

Fund Drive

Setup

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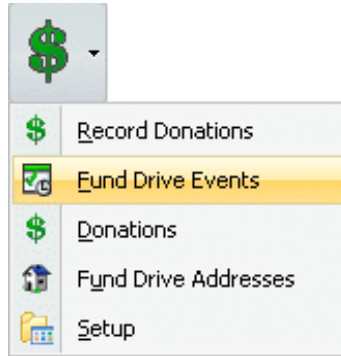
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Introduction

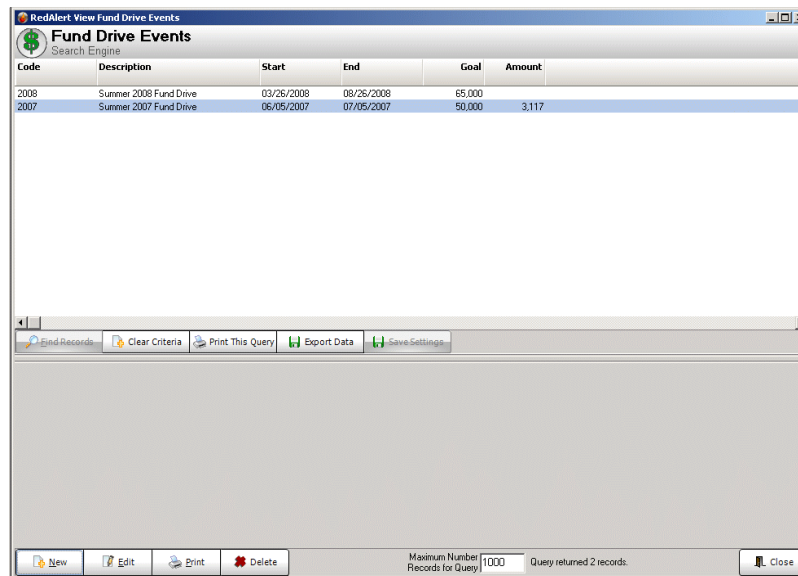
This manual discusses how to setup the Fund Drive Module.

Fund Drive Events

This section allows for the creation of new events, review of donation history, importing new CASS, and generate mailing. To access this, click the tab next to the **Fund Drive Icon** and select **Fund Drive Events**.



To create a new event select **New** on the bottom left. To edit an event, select the **Event** then click on **Edit**



Fill in the fields with the appropriate info (**Fund Drive Code, Financial Goal, Start Date, End Date, Description, Administrator, Procedures**).

Fund Drive
MANAGEMENT

Fund Drive Code: 2007 Financial Goal: 50,000.00
Start Date: 06/05/2007 Amount Collected: 3,117.00 \$ Total
Ending Date: 07/05/2007
Description: Summer 2007 Fund Drive
Administrator: Pete Hotchkiss
Procedures: [Empty list]

Actions | Donations

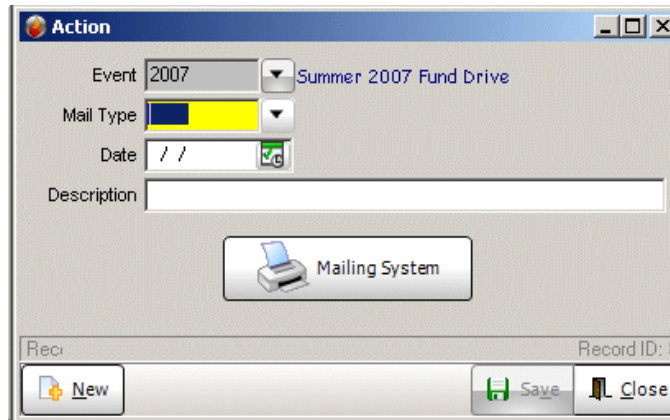
Date Done	Action Type	Description
08/06/2007	1st Mailing	Send out first mailing using CSV File Format.

[New] [Edit] [Delete]

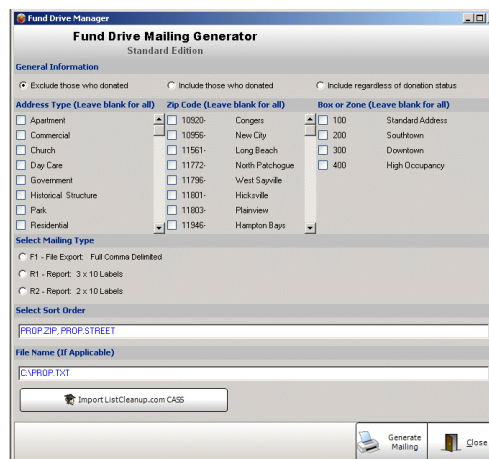
Record Status Record ID: 3

To create a new **Action**, select the **Actions** tab and select **New** on the bottom left.

Select a **Mail Type** (To edit Mail type refer to the **Setup** section). Enter a **Date** and **Description** then click on Mailing System.



Under **General Information** decide on what to base the list on: Exclude those who donated, Include those who donated, Include regardless of donation status.



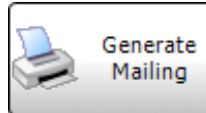
Decide on **Address Types**, **Zip Codes**, **Box or Zones** to be included. If one of the sections is left **blank**, all of the fields will be included for that field.

Select a **Mailing Type**. (F1 - File Export: Full Comma Delimited, R1 - Report: 3 x 10 Labels, R2 - Report: 2 x 10 Labels.)

Change the File Name and location if Mailing type is F1

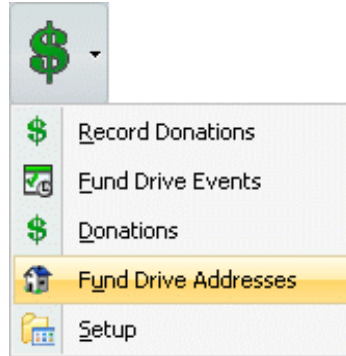
If a new CASS needs to be uploaded, click on **Import ListCleanup.com CASS**. Make sure the file is in a .CSV format.

Click on **Generate Mailing** to either compile a text file (F1 - File Export) or in labels in a printable format to be printed.

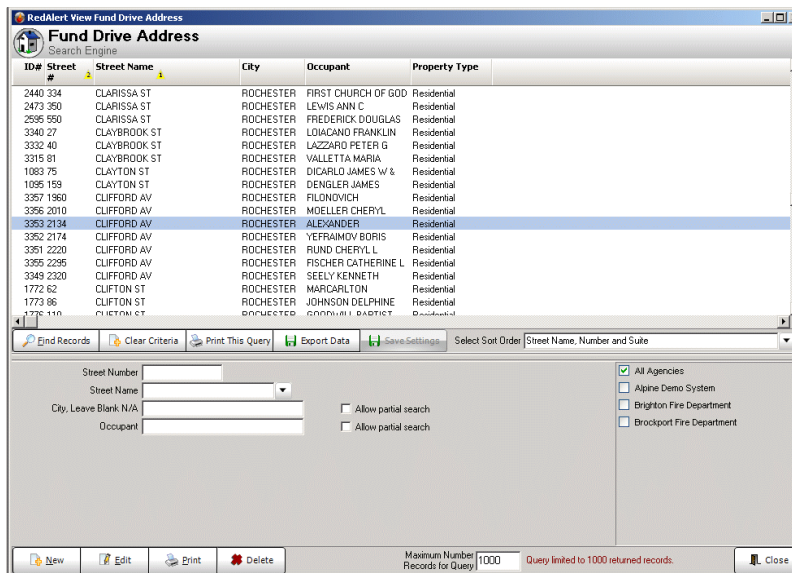


Fund Drive Addresses

This section will show a list of addresses and allow entry of new addresses or view past donation histories. To access this, click the tab next to the **Fund Drive Icon** and select **Fund Drive Addresses**.



To access an Address's history, select the address and click on the Edit Button. To create a new address, click on the New button.



When a new address is created, fill in the appropriate data fields.

The screenshot shows a software window titled "City Entry". It is divided into two main sections: "Contact Information" and "Donation History".

Contact Information

- ID#: 3656
- Street #: [text box] Street: [text box with dropdown arrow] Apt: [text box]
- City: [text box with dropdown arrow]
- State: [text box with dropdown arrow]
- Zip Code: [text box] Post Bar Code: [text box]
- Occupant: [text box]
- Type: [text box with dropdown arrow]

Donation History

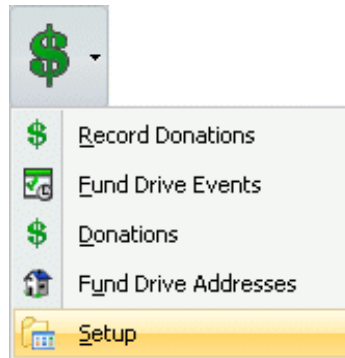
Date Entered	Date Received	Name	#	Street Name	A

At the bottom of the window, there are three buttons: "New" (with a plus icon), "Edit" (with a pencil icon), and "Delete" (with a red X icon).

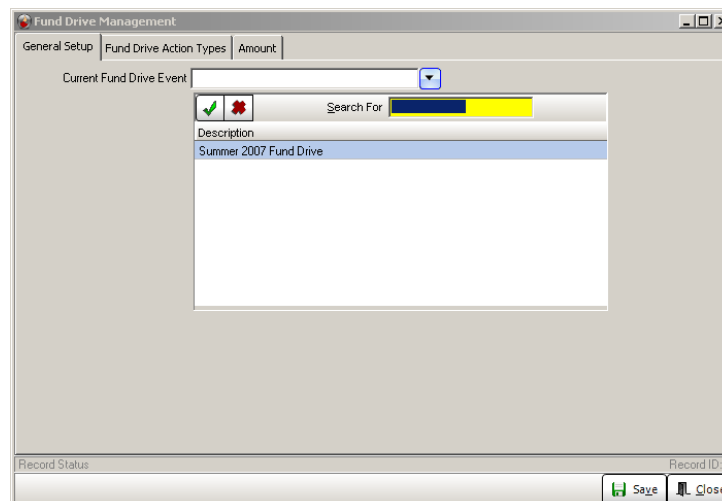
To enter a new donation, select **New** and refer to the **Donations** section of the manual.

Setup

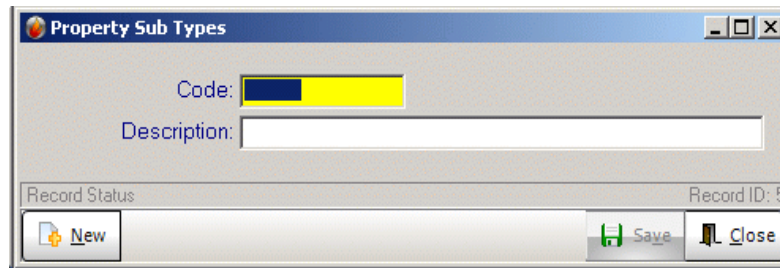
This section will allow the creation of monies amount, fund drive action types, and selection of events. To access this, click the tab next to the **Fund Drive Icon** and select **Setup**.



To change the **Current Fund Drive Event**, select the **General Setup** Tab and click on the drop down to the appropriate event. After it is selected, click on the **Save** button on the bottom right.



To edit or create a new Fund Drive Action Type (ex: 1st Mailing, 2nd Mailing, etc...) select the **Fund Drive Action Types** tab. To edit or create a new one, click on the **Edit** or **New** button on the bottom left.



























Fill in the **Code** and **Description** then click on the **Save** button.

Fund Drive Amounts

Select this tab to create a fund drive amount sheet. The fund drive amount sheet represents the top 10 or 20 donations that typically occur. Follow these steps.

1. Enter all of the amount from lowest to highest.
2. Install the Code 3 of 9 fonts, see next section. Skip this step if they are already installed.
3. Print the amount sheet. Make sure the amounts are in the bar code format.
4. Laminate it if possible. It will be used a lot.

Fund Drive Amount Scan Sheet		
Alpine RedNMX Demonstration		
 \$0.00	 \$55.00	 \$150.00
 \$5.00	 \$60.00	 \$250.00
 \$10.00	 \$65.00	
 \$15.00	 \$70.00	
 \$20.00	 \$75.00	
 \$25.00	 \$80.00	
 \$30.00	 \$85.00	
 \$35.00	 \$90.00	
 \$40.00	 \$95.00	
 \$45.00	 \$100.00	
 \$50.00	 \$125.00	

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Code 3 of 9 Fonts

The following are steps for installing the Code 3 of 9 fonts. This example uses Windows XP.

1. Download the BARCODE.ZIP file from
Site Name: www.alpinesoftware.com/download
User Name: download
Password: 1324
2. Place the file in C:\ root directory
3. Unzip the file in the C:\ root directory.
4. Install the new fonts in the C:\ directory. There should be 3 fonts installed.