



home

classroom

administration

RenWeb Fundraising PRO Training #2

Fund Manager

- About Fund Manager
- Fund Management is a way to connect giving data with your internal accounting practices. If you assign a gift record to a specific fund code, you can track the flow of monies.
- Specify a fund name for your benefit. A fund code can be the same or similar to pre-existing account codes you may already have in place. Specifying a Default Effort can assist in data entry on the Giving History tab of the Constituent Detail screen. See the Quick Gift Entry help topic for details.
- Quick Definitions:
 - Effort – How did we get the money
 - Fund – Tied to where the money goes

Creating Campaigns/Efforts

- Adding a Campaign
 - Name
 - Type
 - Focus
 - Code
 - Date
- Adding an Effort
 - General Effort Information
 - Filtering
 - A = Active
 - X = Deleted (although an effort is NEVER really deleted as all giving is tied to an effort)
 - Defining Giving Levels and Perks
 - Association with an EVENT Type
 - Golf Tournament
 - Auction
 - Telethon

Recording Giving Payments

- From the Constituent's Record
 - Giving History Tab
 - Select Gift For
 - Enter Gift Information
- From the Effort
 - Effort Giving Tab
 - Enter Gift Information
- Matching Gift



Pledges

- **Constituent Record**
 - Pledges Tab
 - Entering a Pledge
- **Effort Giving Tab**
 - Associated Pledge Donation

