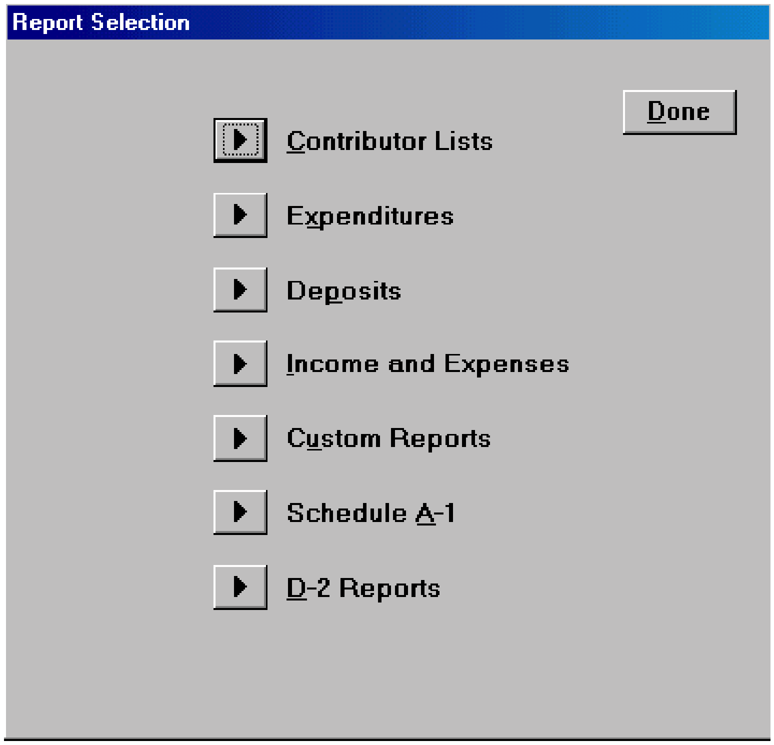


Fig. 6

Reports
Click the Reports button (Fig.1 - H) to open the Report Selection screen (Fig.6). From this screen, you can print

- Contributor Lists, including Detailed Receipts, which provides a listing of detailed receipts; Total Receipts, which provides a summary of receipts; Fundraising Call List, which provides a list of phone numbers of your contributors
- Expenditures, which provides a list of expenditures by payee
- Deposits, which provides a list of receipts to check against your bank deposit slips
- Income and expense reports
- Custom Reports
- Schedule A-1
- D-2 Reports

For more information on reports, refer to Chapter 10 -- Reports.

FIRST STEPS

The first time you enter E.L.E.C.T. Fundraising, you will get a message to enter a Committee Name. To do this,

1. Click OK to the message. The Committees List screen (Fig.7) appears.

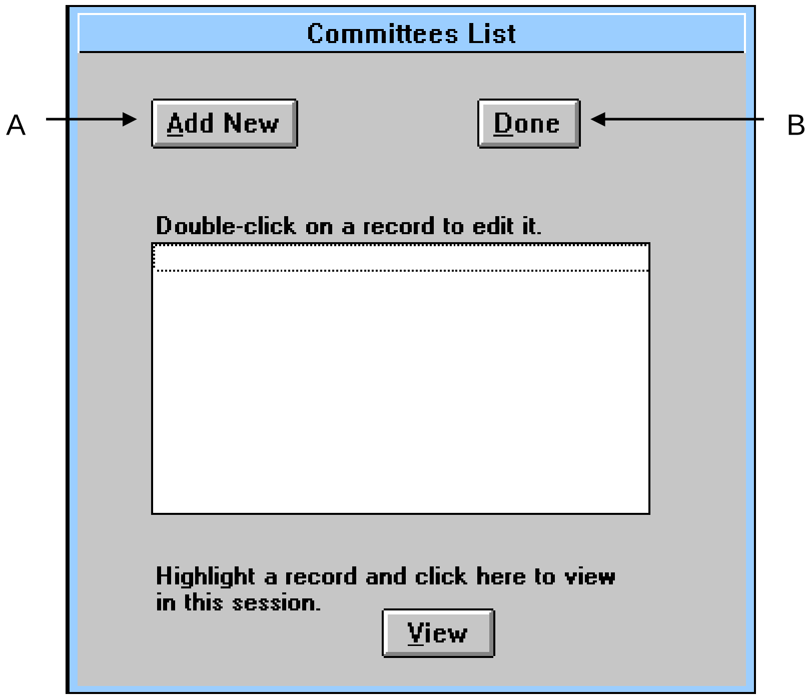


Fig. 7

2. Click the Add New button (Fig.7 - A). The Committees screen (Fig.8) appears.

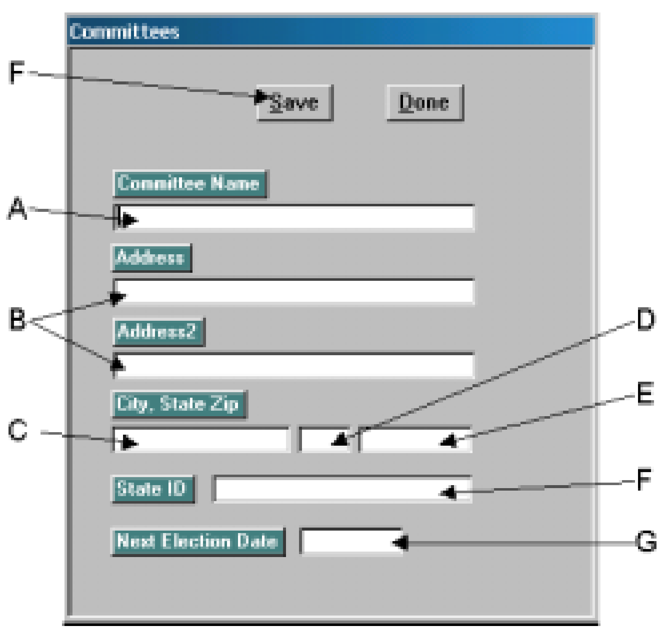


Fig. 8

3. Enter the name of your political Committee in the Committee Name field (Fig.8 - A), the Committee's address in the Address and Address2 fields (Fig.8 - B), the Committee's city, state and zip in the City, State Zip field (Fig.8 - C), the Committee's state identification number in the State ID field (Fig.8 - D) and the date of the next election in the Next Election Date field (Fig.8 - E). This information will also be used on the D-2 reports. To save this information, click the Save button (Fig.8 - F).

4. Click the Done button (Fig.7 - B) on the Committees List screen to return to the Main Screen.

You should also enter information about your committee's funds.

1. On the Main Screen, click the Checkbook button. The Checkbook screen (Fig. 9) appears.

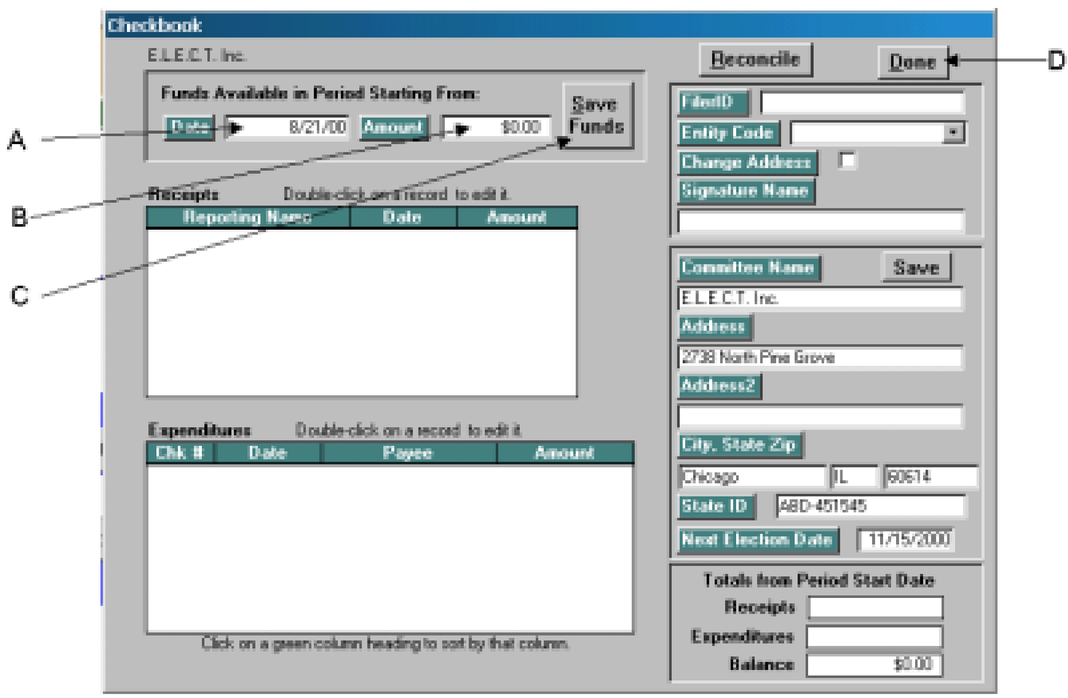


Fig. 9

2. Enter the Starting Date (Fig.9 - A) for the period. (This will be the day after end of the last reporting period.) The Save Funds button (Fig.9 - C) appears.

3. Enter the the balance from the end of the last reporting period into the Amount field (Fig.9 - B). **This amount must be identical to the closing balance on your last D-2 report.**

   This date and this amount will be used for the start of the reporting period and the funds available at the start of the period on the D-2 reports. (For more information on the D-2 report, refer to the D-2 Reports section in Chapter 10 -- Reports.)

4. To save this information, click the Save Funds button (Fig.9 - C).

5. To exit this screen, click the Done button (Fig.9 - D).

Another thing you might want to do right away is to change your password. For more information, refer to refer to the Changing Your Password section in Chapter 11 -- Maintenance

CHAPTER 2 -- CONTRIBUTORS

A Contributor is any person, company, political committee, etc. from whom you have received anything of cash value (e.g., donations, bank loans, in-kind contributions, interest). The Contributor List allows you to locate any contributor in your database by typing in the contributor's last name, company name, or reporting name. You can then view contributor information, edit contributor information, add contributors, delete contributors, enter and edit other contributors for the reporting name, enter and edit donations and enter and edit receipts.

To access the Contributor List option:

- Click the Contributors button on the Main Screen
  (or)
- Hold down the Alt key and press the C key.

The Contributor List screen (Fig.1) appears.

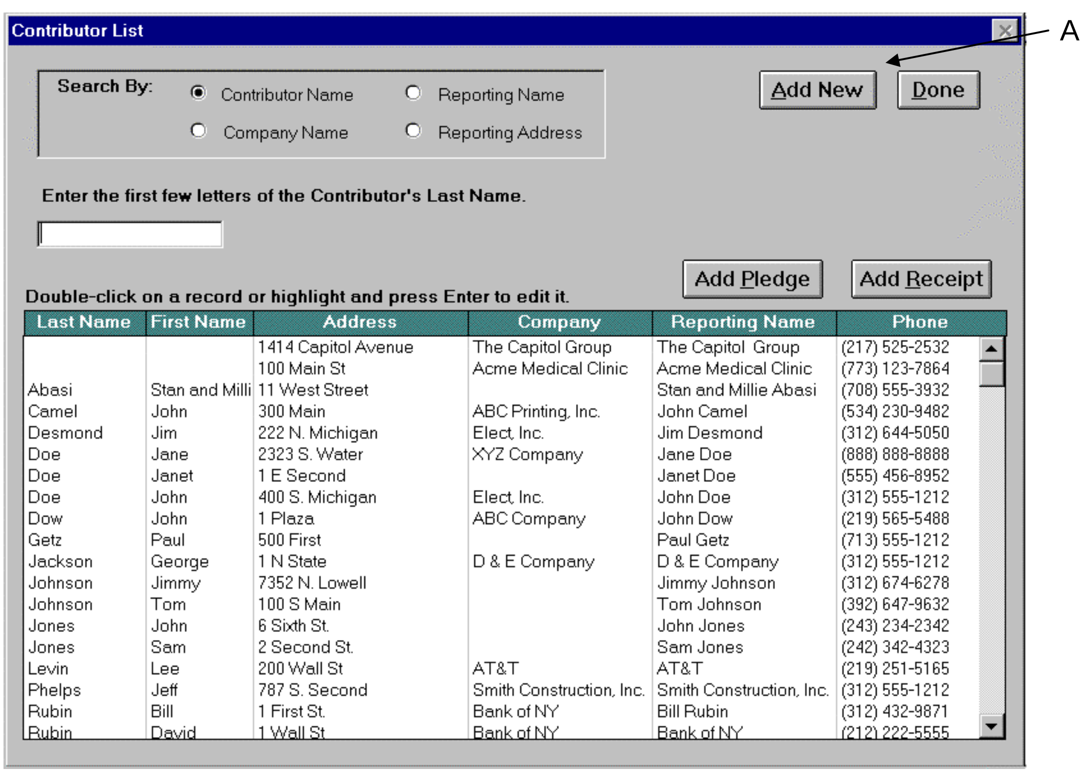


Fig. 1

ADDING A CONTRIBUTOR

To add a contributor to your list,

1. Click the Add New button (Fig.1 - A) on the Contributor List screen. The Contributors screen (Fig.2) appears.

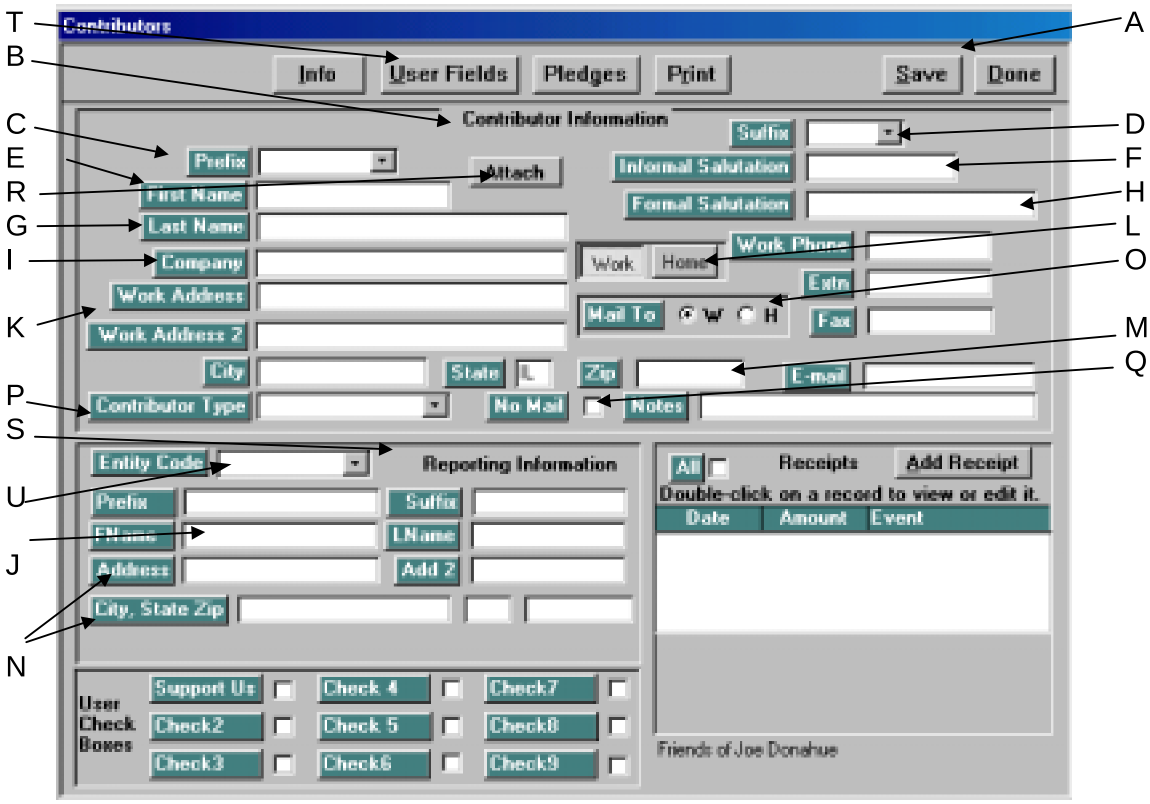


Fig. 2

2. Enter the appropriate information. (For more information on the fields, refer to the next section on Contributors Screen Sections.) Be careful not to enter a contributor who is already listed. To determine if the contributor is already in the system, perform a careful search using the methods described in the Searching for a Contributor section in this chapter to ensure that you are not duplicating contributors.

3. Click the Save button (Fig.2 - A) to save the record. If you do not click Save, the contributor will not be included. After clicking Save, you will automatically be able to enter another new contributor.

CONTRIBUTORS SCREEN SECTIONS

Contributor Information

The Contributor Information section (Fig.2 - B) displays name, mailing address, company name, telephone number, fax number, contributor type, a notes field, etc.

The Prefix (Fig.2 - C) and Suffix (Fig.2 - D) drop-down lists contain common prefixes and suffixes. If the prefix or suffix you need is not in the list, just type in the prefix or suffix.

The First Name field is used with Prefix, Last Name and Suffix to generate names on labels and envelopes. Therefore, if you use a prefix such as Mr. and Mrs., use only one person's first name (e.g., John) not both people's first names (e.g., John and Mary) in the First Name field. You want the labels to print as Mr. and Mrs. John Smith not Mr. and Mrs. John and Mary Smith. (You can put John and Mary in the Informal Salutation field, so informal letters will read Dear John and Mary.)

After you enter the First Name (Fig.2 - E) and tab out of the field, the Informal Salutation (Fig.2 - F) automatically fills in with the First Name you entered. If you did not fill in a First Name, the Informal Salutation defaults to Friend. The Informal Salutation is used for the informal greeting on letters in the form Dear <Informal Salutation>.

After you enter the Last Name (Fig.2 - G) and tab out of the field, the Formal Salutation (Fig.2 - H) automatically fills in with the Prefix and Last Name you entered. If you did not fill in a Last Name, the Formal Salutation defaults to Friend. The Formal Salutation is used for the formal greeting on letters in the form Dear <Formal Salutation>.

If you want to enter work address information, you can enter that information starting in the Work Address field (Fig.2 - K). If you want to enter home address information, first click the Home button (Fig.2 - L). The Home Address fields appear. The Work/Home buttons just display Work or Home Address so that you can enter either or both addresses.

After you enter the address information and tab out of the Zip field (Fig.2 - M), the Reporting Address (Fig.2 - N) automatically fills in. The information you entered for the Contributor's address is copied into the Reporting address. The Entity Code refers to the type of entity of the contributor. The Reporting Name is dependent on the Entity Code chosen. If the Entity Code is ORG, the Reporting Name will be used. If the Entity Code is IND, the Reporting First Name and Reporting Last Name will be used. (For more information on Reporting Information, refer to the next section on Reporting Information.)

The Mail To buttons (Fig.2 - O) determine whether mailings (letters, labels) are sent to the home (H) or work (W) address. If you select Mail To Home, make sure there is a Home Address. If you select Mail To Work, make sure there is a Work Address.

The Contributor Type field (Fig.2 - P) has five default values listed: Business, Grouped, Individual, Lobbyist, PAC. This information is not required for any reports, but it helps you categorize your contributors. If you need a value that is not one of the defaults, type it in and press Tab. You will then be prompted to add that value to the list.

Note: The Grouped type should be used only for a contributor that is set up for grouped, unitemized donations. Receipts from contributors of this type will never be itemized. For example, you can use Grouped to record one hundred raffle tickets sold at $20 each. The $2000 receipt will be reported as an unitemized receipt.

The No Mail checkbox (Fig.2 - Q) is used to prevent mass mailings to this contributor. However, even if this box is checked, Thank You letters are still sent.

The Attach button (Fig.2 - R) is used to bring up another screen to enter additional contributors for this Reporting Name. (For more information on adding additional contributors refer to the Adding Additional Contributors to a Reporting Name section in this chapter.)

Reporting Information

The Reporting Information section (Fig.2 - S) of the Contributors screen displays the way any receipts from this individual are reported. Make sure that the information in this section exactly matches the top of any check you receive. If you receive a cash contribution, you must get the Reporting information from the Contributor.

Note: You should have only one Contributor record for each Reporting Name (and address). Multiple receipts are then associated with this one record. (For more information on receipts see Chapter 4 -- Receipts.)

Receipts

The Receipts section (Fig.3) displays a list of all receipts (Fig.3 - A) from this Contributor. When you are adding a new Contributor, this list is blank. Also, the Donations section (Fig.3 - B) does not display when you add a new Contributor.

When you view a Contributor already in the database (see the section below on Viewing and Editing Contributor Information), four fields of previous donations display. These amounts are donations only and do not include loans received, miscellaneous receipts or in-kind contributions. The Largest Donation field (Fig.3 - C) displays the largest single donation from this Contributor. The Total Donations field (Fig.3 - D) displays the total of all donations from this Contributor. The YTD Donations field (Fig.3 - E) displays the total of donations from the start of the year trhough the current date. The Prev Yr Donations field (Fig.3 - F) displays the total of donations in the entire previous year.

To add a new receipt for this Contributor, click the Add Receipt button (Fig.3 - G). To view the entire receipt record of an item in the list (Fig.3 - A), either double-click on the record or highlight it and press the Enter key. (For more information on adding and editing receipts, refer to Chapter 4 -- Receipts.)

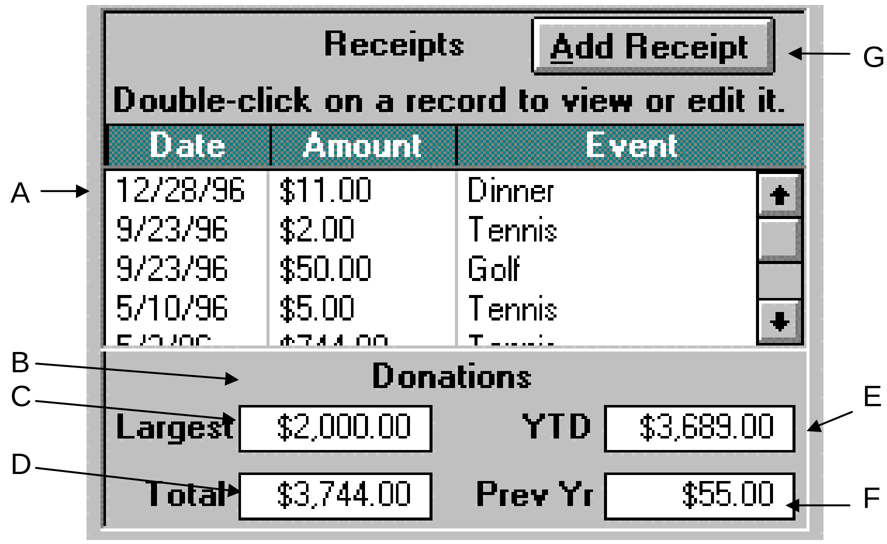


Fig. 3

User Check Boxes

The User Check Boxes section (Fig.4 - A) of the screen is used to designate nine categories and mark each voter accordingly. Click on the green label (Fig.4 - B) of a checkbox to name it. You can tracking anything, from people who sponsor a hole at your golf outing to those who you send complimentary tickets to. After you name the Check Box, you will get the option to delete all current data in this field. For instance, if you change the label on a check box from Golf to Tickets, you will want to delete the records of contributors checked for Golf and start with a clean slate for Tickets.

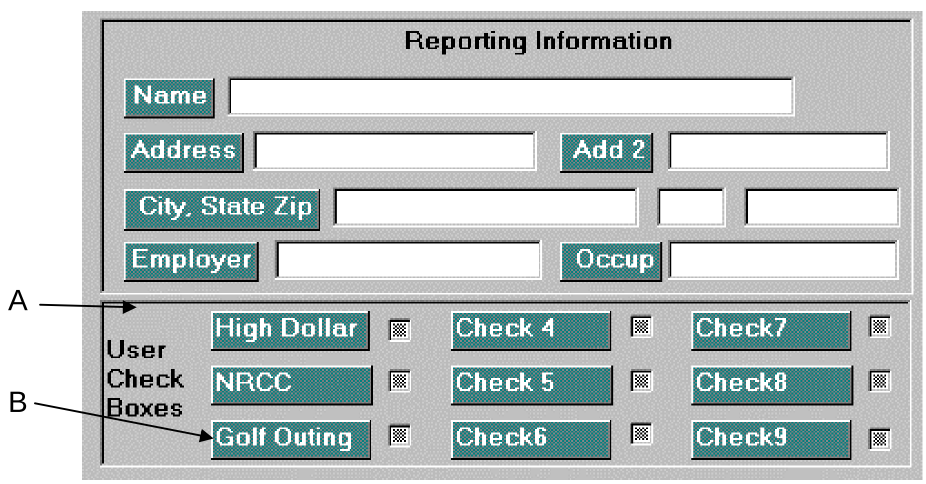


Fig. 4

User Fields

Clicking on the User Fields button (Fig.2 - T) displays the User Fields (Fig.5). On this screen, you can enter information into your user-defined fields. (For more information on setting up User-Defined fields, refer to the User-Defined Fields section in Chapter 11 -- Maintenance).

To enter information into a field, simply click on the drop down box next to each entry (Fig.5 - A). This will display a list of possible options for that field. If you tab into the field, the list will automatically drop down. Either select an option from the list or type in the desired entry.

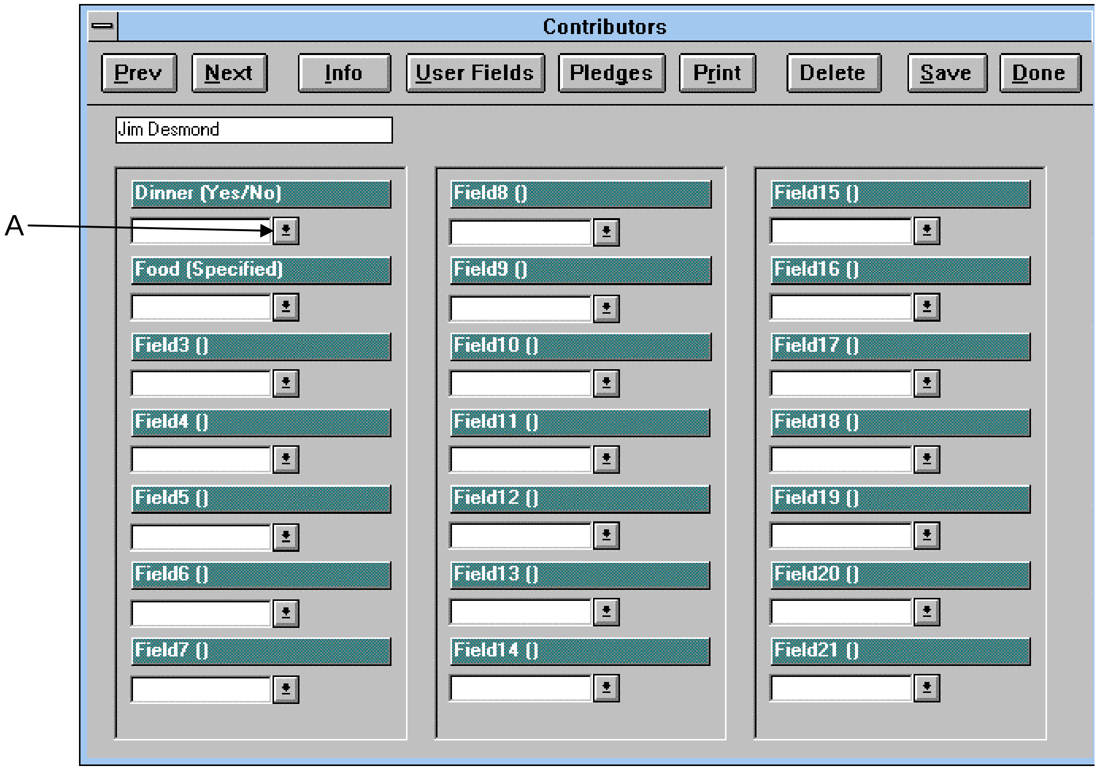


Fig. 5

Buttons

The top of the Contributors screen contains a row of buttons (Fig.6).

Fig. 6

Prev	Takes you to the previous Contributor record (does not display when adding a new contributor)
Next	Takes you to the next Contributor record (does not display when adding a new contributor)
Info	Takes you to the Contributor Information screen when you are on the Contributor User Fields screen
User Fields	Takes you to the Contributor User Fields screen when you are on the Contributor Information screen

Pledges	Takes you to a screen to enter and view pledges for this contributor (For more information on entering and editing pledges, refer to Chapter 3 -- Pledges.)
Print	Prints the current contributor's record
Delete	Deletes the current contributor (does not display when adding a new contributor)
Save	Saves the current contributor record
Done	Closes this screen and returns you to the Contributor List screen

SEARCHING FOR A CONTRIBUTOR

On the Contributor List screen (Fig.1), determine how you wish to find the contributor:

- by last name
- by company name
- by reporting name

By Contributor Name

This feature allows you to look up contributors by their last name.

1. Click on the small circle in the "Search By" section next to Contributor Name (Fig.7 - A). Contributor Name is the default setting and is automatically selected when you access this feature.

2. Begin typing in the last name (Fig.7 - B).

   As you type the last name, the system highlights the first record in the list that contains a last name with the entered letter or letters.

   For example, if you type A the system highlights the first record in your list that contains a last name that begins with A. If you type AS, the system highlights the first record in your list that contains a last name that begins with AS.

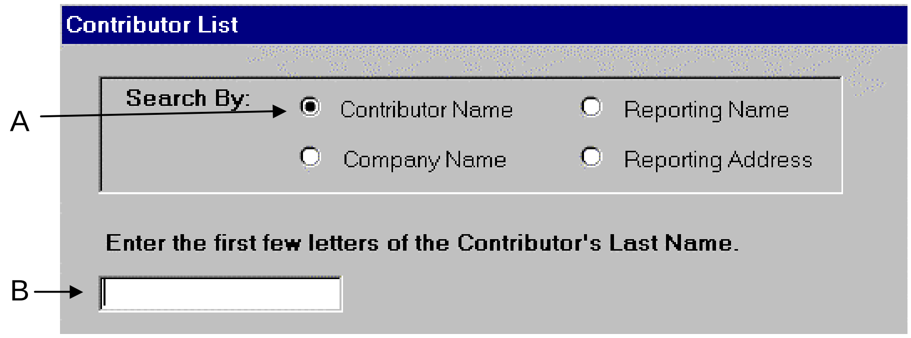


Fig. 7

By Company Name
This feature allows you to look up contributors by their company name.

1. Click on the small circle in the "Search By" section next to Company Name (Fig.8 - A).

2. Begin typing in the company name (Fig.8 - B).

   As you type the company name, the system highlights the first record in the list that contains a company name with the entered letter or letters.

   For example, if you type A the system highlights the first record in your list that contains a company name that begins with A. If you type AS, the system highlights the first record in your list that contains a company name that begins with AS.

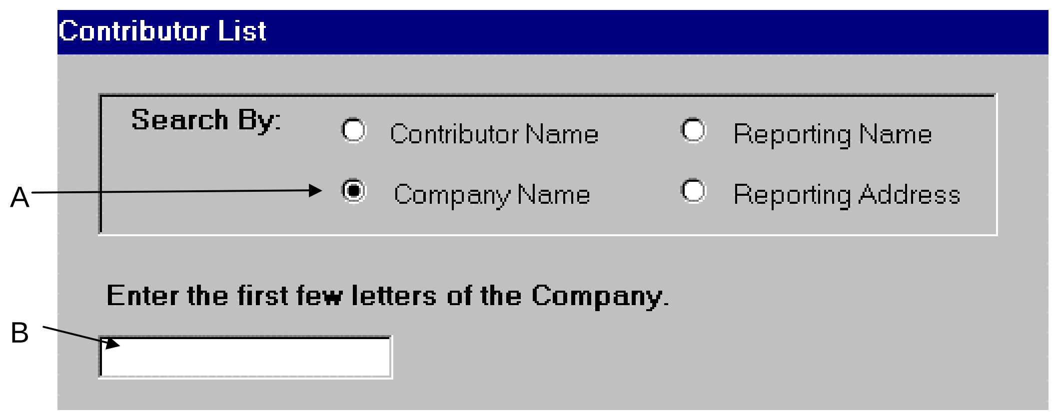


Fig. 8

By Reporting Name
This feature allows you to look up contributors by their reporting name. This is the name on their check, though not always their name or their mailing information.

1. Click on the small circle in the "Search By" section next to Reporting Name (Fig.9 - A).

2. Begin typing in the reporting name (Fig.9- B).

   As you type the reporting name, the system highlights the first record in the list that contains a reporting name with the entered letter or letters.

For example, if you type A the system highlights the first record in your list that contains a reporting name that begins with A. If you type AS, the system highlights the first record in your list that contains a reporting name that begins with AS.

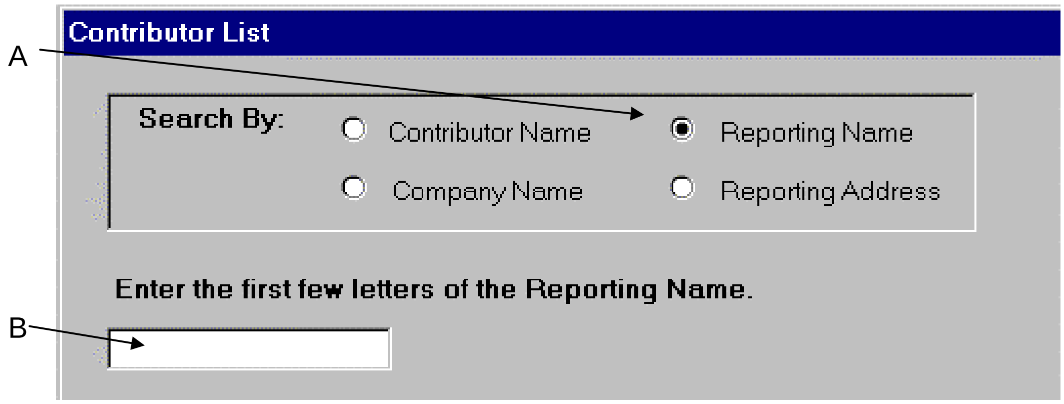


Fig. 9

By Reporting Address

This feature allows you to look up contributors by their reporting address. This is the address on their check, though not always the address in their mailing information.

1. Click on the small circle in the “Search By” section next to Reporting Address (Fig.10 - A).

2. Begin typing in the reporting address (Fig.10- B).

   As you type the reporting adress, the system highlights the first record in the list that contains a reporting address with the entered letters or numbers.

   For example, if you type 9 the system highlights the first record in your list that contains a reporting address that begins with 91. If you type 91, the system highlights the first record in your list that contains a reporting address that begins with 91.

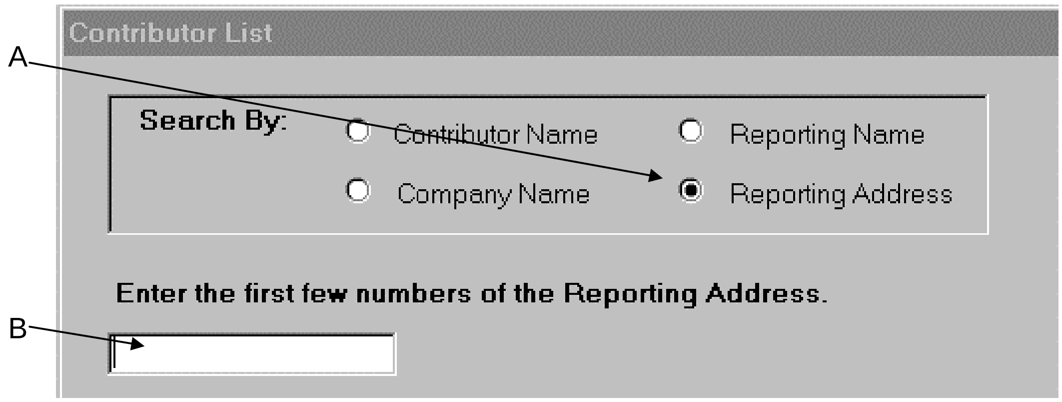


Fig. 10

VIEWING AND EDITING CONTRIBUTOR INFORMATION

After you use the Search option, the Contributor List screen brings you to the place in the list of contributors who best match what you have typed in. This screen only provides limited data about each contributor.

HINT - You can add a new contributor by clicking Add New (Fig. 11 - A). For more information, refer to the Adding a Contributor section in this chapter.

To see more information about the contributor, you can

- Double-click anywhere in the line (Fig.11 - B) where the contributor is displayed
  (or)
- Select (highlight) the contributor either by clicking with the mouse or using the ↑ or ↓ keys, and then pressing the ENTER key.

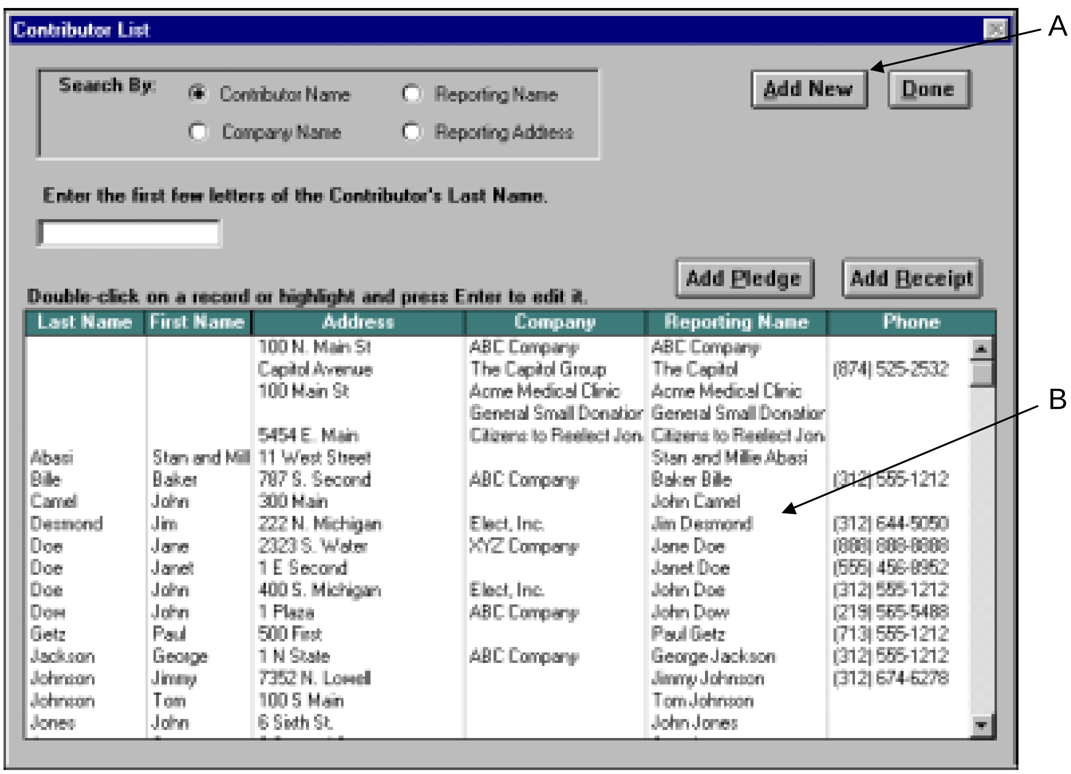


Fig.11

The Contributors screen (Fig.12) appears. You can edit contributor information, edit reporting information, enter user field information, attach other contributors to this contributor record, enter pledges, enter receipts, print the contributor record, view other contributors, or delete the contributor record from this screen.

For more information on the fields and buttons on this screen, refer to the section on Contributors Screen Sections above.

To change the contributor's current information,

1. Tab to the field (or click in it).
2. Type the new information.
3. **Click the Save button** (Fig.12 - A*). If you do not click the Save button, the changes will not be recorded.*

To cancel changes made to a record (before they are saved),

1. Click the Done button (Fig.12 - B).
2. Respond Yes, you do want to leave the record without saving your changes.

To delete a contributor, click on the Delete button (Fig.12 - C). *Once a contributor is deleted, he or she is permanently removed from your list. You cannot delete a contributor who has made a donation or pledge. To remove a contributor who has made a pledge, first delete the pledge and then delete the contributor.*

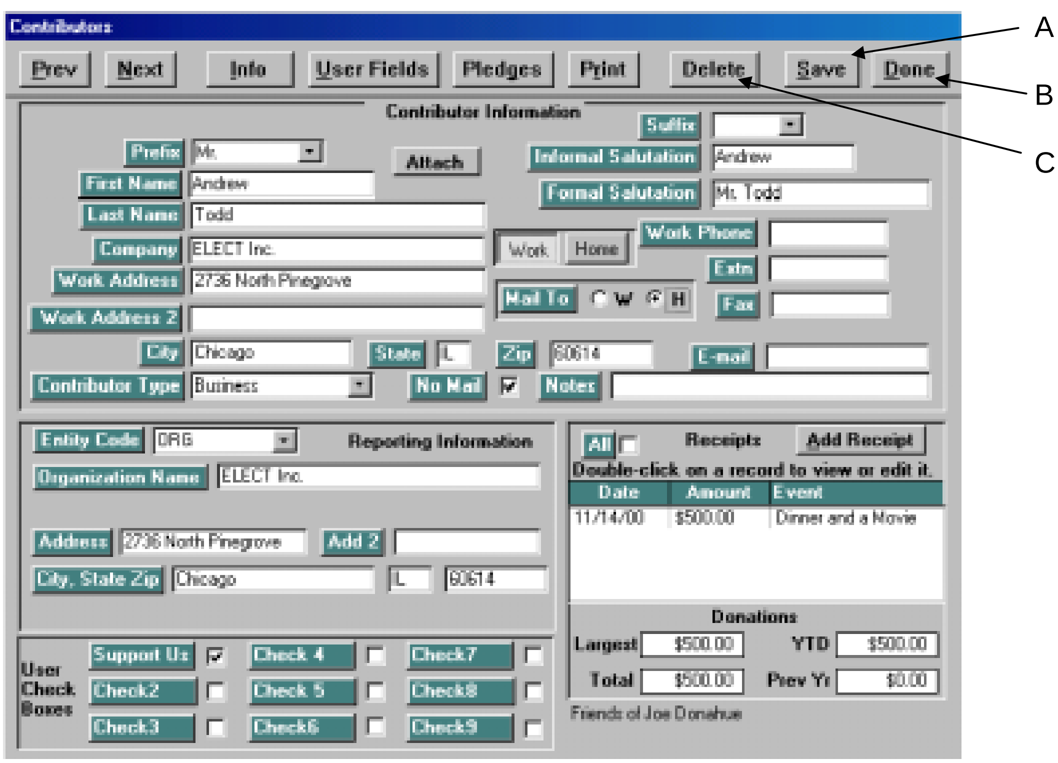


Fig.12

ADDING ADDITIONAL CONTRIBUTORS TO A REPORTING NAME

Sometimes you have more than one contributor for a single Reporting Name. For example, a Reporting Name might be Acme Medical Clinic. But, there might be five different doctors there who are contributing. E.L.E.C.T. Fundraising will allow you to set up the Acme Medical Clinic as the Reporting Name and list the five doctors as contributors who will receive Thank You letters.

HINT: If you want to send a Thank You letter to all additional contributors plus one to the Reporting Name, do not enter a person's name on the Contributors screen. Instead, enter all of the people on the Attached Contributors screen. If you only want to send Thank You letters to the additional contributors, then enter one of the contributors on the Contributors screen and the rest on the Attached Contributors screen.

To add additional contributors,

1. Go to the Contributors screen as described in the Viewing and Editing Contributors section.

2. Click the Attach button (Fig.2 - R). The Attached Contributors screen (Fig.13) appears. A list (Fig.13 - A) diplays attached contributors previously entered for this Reporting Name.

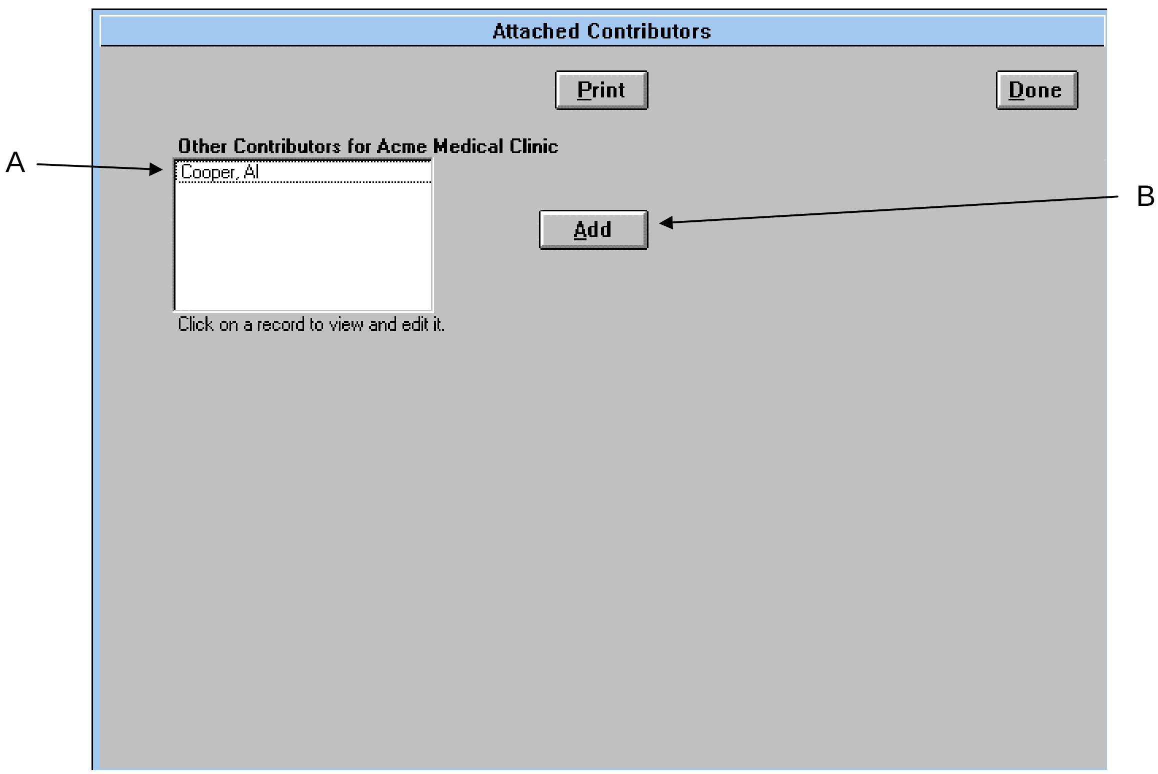


Fig. 13

3. Click the Add button (Fig.13 - B). The Contributor Information section (Fig.14 - A) displays.

4. Enter the information for the new contributor. (For more information on the fields, refer to the Adding a Contributor section above.)

5. Click the Save button (Fig.14 - B) to save the record.

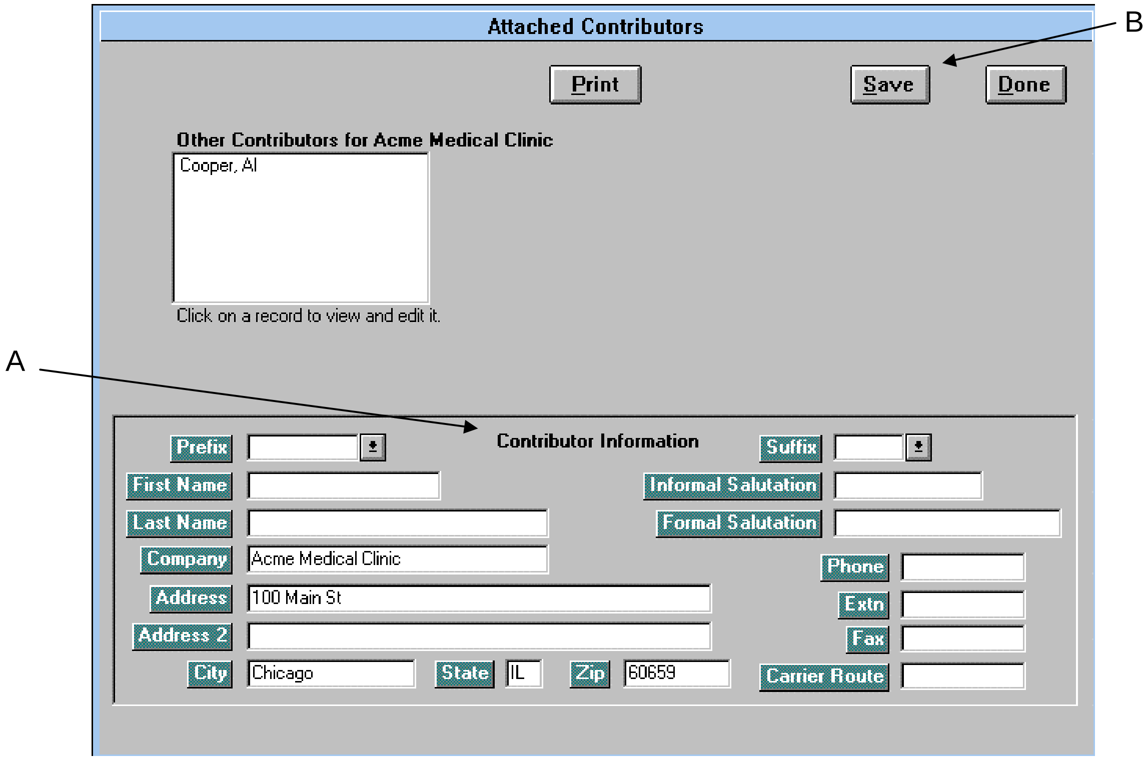


Fig. 14

EDITING ADDITIONAL CONTRIBUTORS FOR A REPORTING NAME

To edit the additional contributors for a Reporting Name,

1. Go to the Attached Contributors screen as described in the section above.
2. Highlight a name in the list (Fig.15 - A). The Contributor Information section (Fig.15 - B) displays.
3. Make your changes.
4. Click the Save button (Fig.15 - C) to save your changes.
   (or)
   Click the Delete button (Fig.15 - D) to delete the record.

You can print the current record by clicking the Print button (Fig.15 - E).

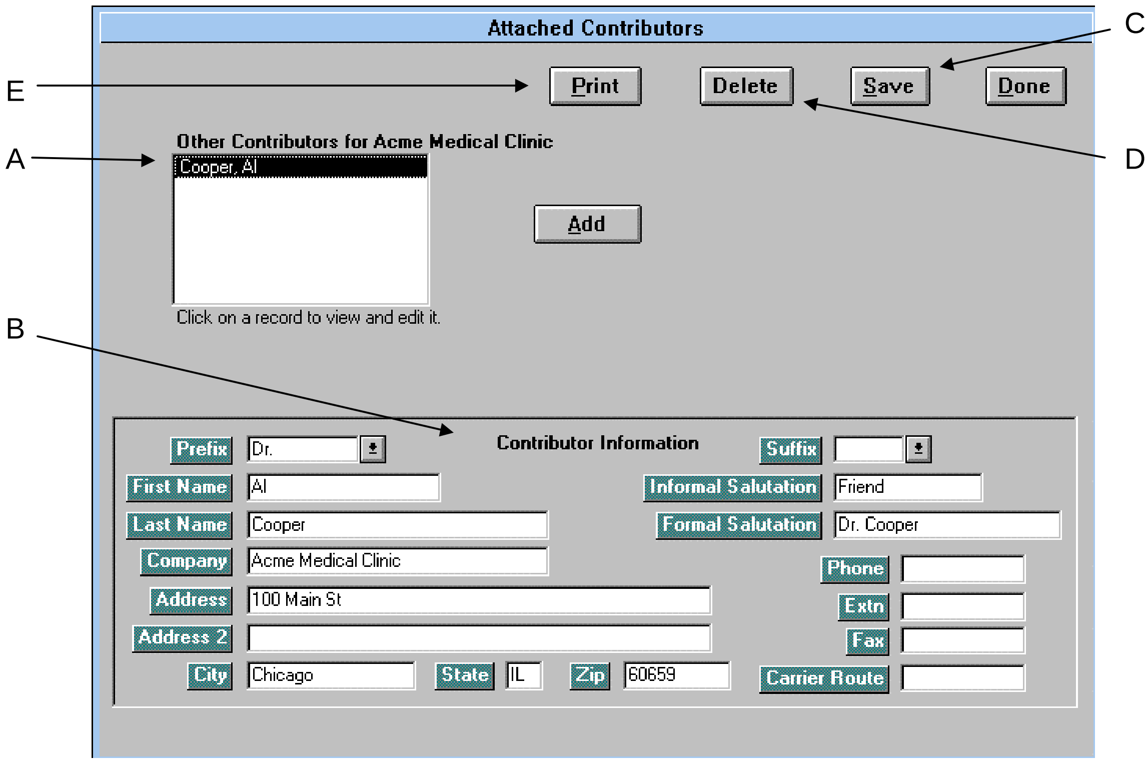

Attached Contributors
E
Print
Delete
Save
Done
C
D
A
Other Contributors for Acme Medical Clinic
Cooper, Al
Add
Click on a record to view and edit it.
B
Contributor Information
Prefix
Dr.
Suffix
First Name
Al
Informal Salutation
Friend
Last Name
Cooper
Formal Salutation
Dr. Cooper
Company
Acme Medical Clinic
Phone
Address
100 Main St
Extn
Address 2
Fax
City
Chicago
State
IL
Zip
60659
Carrier Route

Fig. 15

CHAPTER 3 -- PLEDGES

The Pledges section is used to track pledges from contributors. These pledges can later be converted into receipts or deleted if the pledge is not fulfilled.

ADDING PLEDGES

Pledges must be added through the Contributors screen to ensure the correct contributor information is kept with each pledge. For more information on accessing pledges through the Contributors screen, refer to Chapter 2 -- Contributors.

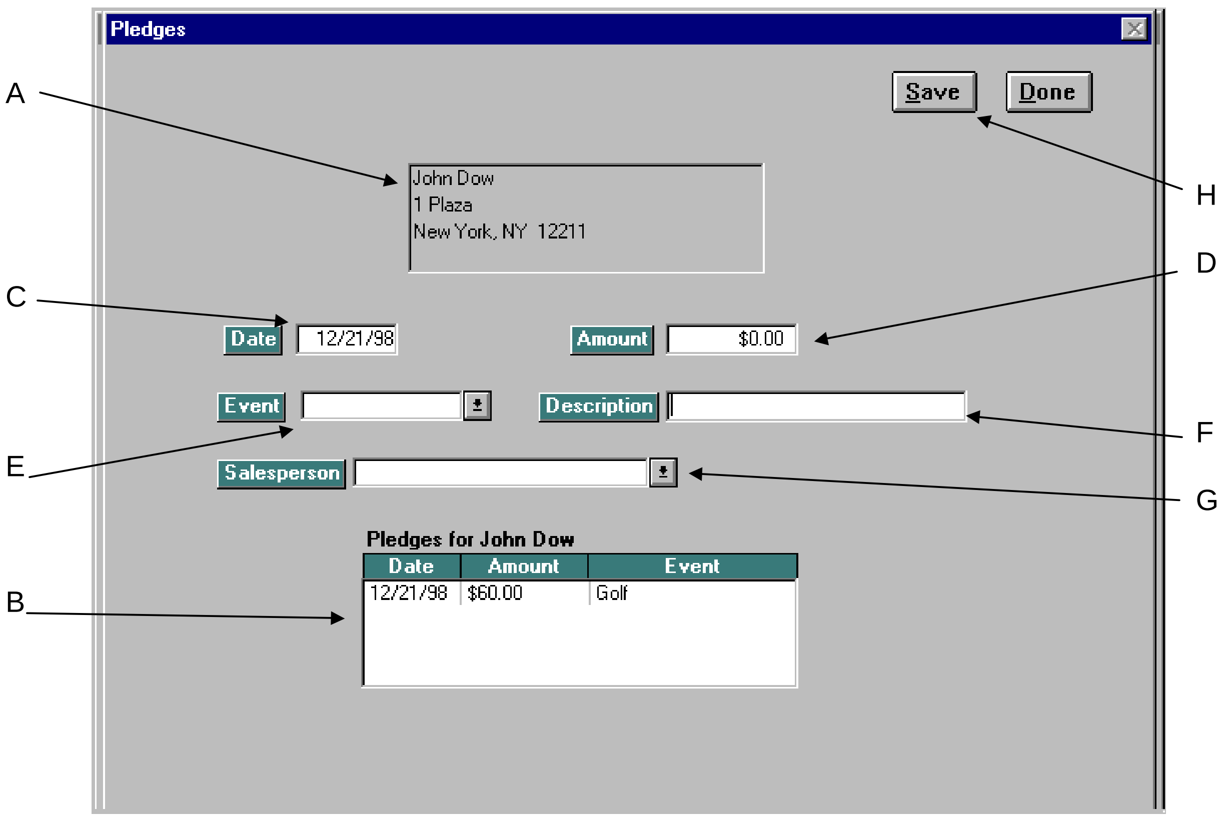


Fig. 1

Once you have reached the Pledges screen (Fig.1), the name of the Contributor (Fig.1 - A) and a list (Fig.1 - B) of all donations for this Contributor display. To enter information about the pledge,

1. Enter the date of the pledge in the Date field (Fig.1 - C).

2. Enter the amount of the pledge in the Amount field (Fig.1 - D).

3. If the pledge is for a specific event, select that event from the Event drop-down list (Fig.1 - E). If the event is not in the list, type in the name of the event. Tab out of the field.

You will then be prompted to save the new event. You must save the new event if you want to include it in this pledge record.

4. If there a description you need to save with this pledge, enter that in the Description field (Fig.1 - F).

5. Optionally, select a salesperson from the Salesperson drop-down list (Fig.1 - G). If the Salesperson is not listed, type the new name and hit the Tab key. The program asks if you want to add this person to the Salespeople list.

5. Click the Save button (Fig.1 - H) to save the record and exit the screen.

VIEWING AND EDITING PLEDGES

To view and edit pledges,

1. On the Main Screen, click the Receipts button or hold down the Alt key and press the R key. The Receipts Selection screen (Fig. 2) appears.

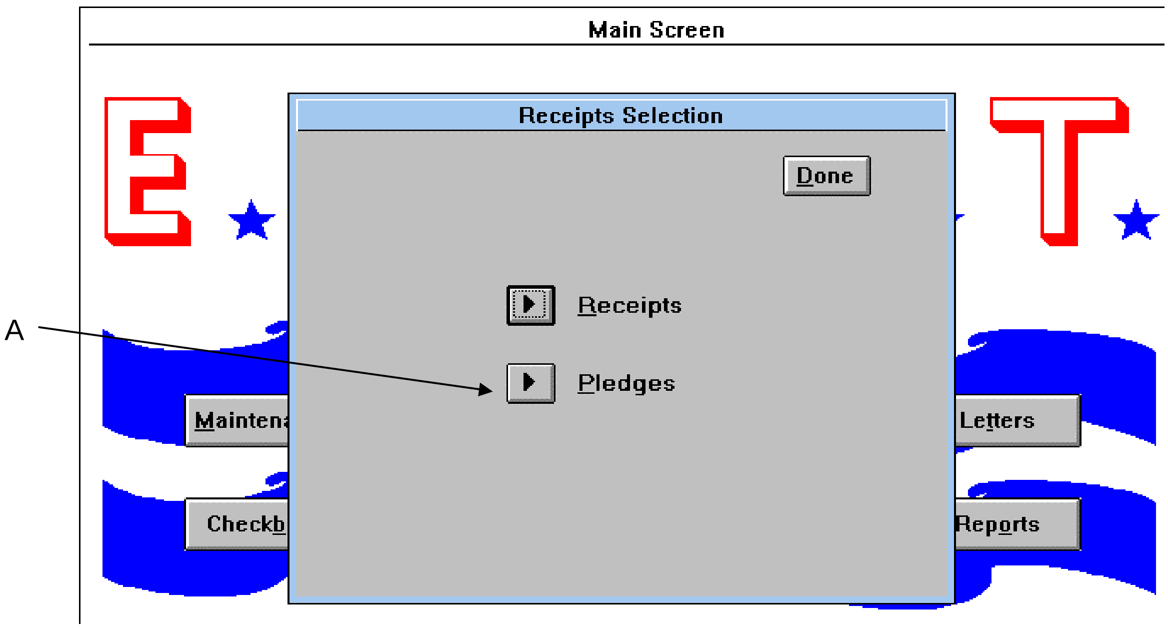


Fig. 2

2. Click the Pledges button (Fig.2 - A) on the Receipts Selection screen. The Pledges List screen (Fig.3) appears.

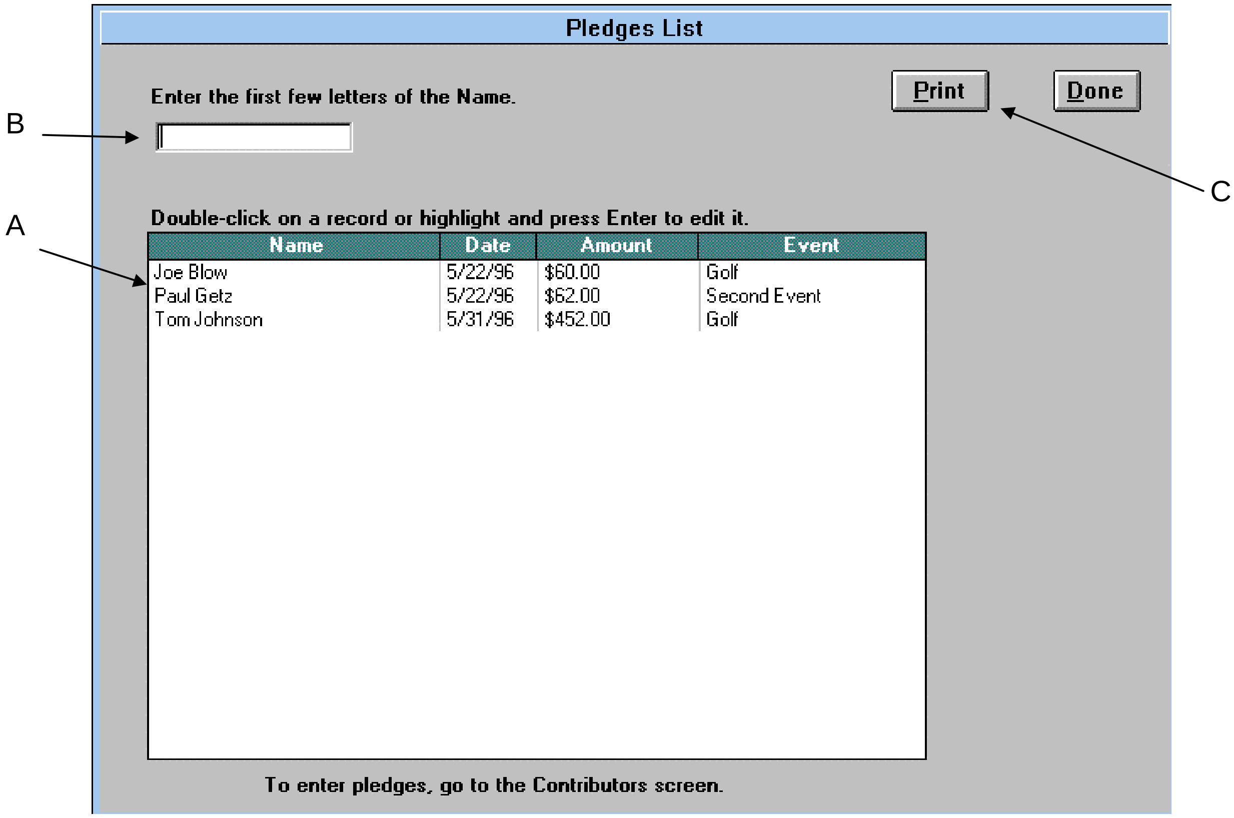


Fig. 3

3. The pledges you have received will be listed on the screen (Fig.3 - A). To find a pledge from a specific contributor, type the first few letters of the name (Fig.3 - B). If your entry matches a name in the list, that record will be highlighted.

4. To view and edit the details of the pledge,

   a. Select a record by clicking on it and then pressing the Enter key
   (or)
   b. Double-click on a record

5. The Pledges screen (Fig.4) appears. This screen displays Contributor information (Fig.4 - A), the date of the pledge (Fig.4 - B), the amount of the pledge (Fig.4 - C), the event the pledge was for (Fig.4 - D), a description (Fig.4 - E), the salesperson (Fig.4 - F) and a list of all pledges from this Contributor (Fig.4 - G).

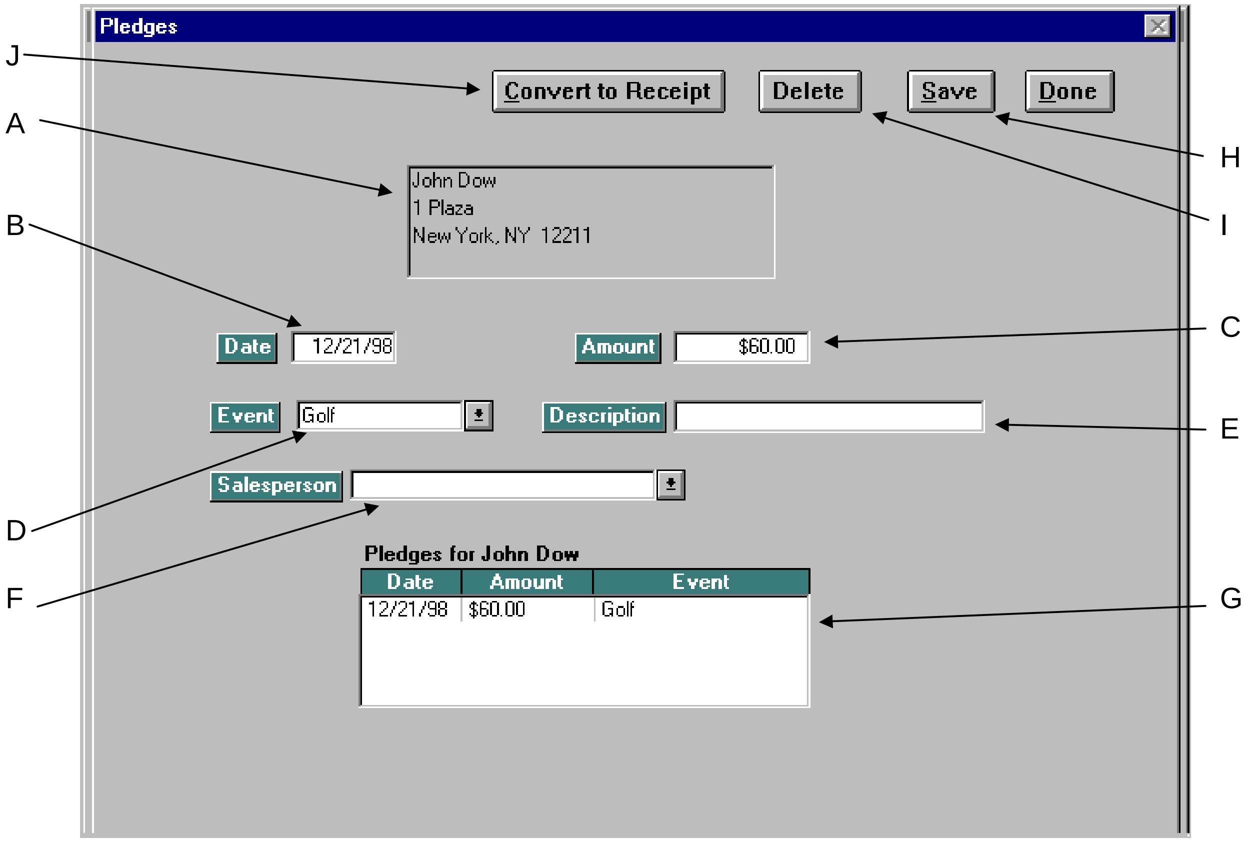


Fig. 4

6. Edit any field that needs to be changed.

7. Click the Save button (Fig.4 - H) to save the changes and exit the screen.

To delete the pledge, click the Delete button (Fig.4 - I).

CONVERTING PLEDGES TO RECEIPTS

When a donation is received, the pledge (if there was one) can be converted into a receipt. There are two places to do this conversion: through the Pledges screen and through the Receipts screen.

Converting Pledges Through the Pledges Screen
To convert pledges through the Pledges screen,

1. Go to the specific pledge as described above in Viewing and Editing Pledges.

2. Click the Convert to Receipt button (Fig.4 - J).

3. The Receipts screen appears. (For more information detailing appropriate data entry, refer to Chapter 4 -- Receipts.)

4. You must click the Save button on the Receipts screen to save the record.

Converting Pledges Through the Receipts Screen
To convert a pledge through the Receipts screen,

1. Go to the Contributor's record as described in Chapter 2 -- Contributors.

2. Click the Add Receipt button to bring up the Receipts screen (Fig.5). You will see a list (Fig.5 - A) of pledges for this Contributor. (Alternatively, you can go to the Receipts screen through the Receipts List screen. Refer to the Viewing and Editing Receipts section in Chapter 4 -- Receipts).

3. Click the Convert button (Fig.5 - B) to copy the pledge information into the fields on the current Receipts screen. For more information on the fields on the Receipts screen, refer to the Adding Receipts section in Chapter 4 -- Receipts.

4. Make any needed modifications and click the Save button (Fig.1 - C).

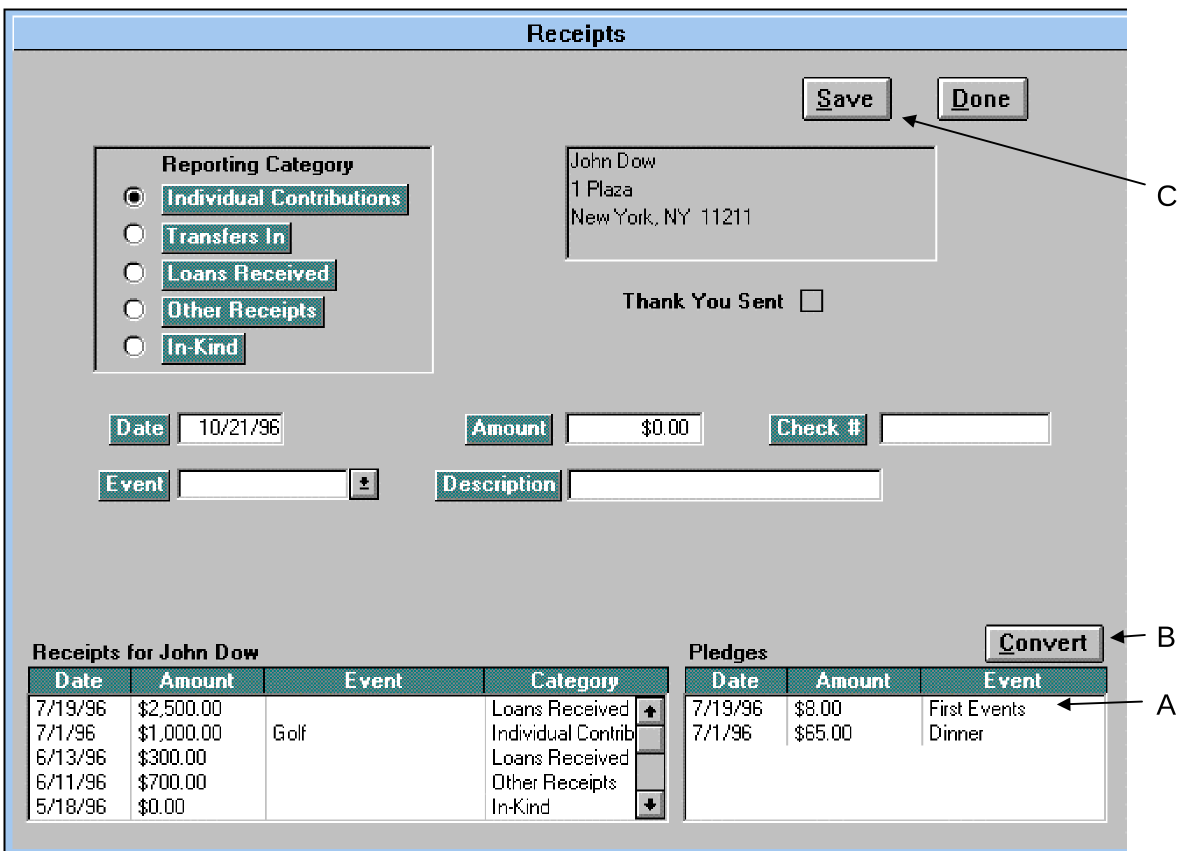


Fig. 5

PRINTING A LIST OF PLEDGES

The Pledges report will print the Contributor's name, company, address, city, state, zip, phone, date of the pledge and amount of the pledge. To print a list of pledges for an event,

1. Click the Print button (Fig.3 - C) on the Pledges List screen. The Event Selection screen (Fig.6) appears.

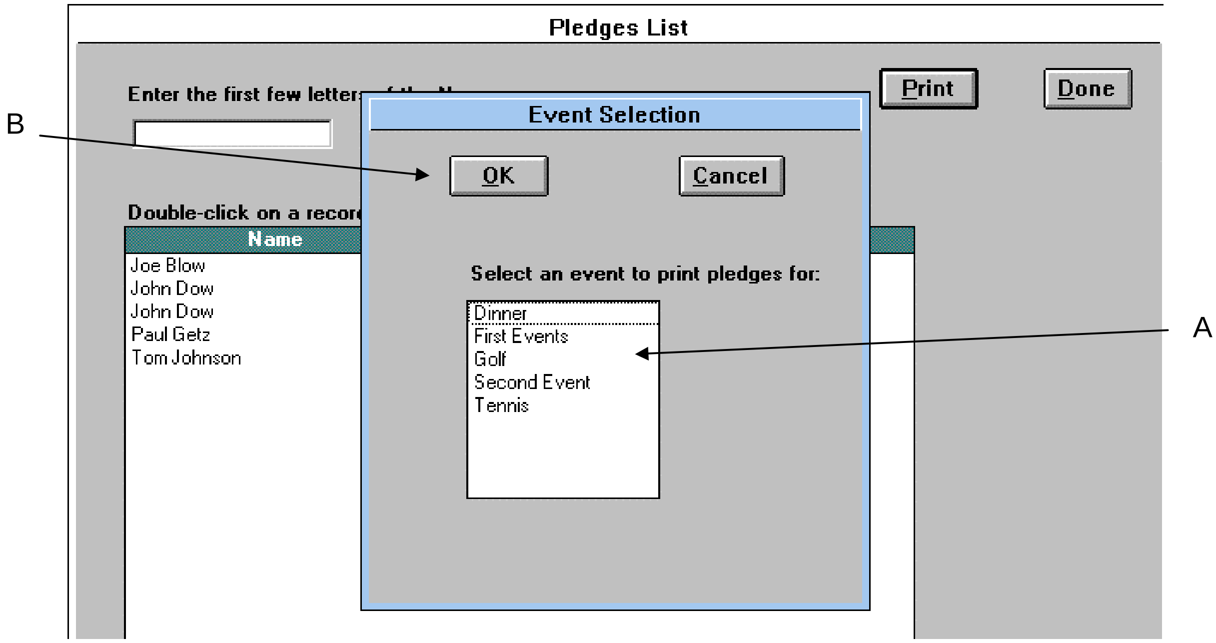


Fig. 6

3. Select an event from the list (Fig.6 - A) that you want to print pledges for.

4. Click the OK button (Fig.6 - B).

CHAPTER 4 -- RECEIPTS

The Receipts section is used to track receipts from Contributors. Receipts include donations from individuals or businesses, contributions from political committees, loans received, miscellaneous receipts (e.g., interest on bank accounts) and in-kind contributions.

ADDING RECEIPTS

Receipts must be added through the Contributors screen to ensure the receipt is associated with the proper contributor. To add a receipt,

1. On the Main Screen, click the Contributors button or hold down the Alt key and press the R key. The Contributor List screen (Fig.1) appears.

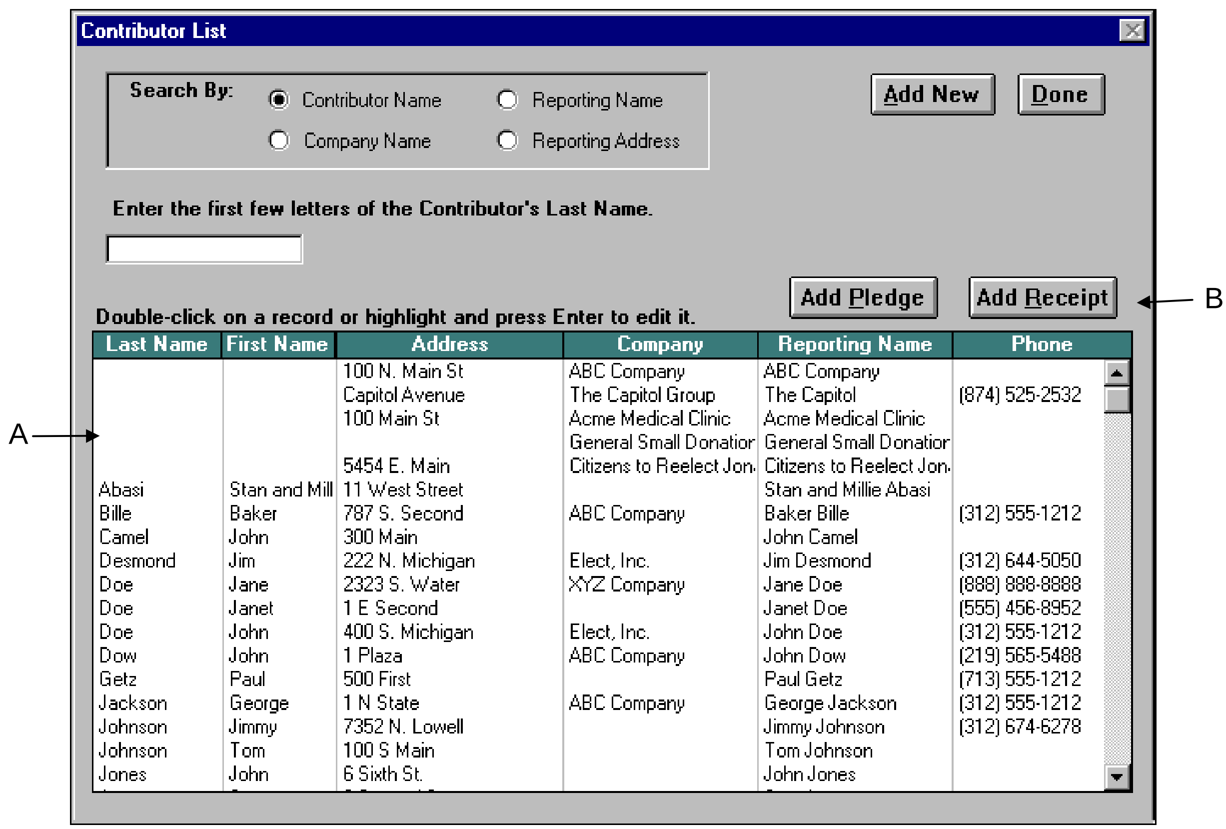


Fig. 1

2. You can add receipts either from this screen or from the Contributors screen.

   To add a receipt from the Contributors screen,

a. Highlight a Contributor in the list (Fig.1 - A) and either double-click on it or press Enter. The Contributors screen appears (Fig.2).
b. Click the Add Receipt button (Fig.2 - A).
c. The Receipts screen (Fig.3) appears.

To add a receipt from the Contributor List screen,

a. Highlight a Contributor in the list (Fig.1- A).
b. Click the Add Receipt button (Fig.1 - B).
c. The Receipts screen (Fig.3) appears.

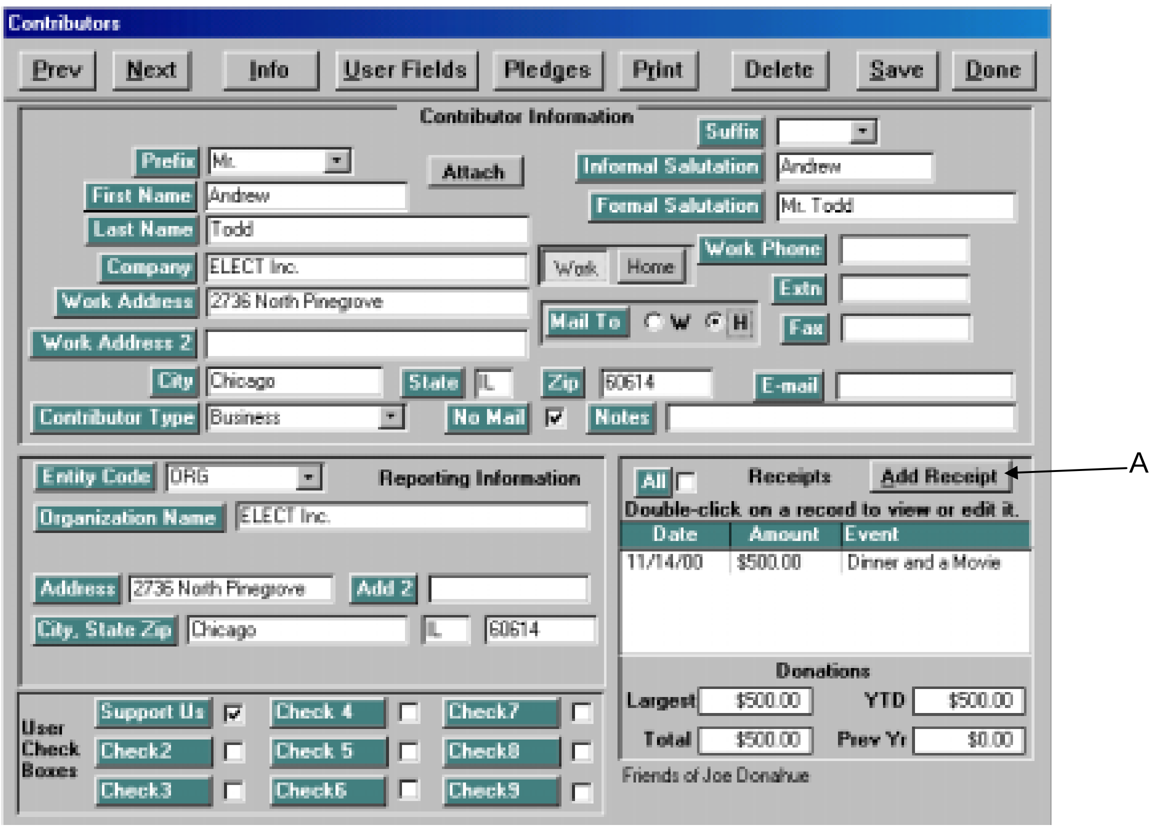


Fig. 2

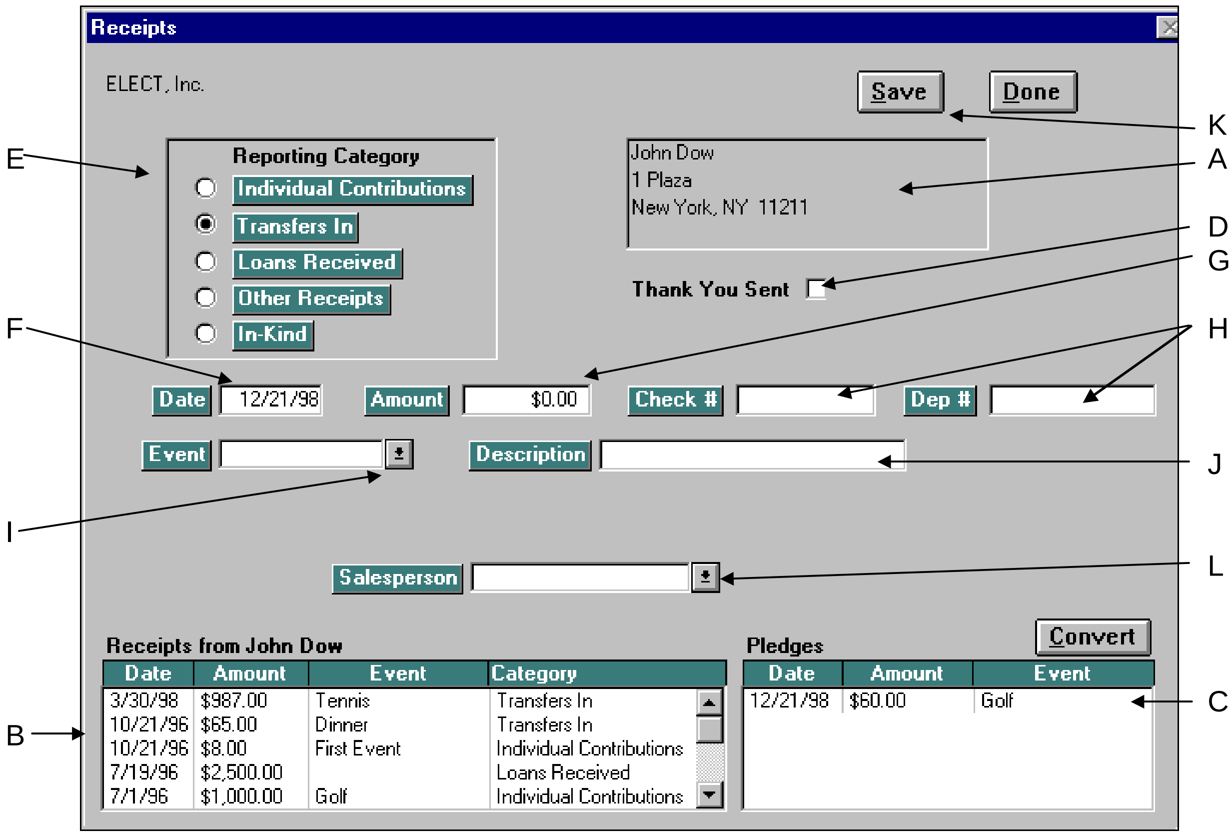


Fig. 3

The Receipts screen displays the Contributor's Reporting Name (Fig.3 - A), other receipts from this Contributor (Fig.3 - B), pledges from this Contributor (Fig.3 - C) and a Thank You Sent box which will automatically get marked after a Thank You letter has been sent for this contribution (Fig.3 - D) (For more information on Thank You letters, refer to the Thank You Letters section in Chapter 9 -- Letters and Mail Labels.)

3. Enter the Reporting Category by clicking one of the radio buttons in the Reporting Category section (Fig.3 - E). Use the following guidelines for your selection:

   - Individual Contributions - a donation from an individual or business (reported in Section A Part 1 of D-2)
   - Transfers In - contributions from political committees (reported in Section A Part 2 of D-2)
   - Loans Received - loans received (reported in Section A Part 3 of D-2)
   - Other Receipts - miscellaneous cash receipts that do not fall into the previous three categories (e.g., interest on bank accounts, payments on loans made) (reported in Section A Part 4 of D-2)
   - In-Kind - non-cash contributions (e.g., donated goods and services) (reported in Section A Part 5 of D-2)

4. Enter the date of the receipt in the Date field (Fig.3 - F).

5. Enter the amount of the receipt in the Amount field (Fig.3 - G). For in-kind contributions, estimate the value of the contribution. If you cannot determine a value, refer to Step 9c.

6. Optionally, enter the check number in the Check # field and the deposit number in the Dep # field (Fig.3 - H).

7. Select an event from the Event drop-down list (Fig.3 - I). If this receipt is not associated with a specific event, put it into a miscellaneous event. If you want to add a new event, type it in and hit Tab. You will then be prompted to save the new event. You must save the new event if you want to include it in this receipt record.

8. Enter a description in the Description field (Fig.3 - J). You must fill out this field for In-Kind contributions.

9. Optionally, select a salesperson from the Salesperson drop-down list (Fig.2 - L). If the Salesperson is not listed, type the new name and hit the Tab key. The program asks if you want to add this person to the Salespeople list.

10. Depending on the Reporting Category selected, other fields may appear on the screen.

    a. Loan - Fill in the Guarantor field (Fig.4 - A), if one exists, for this loan.

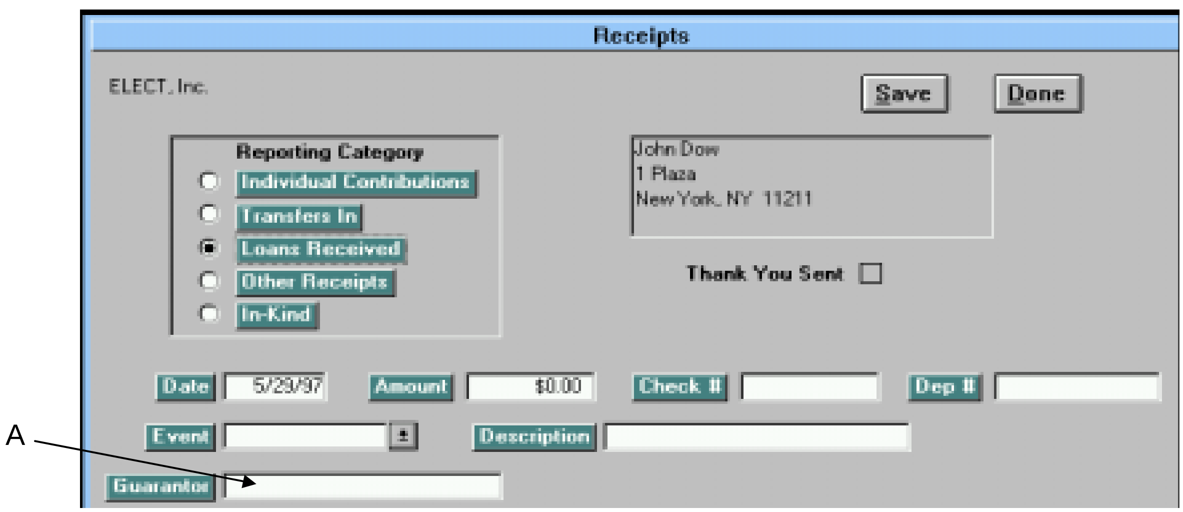


Fig. 4

    b. Other Receipts - The Loan Made drop-down list (Fig.5 - A) appears. If this receipt is a payment on a loan you have made to someone else, then select the loan from the list. (If this receipt is not a repayment of a loan, do not use this field.) This feature will track payments on loans you have made. You can view a complete list of repayments on the Loans screen. (For more information on Loans, see Chapter 7 -- Loans.)

Note: Do not include principal and interest payments together. Use the Loan Made drop-down list to record principal payments. Interest payments should be separate records and the Loan Made drop-down list should not be used for the interest payments.

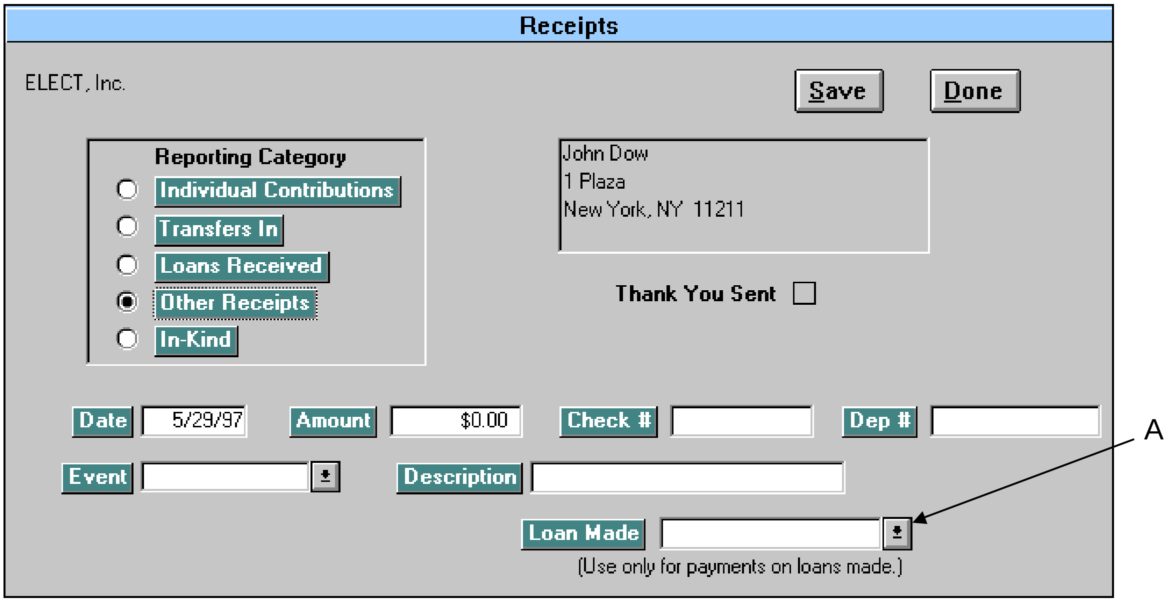


Fig. 5

c. In-Kind - The Value Unknown checkbox (Fig.6 - A) appears. If you do not know the value of an in-kind contribution, click this checkbox. Fill in the Vendor Paid fields (Fig.6 - B), if applicable.

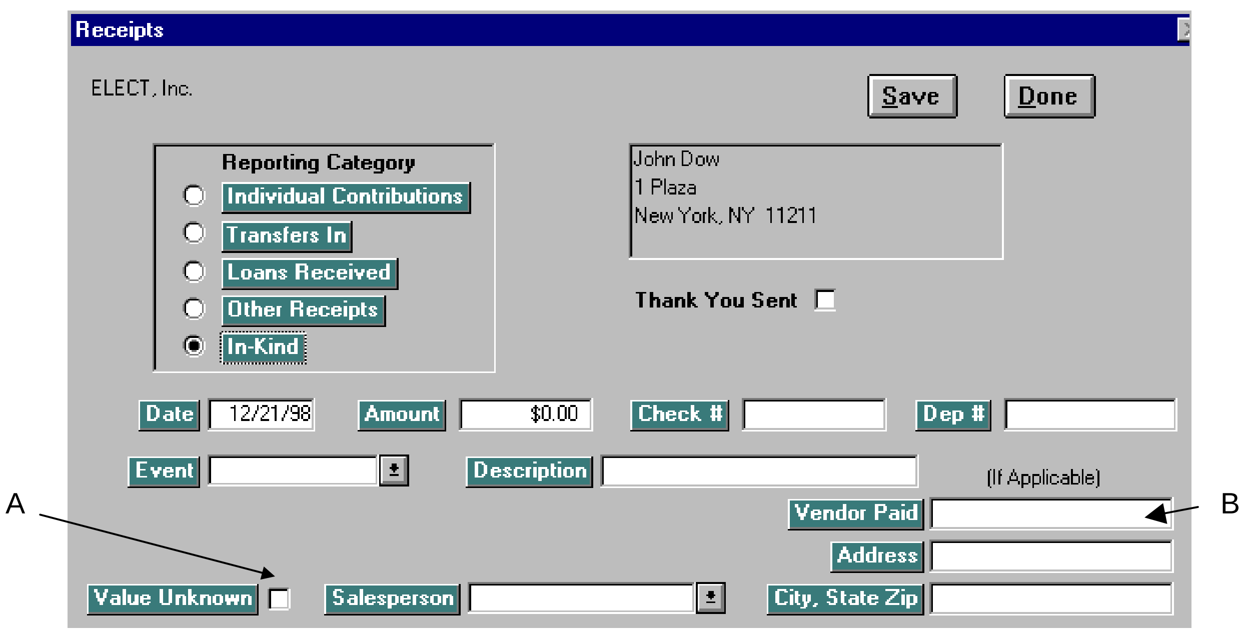


Fig. 6

11. Click the Save button (Fig.3 - K) to save the record.

CONVERTING PLEDGES TO RECEIPTS

If there is already a pledge from a contributor in the database, you can automatically convert the pledge into a receipt. For more information on this process, refer to the Converting Pledges to Receipts section in Chapter 3 -- Pledges.

VIEWING AND EDITING RECEIPTS

To view and edit receipts,

1. On the Main Screen, click the Receipts button or hold down the Alt key and press the R key. The Receipts Selection screen (Fig.7) appears.

2. Click the Receipts button (Fig.7 - A) on the Receipts Selection screen. The Receipts List screen (Fig. 8) appears.

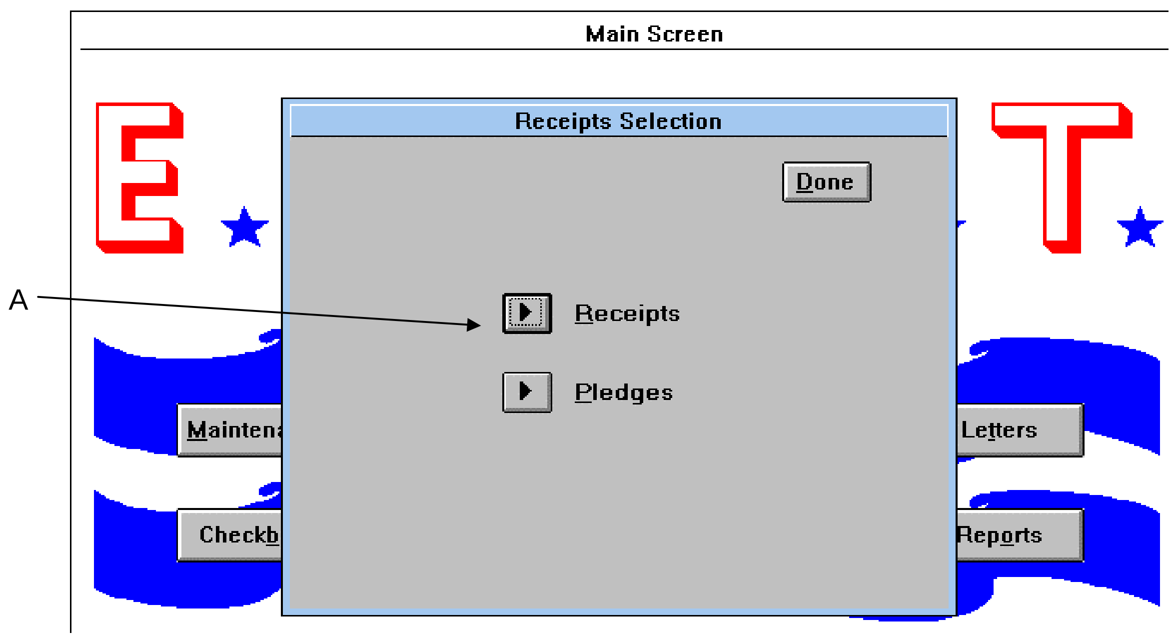


Fig. 7

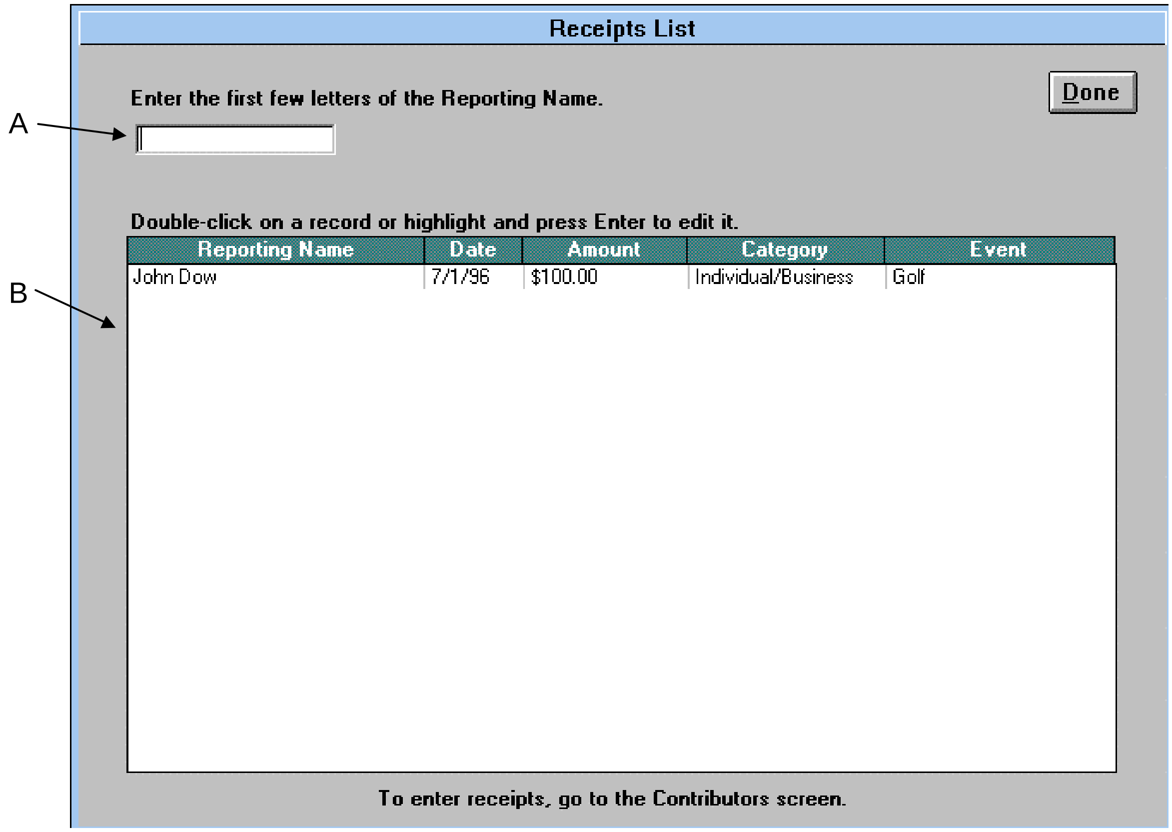


Fig. 8

3. To search for a receipt, type the first few letters of the Reporting Name (Fig.8 - A). The first match in the list (Fig.8 - B) will be highlighted.

4. To view the detail of a receipt, highlight the record in the list. Then, either double-click on it or press the Enter key. The Receipts screen (Fig.9) appears.

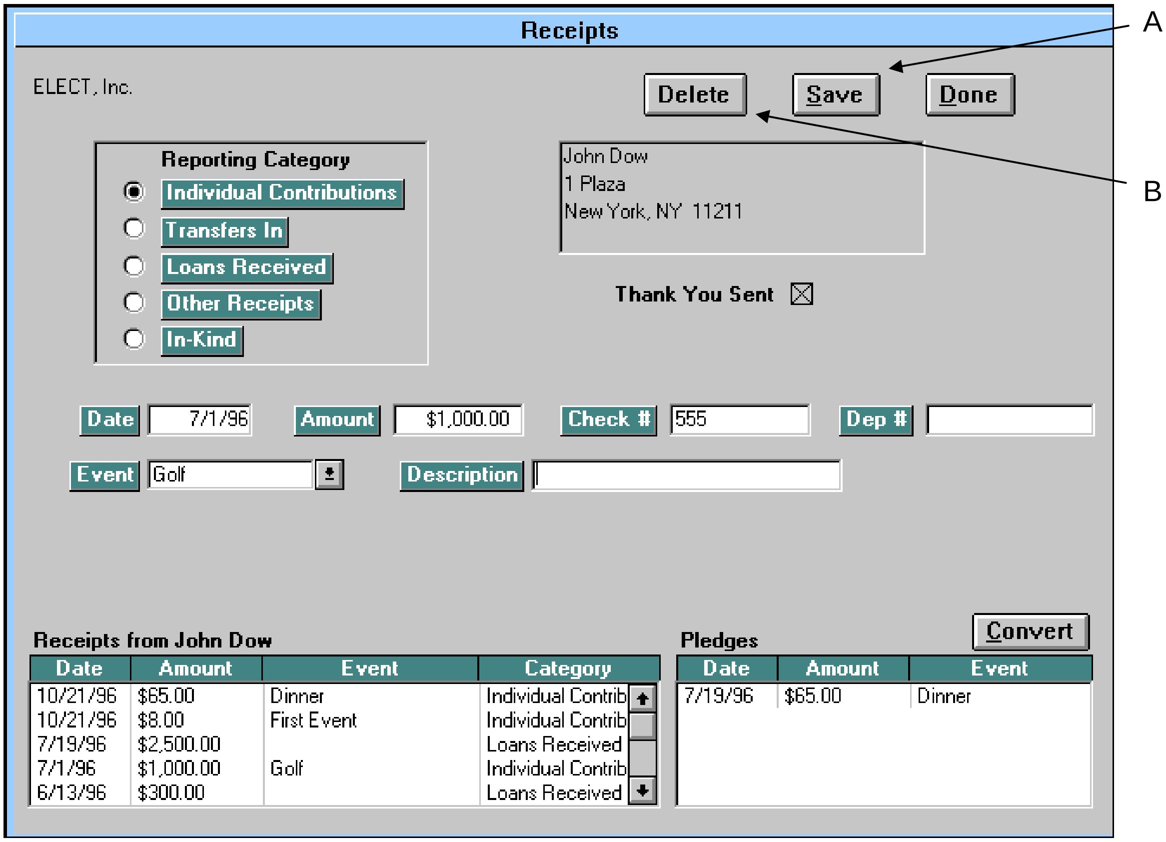


Fig. 9

5. Make the required changes. See the Adding Receipts section above for a description of the fields.

6. Click the Save button (Fig.9 - A) to save the record.

7. To delete a record, click the Delete button (Fig.9 - B).

Note: Receipts from a specific contributor can also be viewed through the Contributors screen. For more information, refer to Chapter 2 --Contributors.

PRINTING RECEIPTS

To print a list of receipts between two specified dates, refer to the Deposits section of Chapter 10 -- Reports.

CHAPTER 5 -- PAYEES

The Payees section allows you to track individuals and businesses that you pay expenses to.

ADDING PAYEES

To add a Payee,

1. On the Main Screen, click the Expenditures button or hold down the Alt key and press the E key. The Expenditures Selection screen (Fig.1) appears.

2. Click the Payees button (Fig.1 - A) on the Expenditures Selection screen. The Payees List screen (Fig.2) appears.

A

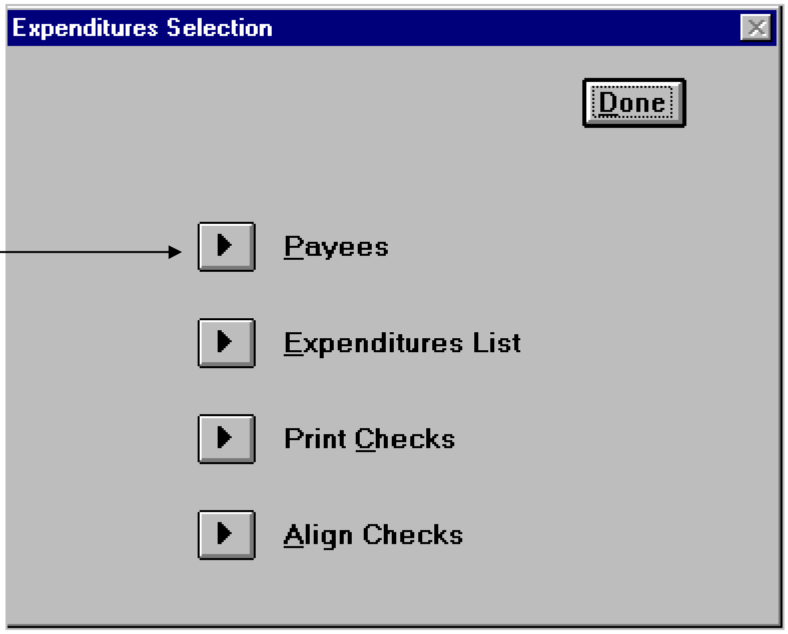


Fig. 1

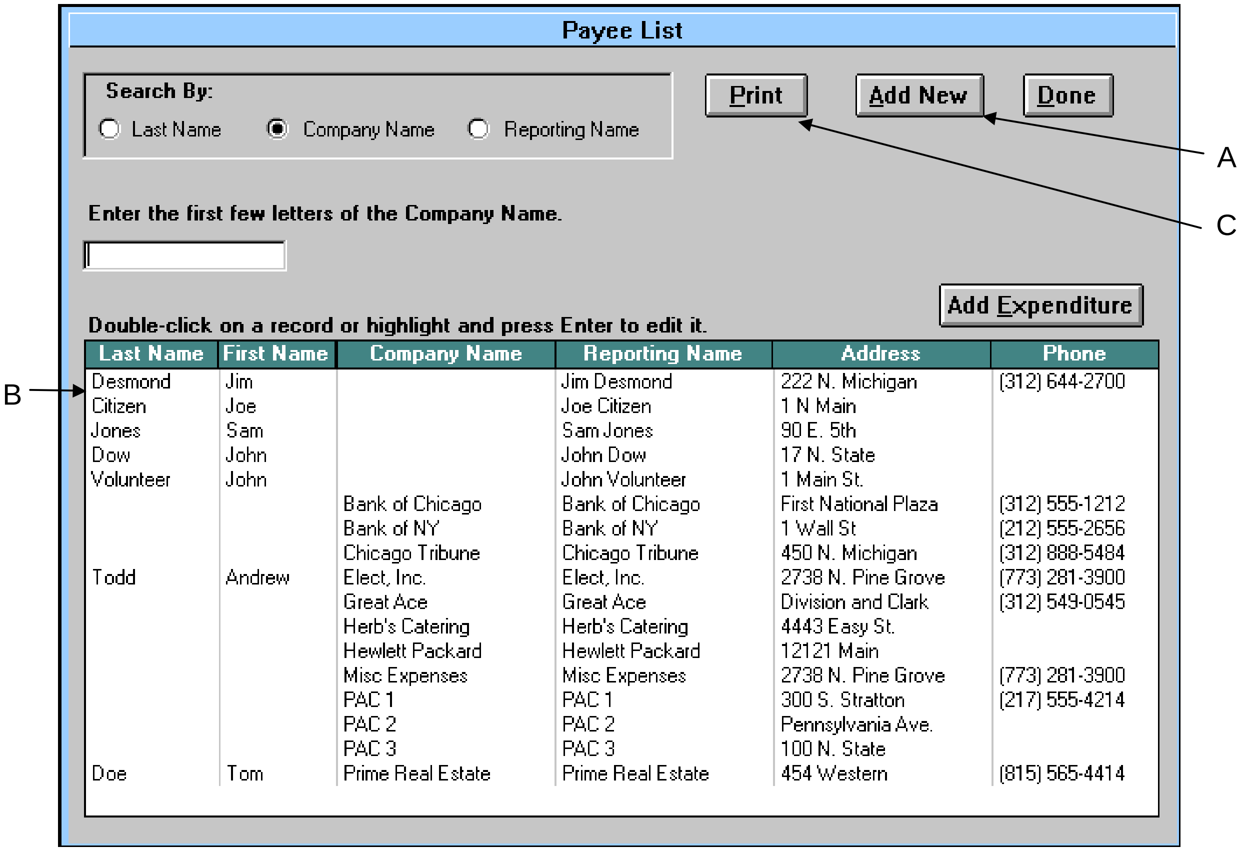


Fig. 2

3. Click the Add New button (Fig.2 - A). The Payees screen (Fig.3) appears.

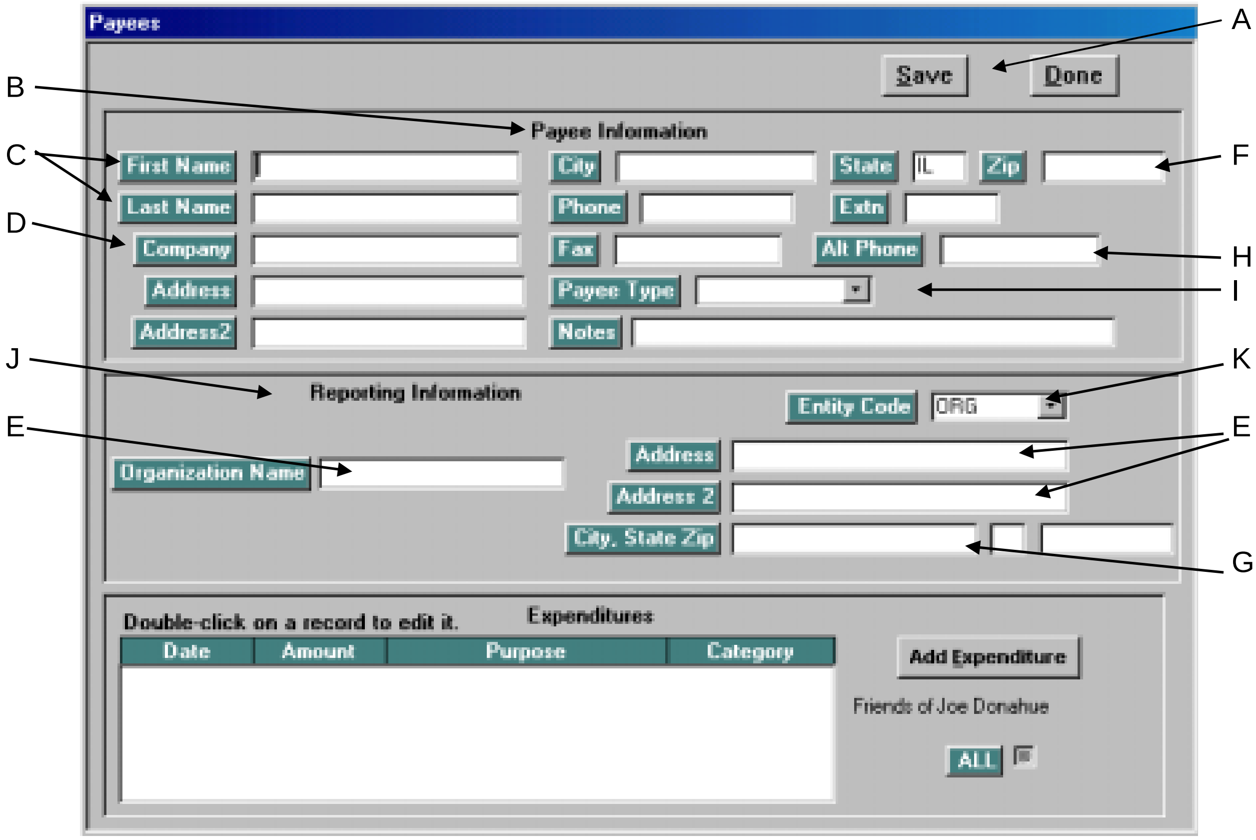


Fig. 3

4. Enter Payee information into the appropriate fields. (For more information on the fields, refer to the next section on Payees Screen Sections.) Be careful not to enter a payee who is already listed. To determine if the payee is already in the system, perform a careful search using the methods described in the Searching for a Payee section in this chapter to ensure that you are not duplicating payees. (You can enter a payee more than once if it has different addresses.)

5. Click the Save button (Fig.3 - A) to save the record. If you do not click Save, the payee will not be included. After clicking Save, you will automatically be able to enter another new payee.

PAYEES SCREEN SECTIONS

Payee Information

The Payee Information section (Fig.3 - B) displays name, company name, address, phone and extension, fax number, alternate phone number, payee type and a notes field.

Use the First Name and Last Name fields (Fig.3 - C) for the first and last names of a payee who is an individual. You can also use these fields for a contact name at a company.

After you enter the address information and tab out of the Zip field (Fig.3 - F), the Reporting Address (Fig.3 - G) automatically fills in. The information you entered for the Payee's address is copied into the Reporting Address. . The Entity Code refers to the type of entity of the contributor. The Reporting Name is dependent on the Entity Code chosen. If the Entity Code is ORG, the Reporting Name will be used. If the Entity Code is IND, the Reporting First Name and Reporting Last Name will be used. (For more information on Reporting Information, refer to the next section on Reporting Information.)

Use the Alt Phone field (Fig.3 - H) for a second phone number, a home phone number for a business or a business phone number for an individual.

The Payee Type field (Fig.3 - I) has three default values listed: Business, Grouped and Individual. This information is not required for any reports, but it helps you categorize your payees. If you need a value that is not one of the defaults, type it in and press Tab. You will then be prompted to add that value to the list.

Note: The Grouped type should be used only for a payee that is set up for grouped, unitemized expenditures. Expenditures for payees of this type will never be itemized. For example, you can use Grouped to record $500 in miscellaneous expenses. The $500 will be reported as an unitemized expenditure.

Reporting Information
The Reporting Information section (Fig.3 - J) of the Payees screen displays the way any expenditures for this payee are reported.

Note: You should have only one Payee record for each Reporting Name (and address). Multiple expenditures are then associated with this one record. (For more information on expenditures see Chapter 6 -- Expenditures.)

SEARCHING FOR A PAYEE

On the Payee List screen (Fig.2), determine how you wish to find the payee:

- by Last Name
- by Company Name
- by Reporting Name

By Last Name

This feature allows you to look up payees by their last name.

1. Click on the small circle in the “Search By” section next to Last Name (Fig.4 - A).

2. Begin typing in the last name (Fig.4 - B).

   As you type the last name, the system highlights the first record in the list that contains a last name with the entered letter or letters.

   For example, if you type A the system highlights the first record in your list that contains a last name that begins with A. If you type AS, the system highlights the first record in your list that contains a last name that begins with AS.

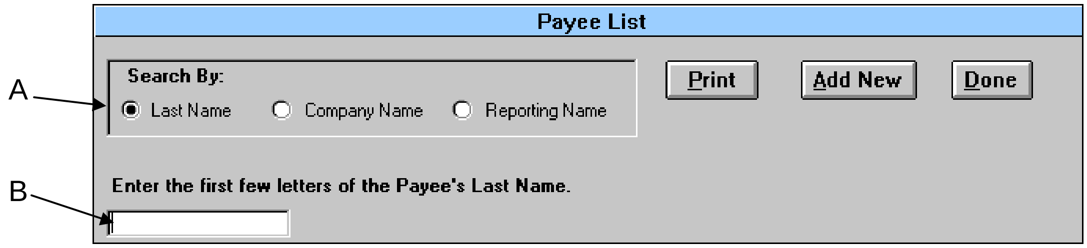


Fig. 4

By Company Name
This feature allows you to look up payees by their company name.

1. Click on the small circle in the “Search By” section next to Company Name (Fig.5 - A). Company Name is the default setting and is automatically selected when you access this feature.

2. Begin typing in the company name (Fig.5 - B).

   As you type the company name, the system highlights the first record in the list that contains a company name with the entered letter or letters.

   For example, if you type A the system highlights the first record in your list that contains a company name that begins with A. If you type AS, the system highlights the first record in your list that contains a company name that begins with AS.

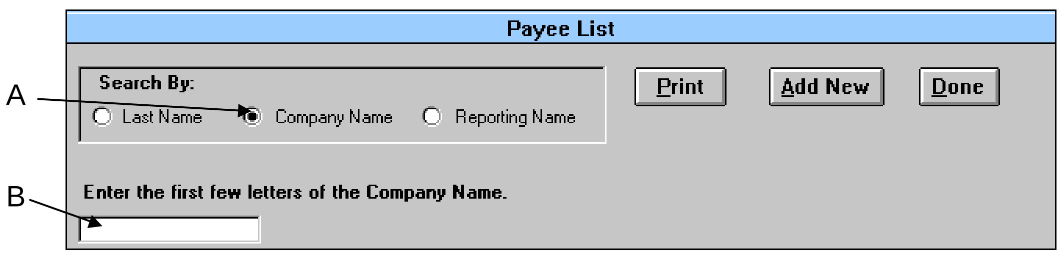


Fig. 5

By Reporting Name
This feature allows you to look up payees by their reporting name.

1. Click on the small circle in the “Search By” section next to Reporting Name (Fig.6 - A).

2. Begin typing in the reporting name (Fig.6- B).

   As you type the reporting name, the system highlights the first record in the list that contains a reporting name with the entered letter or letters.

   For example, if you type A the system highlights the first record in your list that contains a reporting name that begins with A. If you type AS, the system highlights the first record in your list that contains a reporting name that begins with AS.

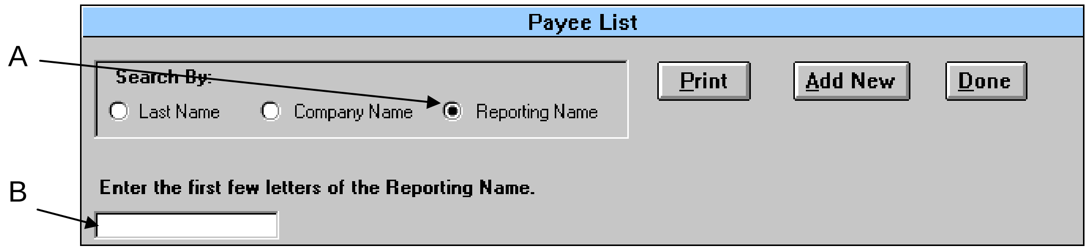


Fig. 6

VIEWING AND EDITING PAYEES

To view or edit a Payee,

1. On the Main Screen, click the Expenditures button or hold down the Alt key and press the E key. The Expenditures Selection screen (Fig.1) appears.

2. Click the Payees button (Fig.1 - A) on the Expenditures Selection screen. The Payees List screen (Fig.2) appears.

3. Search for the Payee in the list. (To search for a Payee, refer to the Searching for a Payee section in this chapter.) The first match in the list (Fig.2 - B) will be highlighted.

4. To view the details of the Payee, highlight a record in the list (Fig.2 - B). Then, either double-click on the record or press the Enter key. The Payees screen (Fig.7) appears. In addition to Payee information, this screen also displays a list (Fig.7 - A) of expenditures for this Payee. (For more information on expenditures, refer to Chapter 6 -- Expenditures.)

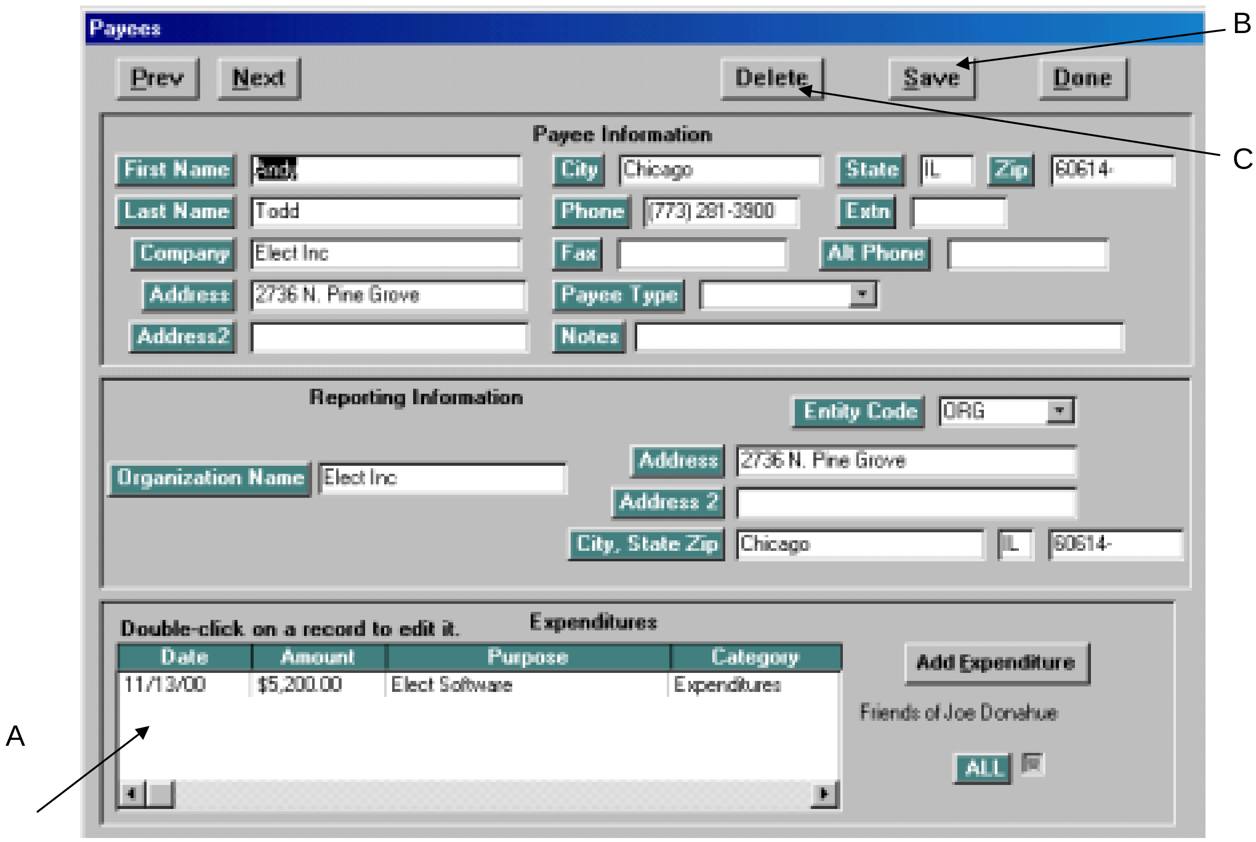


Fig. 7

5. Make any needed changes.

6. Click the Save button (Fig.7 - B) to save the changes.

7. Click the Delete button (Fig.7 - C) to delete the record. *Once a payee is deleted, it is permanently removed from your list. You cannot delete a payee if you have made an expenditure to that payee. To remove a payee to whom you have made an expenditure, first delete the expenditure and then delete the payee.*

PRINTING PAYEE LIST

To print a list of payees with address, city, state, zip, phone and fax,

1. Go to the Payee List screen as described above under Adding Payees.

2. Click the Print button (Fig.2 - C).

CHAPTER 6 -- EXPENDITURES

This part of the program tracks expenditures made to payees and reports them in Section B of the D-2 report.

ADDING EXPENDITURES

Expenditures must be added through the Payees section to ensure that expenditures are associated with the correct payee. To add an expenditure,

1. On the Main Screen, click the Expenditures button or hold down the Alt key and press the E key. The Expenditures Selection screen (Fig.1) appears.

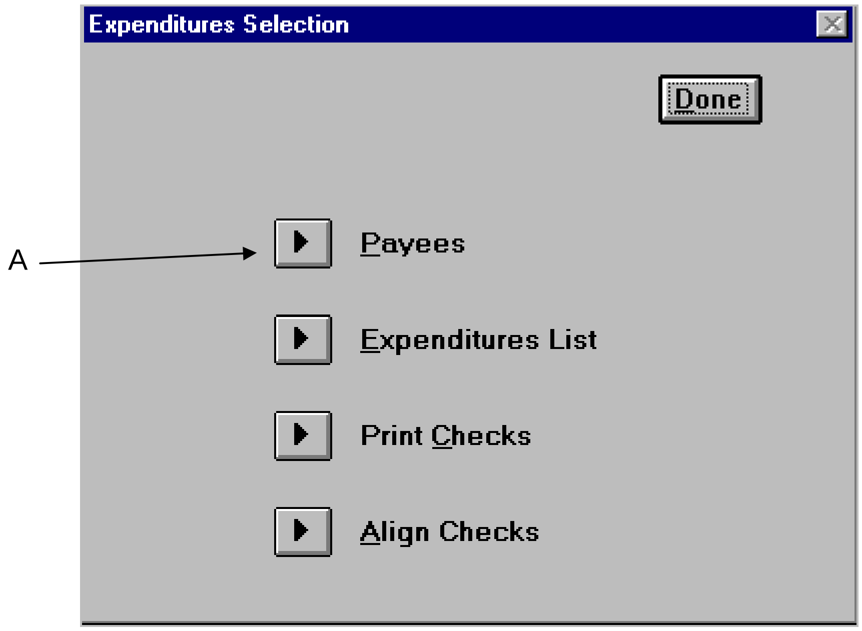


Fig. 1

2. Click the Payees button (Fig.1 - A) on the Expenditures Selection screen. The Payees List screen (Fig.2) appears.

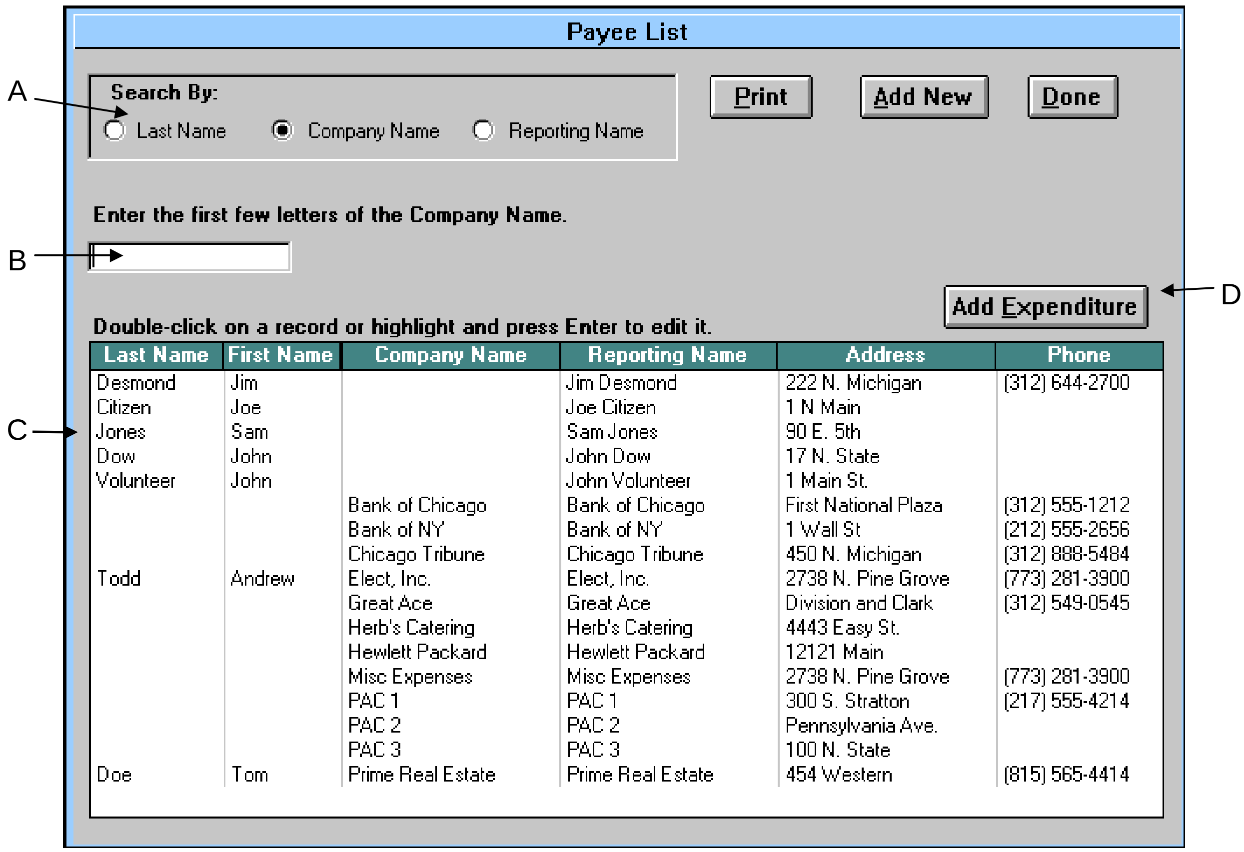


Fig. 2

3. Use the Search By box (Fig.2 - A) to select the type of search you want to run. Enter the first few letters of the name (Fig.2 - B). The first match in the list (Fig.2 - C) will be highlighted.

4. You can add expenditures either from the Payee List screen or the Payees screen.

   To add an expenditure from the Payee List screen,

   a. Highlight a record in the list.
   b. Click the Add Expenditure button (Fig.2 - D).
   c. The Expenditures screen (Fig.3) appears.

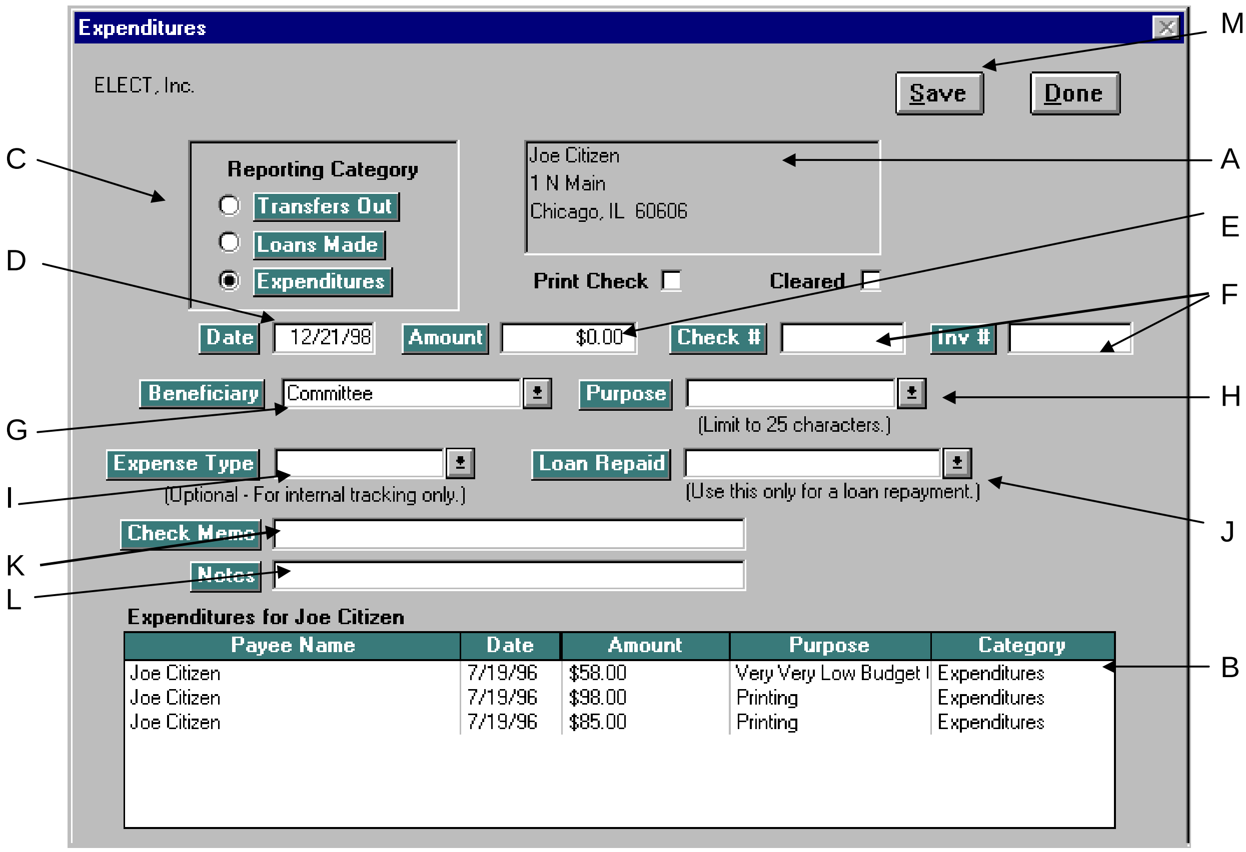


Fig. 3

To add an expenditure from the Payees screen,

a. Highlight a record in the list.
b. Either double-click on the record or Press the Enter key. The Payees screen (Fig.4) appears.
c. Click the Add Expenditure button (Fig.4 - A).
d. The Expenditures screen (Fig.3) appears.

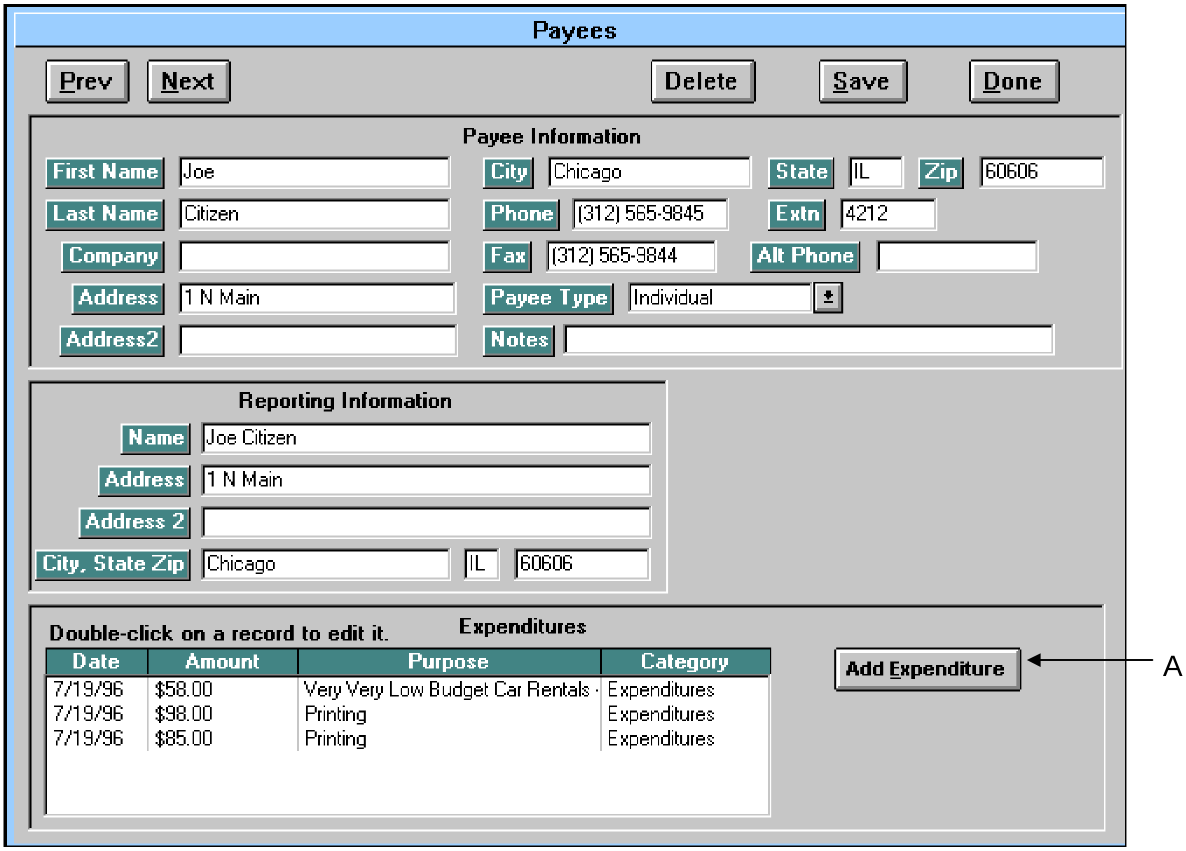


Fig. 4

The Expenditures screen displays the Payee Name (Fig.3 - A) and a list of expenditures for this Payee (Fig.3 - B).

5. Enter the Reporting Category by clicking one of the radio buttons in the Reporting Category section (Fig.3 - C). Use the following guidelines for your selection:

   - Transfers Out - expenditures made to political committees (reported in Section B Part 6 of D-2)
   - Loans Made - loans made (reported in Section B Part 7 of D-2)
   - Expenditures - most expenditures will fall into this category (e.g., operating expenses, loan payments, etc.) (reported in Section B Part 8 of D-2)

6. Enter the date of the expenditure in the Date field (Fig.3 - D).

7. Enter the amount of the expenditure in the Amount field (Fig.3 - E).

8. Optionally, enter the check number in the Check # field and the invoice number in the Inv # field (Fig.3 - F).

9. Select the beneficiary from the Beneficiary drop-down list (Fig.3 - G). The beneficiary is usually the Committee. For a Transfer Out, the beneficiary would be the committee

receiving the money. If the beneficiary is not listed, type the new beneficiary and it will automatically be added to your Beneficiaries list.

10. Enter the purpose in the Purpose drop-down field (Fig.3 - H). Once you enter a purpose for a Payee, this purpose will be in the Purpose drop-down list the next time you enter an expenditure for this Payee. Try to keep the length of the purpose below 25 characters so it will fit more easily on the D-2 report.

Note: If the Payee is a credit card company, the Purpose field must contain the name of the company, city and state who provided the services or merchandise.

11. Optionally, select the type of expense from the Expense Type drop-down list (Fig.3 - I). If the type is not in the list, enter a new type and it will be saved automatically. Use this field for internal tracking only. You can set up expense types such as: travel, utilities, salary, office supplies, etc.

12. If the expenditure is for the repayment of a loan you have received, select the loan from the Loan Repaid drop-down list (Fig.3 - J). You can view the status of loan repayments on the Loans screen. (For more information on Loans, refer to Chapter 7 -- Loans).

Note: Use the Loan Repaid drop-down list only for the repayment of principal. Report the interest payment as a separate expenditure and do not use the Loan Repaid drop-down list.

13. Optionally, enter a memo to appear on printed checks in the Check Memo field (Fig.3 - K).

14. Enter any other comments into the Notes field (Fig.3 - L).

15. Click the Save button (Fig.3 - M) to save the record.

VIEWING AND EDITING EXPENDITURES

To view and edit expenditures,

1. On the Main Screen, click the Expenditures button or hold down the Alt key and press the E key. The Expenditures Selection screen (Fig.5) appears.

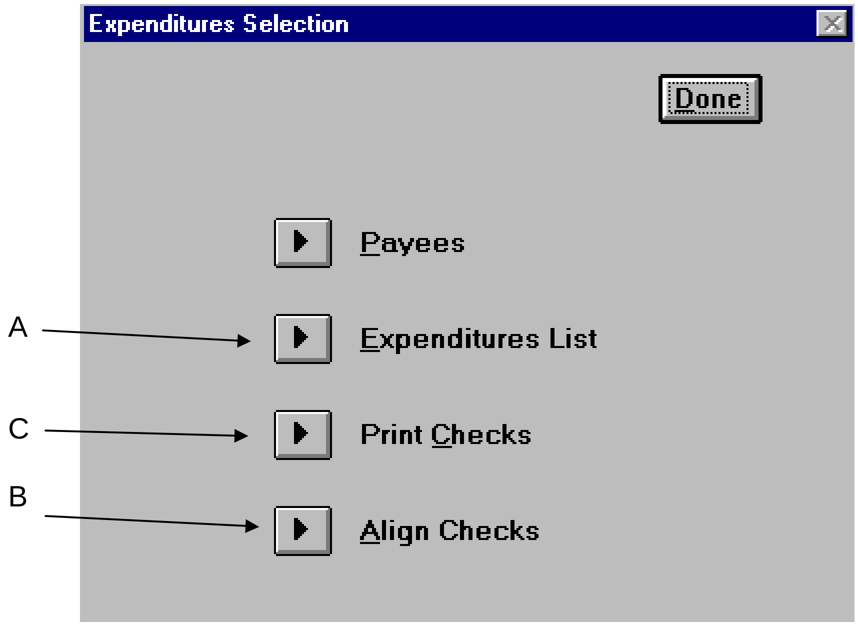


Fig. 5

2. Click the Expenditures List button (Fig.5 - A) on the Expenditures Selection screen. The Expenditures List screen (Fig.6) appears.

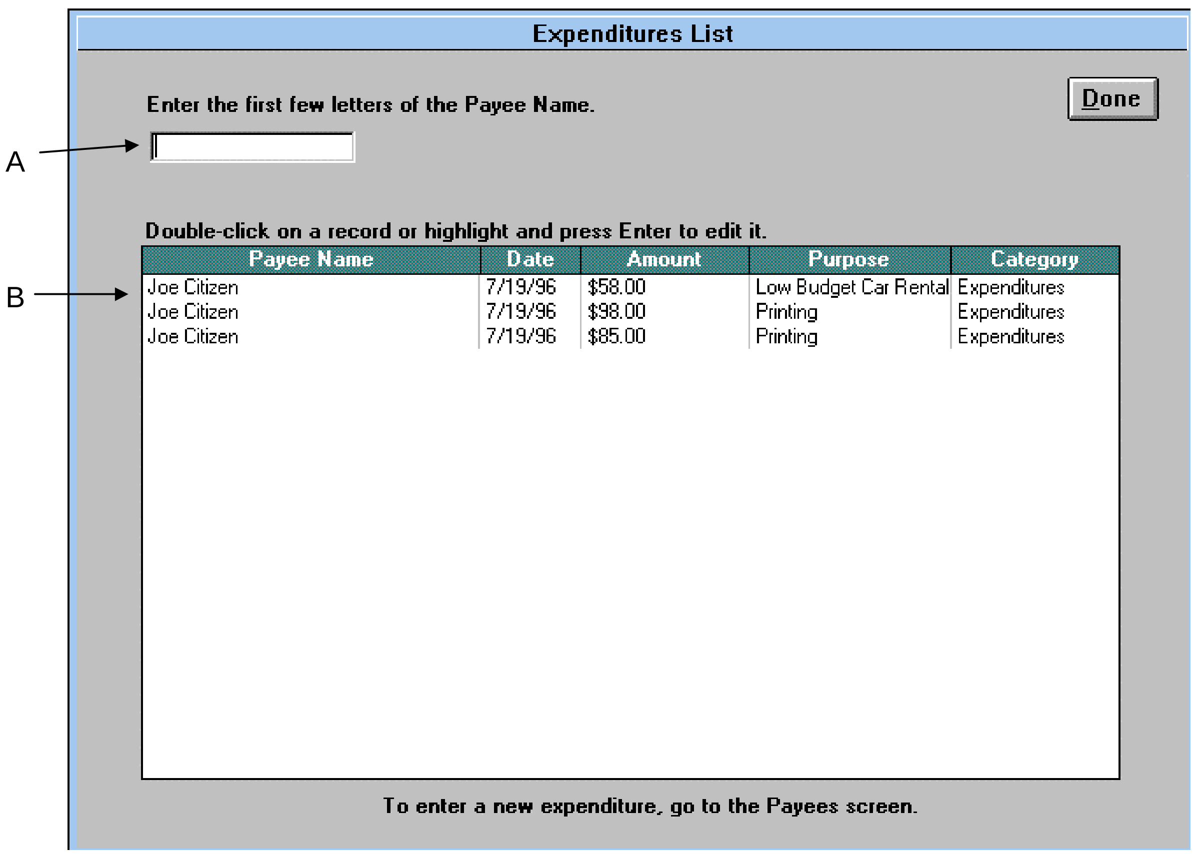


Fig. 6

3. To search for an expenditure, type the first few letters of the Payee Name (Fig.6 - A). The first match in the list (Fig.6 - B) will be highlighted.

4. To view the detail of an expenditure, highlight the record in the list. Then, either double-click on it or press the Enter key. The Expenditures screen (Fig.7) appears.

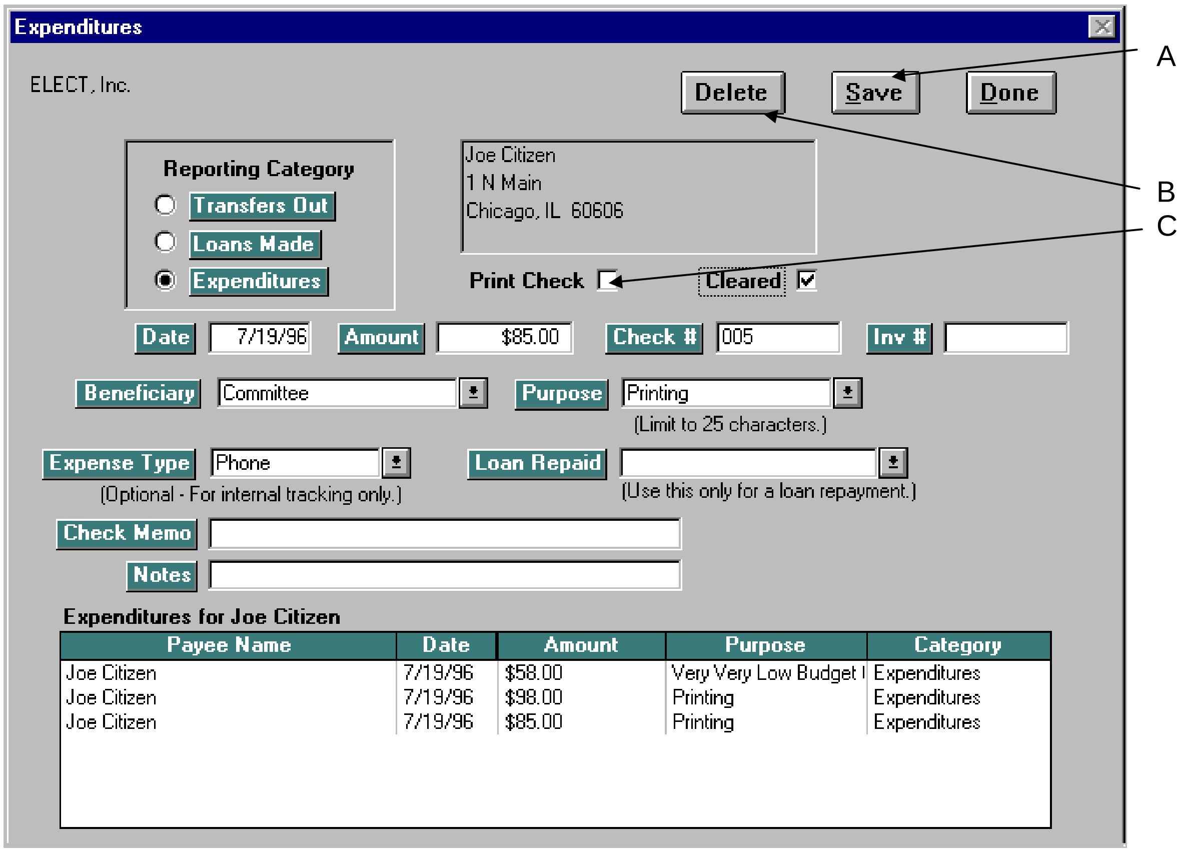


Fig. 7

5. Make the required changes. See the Adding Expenditures section above for a description of the fields.

6. Click the Save button (Fig.7 - A) to save the record.

7. To delete a record, click the Delete button (Fig.7 - B).

Note: Expenditures to a specific payee can also be viewed through the Payees screen. For more information, refer to the Viewing and Editing Payees section of Chapter 5 -- Payees.

PRINTING EXPENDITURES

To print a list of expenditures back to a specific date, refer to the Expenditures section of Chapter 10 -- Reports.

PRINTING CHECKS

E.L.E.C.T. Fundraising software is set up to print single sheet voucher style checks.

Aligning Checks
Before printing actual checks, align your checks in the printer. You can test the alignment on plain paper. To do this,

1. On the Main screen, click the Expenditures button or hold down the Alt key and press the E key. The Expenditures Selection screen (Fig.5) appears.

2. Click the Align Checks button (Fig.5 - B) or hold down the Alt key and press the A key. The Align Checks screen (Fig.8) appears.

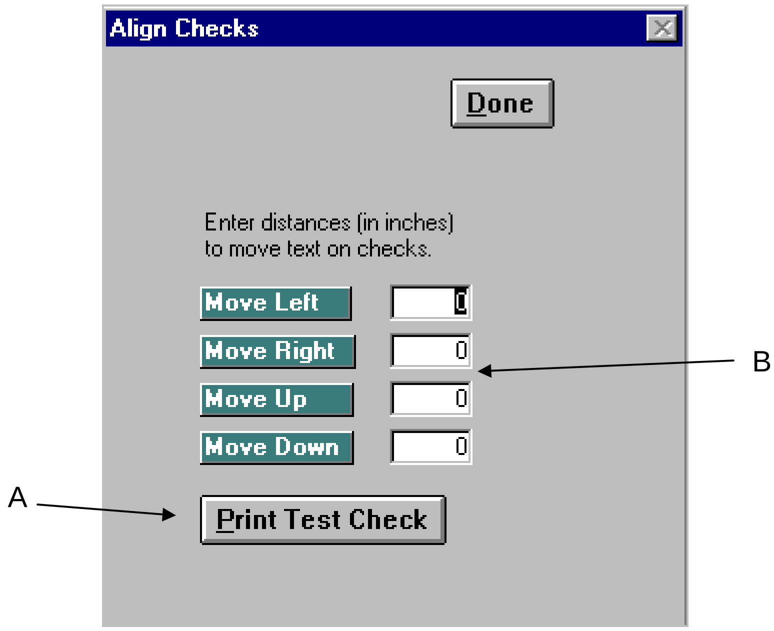


Fig. 8

3. Click the Print Test Check button (Fig.8 - A). A sample check prints out.

4. If the printing is off center, enter the distances to move the text in the appropriate fields (Fig.8 - B). Then, print another test check.

Selecting Expenditures and Printing Checks
Once the printer is aligned, you can select expenditures and print checks for them. To select the expenditures for check printing,

1. On the Expenditures screen, mark the Print Check box (Fig.7 - C) for each expenditure you want to print checks for and click the Save button (Fig.7 - A) to save the record.

2. On the Main screen, click the Expenditures button or hold down the Alt key and press the E key. The Expenditures Selection screen (Fig.5) appears.

3. Click the Align Checks button (Fig.5 - C) or hold down the Alt key and press the C key.

4. Enter the check number of the first check to be printed and click the OK button. (Use only numbers; do not use any letters.) This number will be increased by one for each check. As each check is printed, the check number is saved in the database. Any check number you have entered on the Expenditures screen is overwritten.

5. After printing, the program prompts you to reprint checks. If you need to reprint checks, click the Yes button.

6. Select the checks that need to be reprinted from the list (Fig.9 - A) and click the OK button (Fig.9 - B).

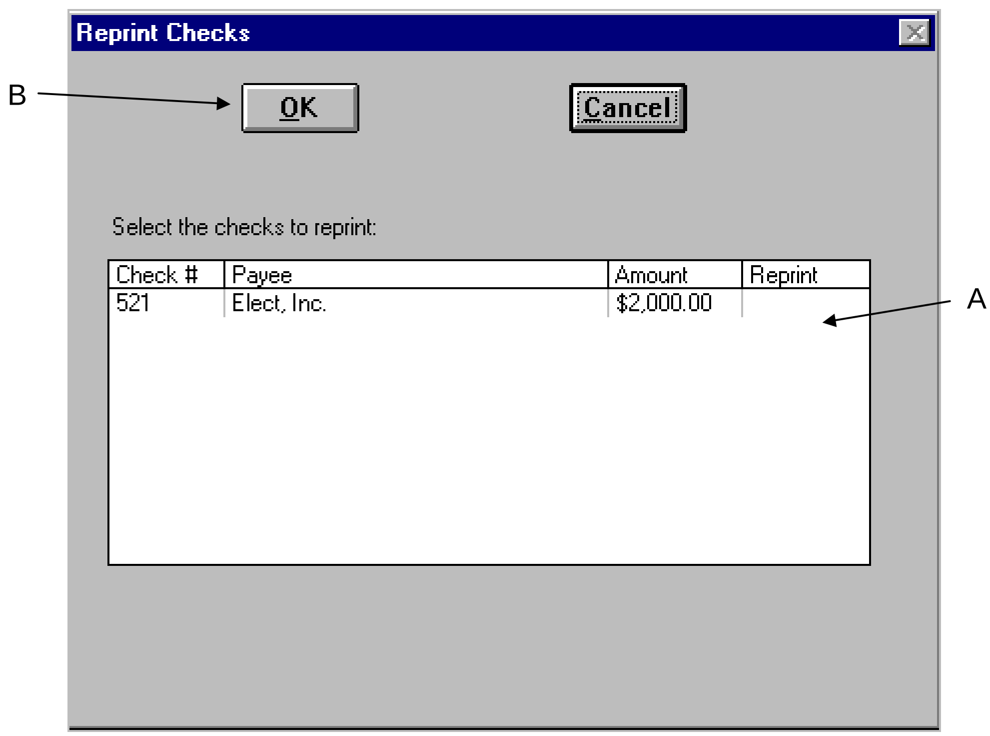


Fig. 9

7. Enter the check number of the first check to be reprinted and click the OK button.

CHAPTER 7 -- LOANS

This section of the program allows you to track loans made, loans received, payments on loans received, payments on loans made and balances on loans.

ADDING LOANS RECEIVED

To add a loan received, you must add a receipt that is designated as a loan. For more information, refer to the Adding Receipts section of Chapter 4 -- Receipts.

ADDING LOANS MADE

To add a loan made, you must add an expenditure that is designated as a loan made. For more information, refer to the Adding Expenditures section of Chapter 6 -- Expenditures.

VIEWING AND EDITING LOANS/DEBTS

1. To view and edit loans,On the Main Screen, click the Loans/Debts button or hold down the Alt key and press the L key. The Loans/Debts screen (Fig.1) appears.

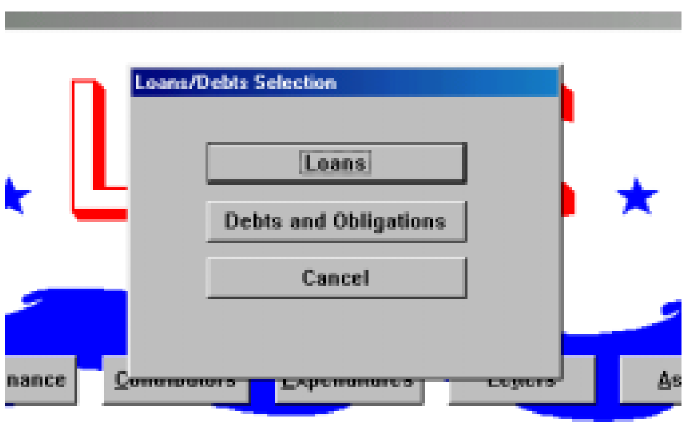


Fig. 1

2. Click on the Loans button on the Selection Screen (Fig. 1). The Loan Selection screen (Fig. 2) appears.

3. To view the detail of a loan, either double-click on it or highlight it and press the Enter key. If you selected a Loan Received, the Receipts screen will appear. If you selected a Loan Made, the Expenditures screen will appear.

4Make any needed changes and click the Save button to save the record. (For more information on Loans Received, refer to Chapter 4-- Receipts. For more information on Loans Made refer to Chapter 6 -- Expenditures.)

To view and edit debts and obligations,

1. On the Main Screen, click the Loans/Debts button or hold down the Alt key and press the L key. The Loans/Debts screen (Fig.1) appears.

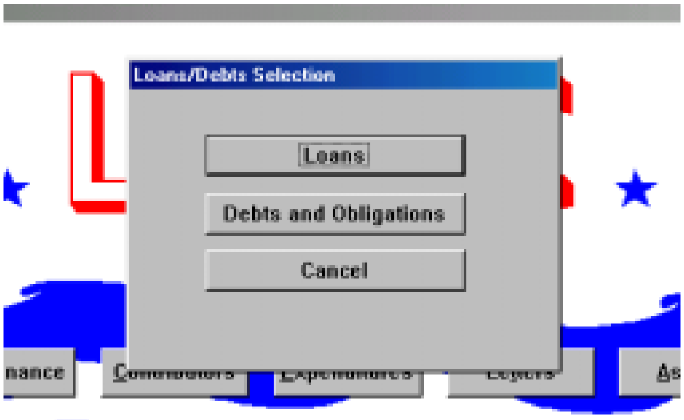


Fig. 1

2. Click on the Debts and Obligations button on the Selection Screen (Fig. 1). The Debt and Obligations Selection screen (Fig. 4) will appear.

3. To view the detail of a debt/obligation, either double-click on it or highlight it and press the Enter key and the Debt/Obligation detail will appear.

4. Make any needed changes and click the Save button to save the record.

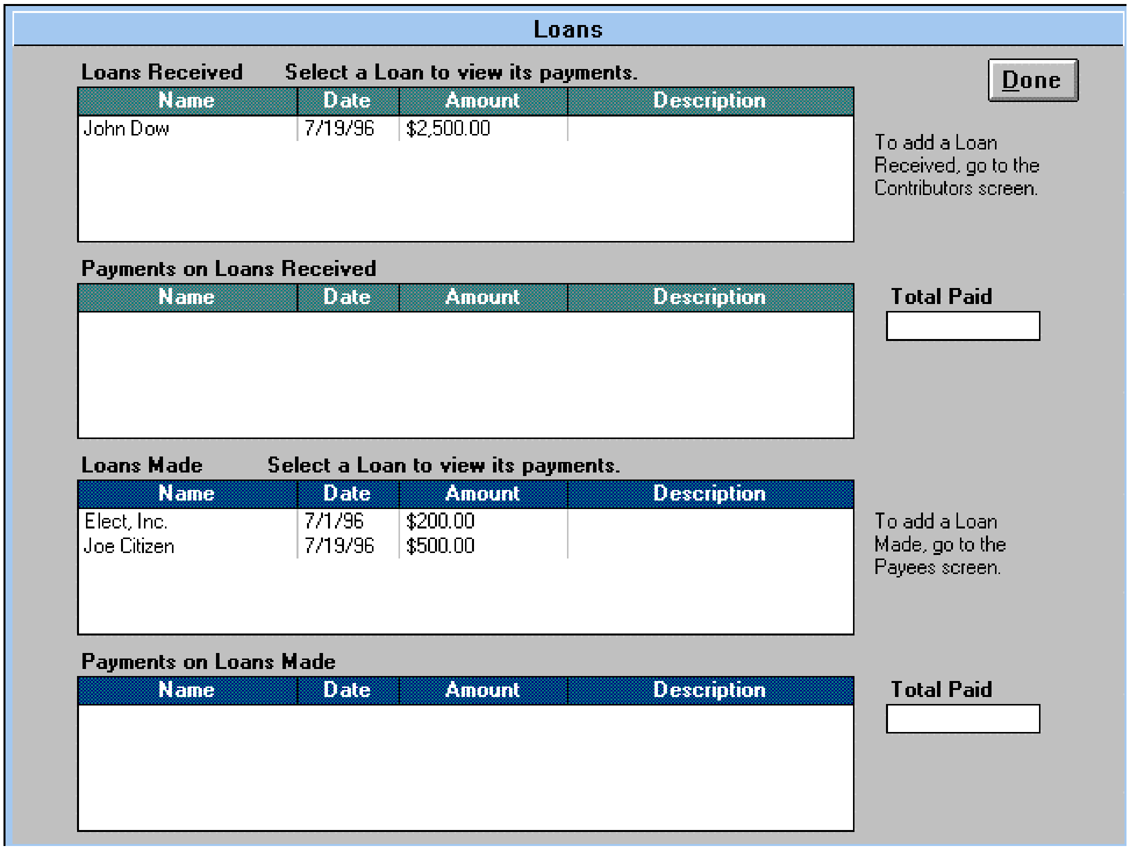


Fig. 2

VIEWING AND EDITING LOAN PAYMENTS

To view and edit loan payments,

1. On the Main Screen, click the Loans button or hold down the Alt key and press the L key. The Loans screen (Fig.1) appears.

2. To view the payments on a loan, highlight the loan (Figs.3 - A, B). Payments on that loan will appear in the list box below (Figs.3 - C, D). The total of the payments on the loan will appear in the Total Paid field (Figs.3 - E, F).

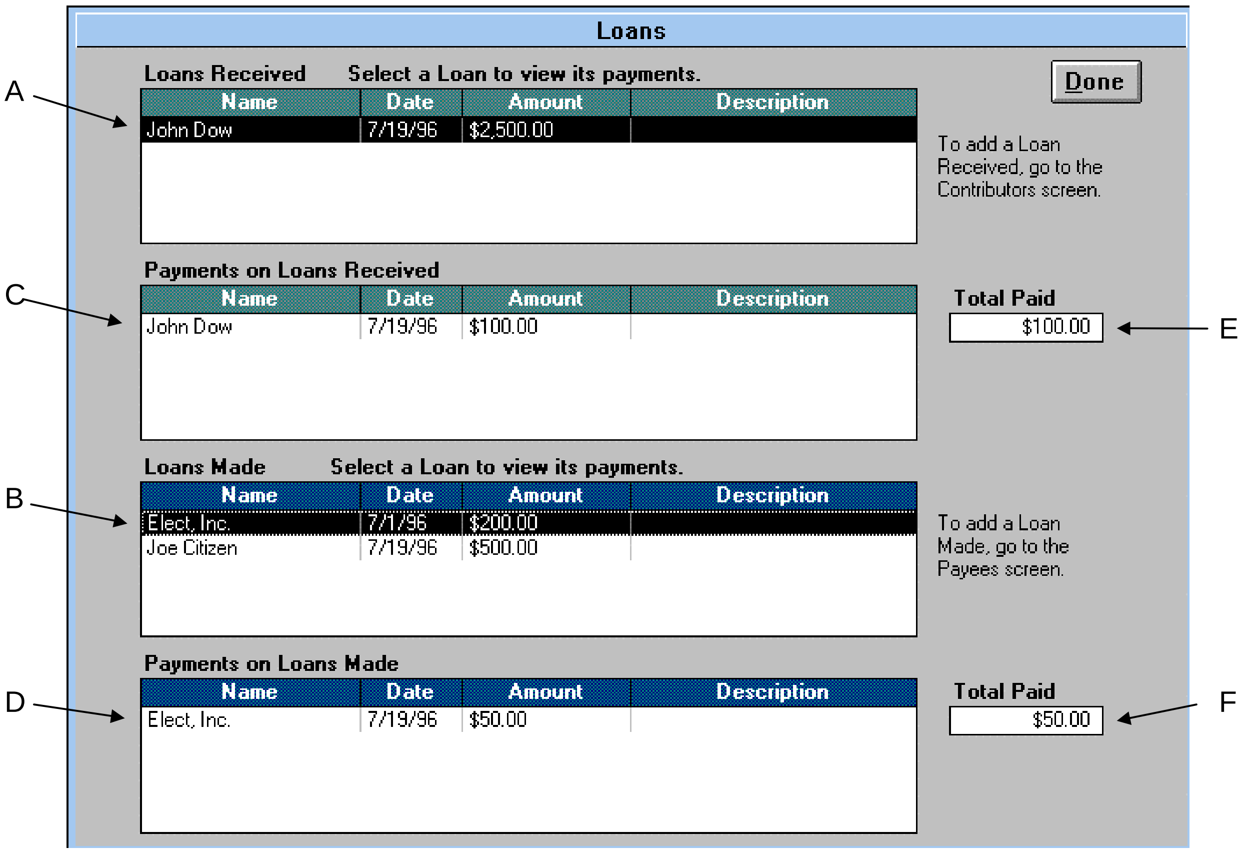


Fig. 3

3. To view the detail of a payment on a loan, either double-click the payment record or highlight it and press the Enter key. If you selected a Payment on Loans Received, the Expenditures screen will appear. If you selected a Payment on Loans Made, the Receipts screen will appear.

4. Make any needed changes and click the Save button to save the record.. (For more information on Payments on Loans Made, refer to Chapter 4 -- Receipts. For more information on Payments on Loans Received, refer to Chapter 6 -- Expenditures.)

Insert debt/obligation screen here

Fig. 4

CHAPTER 8 -- CHECKBOOK

The checkbook section allows you to view the status of your account balance. You enter the amount of funds available at the start of your reporting period. You can view all receipts, expenditures and the balance during that period. You can also reconcile your checking account.

In addition, you enter information about your political committee in the Checkbook. This information will appear on the D-2 reports. You also enter the date of the next election in the Checkbook. This date is used for gathering the appropriate reporting data on the D-2 report.

SETTING UP THE REPORTING PERIOD

To enter information about the reporting period,

1. On the Main Screen, click the Checkbook button or hold down the Alt Key and press the B key. The Checkbook screen (Fig.1) appears.

2. Enter the date the reporting period begins in the Date field (Fig.1 - A). The Save Funds button (Fig.1 - B) appears. This date should be the day after the last day of the previous reporting period. The date you enter will be used as the first day of the reporting period for the D-2 report.

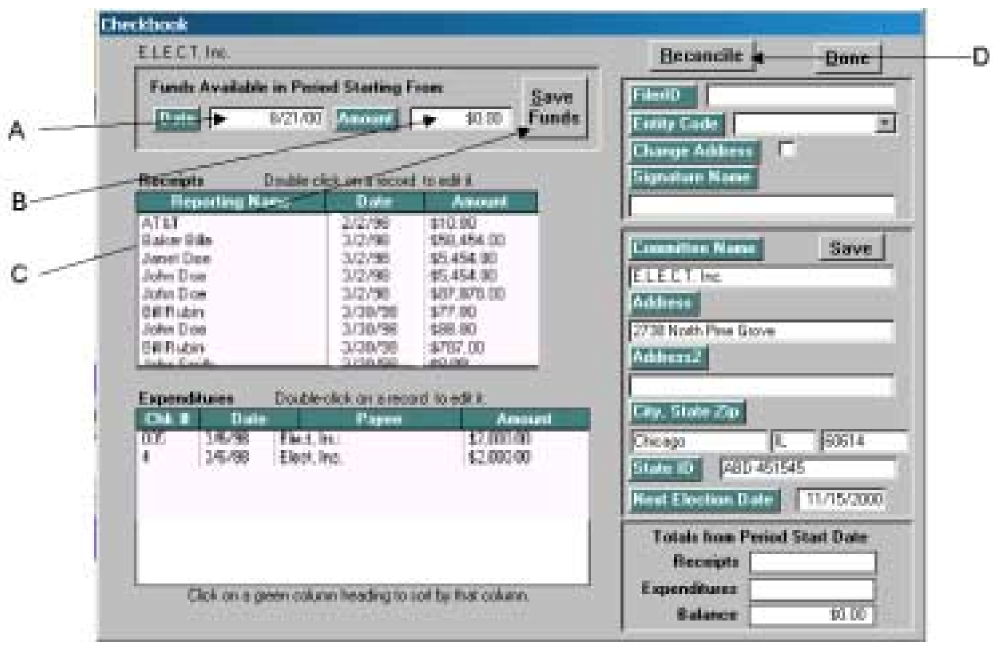


Fig. 1

3. Enter the amount of funds available at the beginning of this reporting period in the Amount field (Fig.1 - C). This amount should be the same as the amount at the close of the last reporting period. This amount will be used as the Funds Available at the Beginning of the Reporting Period on the D-2 report.

4. Click the Save Funds button (Fig.1 - B) to save the record.

VIEWING AND EDITING THE CHECKBOOK BALANCE

To view and edit the checkbook balance,

1. Go to the Checkbook screen (see the section above).

2. A list of all receipts since the start of the reporting period displays in the Receipts list (Fig.2 - A). A list of all expenditures since the start of the reporting period displays in the Expenditures list (Fig.2 - B). You can sort these lists by clicking on the green column heading you want to sort by. To view or edit any of these records, either double-click on the record or highlight the record and press the Enter key.

   If you view a receipt record, the Receipts screen appears. (For more information on the Receipts screen, refer to Chapter 4 -- Receipts.) If you view an expenditure record, the Expenditures screen appears. (For more information on the Expenditures screen, refer to Chapter 6 -- Expenditures.)

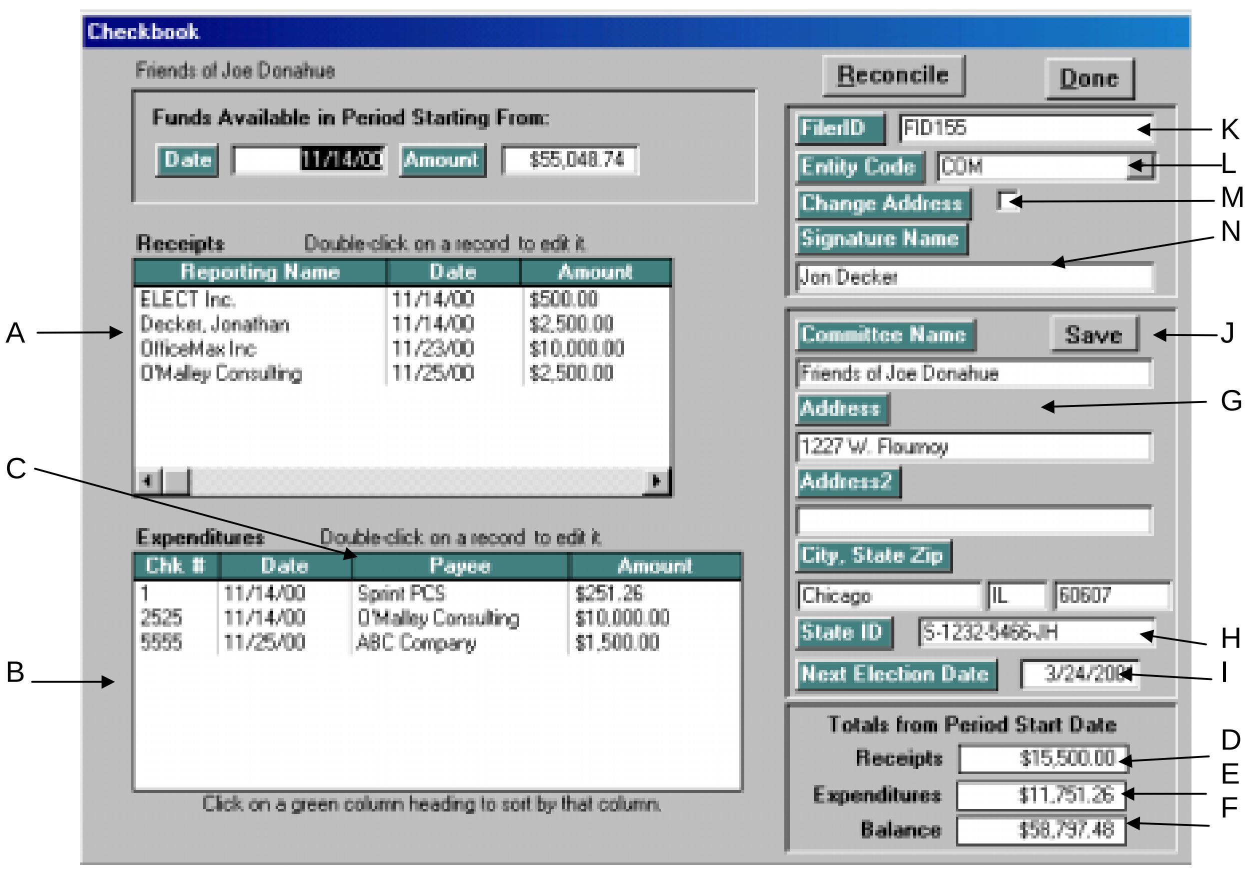


Fig. 2

The totals of all receipts (Fig.2 - D) and expenditures (Fig.2 - E) from the period start date display in the lower right corner. The balance (the amount at the start of the period plus receipts minus expenditures) also displays (Fig.2 - F).

VIEWING AND EDITING COMMITTEE INFORMATION AND NEXT ELECTION DATE

To view and edit committee information and the date of the next election,

1. Go to the Checkbook screen (see the first section in this chapter). Committe information is displayed on the right side of the screen (Fig.2 - G).

2. Enter or change the appropriate information. This information will appear on your D-2 reports. Contact the State Board of Elections to get your State ID (Fig.2 - H).

3. Also be sure to enter the date of the next election (Fig.2 - I). E.L.E.C.T. Fundraising uses this date to calculate receipts that need to be reported on the A-1 report. This date also appears on the D-2 report.

4. Click the Save button (Fig.2 - J) to save the record.

RECONCILING YOUR CHECKING ACCOUNT

On the Reconciliation screen, you can easily reconcile your account by clicking cleared transactions. To reconcile your account,

1. On the Main Screen, click the Checkbook button or hold down the Alt key and press the B key. The Checkbook screen (Fig.1) appears.

2. Click the Reconcile button or hold down the Alt key and press the R key (Fig.1-D). The Reconciliation screen (Fig.3) appears.

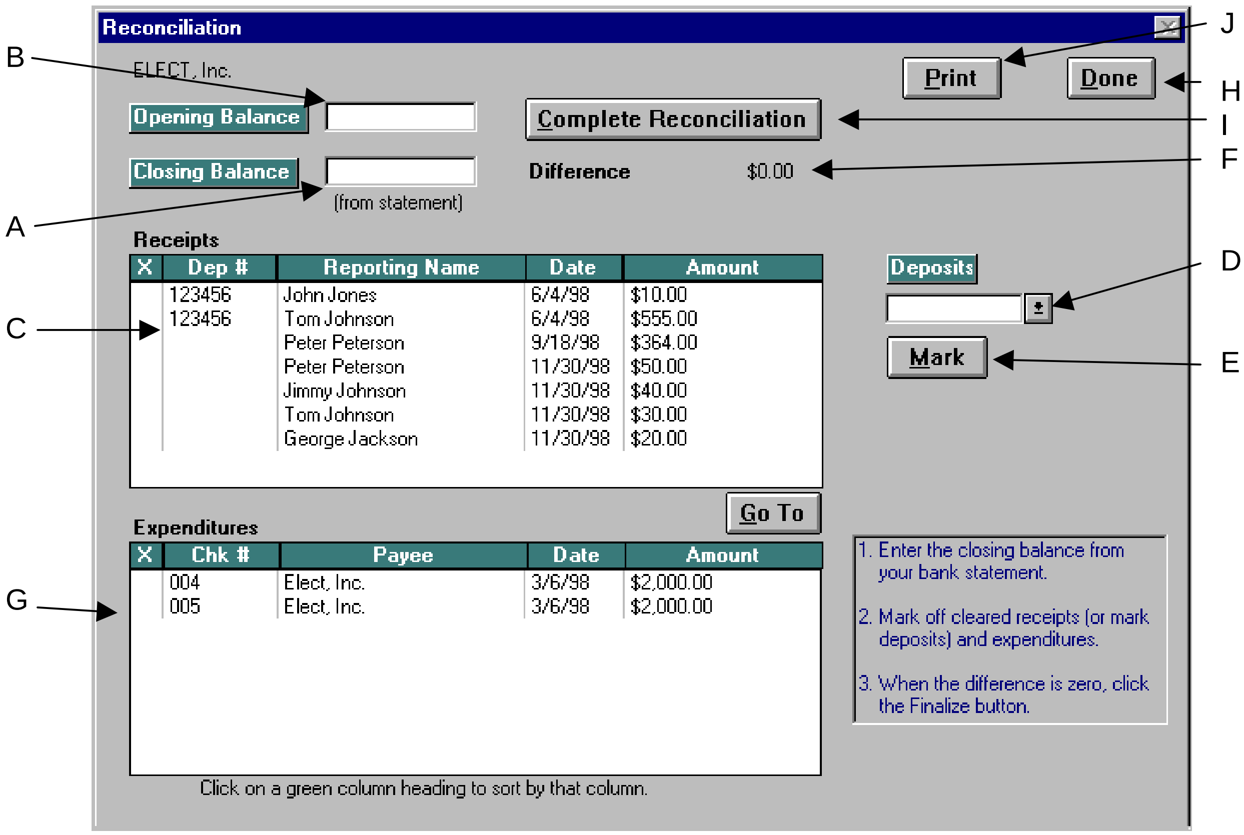


Fig. 3

3. Enter the Closing Balance (Fig.3-A) from your statement. If you have previously reconciled, the Opening Balance (Fig.3-B) will automatically populate. If this is the first time you are reconciling, enter the Opening Balance with an approximate amount.

4. Mark all bank deposits that are listed on your statement. You do this either by clicking on each receipt (Fig.3-C) or by selecting a deposit number from the drop-down list (Fig.3-D) and clicking the Mark button (Fig.3-E) to automatically mark each receipt in that deposit. As you mark each receipt, an X will appear next to your selection and the difference (Fig.3-F) between Opening and Closing Balances will be recalculated.

5. Mark all cleared checks by clicking the check in the Expenditures list (Fig.3-G). As you mark each expenditure, an X will appear next to your selection and the difference (Fig.3-F) between Opening and Closing Balances will be recalculated.

6. If you have adjustments, such as interest or fees, enter those amounts on the appropriate Receipts or Expenditures screen. (For more information, refer to Chapter 4 -- Receipts or Chapter 6 -- Expenditures.) Then, come back to the Reconciliation screen and mark those entries.

NOTE: When you click the Done button (Fig.3-H), you will not lose any work you have done. It will only close the screen.

7. When the difference is down to $0.00 (Fig.3-F), click the Complete Reconciliation button (Fig.3-I). If this is your first reconcilation, you might have to adjust the Opening Balance

(Fig.3-B) to get the difference to $0.00. If you need a printout of your work, click the Print button (Fig.3-J).

CHAPTER 9 -- LETTERS AND MAIL LABELS

In this section, you can create form letters, send Thank You letters for selected events and send mailings to contributors who meet specified criteria.

CREATING FORM LETTERS

To create a form letter,

1. On the Main Screen, click the Letters button or hold down the Alt key and press the T key. The Letters/Mail Labels Selection screen (Fig.1) appears.

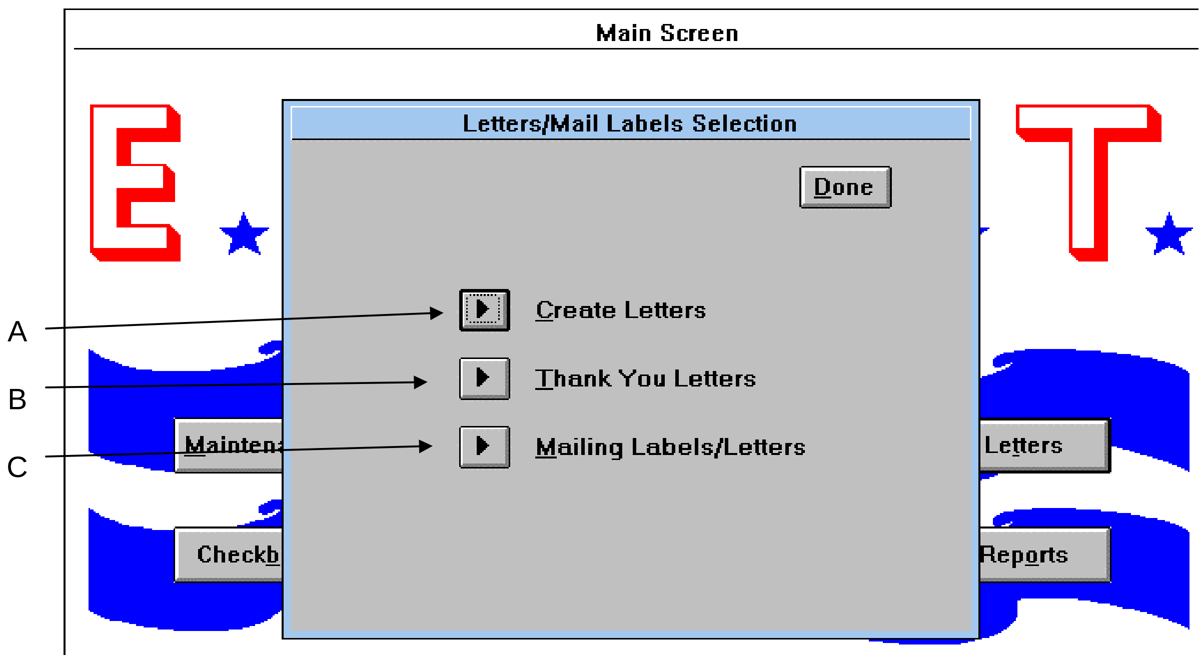


Fig. 1

2. Click the Create Letters button (Fig.1 - A) on the Letters/Mail Labels Selection screen. The Form Letters screen (Fig.2) appears.

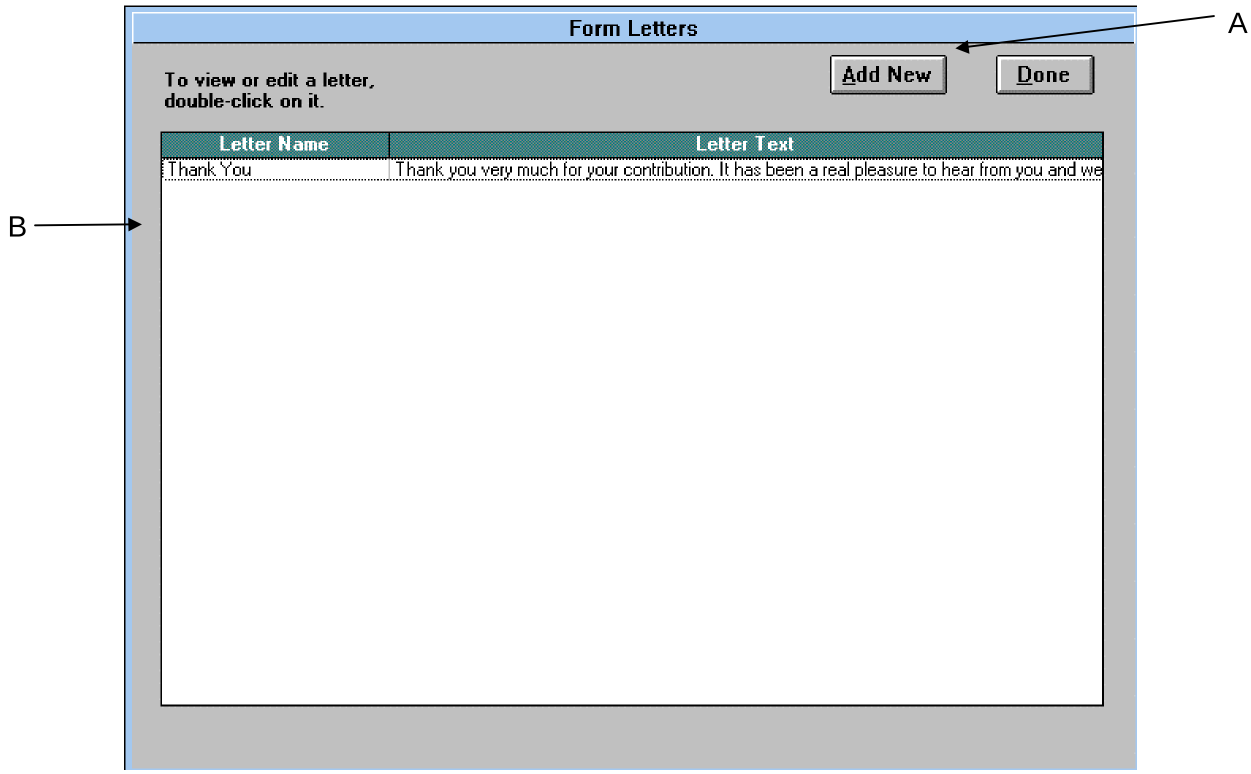


Fig. 2

3. Click the Add New button (Fig.2 - A) on the Form Letters screen. The Letter Text screen (Fig.3) appears.

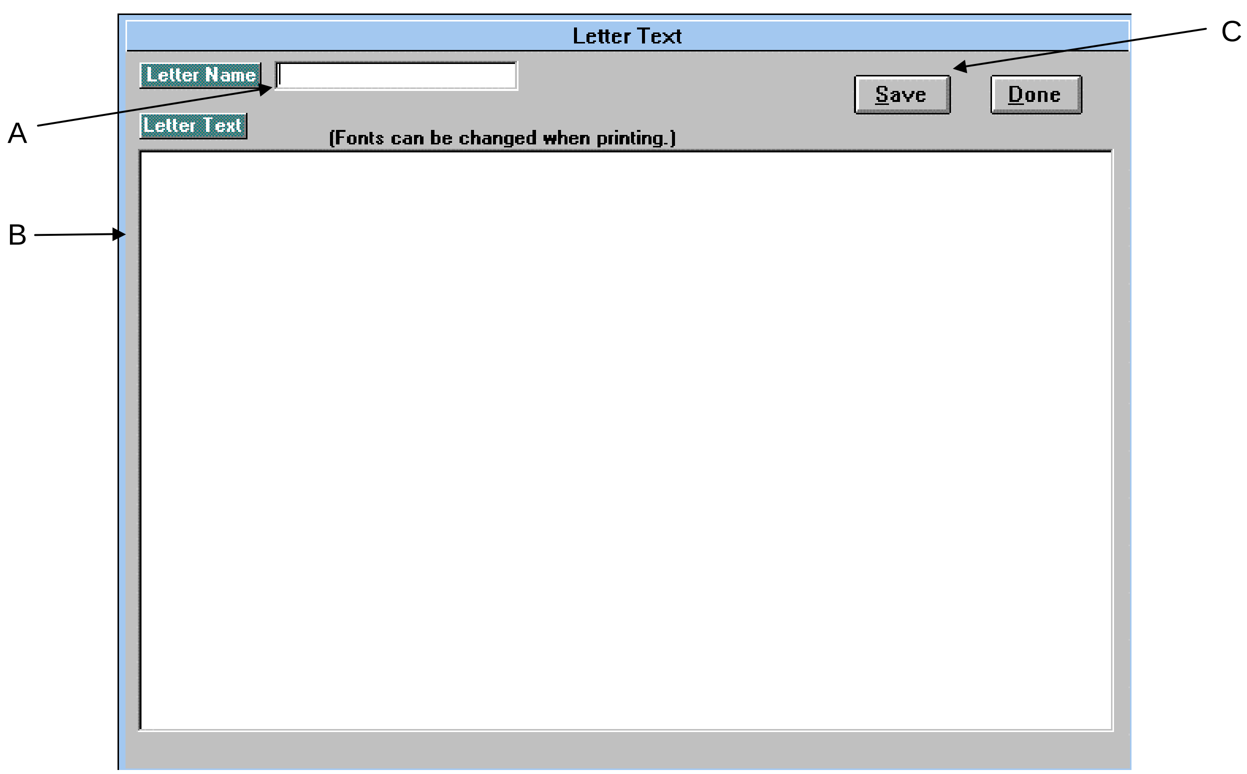


Fig. 3

4. Type the name of the letter in the Letter Name field (Fig.3 - A).

5. Type the text of the letter in the Letter Text field (Fig.3 - B). Do not put in carriage returns at the end of each line; the text will automatically wrap. The text will appear here in the default font, but the font can be changed when you print the letter.

6. Click the Save button (Fig.3 - C) to save the record.

VIEWING AND EDITING FORM LETTERS

To view and edit form letters,

1. Go to the Form Letters screen as described above in the Creating Form Letters section.

2. To view the detail of a letter in the list (Fig.1 - B), either double-click on the record or highlight it and press the Enter key. The Letter Text screen (Fig.4) appears.

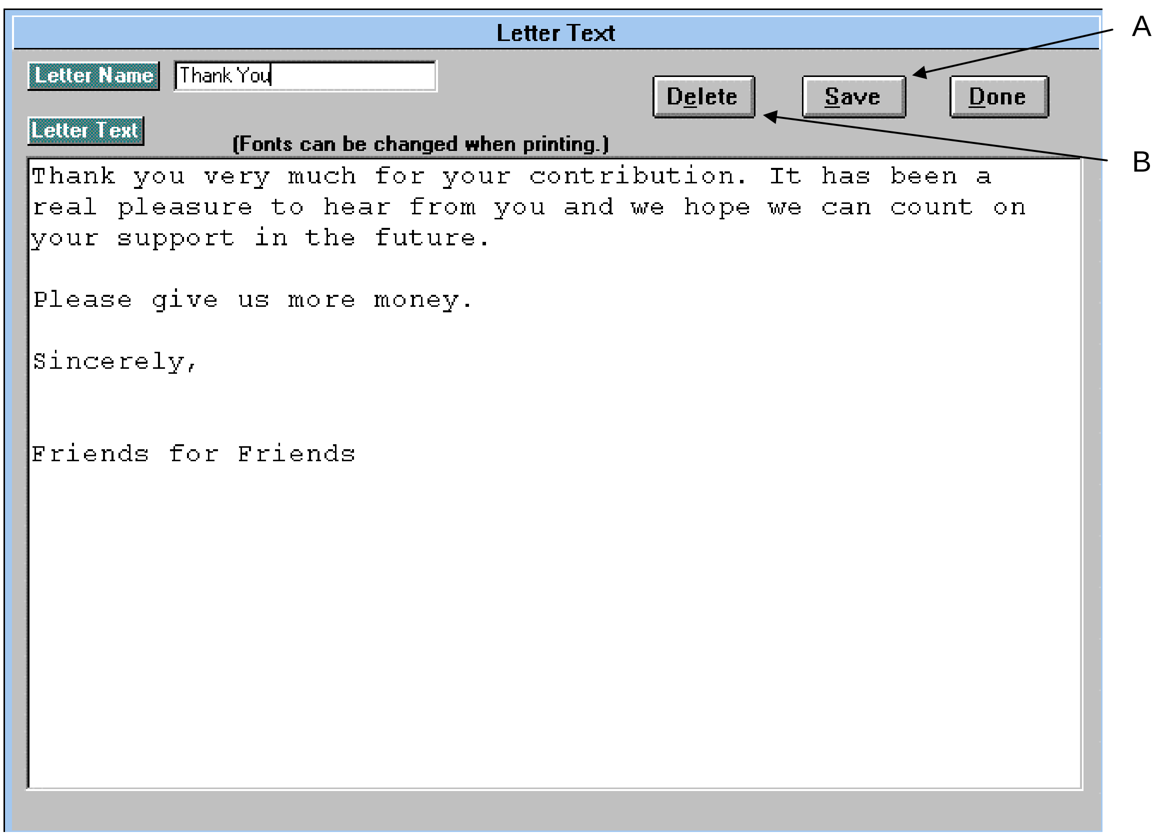


Fig. 4

3. Make changes to the name or the text.

4. Click the Save button (Fig.4 - A) to save the record.

5. Click the Delete button (Fig.4 - B) to delete the record.

THANK YOU LETTERS

You can print Thank You letters for contributors who have made donations to events. (For more information on correlating a receipt with an event, refer to the the Adding Receipts section in Chapter 4 -- Receipts.) This letter will go not only to the contributor but also to any contributors attached to that Reporting Name. (For more information on attached contributors, refer to Chapter 2 -- Contributors.) E.L.E.C.T. Fundraising will track Thank You letters so that Thank You letters will not be printed a second time for a receipt.

Printing Thank You Letters

To print Thank You letters,

1. On the Main Screen, click the Letters button or hold down the Alt key and press the T key. The Letters/Mail Labels Selection screen (Fig.1) appears.

2. Click the Thank You Letters button (Fig.1 - B) on the The Letters/Mail Labels Selection screen. The Thank You Letters screen (Fig.5) appears.

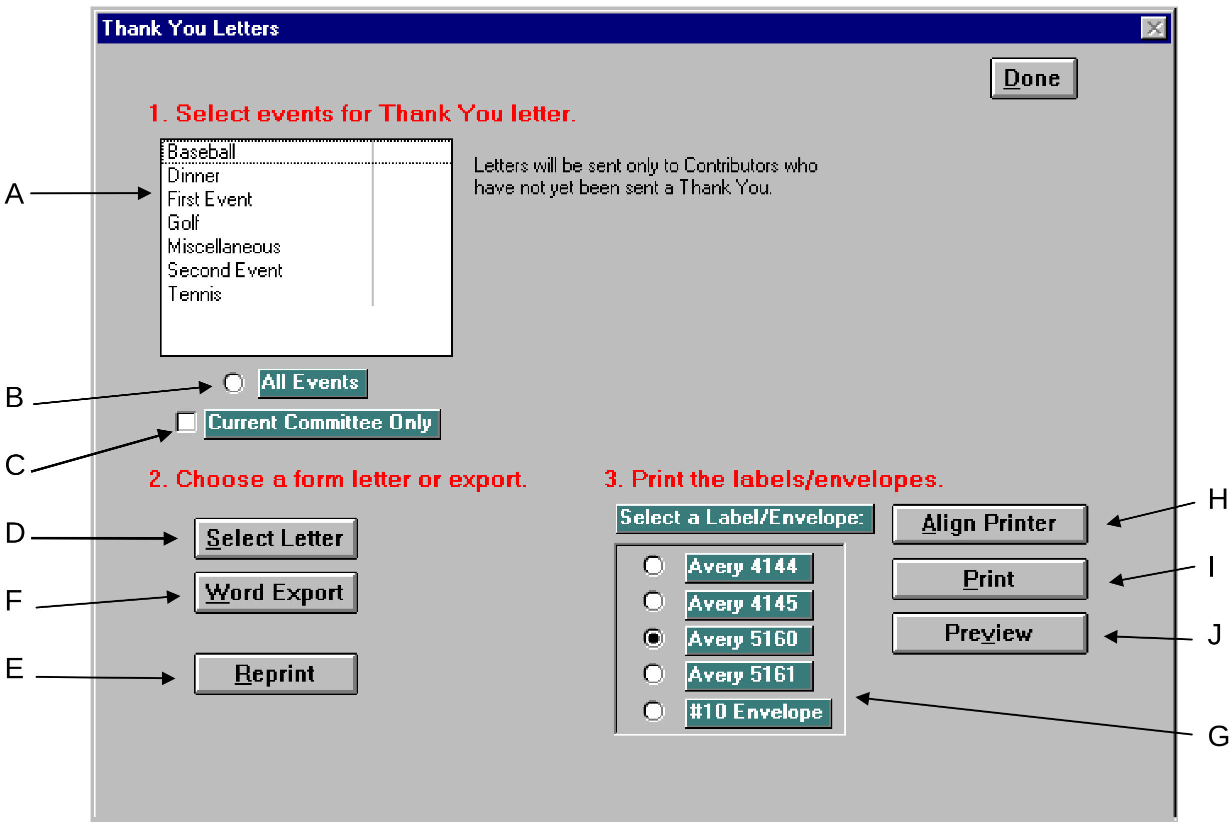


Fig. 5

3. Select the event(s) (Fig.5 - A) you want to send Thank You letters for. Click an event to place an 'X' next to it. Click a second time to unselect the event. Click the All Events button (Fig.5 - B) to select all events. Click it again to unselect All Events.

   If you are tracking more than one committee, you will see a checkbox for Current Committee Only (Fig.5 - C). Mark this checkbox if you want to include receipts only for the committee you are currently viewing for the selected events. Do not mark this box if you want to include all receipts for the selected events.

4. Click the Select Letter button (Fig.5 - D) to search for Contributors who need to be sent a Thank You letter for the selected event(s). A confirmation message with the number of letters to be sent displays. (If you just want to print labels, you must still go through the letter selection and letter preview to mark which Contributors need labels printed.)

Note: If a Thank You has already been sent to a Contributor for the selected event(s), a second letter will not be sent.

5. Click the OK button on the confirmation message to continue. The Letters screen (Fig.6) appears.

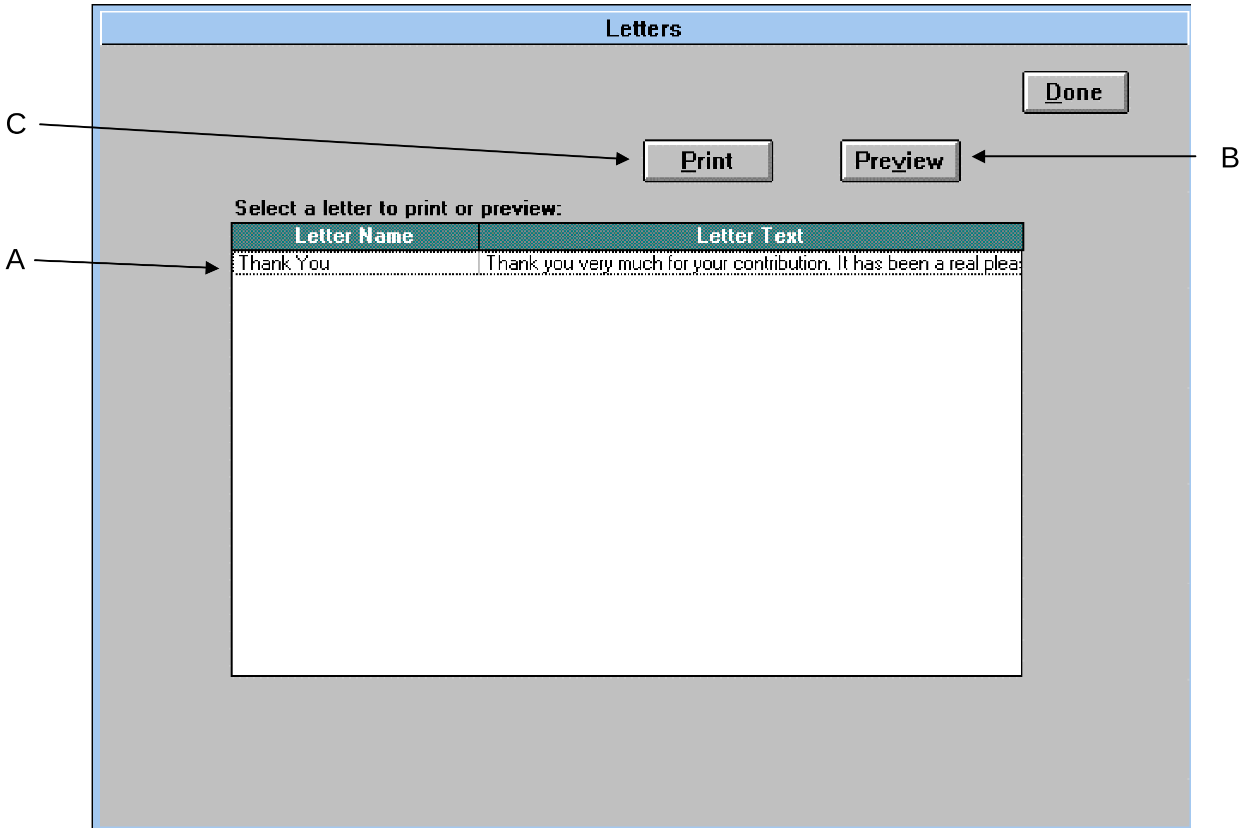


Fig. 6

6. Select a letter from the list (Fig.6 - A).

7. Click the Preview button (Fig.6 - B) to preview the letters. Click the Print button (Fig.6 - C) to print the letters. The Choose Letter Style screen (Fig.7) appears.

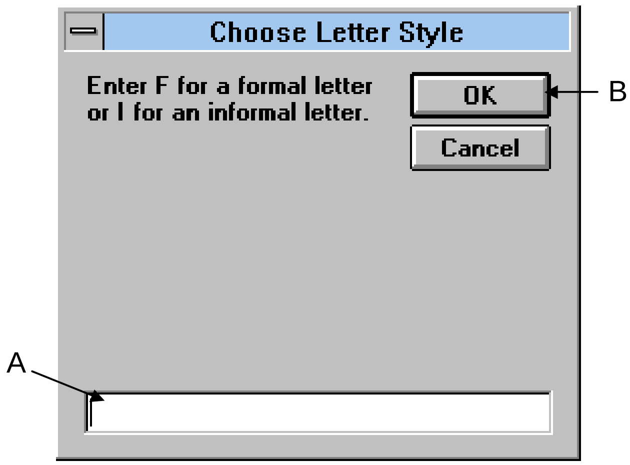


Fig. 7

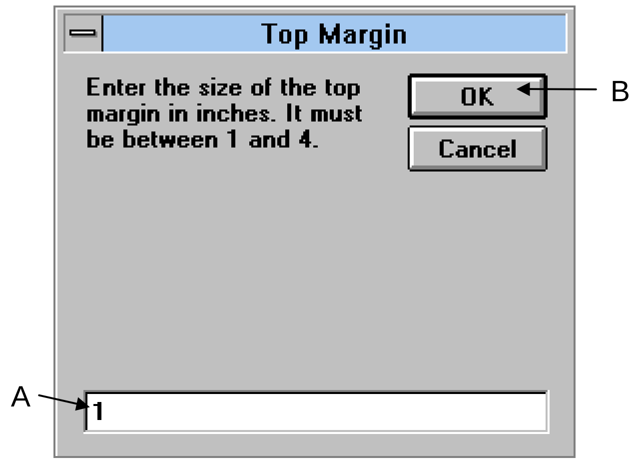


Fig. 8

8. Enter an F (Fig.7 - A) for formal letters. These letters will have the Contributor's address at the top of the letter and the salutation will be Dear Mr. Smith. Enter an I (Fig.7 - A) for informal letters. These letters will not have the address at the top and the salutation will be DearJohn. Click the OK button (Fig. 7 - B). The Top Margin screen (Fig.8) appears.

9. Enter the size of the top margin in inches (Fig.8 - A). Do not enter a margin larger than 4 inches. This margin should take the size of your letterhead into account.

10. Click the OK button (Fig.8 - B). The Left Margin screen (Fig.9) appears.

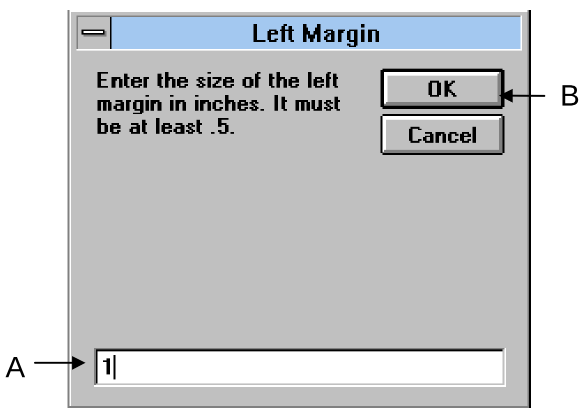


Fig. 9

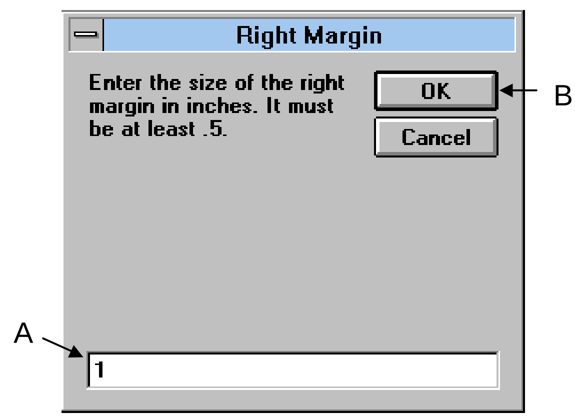


Fig. 10

11. Enter the size of your left margin in inches (Fig.9 - A). The mimimum size allowed is 0.5 inches.

12. Click the OK button (Fig.9 - B). The Right Margin screen (Fig. 10) appears.

13. Enter the size of your right margin in inches (Fig.10 - A). The mimimum size allowed is 0.5 inches.

14. Click the OK button (Fig.10 - B). The Installed Font List screen (Fig.11) appears.

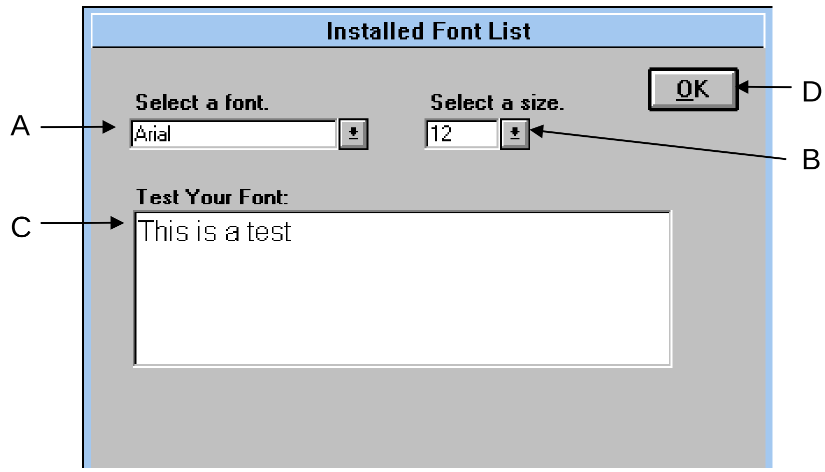


Fig. 11

15. Select a font from the drop-down list (Fig.11 - A). This list will include all fonts installed on your computer.

16. Select the size of the font from the drop-down list (Fig.11 - B). Sample text with the chosen font and size displays on the screen (Fig.11 - C).

17. Click the OK button (Fig.11 - D). The Select Sort Order screen (Fig.12) appears.

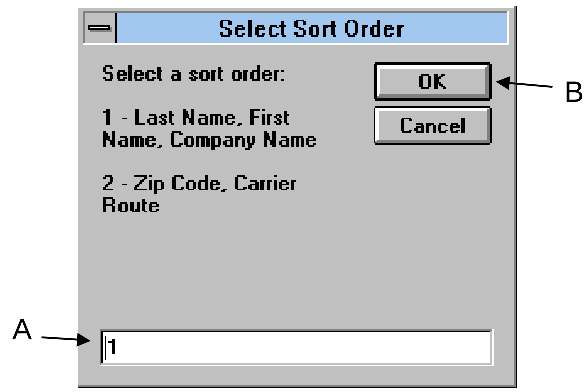


Fig. 12

18. Enter a 1 (Fig.12 - A) to sort by Last Name, First Name and Company Name. Enter a 2 to sort by Zip Code and Carrier Route. To make evelope stuffing easier, the sort order you use here for the letters should also be used when printing the envelopes or labels.

19. Click the OK button (Fig.12 - B). The letters will then either print or preview on the screen depending on your selection in Step 7.

Caution: After you preview or print the letters, all receipt records for the letters you printed will now display an 'X' in the Thank You Sent box (Fig.13 - A). Therefore, if you do try to send Thank You letters for the event(s) you just printed, no Contributors will be found.

Note: If the printing did not complete successfully, you can reprint the last batch of Thank You letters by clicking the Reprint button (Fig.5 - E) on the Thank You Letters screen.

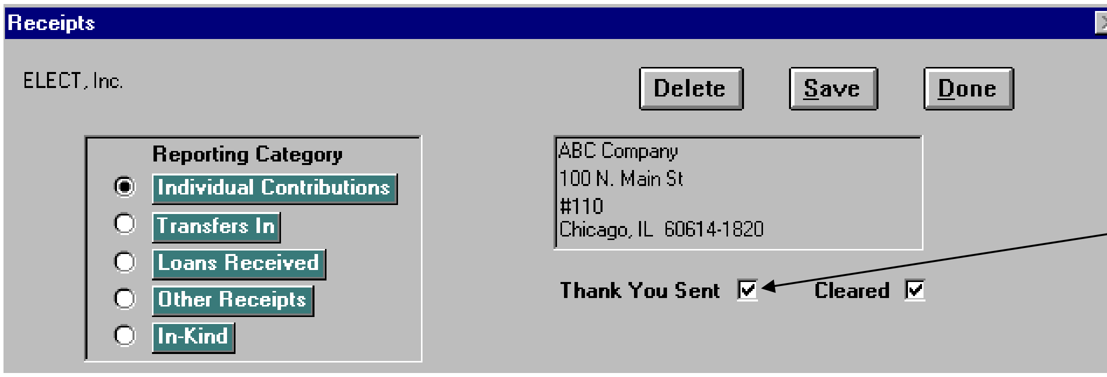


Fig. 13

Reprinting Thank You Letters

To reprint a batch of Thank You letters,

1. Click the Reprint button (Fig.5-E) on the Thank You Letters screen. The Thank You Sent screen (Fig.14) appears. The screen contains a list of the date and events for each batch of Thank You letters printed (Fig.14-A).

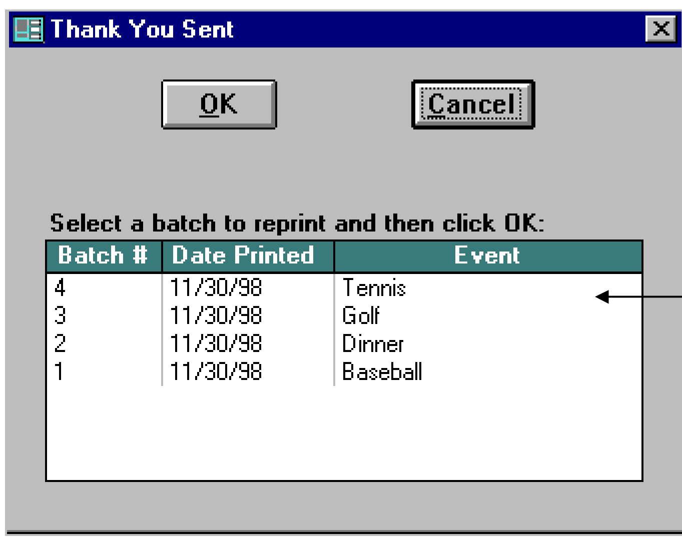


Fig. 14

2. From the list of batches (Fig.14-A), select the batch of Thank You letters you want to reprint.

3. Click the OK button.

4. Continue the process as described in Step 6 for printing Thank You letters.

Exporting Thank You Letters to Microsoft Word

If you want to write your Thank You letters in Microsoft Word, you can export the data there. The fields that will be exported are: Prefix, FirstName, LastName, Suffix, CompanyName, InformalName, FormalName, Address, Address2, City, State, Zip, CarrierRoute and ZipCode(first 5 numbers of Zip).

To export the data to Word,

1. Perform steps 1-3 in the Printing Thank You letters section to export data for a new Thank You letter.

2. Click the Word Export button (Fig.5 - F).

3. Click Yes if to export data for the selection of events on the screen. Click No to export data for a previous Thank You letter you processed.

4. Click OK for the confirmation message if this a a new batch. Select the previous batch from the list (Fig.14) and click the OK button if you are rerunning a batch.

5. Enter the name of the file for this export. (The export file will be written to the c:\elect directory and will overwrite an existing file with the same name.)

6. Click OK.

Note: The exported file is a tab-delimited text file with field headings. You can open the file in any word processor. Please follow your word processor's instructions for importing a tab-delimited text file.

Printing Labels/Envelopes for Thank You Letters

After you print the Thank You letters, you can print the mail labels or envelopes for those letters.

To print the labels or envelopes,

1. Print the letters as described in the Printing Thank You Letters section.

2. Select a label or envelope from the Select a Label\Envelope list (Fig.5 - G). If you pick labels for a dot matrix printer (Avery 4144 or 4145), you can align your printer by clicking the Align Printer button (Fig.5 - H).

3. To print the labels/envelopes, click the Print button (Fig.5 - I). To preview the labels/envelopes, click the Preview button (Fig.5 - J). The Select Sort Order screen (Fig.12) appears.

4. Enter a 1 (Fig.12 - A) to sort by Last Name, First Name and Company Name. Enter a 2 to sort by Zip Code and Carrier Route. To make evelope stuffing easier, the sort order you used for the letters should also be used when printing the envelopes or labels.

5. Click the OK button (Fig.12 - B). The labels/envelopes will then either print or preview on the screen.

FORM LETTERS/MAIL LABELS

You can print form letters or mail labels for contributors (or payees) who meet specified criteria. Contributors (and attached contributors) who have the No Mail box checked will not be included. (For more information, refer to Chapter 2 -- Contributors.)

To print form letters or mail labels,

1. On the Main Screen, click the Letters button or hold down the Alt Key and press the T key. The Letters/Mail Labels Selection screen (Fig.1) appears.

2. Click the Mailing Labels/Letters button (Fig.1 - C) on the Letters/Mail Labels Selection screen. The Mailing Labels screen (Fig.15) appears.

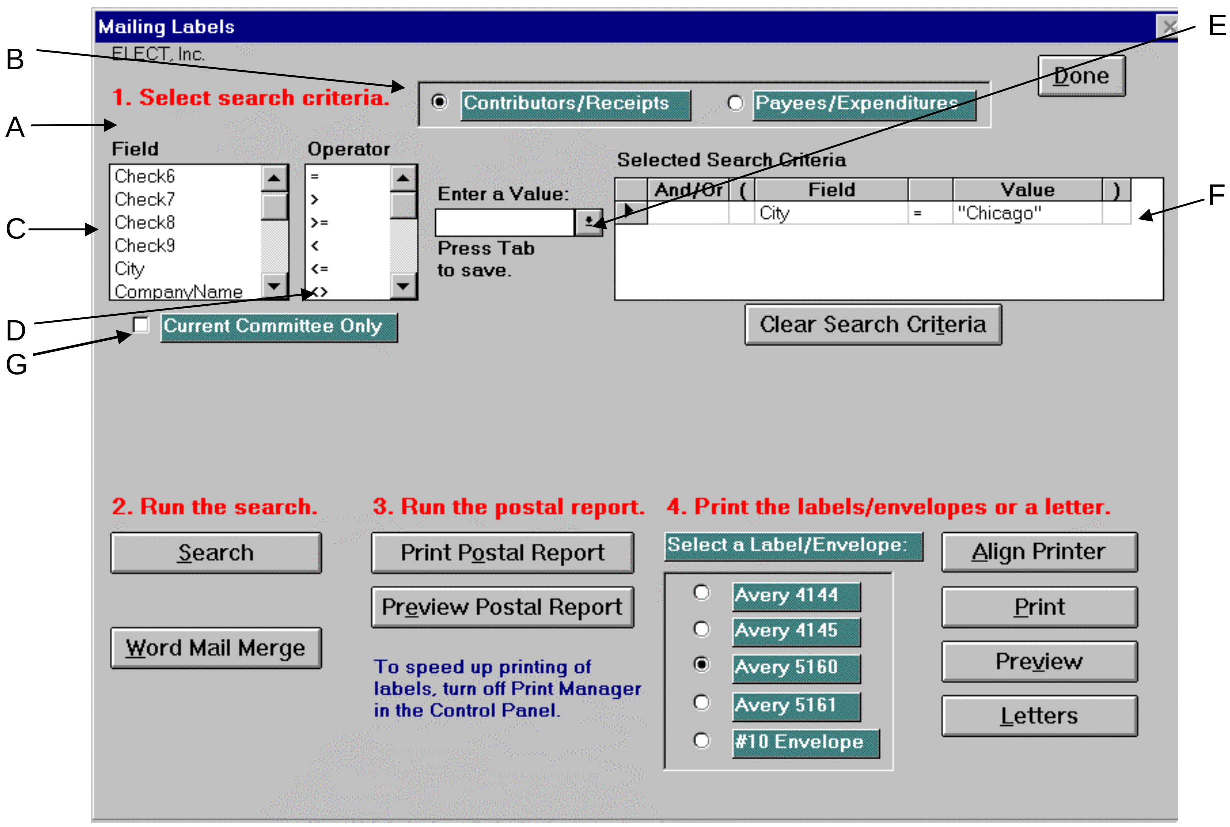


Fig. 15

3. Enter your search criteria (Fig.15 - A). Leaving this section blank gives you every record in the database.

   a. Select whether your search is for Contributors or Payees (Fig.15 - B). Use the Field the box on the left of the screen to select a field to search on (Fig.15 - C). This box lists all fields, including your user-defined fields. There are also five fields relating to donations. They begin with the word ‘Donations’ and give you the option to choose from the following: Largest; Last; Previous Year; Total; and Year-to-Date. Click on the field you want to search by. It will be highlighted with black.

b. Click on an operator from the Operator list (Fig.15 - D). This determines how your selected field will be searched. The operators are:

=	equal to
>	greater than
>=	greater than or equal to
<	less than
<=	less than or equal to
<>	not equal to
Either	meets either of several criteria for a field
Is Null	used to search for empty fields
Is Not Null	used for finding any value in a field
Like	like

Use the Either operator to search for records that meet one of several criteria for one field. For example, you can find records in any of several zip codes. Select the Zip field. Then, select the Either operator. Next, enter a value. Press the Tab key and the *Add Another Value?* message appears. Click the Yes button and add enter another value. After you have entered your last Zip, click the No button on the *Add Another Value?* Message.

Use the Is Null operator to search for empty fields. For example, you can find contributors who have not yet indicated a phone number. To do this, first select Phone from the Field list. Then, select Is Null from the Operator list. Finally, press the Tab key twice.

Use the Is Not Null operator to search for any record that has a value in that field. For example, you could find all people who have a fax number. First, select Fax from the Field list. Then, select Is Not Null from the operator list. Press the Tab key twice.

Use the ‘like’ operator for wildcard searches using an asterisk (*). For example, to find all contributors whose last donation was in July, 1996, choose Donations-Last from the Field list, select ‘like’ from the operator list and enter 7/*/96 in the value section (see step c.). Or, to select all contributors with last names beginning with B, select ‘like’ and type B* in the value section. Be careful using the Like operator; it can sometimes return unexpected results.

c. Now, enter a value (Fig.15 - E). For some fields, the Enter a Value drop-down list will already have a listing of possible values. Click on the ↓ and you will have a list of possible values for this field (or tab into the box for the list to open up). In fields with many possible values (such as LastName), simply type a value into the box.

d. Once you have selected a field, an operator and a value, press the TAB key to move the information into the Selected Search Criteria box on the right side of the screen (Fig.15 - F).

e. You may now go back and repeat steps a-d as many times as necessary to limit the scope of your selection. In this example (Fig.16), City=Chicago and

Donations-Largest>1000 means that only in Chicago whose largest donation is over $1000 will be selected.

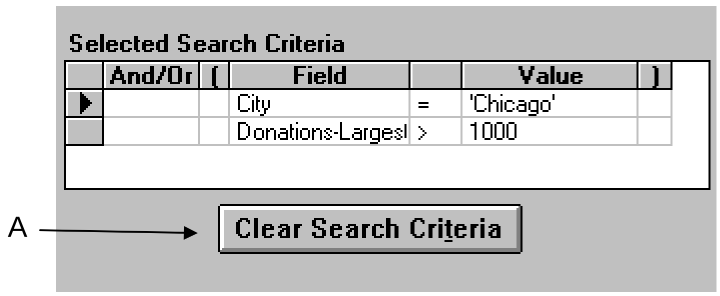


Fig. 16

f. To clear your selections and begin a new search, click the Clear Search Criteria button (Fig.16 - A). You can also correct mistakes in the search value you entered by changing it in the Selected Search Criteria box. Be careful to change only the values and not the special characters (‘, #) that are automatically entered for each entry.

Including OR in your searches

When you add search criteria to the Selected Search Criteria box, E.L.E.C.T. Fundraising assumes there is an AND before each line. If you need to use OR in your searches, you must type directly into the Selected Search Criteria box. For example, if you wanted to select individuals who donated over $1000 and lived in either Chicago or Springfield, you would need to enter OR in the And/Or columns for the appropriate search criteria. To do so,

a. Place the open parenthesis in the open parenthesis column (Fig.17 - A) at the beginning of the selection in which you would like OR to be used by placing your cursor in the column and typing **(**.

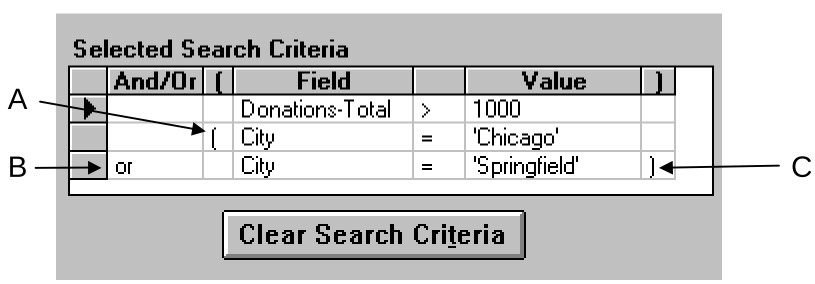


Fig. 17

b. Type the word ‘or’ into the And/Or column (Fig.17 - B) on all lines which the parentheses will contain.

c. At the end of the selection, place a closed parenthesis in the closed parenthesis column (Fig.17 - C) by placing your cursor in the column and typing **)**.

Hint - Use OR searches cautiously. If you don’t set up the criteria correctly, you will get unexpected results. You can use the Either operator in place of many OR searches.

If you are tracking more than one committee, you will see a checkbox for Current Committee Only (Fig.15 - G). Mark this checkbox if you want your search criteria to include donations only to the committee you are currently viewing. Do not mark this box if you want your search criteria to include donations to all committees.

4. Click the Search button (Fig.18 - A) to search for the contributors matching your search criteria.

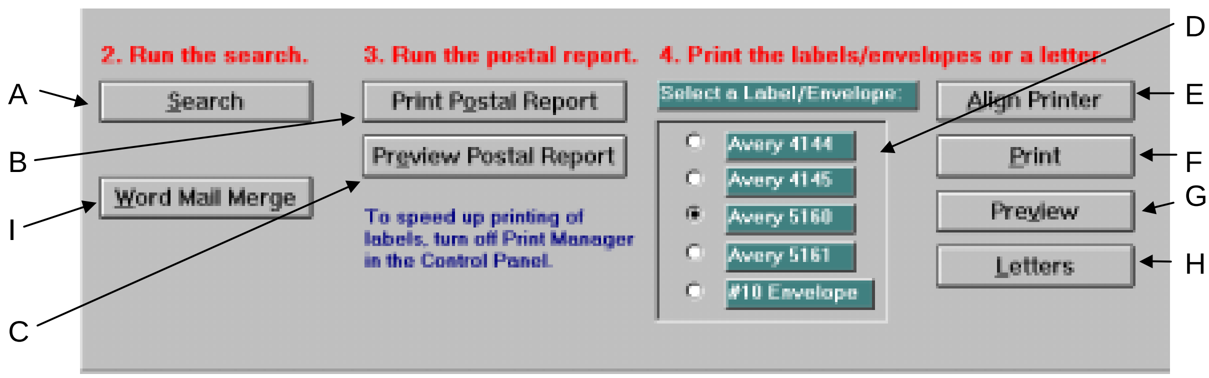


Fig. 18

5. Click OK to the message on the screen to confirm your search criteria. Then, a message on the screen displays the number of matching contributors.

6. Optionally, run the Postal Report by clicking the Print Postal Report button (Fig.18 - B) to print the report or the Preview Postal Report button (Fig.18 - C) to preview the report.

7. Select a label or envelope from the Select a Label/Envelope box (Fig. 18 - D). If you selected a label for a dot matrix printer (Avery 4144 or 4145), you can align your printer by clicking the Align Printer button (Fig.18 - E).

8. To print the labels/envelopes, click the Print button (Fig.18 - F). To preview the labels/envelopes, click the Preview button (Fig.18 - G). The Select Sort Order screen (Fig.12) appears.

9. Enter a 1 (Fig.12 - A) to sort by Last Name, First Name and Company Name. Enter a 2 to sort by Zip Code and Carrier Route. To make evelope stuffing easier, the sort order you use here should also be used when printing the letters.

10. Click the OK button (Fig.12 - B). The labels/envelopes will then either print or preview on the screen.

11. To print form letters for the selected contributors, click the Letters button (Fig.18 - H).

12. Follow steps 6-19 in the Printing Thank You Letters section.

Exporting Data to Microsoft Word

If you want to write your letters in Microsoft Word, you can export the data there. The fields that will be exported are: Prefix, FirstName, LastName, Suffix, CompanyName, InformalName,

FormalName, Address, Address2, City, State, Zip, CarrierRoute and ZipCode(first 5 numbers of Zip).

To export data to Microsoft Word,

1. Run the search as described in steps 3-5 above.
2. Click the Word Mail Merge button (Fig.18 - I).
3. Enter the name of the file for this export. (The export file will be written to the c:\elect directory and will overwrite an existing file with the same name.)
4. Click OK.

Note: The exported file is a tab-delimited text file with field headings. You can open the file in any word processor. Please follow your word processor's instructions for importing a tab-delimited text file.

CHAPTER 10 -- REPORTS

This section, contains procedures to print Contributor Lists, Expenditures, Deposits, Income and Expense, Custom, Schedule A-1 and D-2 Reports.

CONTRIBUTOR LISTS

E.L.E.C.T. Fundraising allows you to print three types of Contributor Lists for which you can select the contributors included based on your search criteria.

- Detailed Receipts - This report displays the dates, amounts and events of the last five donations (or you can select all donations) from each contributor matching your search criteria. It also displays Reporting Name and Address, phone #, fax #, Informal Name, Formal Name and Contributor Type. (Only contributors who have given donations will appear on this report.)

- Total Receipts - This report displays the largest donation, total of donations, amount of donations year-to-date and total of donations in the previous year. It also displays Reporting Name and Address, Phone # and Extension, Fax # and Contributor Type.

NOTE: These two reports list only Individual Contributions and Transfers In, not other types of receipts.

- Fundraising Call List - This report is used to call your contributors and record pledges. It displays Reporting Name and Address, Phone # and Extension, Fax # and Contributor Type. You can record Date Called, # Attending and $ Pledged.

To print or preview a Contributor Lists report,

1. On the Main Screen, click the Reports button or hold down the Alt key and press the O key. The Report Selection screen (Fig.1) appears.

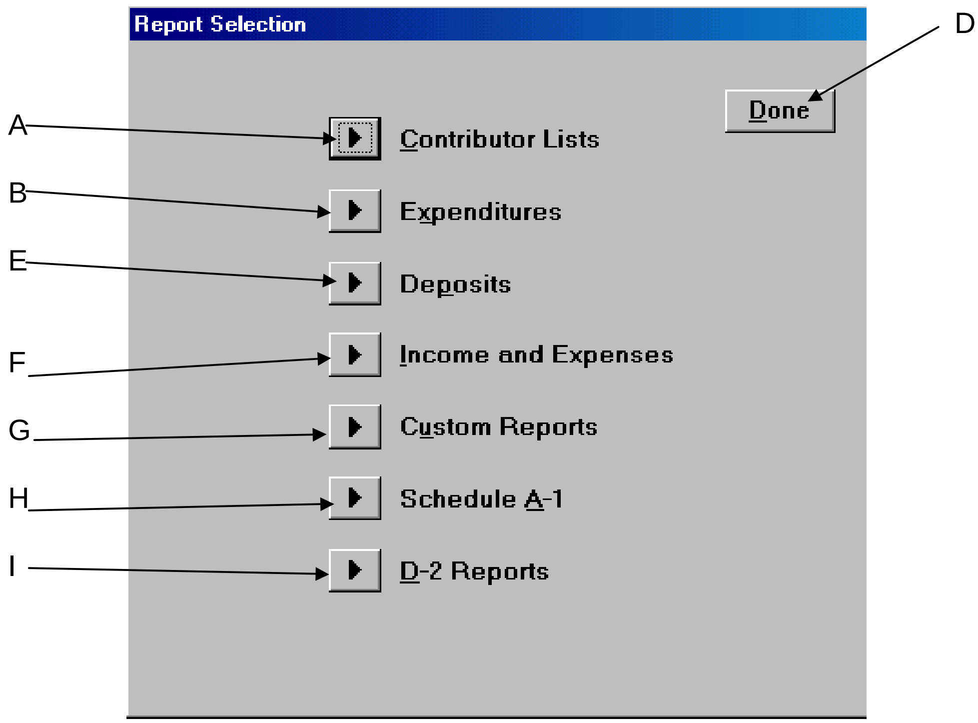


Fig. 1

2. Click the Contributor Lists button (Fig.1 - A) or hold down the Alt key and press the C key. The Report Criteria screen (Fig.2) appears.

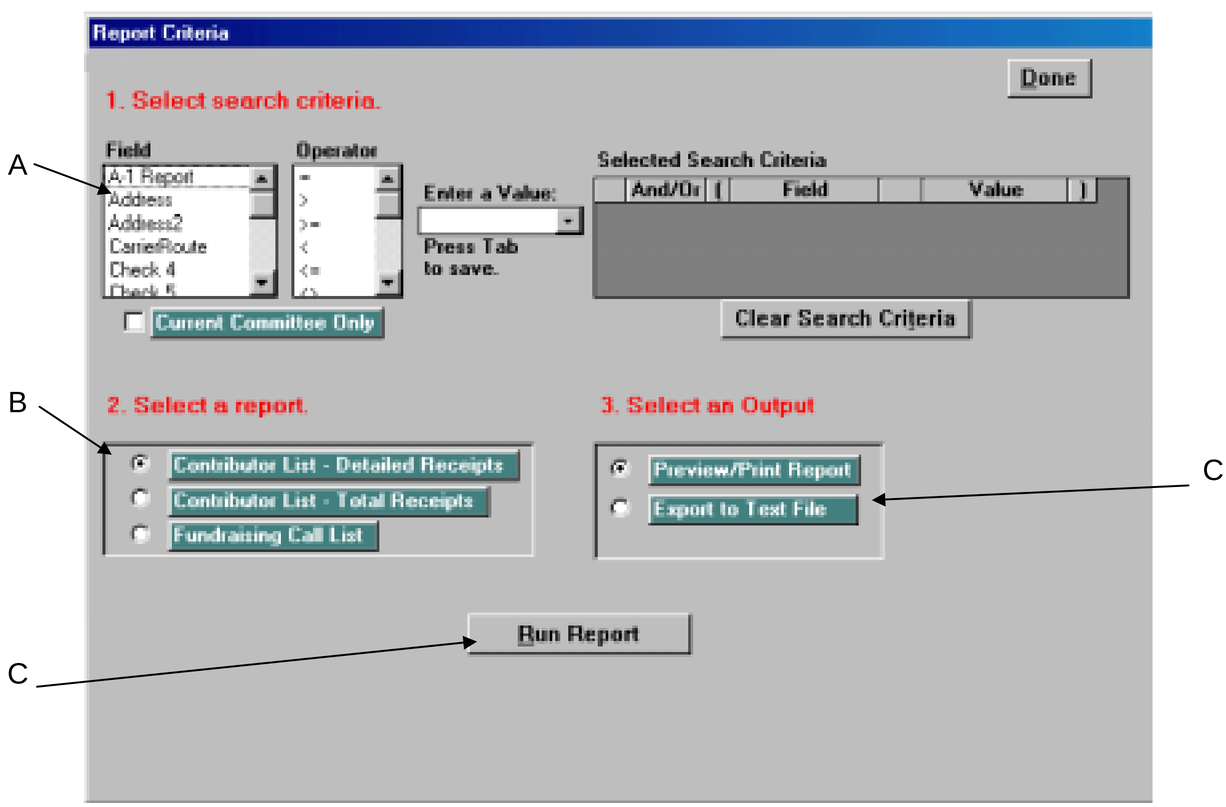


Fig. 2

3. Click the radio button in the ‘Select a report’ section (Fig.2 - A) for the report you want to preview or print.

4. Select your search criteria in the ‘Select search criteria’ section (Fig.2 - B). (For more information of selecting search criteria, refer to Step 3 of the Form Letters/Mail Labels section in Chapter 9 -- Letters and Mail Labels.)

5. Click the Preview button (Fig.2 - C) to preview the report or the Print button (Fig.2 - D) to print the report.

EXPENDITURES

This report displays all expenditures from the current date back to a date that you select. The fields on the report are: Payee Name and Address, amount, date, purpose, expense type and check # of the expenditure.

To preview or print the Expenditures Report,

1. On the Main Screen, click the Reports button or hold down the Alt key and press the O key. The Report Selection screen (Fig.1) appears.

2. Click the Expenditures button (Fig.1 - B) or hold down the Alt key and press the X key. The Print Payee List with Expenditures screen (Fig.3) appears.

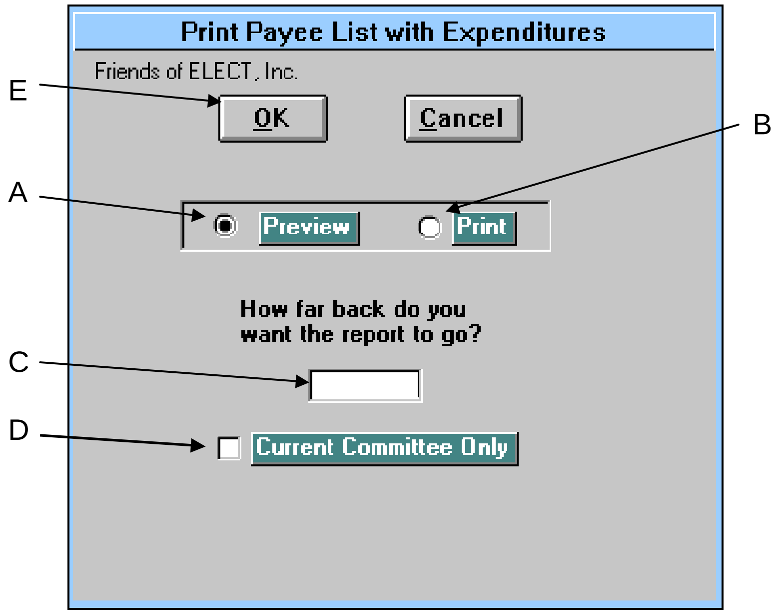


Fig. 3

3. Click the Preview radio button (Fig.3 - A) to preview the report
   (or)
   Click the Print radio button (Fig.3 - B) to print the report.

4. Enter the date of the oldest expenditure you want on the report (Fig.3 - C).

   If you are tracking more than one committee, you will see a checkbox for Current Committee Only (Fig.3 - D). Mark this checkbox if you want your search to include expenditures only for the committee you are currently viewing. Do not mark this box if you want your search to include expenditures for all committees.

5. Click the OK button (Fig.3 - E).

DEPOSITS

This report displays all receipts, receipts between two specified dates, or receipts from a specific deposit number. Use this report to match to your bank deposit slips. The fields on the report are: Date, Reporting Name, Check #, Deposit # and Amount.

To preview or print the Deposits report,

1. On the Main Screen, click the Reports button or hold down the Alt key and press the O key. The Report Selection screen (Fig.1) appears.

2. Click the Deposits button (Fig.1 - E). The Print Deposit Report screen (Fig.4) appears.

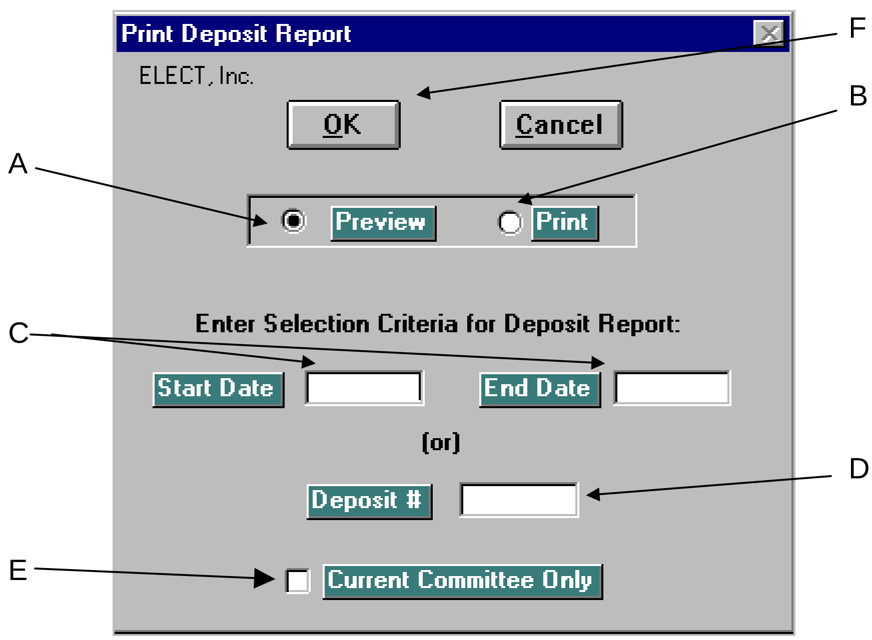


Fig. 4

3. Click the Preview radio button (Fig.4 - A) to preview the report
   (or)
   Click the Print radio button (Fig.4 - B) to print the report.

4. Enter the Start Date and the End Date (Fig.4 - C) for the range of receipt dates you want on the report.
   (or)
   To limit the report to a single deposit, enter the Deposit # (Fig.4 –D)

5. If you are tracking more than one committee, click the Current Committee Only box (Fig.4 - E) to print deposits only for the committee you are currently viewing.

6. After making your selections, click the OK button (Fig.4 – F) to print or preview the report.

INCOME AND EXPENSE REPORT

Income and Expense reports show the total amount of money raised and spent by your campaign for a specified time period. They will break income out by event and expenses out by expense type.

To preview or print the Income and Expense report,

1. On the Main Screen, click the Reports button or hold down the Alt key and press the O key. The Report Selection screen (Fig.1) appears.

2. Click the Income and Expense button (Fig.1 - F). The Print Income and Expense Report screen (Fig.5) appears.

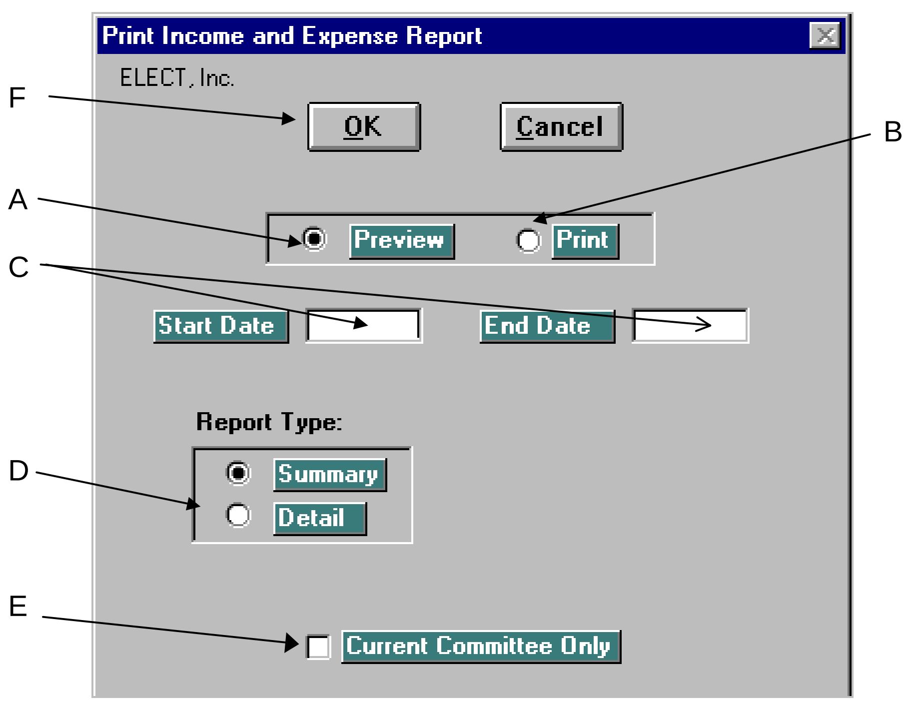


Fig. 5

3. Click the Preview radio button (Fig.5 - A) to preview the report
   (or)
   Click the Print radio button (Fig.5 - B) to print the report.

4. Enter the Start Date and the End Date for the report (Fig.5 - C).

5. Choose either a summary report (only showing totals by events and expense types) or a detailed report which lists every contribution and expense (Fig.5 –D).

6. If you are tracking more than one committee, click Current Committee Only (Fig.5 - E) to print figures only for the committee you are currently viewing.

7. After making your selections, click the OK button (Fig.5 – F) to print or preview the report.

CUSTOM REPORTS

Using the Custom Reports Feature, you can select which fields to print on your report. To print a custom report,

1. On the Main Screen, click the Reports button or hold down the Alt key and press the O key. The Report Selection screen (Fig.1) appears.

2. Click the Custom Reports button (Fig.1 - G) or hold down the Alt key and press the U key. The Custom Reports screen (Fig.6) appears.

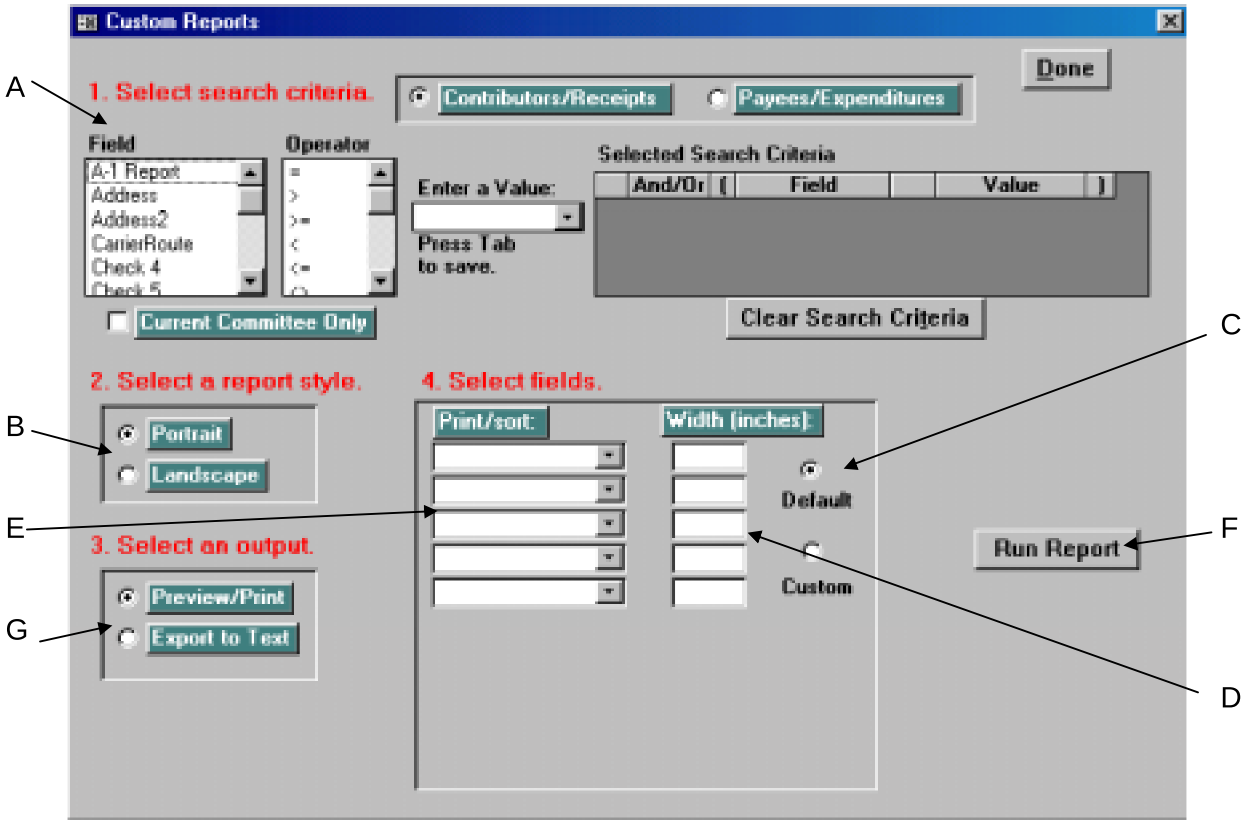


Fig. 6

3. Select your search criteria in the 'Select search criteria' section (Fig.6 - A). (For more information of selecting search criteria, refer to Step 3 of the Form Letters/Mail Labels section in Chapter 9 -- Letters and Mail Labels.)

4. Select a report style (Fig.6 - B). Portrait reports allow up to seven fields, while landscape reports allow up to ten fields.

5. Select either default or custom field widths (Fig.6 - C). The default setting allows five fields for portrait and seven fields for landscape reports. All fields widths are 1.5 inches. The custom setting allows seven fields for portrait and ten fields for landscape reports. You must manually enter the widths for each field (Fig.6 - D).

6. Select the fields you want to appear on the report (Fig.6 - E). The report sorts on each field listed.

7. Click the Preview button (Fig.6 - F) to preview the report
 (or)
Click the Print button (Fig.6 - G) to print the report.

SCHEDULE A-1

You must file Schedule A-1 within two days of receipt of contributions of $500 or more, in aggregate, from a contributor during the thirty days prior to an election. E.L.E.C.T. Fundraising will notify you of this requirement when you enter a qualifying receipt.

To preview or print Schedule A-1,

1. On the Main Screen, click the Reports button or hold down the Alt key and press the O key. The Report Selection screen (Fig.1) appears.

2. Click the Preview radio button (Fig.1 - C) to preview the report
   (or)
   Click the Print radio button (Fig.1 - D) to print the report.

3. Click the Schedule A-1 button (Fig.1 - H) or hold down the Alt key and press the A key.

4. After you preview or print the report, you will be asked if you have printed the report successfully. If you answer ‘Yes’, then the receipt records will be marked as printed. This will prevent duplicate reporting if you have more receipts from the same contributor during the thirty day period.

WARNING: Answer ‘Yes’ only if the report has been printed successfully and you do not have to print the report again. You will not be able to print the same records after they have been marked as printed.

D-2 REPORTS

These reports include Form D-2 along with its accompanying Schedules A, I, B and C and meet the state reporting requirements.

To preview or print the D-2 reports,

1. On the Main Screen, click the Reports button or hold down the Alt key and press the O key. The Report Selection screen (Fig.1) appears.

2. Click the D-2 Reports button (Fig.1 - I) or hold down the Alt key and press the D key. The D-2 Selection screen (Fig.7) appears.

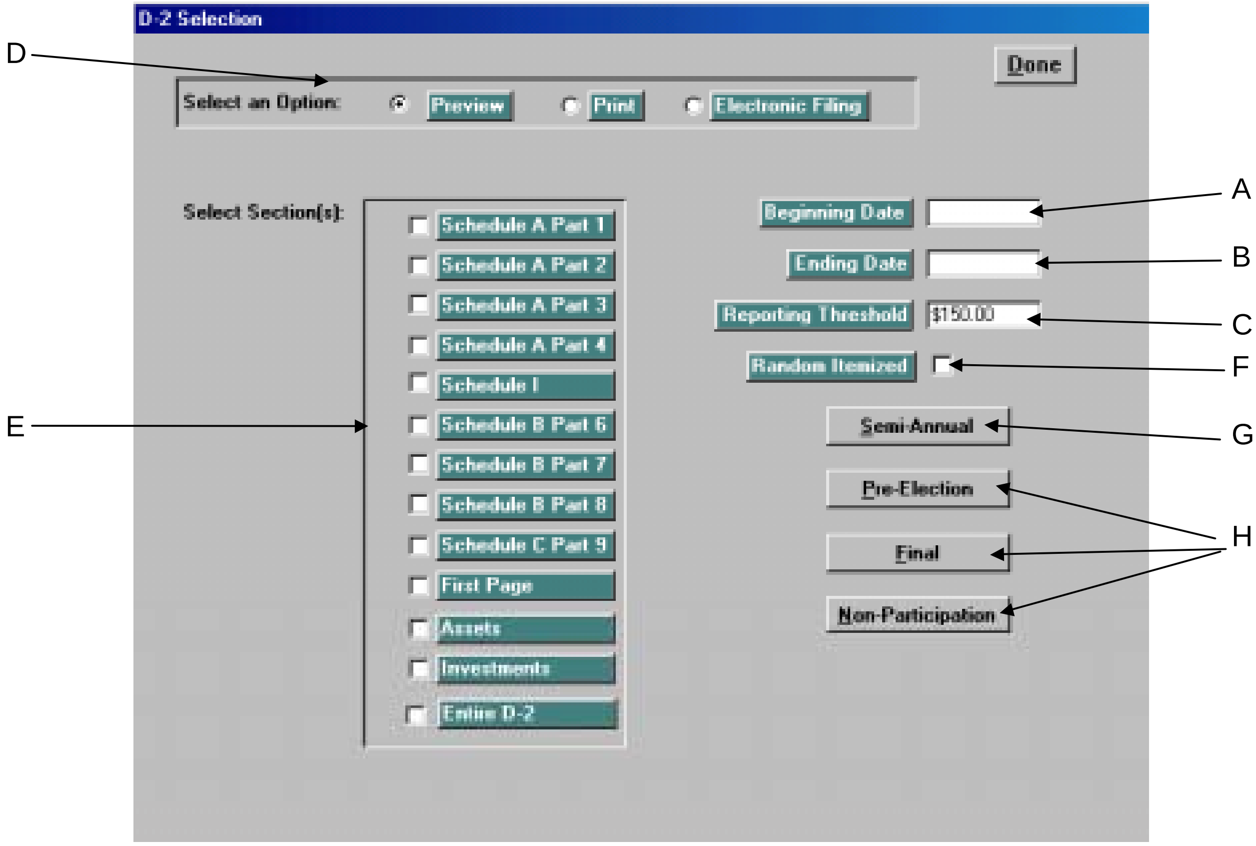


Fig. 7

3. Enter the Beginning Date (Fig.7 - A) and Ending Date (Fig.7 - B) for the report. These dates are inclusive.

4. Enter the Reporting Threshold (Fig.7 - C). The Reporting Threshold is the amount above which aggregate receipts will be itemized. This amount is not inclusive. Therefore, if you enter $150, aggregate receipts of $150.01 will be itemized. To itemize aggregate receipts of $150, you must enter $149.99 in the Reporting Threshold field.

5. In the Select an Option section (Fig.7 - D),
   Click the Preview radio button to preview the D-2 report.
   (or)
   Click the Print radio button to print the D-2 report.

6. Click the checkboxes in the Select Section(s) area (Fig.7 - E) to mark the parts of the report you want to preview or print.

7. Enter the Investments total in the space provided (Fig.7 – F).

8. If you would like your contributors and payees to print in a random order, click the Random Itemized checkbox (Fig.7 – G). If this box is not checked, the itemized contributions and expenditures print in alphabetical order.

7. Click the appropriate button (Fig.7 – H) to print or preview either the Semi-Annual, Pre-Election or Non-Participation D-2.

NOTE: The D-2 reports require large amounts of memory to preview. If you preview the entire report or several parts of the report, you might get a message that you do not have enough resources available to display the report. It is sometimes possible to replenish your resources by exiting Windows, re-entering Windows and running E.L.E.C.T. Fundraising again. Otherwise, either preview fewer parts or print the reports.

CHAPTER 11 -- MAINTENANCE

This section of the program allows you to enter values for events, contributor types, payee types, salespeople, beneficiaries and expense types drop-down lists, set up your user-defined fields, change your password, change the print setup for reports and change committee information.

EVENTS

Events are fundraisers, dinners, outings or any other events that you want to associate with a pledge or receipt. In this section, you can add, edit and delete events that appear in the Event drop-down list on the Pledges and Receipts screen (see Chapter 4 -- Receipts and Chapter 3 -- Pledges). You can enter events either when entering a pledge or receipt or on the Events screen.

Note: Since Thank You letters are sent based on Events, you will want to set up a Miscellaneous category for contributions not related to a specific event.

Adding Events

To add an event,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

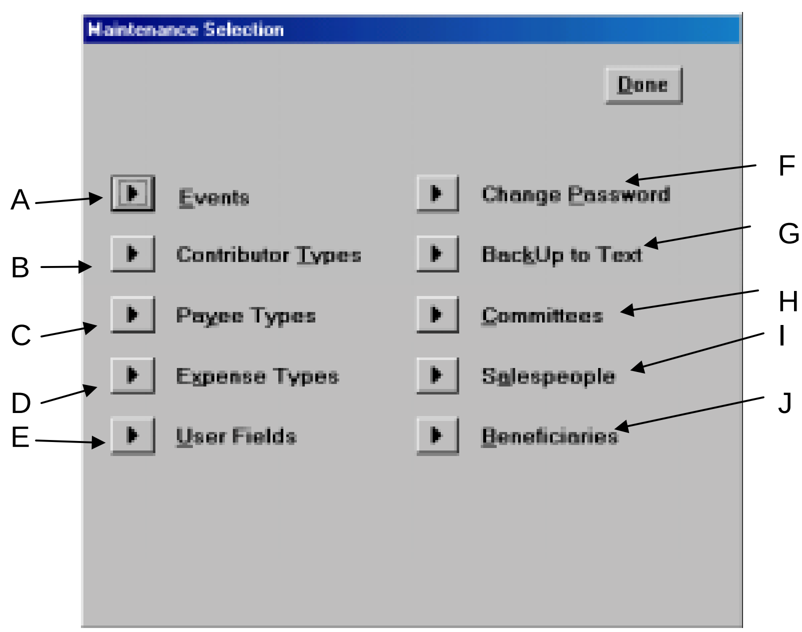


Fig. 1

2. Click the Events button (Fig.1 - A) or hold down the Alt key and press the E key. The Events List screen (Fig.2) appears.

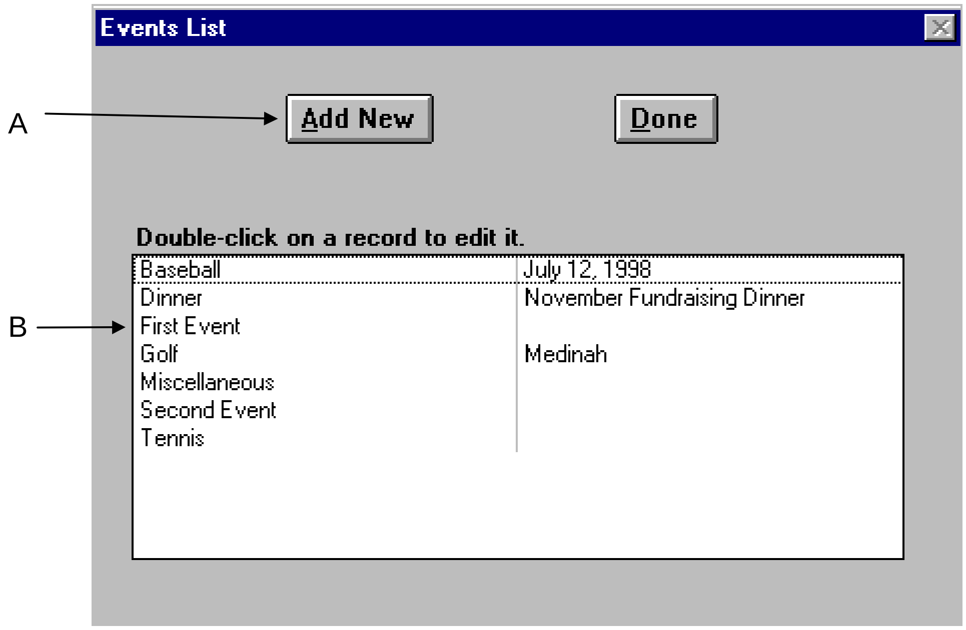


Fig. 2

3. Click the Add New button (Fig.2- A). The Events screen (Fig.3) appears.

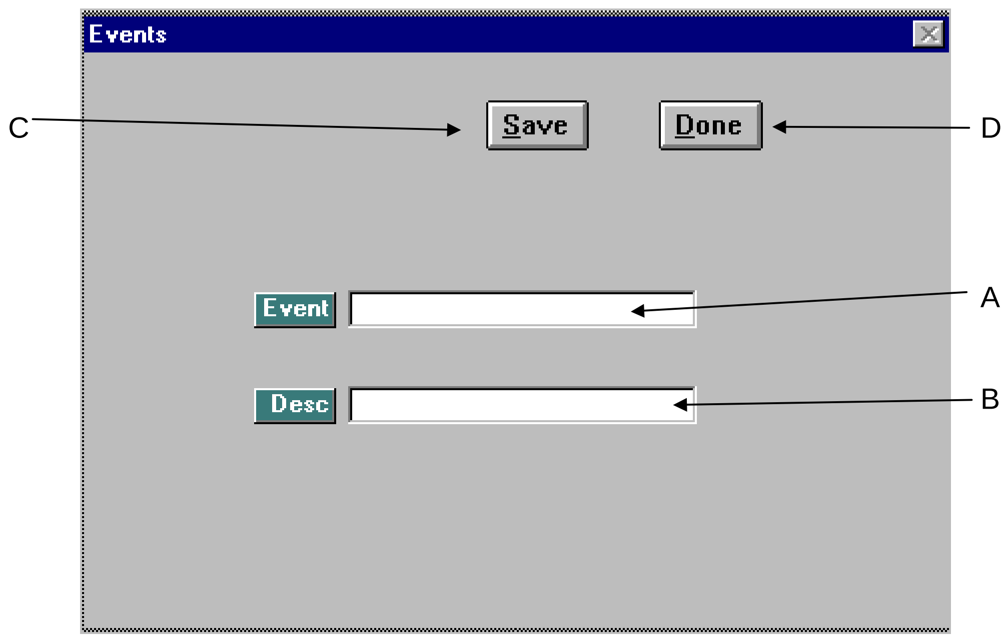


Fig. 3

4. Type in the name of the event in the Event field (Fig.3 - A).

5. Optionally, type in a description of the event (Fig.3 – B).

6. Click the Save button (Fig.3 - C) to save the record.

7. Repeat Steps 4 and 5 to add more events.

8. Click the Done button (Fig.3 - D) when you are done adding events.

Editing Events

To edit an event,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Events button (Fig.1 - A) or hold down the Alt key and press the E key. The Events List screen (Fig.2) appears.

3. Either double-click on a record in the list (Fig.2 - B) or highlight a record and press the Enter key. The Events screen (Fig.4) appears.

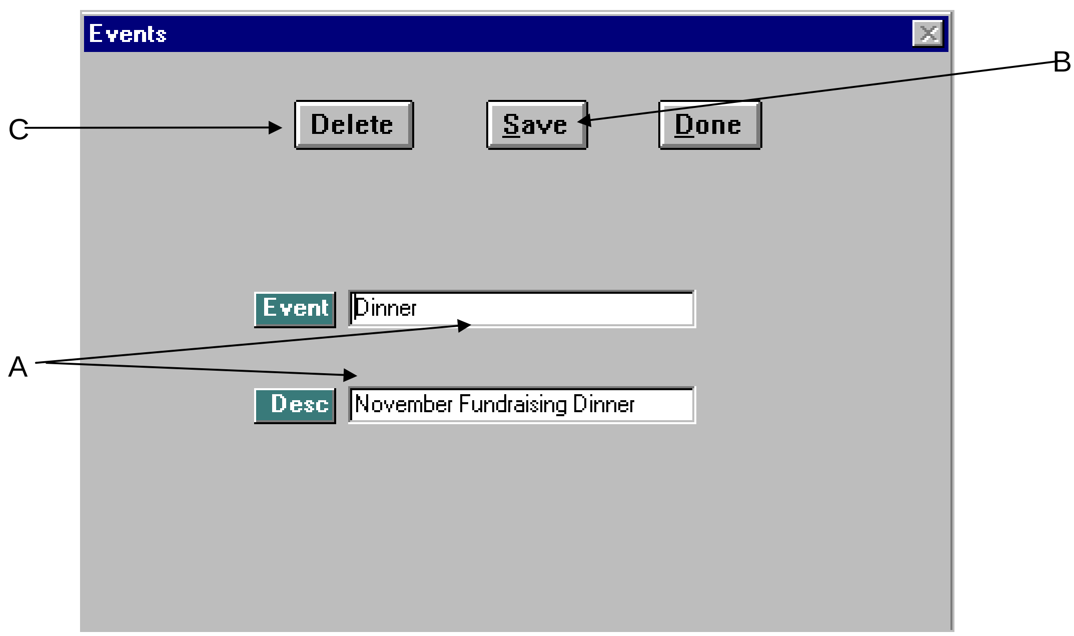


Fig. 4

4. Edit the event.

   - Change the event in the Event and/or Description fields (Fig.4 - A) and click the Save button (Fig.4 - B) to save the changes.

     NOTE: When you change an event, all pledge and receipt records with this event will also be changed. Therefore, do not modify an event unless you want to modify related pledge and receipt records.

   (or)

   - Click the Delete button (Fig.4 - C) to delete the record.

NOTE: You will not be able to delete an event if there are pledges or receipts for the event.

CONTRIBUTOR TYPES

You can use Contributor Types to categorize your Contributors. This field is found on the Contributors screen. There are five Contributor Types that are preloaded in the program: Business, Grouped, Individual, Lobbyist and PAC.

Note: The Grouped type should be used only for a contributor that is set up for grouped, unitemized donations. Receipts from contributors of this type will never be itemized. For example, you can use Grouped to record one hundred raffle tickets sold at $20 each. The $2000 receipt will be reported as an unitemized receipt.

In the Contributor Types section, you can add, edit and delete Contributor Types that appear in the Contributor Type drop-down list on the Contributors screen (see Chapter 2 -- Contributors). You can enter Contributor Types either when entering a contributor or on the Contributor Types screen.

Adding Contributor Types

To add a Contributor Type,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Contributor Types button (Fig.1 - B) or hold down the Alt key and press the T key. The Contributor Types List screen (Fig.5) appears.

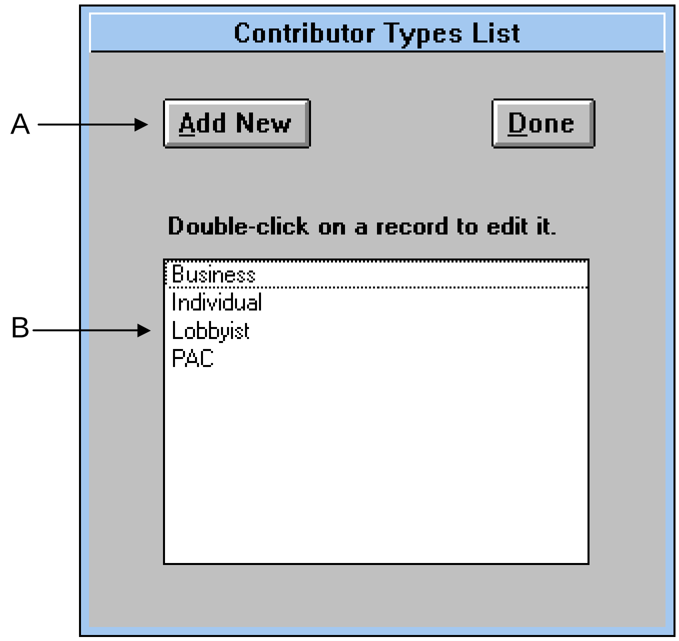


Fig. 5

3. Click the Add New button (Fig.5- A). The Contributor Types screen (Fig.6) appears.

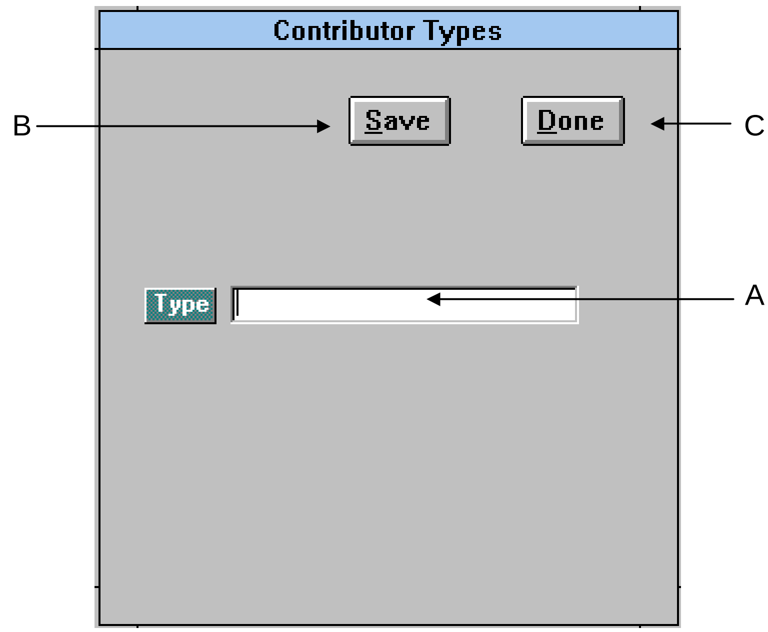


Fig. 6

4. Type the Contributor Type in the Type field (Fig.6 - A).

5. Click the Save button (Fig.6 - B) to save the record.

6. Repeat Steps 4 and 5 to add more Contributor Types.

7. Click the Done button (Fig.6 - C) when you are done adding Contributor Types.

Editing Contributor Types

To edit a Contributor Type,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Contributor Types button (Fig.1 - B) or hold down the Alt key and press the T key. The Contributor Types List screen (Fig.5) appears.

3. Either double-click on a record in the list (Fig.5 - B) or highlight a record and press the Enter key. The Contributor Types screen (Fig.7) appears.

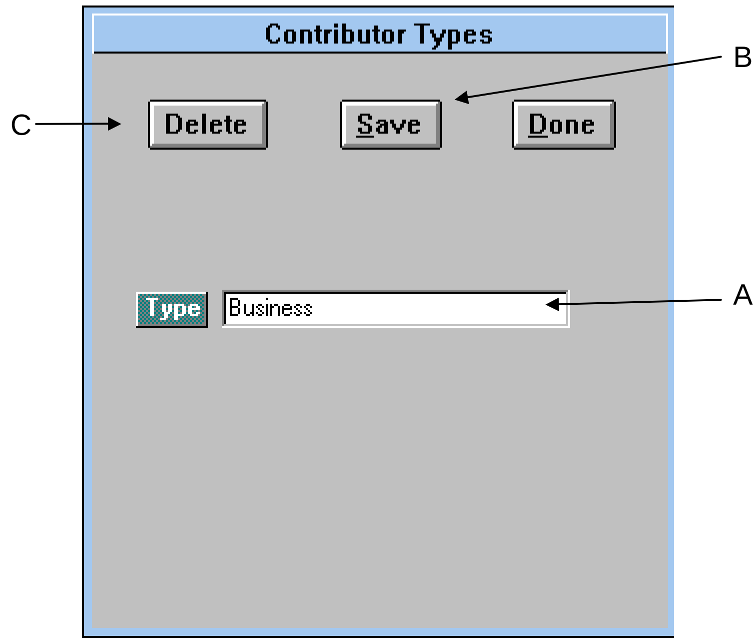


Fig. 7

4. Edit the Contributor Type.

   - Change the Contributor Type in the Type field (Fig.7 - A) and click the Save button (Fig.7 - B) to save the changes.

     NOTE: When you change a Contributor Type, all Contributor records with this type will also be changed. Therefore, do not modify a Contributor Type unless you want to modify related Contributor records.

   (or)

   - Click the Delete button (Fig.7 - C) to delete the record.

     NOTE: You will not be able to delete a Contributor Type if there are Contributors of this type.

PAYEE TYPES

You can use Payee Types to categorize your Payees. This field is found on the Payees screen. There are three Payee Types that are preloaded in the program: Business, Grouped and Individual.

Note: The Grouped type should be used only for a payee that is set up for grouped, unitemized expenditures. Expenditures for payees of this type will never be itemized. For example, you can use Grouped to record $500 in miscellaneous expenses. The $500 will be reported as an unitemized expenditure.

In the Payee Types section, you can add, edit and delete Payee Types that appear in the Payee Type drop-down list on the Payees screen (see Chapter 5 -- Payees). You can enter Payee Types either when entering a payee or on the Payee Types screen.

Adding Payee Types

To add a Payee Type,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Payee Types button (Fig.1 -C) or hold down the Alt key and press the Y key. The Payee Types List screen (Fig.8) appears.

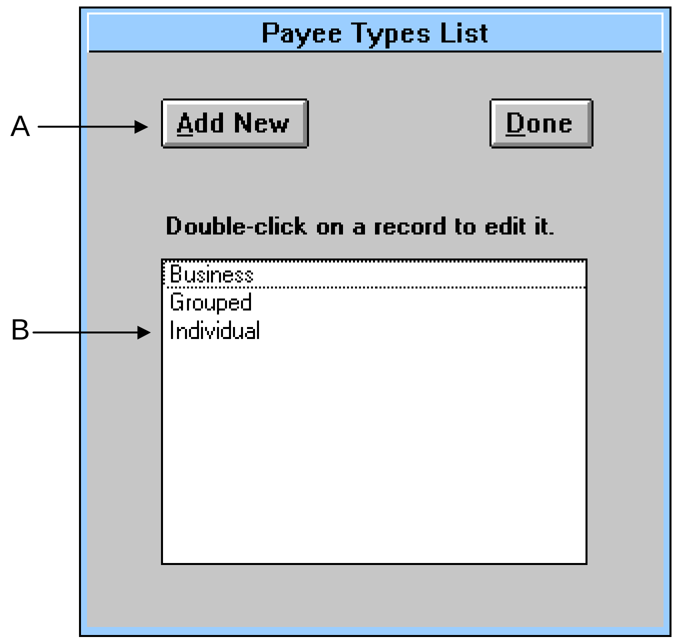


Fig. 8

3. Click the Add New button (Fig.8- A). The Payee Types screen (Fig.9) appears.

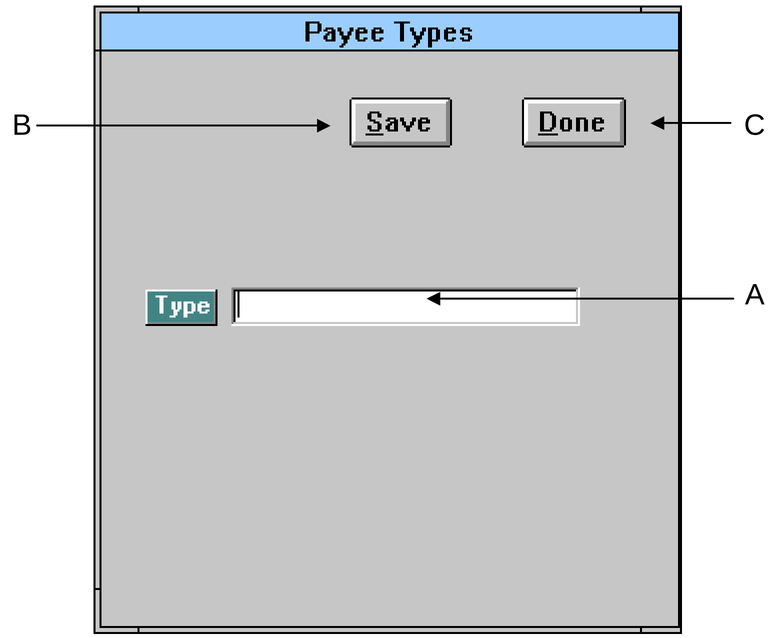


Fig. 9

4. Type the Payee Type in the Type field (Fig.9 - A).

5. Click the Save button (Fig.9 - B) to save the record.

6. Repeat Steps 4 and 5 to add more Payee Types.

7. Click the Done button (Fig.9 - C) when you are done adding Payee Types.

Editing Payee Types

To edit a Payee Type,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Payee Types button (Fig.1 - C) or hold down the Alt key and press the Y key. The Payee Types List screen (Fig.8) appears.

3. Either double-click on a record in the list (Fig.8 - B) or highlight a record and press the Enter key. The Payee Types screen (Fig.10) appears.

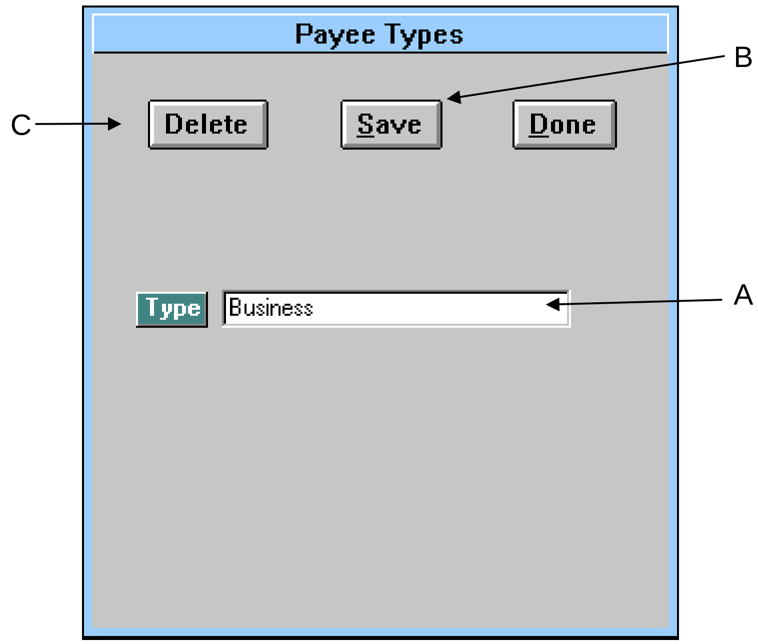


Fig. 10

4. Edit the Payee Type.

   - Change the Payee Type in the Type field (Fig.10 - A) and click the Save button (Fig.10 - B) to save the changes.

     NOTE: When you change a Payee Type, all Payee records with this type will also be changed. Therefore, do not modify a Payee Type unless you want to modify related Payee records.

   (or)

   - Click the Delete button (Fig.10 - C) to delete the record.

     NOTE: You will not be able to delete a Payee Type if there are Payees of this type.

EXPENSE TYPES

You can use Expense Types to categorize your Expenditures. This field is found on the Expenditures screen. Use this field for internal tracking only; it is not required for the D-2 reports.

In the Expense Types section, you can add, edit and delete Expense Types that appear in the Expense Type drop-down list on the Expenditures screen (see Chapter 6 -- Expenditures). You can enter Expense Types either when entering an expenditure or on the Expense Types screen.

Adding Expense Types

To add an Expense Type,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Expense Types button (Fig.1 - D) or hold down the Alt key and press the X key. The Expense Types List screen (Fig.11) appears.

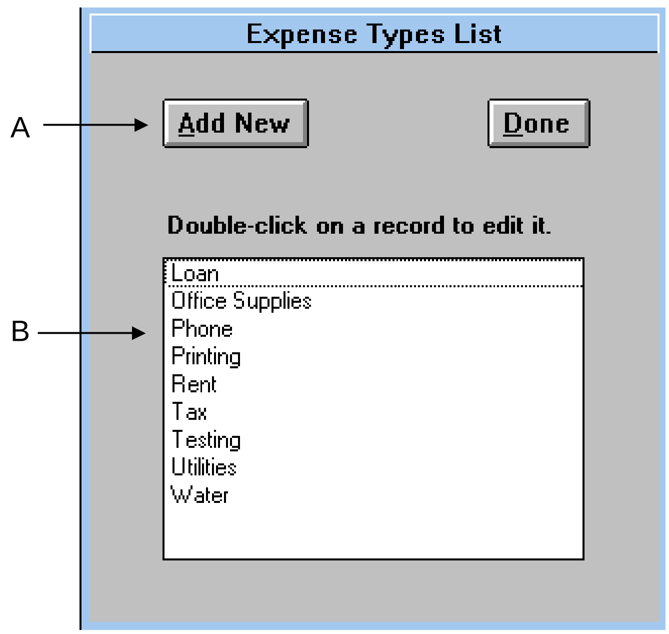


Fig. 11

3. Click the Add New button (Fig.11- A). The Expense Types screen (Fig.12) appears.

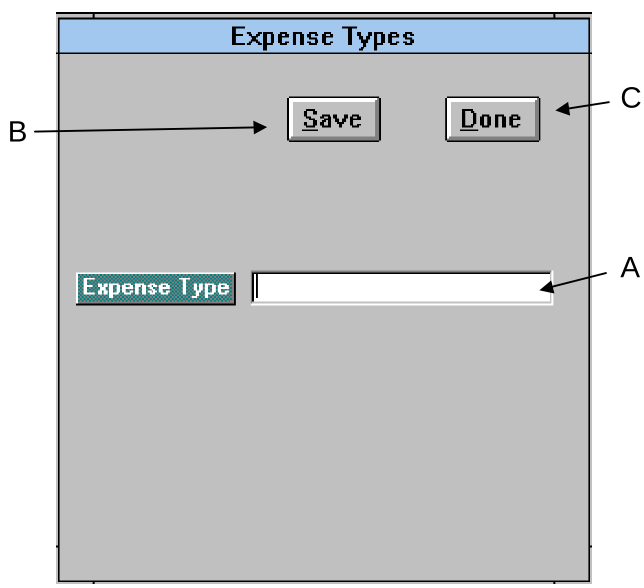


Fig. 12

4. Type the Expense Type in the Expense Type field (Fig.12 - A).

5. Click the Save button (Fig.12 - B) to save the record.

6. Repeat Steps 4 and 5 to add more Expense Types.

7. Click the Done button (Fig.12 - C) when you are done adding Expense Types.

Editing Expense Types

To edit an Expense Type,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Expense Types button (Fig.1 - D) or hold down the Alt key and press the X key. The Expense Types List screen (Fig.11) appears.

3. Either double-click on a record in the list (Fig.11 - B) or highlight a record and press the Enter key. The Expense Types screen (Fig.13) appears.

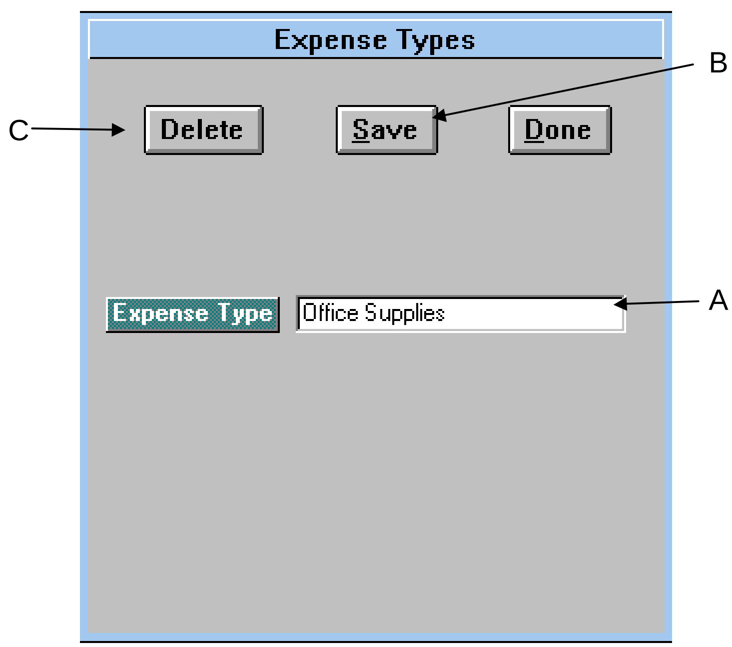


Fig. 13

4. Edit the Expense Type.

   - Change the Expense Type in the Expense Type field (Fig.13 - A) and click the Save button (Fig.13 - B) to save the changes.

     NOTE: When you change an Expense Type, all Expenditure records with this type will also be changed. Therefore, do not modify an Expense Type unless you want to modify related Expenditure records.

   (or)

- Click the Delete button (Fig.13 - C) to delete the record.

  NOTE: You will not be able to delete an Expense Type if there are Expenditures of this type.

USER-DEFINED FIELDS

E.L.E.C.T. Fundraising provides you with 21 user-definable fields that you can customize to track contributor categories, favorite types of events, concerns, occupations, etc.

To use this feature,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the User Fields button (Fig.1 - E) or hold down the Alt key and press the U key. The User-Defined Fields screen (Fig.14) appears.

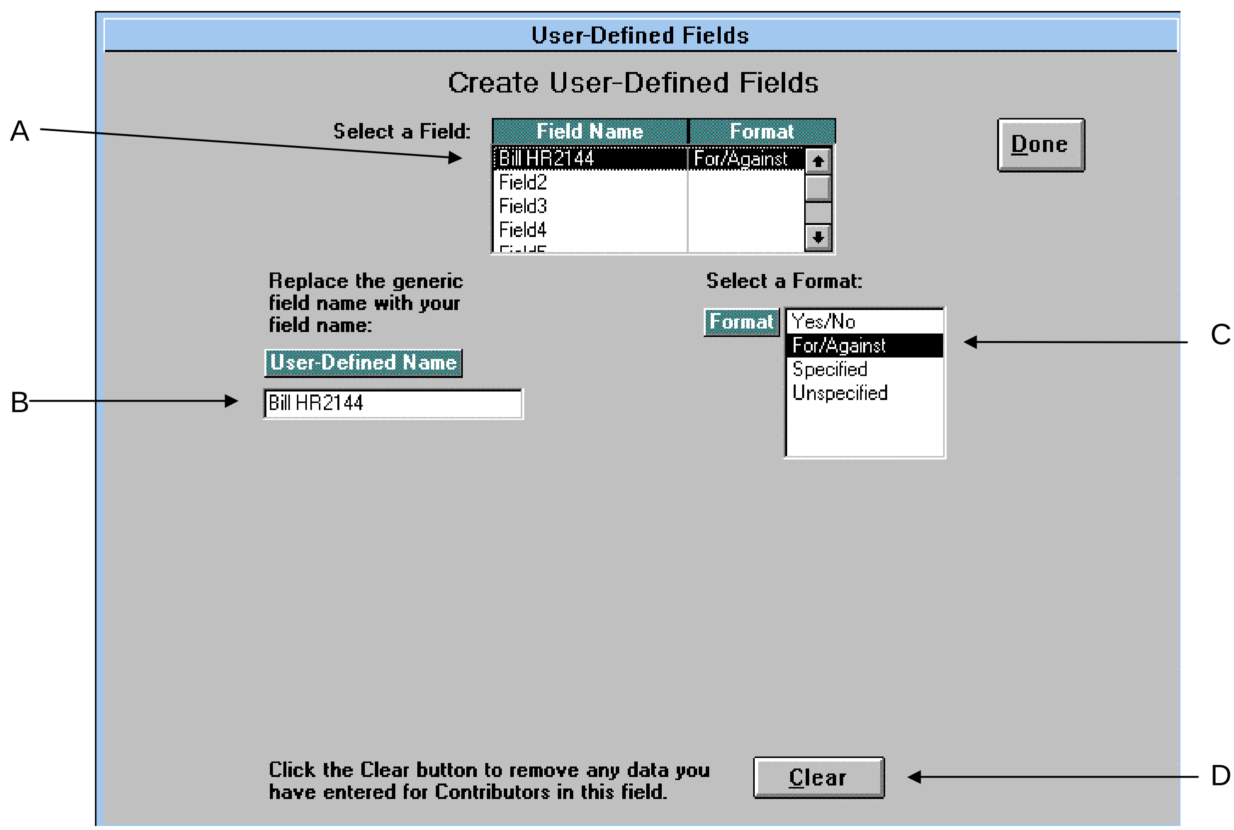


Fig. 14

Adding User-Defined Fields

1. You will see Fields 1-21 listed in the Select a Field box (Fig.14 - A). Simply click on a field to select it. It will appear highlighted.

2. Type the name you want for the field in the User-Defined Name field (Fig.14 - B).

3. Select a format for the field from the Select a Format list (Fig.14 - C). You have 4 choices for field formats:
   i) Yes/No
   ii) For/Against
   iii) Specified
   iv) Unspecified

If you select one of the first two choices, you are limited to those possibilities in that field. If you chose option i or ii, there are no additional criteria to define.

Option iii, Specified, means that you will provide a list of values appropriate for that field. To do so, click on Specified in the Select a Format list. Please see the Working with Specified fields section at the end of this chapter for more information about working with Specified fields.

Option iv, Unspecified, means that there is an unlimited range of possible values. If you choose Unspecified, there are no additional criteria to define.

Editing User-Defined Fields

To change a field name,

1. Select the field in the Select a Field list (Fig.14 - A).

2. In the User-Defined Name box (Fig.14 - B), change the name.

To change a field format,

1. Select the field in the Select a Field list (Fig.14 - A).

2. Select another format from the Select a Format list (Fig.14 - C).

If you are done with a user-defined field and want to use it for another purpose, you can clear all voter data for this field by clicking the Clear button (Fig.14 - D).

Caution! This button will clear your database of all information in this field. It is often helpful to keep this information for a long time, so clear the fields only if you need to. This process can take several minutes.

Working with Specified Fields

Follow the instructions in steps 1-3 of the previous Adding User-Defined Fields section for setting up the field. Select the field in the Select a Field box. Select Specified as the format if not already selected. The ‘Values for this Field’ section appears on the User-Defined Fields screen (Fig.15). (Remember only fields with the Specified format will have values.)

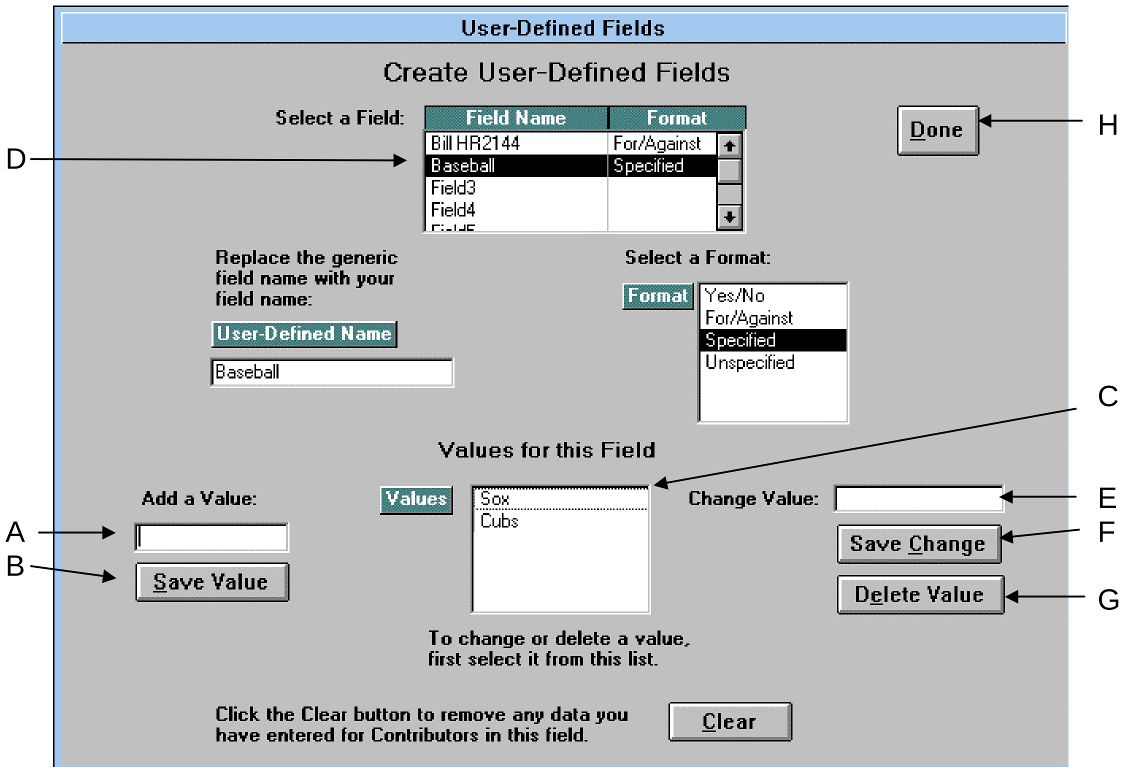


Fig. 15

To add a value,

1. Click in the Add a Value box (Fig.15 - A) and type in the value.

2. Click on the Save Value button (Fig.15 - B) to add the value to the list of Values (Fig.15 - C) in the center of the screen.

To change a value,

1. Select the field in the Select a Field list (Fig.15 - D).

2. Select a value from the Values list (Fig.15 - C).

3. Type your new value in the Change Value box (Fig.15 - E).

4. Click the Save Change button (Fig.15 - F). This will change only the possible values displayed for this field. It will not affect any data already entered into the database.

To delete a value,

1. Select the field in the Select a Field list (Fig.15 - D).

2. Select a value from the Values list (Fig.15 - C).

3. Click the Delete Value button (Fig.15 - G).

4. Click Yes at the prompt to delete the value.

To exit the User-Defined Fields screen, click Done (Fig.15 - H). The Main Screen appears.

CHANGING YOUR PASSWORD

To change your password,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Change Password button (Fig.1 - F) or hold down the Alt key and press the P key. The Change Password screen (Fig.16) appears.

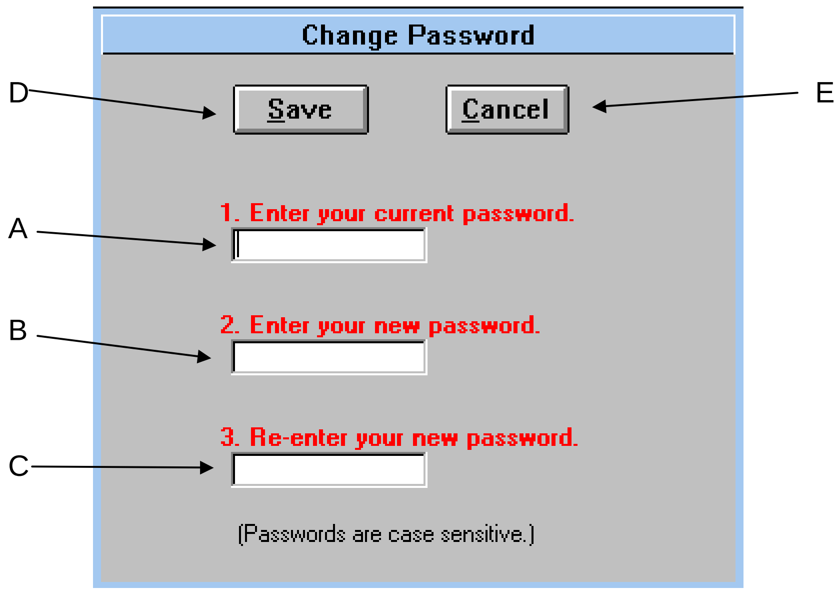


Fig. 16

3. Type your current password into the first text box (Fig.16 - A).

NOTE: Passwords are case-sensitive.

4. Type your new password into the second text box (Fig.16 - B).

5. Confirm your new password by re-typing it into the third text box (Fig.16 - C).

6. Click the Save button (Fig.16 - D) to save your changes.
   (or)

Click the Cancel button (Fig.16 - E) to cancel your changes.

CAUTION: Write down your password and secure it in a place you can remember. If you forget your password, you will not be able to get back into the program.

COMMITTEES

In the Committees section, you can add, edit and delete committees. Also, you can choose which committee you want to view in this session. When you choose a committee to view in this session, all financial information (receipts, expenditures, checkbook, loans) and reports will pertain to the current committee. (Some reports will allow you to print information for the current committee only or for all committees combined.)

NOTE: You must have the multi-committee option to add more than one committee. If you need this option, please call ELECT, Inc.

Adding Committees

To add a committee,

1. On the Main Screen, click either the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Committees button (Fig.1 - H) or hold down the Alt key and press the C key. The Committees List screen (Fig.19) appears.

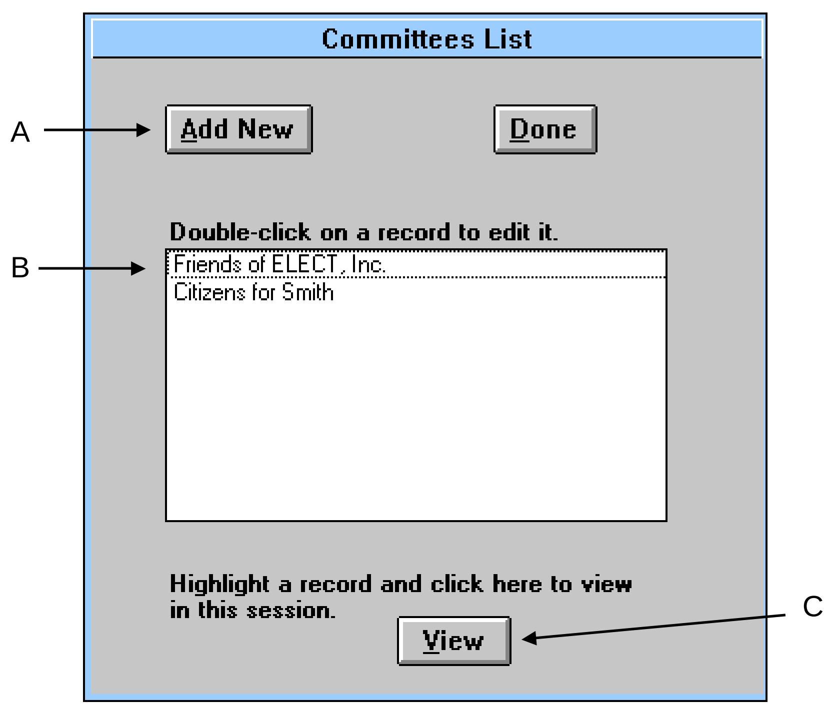


Fig. 19

3. Click the Add New button (Fig.19 - A). The Committees screen (Fig.20) appears.

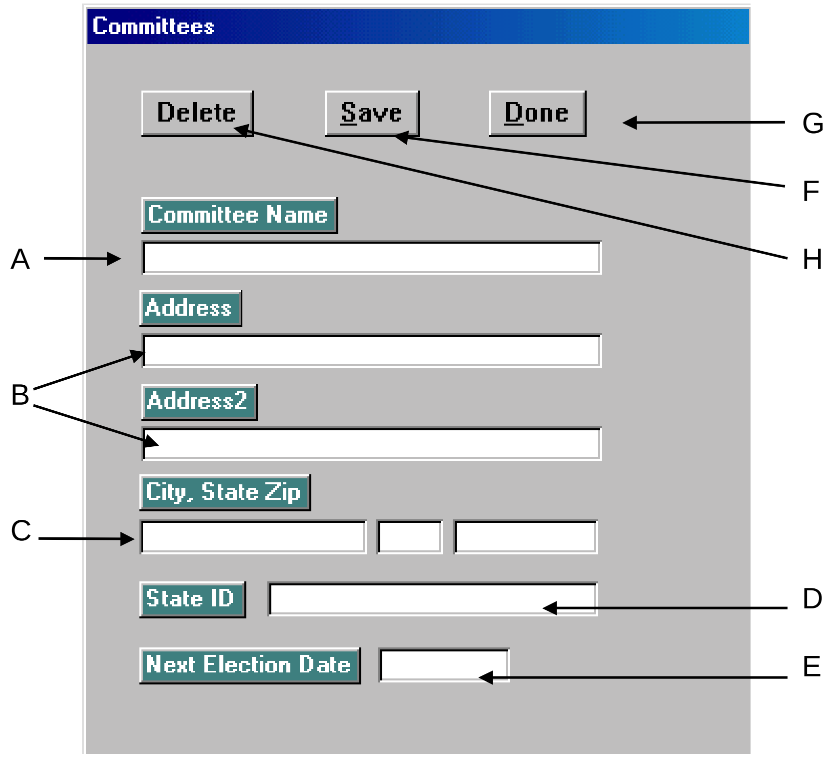


Fig. 20

4. Enter the name of your political Committee in the Committe Name field (Fig.20 - A), the Committee's address in the Address and Address2 fields (Fig.20 - B), the Committee's city, state and zip in the City, State Zip field (Fig.20 - C), the Committee's state identification number in the State ID field (Fig.20 - D) and the date of the next election in the Next Election Date field (Fig.20 - E). This information will also be used on the D-2 reports.

5. Click the Save button (Fig.20 - F) to save the record.

6. Repeat Steps 4 and 5 to add more committees.

7. Click the Done button (Fig.20 - G) when you are done adding committees.

Editing Committees

To edit a committee,

1. On the Main Screen, click either the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Committees button (Fig.1 - H) or hold down the Alt key and press the C key. The Committees List screen (Fig.19) appears.

3. Either double-click a record in the list (Fig.19 - B) or highlight a record and press the Enter key. The Committees screen (Fig.21) appears.

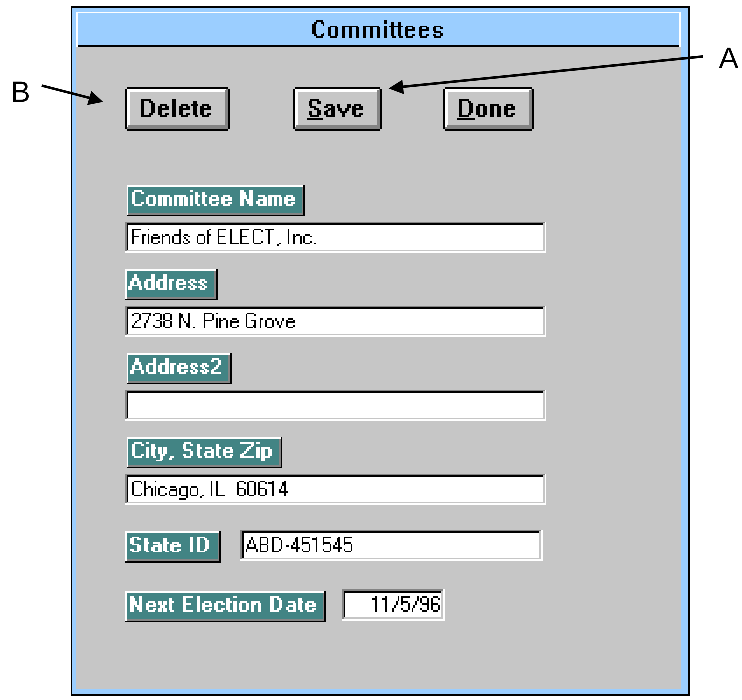


Fig. 21

4. Edit the committee.

   - Change the committee information and click the Save button (Fig.21 - A) to save the changes.

   (or)

   - Click the Delete button (Fig.21 - B) to delete the record.

     NOTE: You will not be able to delete a Committee if there are receipts or expenditures for the Committee.

Selecting a Committee to View in this Session

If you are tracking more than one committee, you can choose which committee's information to view in this session. To select the current committee,

1. On the Main Screen, click either the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Committees button (Fig.1 - H) or hold down the Alt key and press the C key. The Committees List screen (Fig.19) appears.

3. Highlight a name in the list (Fig.19 - B).

4. Click the View button (Fig.19 - C). The Committee Name will now appear on the Main Screen and all screens that are committee specific.

SALESPEOPLE

In the Salespeople section, you can add, edit and delete Salespeople who appear in the Salesperson drop-down list on the Receipts and Pledges screens. You can enter Salespeople either when entering a receipt or pledge or on the Salespeople screen.

Adding Salespeople

To add a Salesperson,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Salespeople button (Fig.1 - I) or hold down the Alt key and press the A key. The Salespeople List screen (Fig.22) appears.

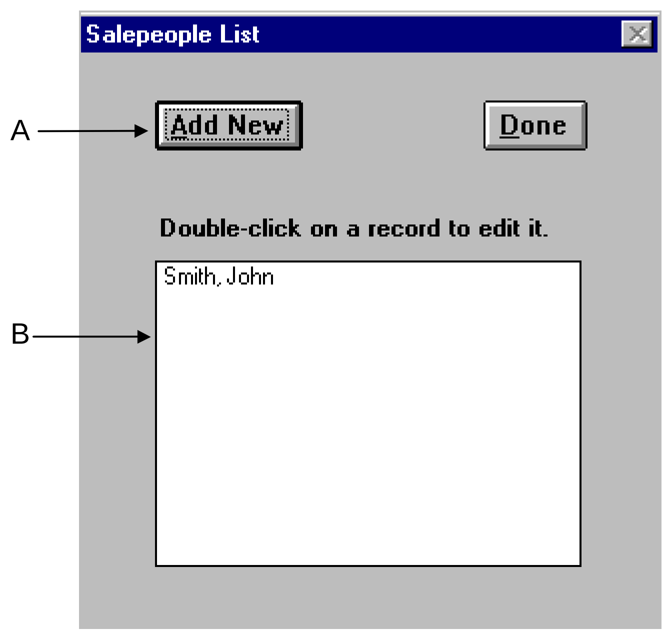


Fig. 22

3. Click the Add New button (Fig.22- A). The Salespeople screen (Fig.23) appears.

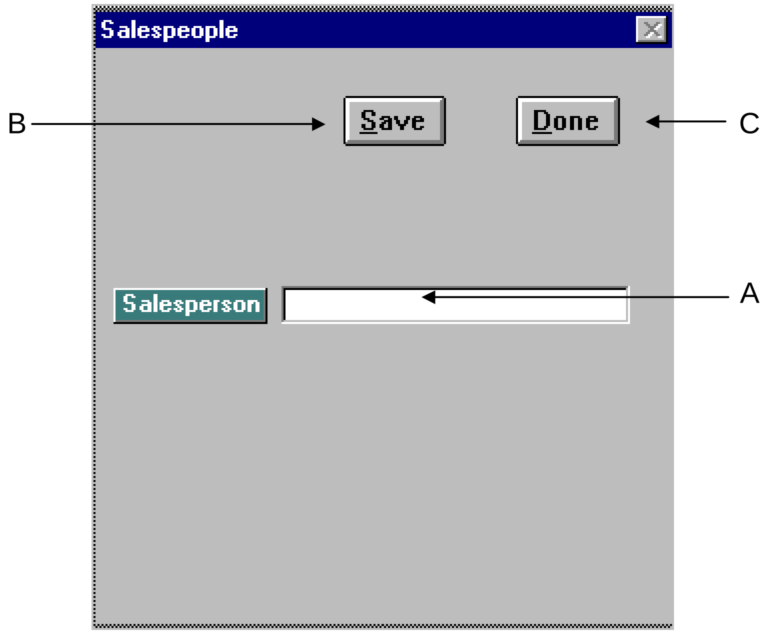


Fig. 23

4. Type the name in the Salesperson field (Fig.23 - A).

5. Click the Save button (Fig.23 - B) to save the record.

6. Repeat Steps 4 and 5 to add more Salespeople.

7. Click the Done button (Fig.23 - C) when you are done adding Salespeople.

Editing Salespeople

To edit a Salesperson,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Salespeople button (Fig.1 - I) or hold down the Alt key and press the A key. The Salespeople List screen (Fig.22) appears.

3. Either double-click on a record in the list (Fig.22 - B) or highlight a record and press the Enter key. The Salespeople screen (Fig.24) appears.

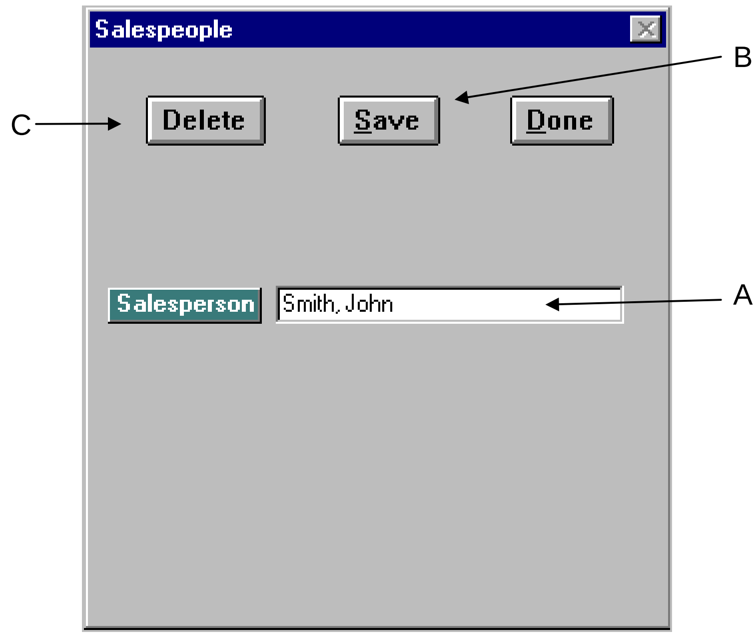


Fig. 24

4. Edit the Salesperson.

   - Change the name in the Salesperson field (Fig.24 - A) and click the Save button (Fig.24 - B) to save the changes.

   (or)

   - Click the Delete button (Fig.24 - C) to delete the record.

BENEFICIARIES

In the Beneficiaries section, you can add, edit and delete Beneficiaries who appear in the Beneficiary drop-down list on the Expenditures screens. You can enter Beneficiaries either when entering an expenditure or on the Beneficiaries screen.

Adding Beneficiaries

To add a Beneficiary,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Beneficiaries button (Fig.1 - B) or hold down the Alt key and press the B key. The Beneficiaries List screen (Fig.25) appears.

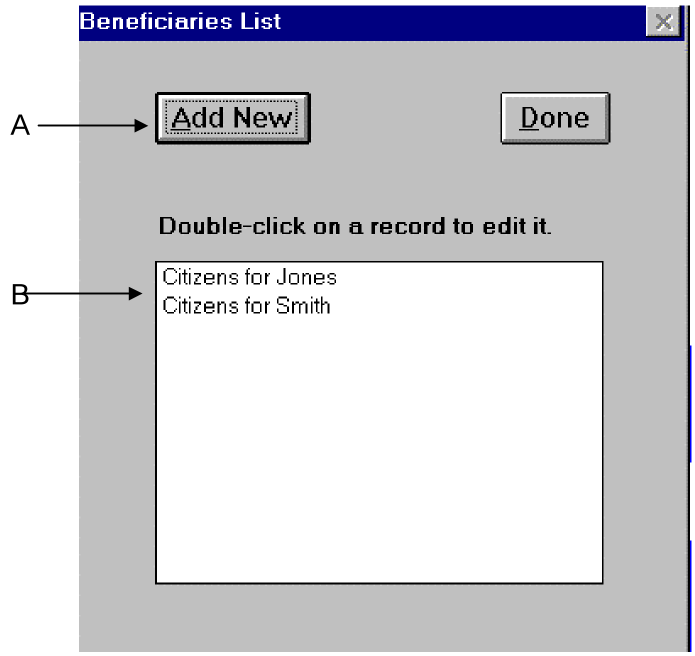


Fig. 25

3. Click the Add New button (Fig.25- A). The Beneficiaries screen (Fig.26) appears.

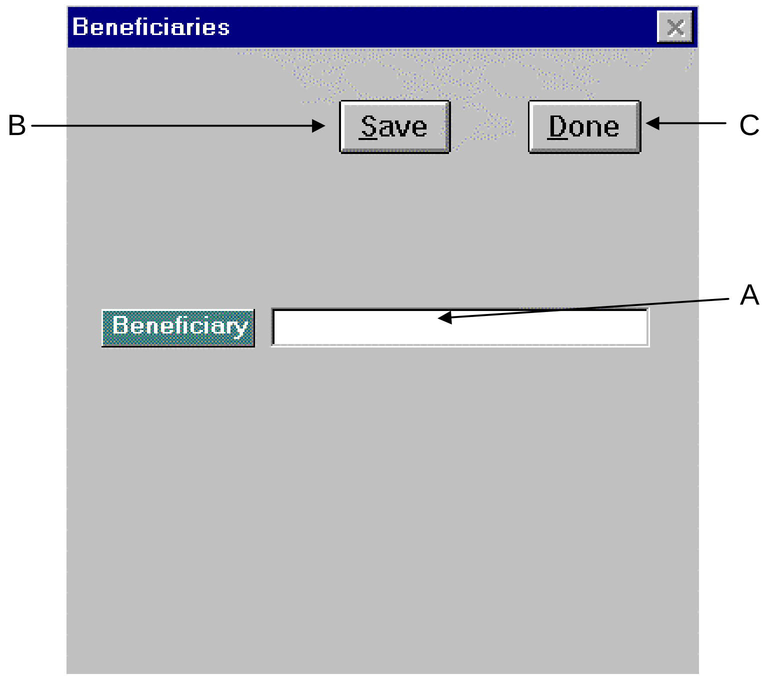


Fig. 26

4. Type the Beneficiary in the Beneficiary field (Fig.26 - A).

5. Click the Save button (Fig.26 - B) to save the record.

6. Repeat Steps 4 and 5 to add more Beneficiaries.

7. Click the Done button (Fig.26 - C) when you are done adding Beneficiaries.

Editing Beneficiaries

To edit a Beneficiary,

1. On the Main Screen, either click the Maintenance button or hold down the Alt key and press the M key. The Maintenance Selection screen (Fig.1) appears.

2. Click the Beneficiaries button (Fig.1 - B) or hold down the Alt key and press the B key. The Beneficiaries List screen (Fig.25) appears.

3. Either double-click on a record in the list (Fig.25 - B) or highlight a record and press the Enter key. The Beneficiaries screen (Fig.27) appears.

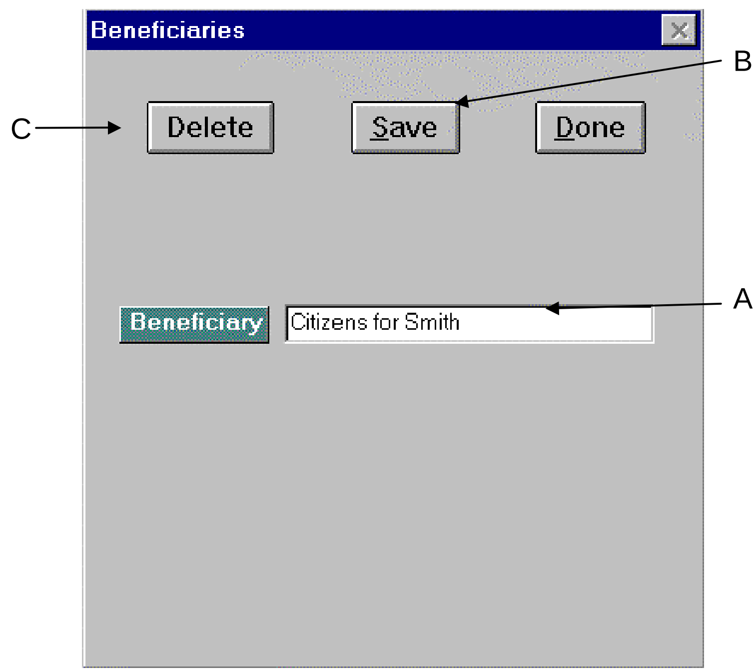


Fig. 27

4. Edit the beneficiary.

   - Change the beneficiary in the beneficiary field (Fig.27 - A) and click the Save button (Fig.27 - B) to save the changes.

   (or)

   - Click the Delete button (Fig.27 - C) to delete the record.

APPENDIX 1 -- DATABASE MAINTENANCE

BACKING UP THE DATABASE

As with all data files, and especially databases, you should perform regular backups. If you enter data for several hours every day, you might want to make backups every day. If you don't change any data for a week, you don't have to make a backup for that period of time. Also, you should make a backup before you perform any major operation (e.g., installing a new version of the program).

The only file that needs to be backed up is funddata.mdb in the c:\elect directory. This file contains all of your data and can be several megabytes in size. The E.L.E.C.T. Fundraising program, itself, is in another file. Since you can always replace this file from your original diskettes, you don't need to back up this file.

Here are three options for making backups. The better option costs more money, but it will be most efficient in the long run.

i. You can buy either an internal or external tape backup. All you have to do is to run the backup program for the unit, and your selected files will be backed up on one tape. There are several kinds of tape backup units on the market.

ii. You can buy backup software. In this case, your data will be stored on diskettes. Since diskettes store a relatively small amount of information, you will have to use several diskettes to back up the file. Windows comes with this type of software. You can find it either in Microsoft Tools in Program Manager or under Tools in File Manager.

iii. You can buy an external drive such as the Iomega Zip Drive or Jaz Drive. A Zip disk holds 100MB of data and the Jaz disk holds 1GB.

COMPACTING THE DATABASE

Whenever you delete information from a database, its space in the file is not completely eliminated. So, after a lot of information is deleted, there is a lot of unused space in the database. Therefore, you must regularly compact the database. This will remove this unused space (making the file size smaller) and also make the indexing work more efficiently.

To run a compaction, double-click on the appropriate compact icon that is in your E.L.E.C.T. group in the Windows Program Manager. It will first run a repair and then a compaction. The compaction of fundform.mdb will take only several seconds. The compaction of funddata.mdb, however, will take longer depending on the amount of data you have. Different circumstances require different compacting techniques.

- If you use E.L.E.C.T. Fundraising only to view data, you don't have to compact funddata.mdb. But, if the funddata.mdb file is growing noticeably in size, or if E.L.E.C.T. Fundraising seems to be giving you incorrect information, run the compaction. Under normal use, compact this file every month or two.

- If you frequently run postal reports, use Search Criteria on Contributor Lists or Mailing Labels or run Word Mail Merge, compact fundform.mdb at least twice a month. Under normal use, compact this file once or twice a month.

- If your computer loses power while E.L.E.C.T. Fundraising is undergoing critical processing (such as running some reports), you may get an error that the database is corrupted. In this case, run the compaction on funddata.mdb.

APPENDIX 2 -- USER TIPS

GENERAL TIPS

Searches are not case sensitive. This means, for example, that on the Contributors screen you can type in Smith, smith, SMITH or any combination of upper and lower case, and all occurrences of the name will be found.

E.L.E.C.T. Fundraising will keep track if you make any changes on any data input screens. If you do not save your changes before clicking the Done button, you will be asked if you want to close the screen without saving your changes. If you click ‘Yes’, the screen will close without saving your changes. If you click ‘No’, the screen will not close and you can then click Save. You can click ‘No’ if you decide that your entries are incorrect and you do not want to save them.

You can go to other programs while keeping E.L.E.C.T. Fundraising open by using this technique: Hold down the Alt key and press the Tab key. Each time you press Tab, you will see the name of a program that is currently running in Windows. Continue pressing Tab until you see the name of the program you want. When you see the one you want, release the Alt key.

KEYBOARD TIPS

For people who prefer the keyboard over the mouse, there are several alternatives to the mouse.

Most buttons you see on the screen will have one letter underlined on the button. When you see this, you can do the equivalent of clicking the button by holding down the Alt key and pressing that letter on the keyboard.

There are drop-down lists or always-open lists on several screens. You can choose an item from a list by Tabbing into the list (or clicking into it) and using your up and down arrows to move to different items in the list. Alternatively, you can type in the first letter of your selection, and the highlight will move to the first matching item in the list. If more than one item matches on a drop-down list, you can type additional letters to find a match on all of the letters you have typed. You do not have to use your mouse; just tab out of the list and the highlighted item will be selected.

To move from field to field, you can either press Tab or Enter. In fields that will take several lines of input (e.g., form letter text), the Enter key will take you to the next line in that field rather than to the next field. You must press Tab to get out of these fields.

In fields that have check boxes, you can use the Spacebar to put an X in the box or to remove the X.

APPENDIX 3 -- PRINTING

PRINTING TIPS

You can print reports just by clicking the Print button on a screen. But, there are some settings you might want to change before printing.

E.L.E.C.T. Fundraising will use the default printer you have chosen in Windows. But, you may be using a laser printer for some reports and a dot matrix printer for labels. You will then need to change your default printer.

In Windows 3.11,

1. Go to Program Manager.
2. Double-click on the Main group.
3. Double-click on the Control Panel icon.
4. Double-click on the Printers icon.
5. You can now select another printer from the list.
6. Click the Set as Default Printer button. (Make sure you also connect the new printer to your computer.)

In Windows 95,

1. Go to Start.
2. Select Settings.
3. Select Printers.
4. Select the Printer you want to use.
5. Select File.
6. Select Set as Default. (Make sure you also connect the new printer to your computer.)

Alternatively, you can select another printer from the Print Preview screen (see the Print Preview section below).

Your computer is probably set up to use Print Manager. Items that are many pages long (e.g., labels) must be processed first and sent to Print Manager before they are printed. This process can last a long time. To start printing immediately, you can turn off Print Manager. This can be done on the same screen as selecting a printer (see above for information on accessing this screen). Just click on the Use Print Manager box to unselect it. The X disappears. Disabling Print Manager will have no effect as long as you are printing only one thing at a time.

PRINT PREVIEW

On most screens, you will have the option to print or preview a report. The Print option will send your report straight to the printer. The Preview option will allow you to display the report on the screen before you actually print it.

When you are on the Print Preview screen, you can zoom in and out of the display by just clicking on the report.

To page through the report, click the arrows at the bottom left of the screen. The left arrow (Fig.1 - A) will bring up the previous page, while the right arrow (Fig.1 - B) will bring up the next page. The arrows with the vertical bar will bring up the first page (left arrow) (Fig.1 - C) or the last page (right arrow) (Fig.1 - D). You can go to any page by typing the page number in the Page box at the bottom left of the screen (Fig.1 - E) and pressing Enter.

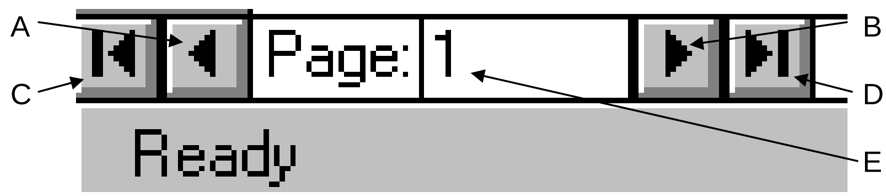


Fig. 1

Printing

To print from the Print Preview screen:

1. Click the Print button.
2. Click OK to print the whole report.
   (or)
   Type the range of pages in the From and To boxes and click OK.

Changing the Printer

To change the printer from the Print Preview screen:

1. Click the Print button.
2. Click the Setup button.
3. Select a different printer from the drop-down list under Specific Printer.
4. Click OK.

APPENDIX 4 -- FIELDS

The following is a list of fields in E.L.E.C.T. Fundraising which can be used to search for Contributors for Mailing Labels, Contributor Lists and Custom Reports.

Field Name	Field Type	Description
A-1 Report	Yes/No	Indicates if an A1 was printed for a receipt
Address	Text	The Contributor's work address.
Address2	Text	The second line of the Contributor's work address.
CarrierRoute	Text	The postal carrier route in which the Contributor works. The format is either the letters C or R followed by three digits.
Check Nbr	Text	Check number on a contribution
Check1-9	Yes/No	User-defined checkboxes (see Chapter 2 - Contributors). The user-defined names will display in alphabetical order.
City	Text	The city in which the Contributor lives.
CompanyName	Text	The name of the company the Contributor is associated with.
ContributorType	Text	Used to categorize Contributors. The defaults are: Individual, Business, Lobbyist, PAC and Grouped. More categories can be added.
D-2 Section	Text	Section on D-2 that a receipt is reported on: 1-Individual contribution; 2-Transfer in; 3-Loan received; 4-Other receipt; 5-In-kind
Deposit Nbr	Text	Bank deposit number
Description	Text	Receipt description to appear on D-2s for In-kinds
Donations-Largest	Number	The Contributor's largest single donation.
Donations-Last	Date	The date of the Contributor's last donation.
Donations-Prv Yr	Number	The total of the Contributor's donations in the previous year.
Donations-Total	Number	The total of all the Contributor's donations.
Donations-YTD	Number	The sum of the Contributor's donations from the first of the year through today's date.
Email	Text	Contributor's email address
Employer	Text	Contributor's employer
Event Code	Text	Event associated with a receipt
Extn	Text	Contributor's phone extension
Fax	Text	The Contributor's work fax number.
Field1 through Field21	User defined	User-defined fields (see Chapter 11 - Maintenance). The user-defined names will display.
FirstName	Text	The Contributor's first name.
FormalName	Text	The Contributor's formal name. Used for salutations in formal letters. The format is Mr./Ms. <LastName>.
Guarantor	Text	Guarantor on a loan received
Home Add	Text	Contributor's home address
Home Addr2	Text	Contributor's home address second line
Home Carr Rt	Text	Contributor's home carrier route
Home City	Text	Contributors home city

Home Fax	Text	Contributor's home fax number
Home Phone	Text	Contributor's home phone number
Home State	Text	Contributor's home state
Home Zip	Text	Contributor's home zip
InformalName	Text	The Contributor's informal name. Used for salutations in informal letters. The format is <FirstName>. If there is no first name, then 'Friend' is used.
Last Name	Text	The Contributor's last name.
Mail To	Text	Location where mail should be sent: W-work; H-home
NoMail	Yes/No	Indicates if no mail should be sent to contributor
Notes	Text	Miscellaneous notes about the Contributor.
Occupation	Text	Contributor's occupation
Phone	Text	The Contributor's work phone number.
Prefix	Text	The prefix used for the Contributor's formal name (e.g., Mr., Ms., Dr.)
Print	Text	Used to mark records for printing Thank You letters. The last batch of Thank You letters printed will be marked with a 'P'.
Receipt Amt	Number	Amount of a receipt
Receipt Date	Date	Date of a receipt
ReportingAddress	Text	The address for the Reporting Name.
ReportingAddress2	Text	The second line of the address for the Reporting Name.
ReportingCity	Text	The city for the Reporting Name.
ReportingName	Text	The name under which receipts will be reported on D-2 reports.
ReportingState	Text	The state for the Reporting Name.
ReportingZip	Text	The zip for the Reporting Name.
Salesperson	Text	Person responsible for obtaining a pledge or receipt
State	Text	The Contributor's work state.
Suffix	Text	The Contributor's suffix (e.g., Jr., M.D.)
Thank You	Yes/No	Indicates if a Thank You letter was sent for a receipt
Thank You #	Number	Batch # of Thank You letters receipt is part of
Value Unknown	Yes/No	Indicates if the value of an in-kind contribution is unknown
Vendor Address	Text	Address of vendor on an in-kind contribution
Vendor City	Text	City,state and zip of vendor on an in-kind contribution
Vendor Paid	Text	Name of vendor on an in-kind contribution
Zip	Text	The Contributor's work zip code.

The following is a list of fields in E.L.E.C.T. Fundraising which can be used to search for Payees for Mailing Labels and Custom Reports.

Field Name	Field Type	Description
Address	Text	Payee’s address
Address2	Text	Payee’s address second line
Alt Phone	Text	Payee’s alternate phone number
Amount	Number	Amount of expenditure
Beneficiary	Text	Beneficiary of expenditure
Check Nbr	Text	Check number of expenditure
City	Text	Payee’s city
Company Name	Text	Payee’s company name
D-2 Section	Text	Section on D-2 that an expenditure is reported on: 6-Tranfer out; 7-Loan payment; 8-Expenditures
Date	Date	Date of the expenditure
Expend Notes	Text	Notes about the expenditure
Expense Type	Text	Expense type of the expenditure - for internal tracking
Extn	Text	Payee’s phone extension
First Name	Text	Payee’s first name
Invoice Nbr	Text	Invoice number the expenditure covers
Last Name	Text	Payee’s last name
Payee Address	Text	Payee’s reporting address
Payee Address2	Text	Payee’s reporting address second line
Payee City	Text	Payee’s reporting city
Payee Fax	Text	Payee’s fax number
Payee Name	Text	Payee’s reporting name
Payee Notes	Text	Notes about the payee
Payee Phone	Text	Payee’s phone number
Payee State	Text	Payee’s reporting state
Payee Type	Text	Used to categorize payees. The defaults are: Individual, Business, Grouped. More categories can be added.
Purpose	Text	Purpose of expenditure that appears on D-2
State	Text	Payee’s state
Zip	Text	Payee’s zip code

INDEX