CAMS Enterprise

Development Setup

Three Rivers Systems, Inc
Published: 26 July 2007

Abstract

This document is provided to help you understand how to set up the Development/Fund-raising module. In this document, the following setup tasks will be covered:

- Configuration – (Complete this task first.) Set fiscal year, automatic functions
- Lookup Tables – (Complete this task second.) Determine values for glossary and reference tables used in Development
- Campaigns – (Complete this task third. Setting up campaigns must be completed prior to subsequent tasks. The remaining tasks may be completed in any order desired.)
- Events – Create and maintain fundraising events and attendees
- Pledge Frequency Ref – Set up pledge frequency for pledges paid in increments
- Activity Lookup – Set up activities (correspondence)
- Activity Sequences – Define activity sequences

Disclaimer

Three Rivers Systems, Inc. makes no representation or warranties with respect to the contents or use of this guide. Further, Three Rivers Systems, Inc. reserves the right to revise this guide and make changes to its contents at any time without obligation to notify any person or entity of such revisions or changes.
In no event will Three Rivers Systems, Inc. be liable to buyer or any other party for any damages, including any lost profits, lost savings, or other special incidental or consequential damages arising out of the use of or inability to use such product, even if Three Rivers Systems, Inc. has been advised of the possibility of such damages, or for any claim by any other party.

Table of Contents

Configuring CAMS Manager Development Options

Step-By-Step: Configure Development Options

1. From the **CAMS Enterprise Home** page, click **CAMS Manager >Configuration**. The CAMS Configuration window opens with the General CAMS Configuration tab displayed.

2. Click the **Development** tab to access the CAMS Development Options form. Use this form to record the Development Office Address (if different from the main address of your institution), establish the Fiscal Year, and set a few important defaults. This is the first setup task you should complete.

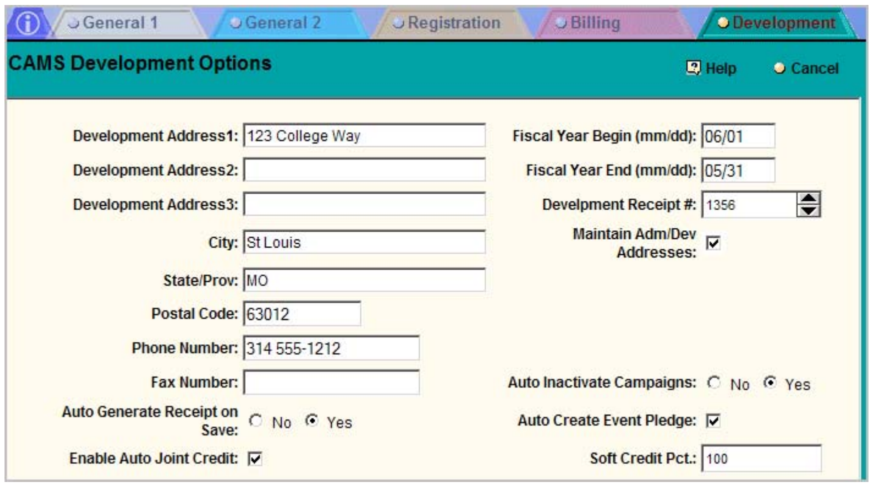


Figure 1: Development Options window

- **Development Address, Phone Number, Fax Number** – Enter separate address and contact information for your institution should your Development office be located apart from the rest of your campus.

- **Fiscal Year Begin** and **Fiscal Year End** – Enter the begin date and end date for the fiscal year. Note the date format for the fiscal year (MM/DD). These dates affect how giving totals are displayed in donor entry forms.

- **Development Receipt #** – Enter the next Development Receipt number to be used in the incremental numbering of development receipts.

- **Maintain Adm/Dev Addresses** – Check this box if you wish Development staff to have the option of updating alumni addresses in Admissions. If checked, the user will be prompted with a modal choice to update the person's address in Admissions each time an address is changed in the Development module.

- **Auto Inactivate Campaigns** – Check this box if you want an active campaign to automatically become inactive once the end date of the campaign has been reached. Inactive campaigns will not display in the Campaign drop-down list, so users may not select an inactive campaign.

- **Auto Create Event Pledges** – Check this box if you want the system to automatically create pledge entries for the constituent/event in pledge batch when event attendees are saved.
- **Auto Generate Receipt on Save** – Select **Yes** if you want CAMS to automatically generate a receipt when a new entry is saved.
- **Enable Auto Joint Credit –** Check this box to have CAMS Enterprise automatically create Soft Credit transactions for all individuals who have a Joint Account with the donor.
- **Soft Credit Pct –** When Enable Auto Joint Credit is selected this field displays. Set the percentage of the amount of the donation that will be used to calculate the automatically created soft credit entry.

3. Click "**X**" to close this window and save this information to the database, or click **Cancel** to exit without saving.

Populating Lookup Tables

See the graphic below to help you determine which lookup tables should be populated in order to use the development module.

To access lookup tables, from the **CAMS Enterprise Home** page, click **CAMS Manager >Lookup Table Options >Table Maintenance**. This is the second setup task you should complete.

Field Name	Table Name	Table Description	Sample Values	Modules	Forms	Table Type	Priority
Profile							
Agent	Fund Agents	Fundraising Agents	Agent Name, Agent Title	Development	Constituent Profile Pg 1	Reference	Recommended
Donor Category	Donor Category	Constituent Category types	Alumni, Board Member	Development	Constituent Profile Pg 1	Glossary	Essential
Donor Type	Donor Type	Constituent Type	Friend, Church	Development	Constituent Profile Pg 1	Glossary	Recommended
Account Type	FundAcctType	Fundraising Account Types	Individual, Alumni, Corporation	Development	Constituent Profile Pg 1	Glossary	Essential
Religion	Religion	Religion	Catholic, Methodist, Lutheran	Admissions, Development, Faculty	Prospect Other;SAI Demographics; Constituent Profile;Faculty Demographics	Glossary	Optimal
Ethnicity	Origins	Ethnicity	Caucasian, Hispanic, Asian	Admissions; Development; Faculty	Prospect Other, SAI Demographics, SAI More-Ethnicity; Constituent Profile; Faculty Maintenance	Glossary	Optimal
Alumni Association	FundAssociationRef	Alumni Associations	Gamma Gamma Gamma	Development	Constituent Profile Pg 2	Reference	Optimal
Primary Code	User Def Code 1	User Defined Primary Code	User Defined	Development	Constituent Profile Groups	Glossary	Optimal
Secondary Code	User Def Code 2	User Defined Secondary Code	User Defined	Development	Constituent Profile Groups	Glossary	Optimal
Tertiary Code	User Def Code 3	User Defined Tertiary Code	User Defined	Development	Constituent Profile Groups	Glossary	Optimal
Mail Code	Mailing Code	Mailing Code	Yearly 1, Yearly 2	Development	Constituent Profile Groups	Glossary	Optimal
Planned Giving Code	Planned Gift Type	Donor Planned Gift	Bond, Trust	Development	Constituent Profile Groups	Glossary	Optimal
Interest Category	Activity Category	Donor activities and honors	Associations, Organizations	Development	Constituent Profile Interest	Glossary	Optimal
Interest	Constituent Interest	Donor Extracurricular and Honors list	Marching Band, Cum Laude	Development	Constituent Profile Interest	Glossary	Optimal
Salary Range	Salary Range	Salary Range	50,000-75,000	Development	Constituent Profile Employment	Glossary	Optimal
Relation	Relationship Type	Relationship Type	Husband, Wife, Daughter	Development	Constituent Profile Relationships	Glossary	Optimal
Reversing Relation	Relationship Type	Reversing Relationship Type	Husband, Wife, Daughter	Development	Constituent Profile Relationships	Glossary	Optimal
Vehicle	Vehicle Type	Development gift's vehicle type	Living trust	Development	Constituent Profile Planned Gifts	Glossary	Optimal
Gift Type	Gift Type	Gift Type	Bond, Cash, Check	Development	Constituent Profile Planned Gifts	Glossary	Essential
Pledge/Gift Entry							
Restriction Type	Gift Restriction Type	Gift/Pledges Registration Types	Restricted, Unrestricted	Development		Glossary	Optimal
Pledge/Gift Source	Gift Source	Source of Gift	Phonathan, Faculty	Development	Constit. Batch Transact. Detail Entry	Glossary	Optimal
Pledge/Gift Type	Gift Type		Bond, Cash, Stock, etc.	Development	Constit. Batch Transact. Detail Entry	Glossary	Optimal
Appeal Code	FundAppealCode	Appeal Codes		Development	Constit. Batch Transact. Detail Entry	Glossary	Optimal
	FundDocumentRef	Primary documents for merges		Development		Reference	Recommended
Frequency/Installment	Fund Frequency	Frequency of installments	Weekly, Monthly	Development	Constit. Batch Transact. Detail Entry	Reference	Recommended
Setup							
Campaigns:							
Campaign Type	Campaign Type	Campaign type	Building Funds, Memorial Funds	Development	Campaign Maintenance Campaigns	Glossary	Essential
Restriction Type	Gift Restriction Type	Gift/Pledges Registration Types	Restricted, Unrestricted	Development	Campaign Maintenance Memorials	Glossary	Recommended
Other							
Season Code	Season Address Type	Seasonal Addresses	Season Name	Development	Constituent Addresses	Reference	Optimal

Figure 2: Development Tables

Setting Up Campaigns

The Campaign Maintenance window holds information about fund-raising campaigns and memorials. Pledges and gifts are associated with a particular campaign. Each campaign record contains the general ledger account numbers, so that funds are correctly posted. This is the third setup task you should complete. This task must be completed prior to setting up subsequent tasks.

Step-by-Step: Set Up Campaigns / Accounts

1. From the **CAMS Enterprise Home** page, click **Development > Setup > Campaigns/Memorial**. The Campaign Maintenance window opens with the Campaigns tab displayed. Right-click in the data grid to add a new campaign or double-click an existing campaign to modify.

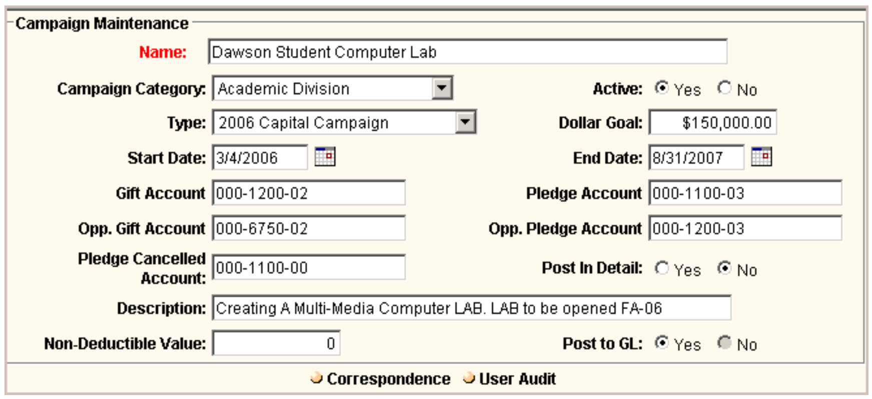


Figure 3: Campaign Maintenance window

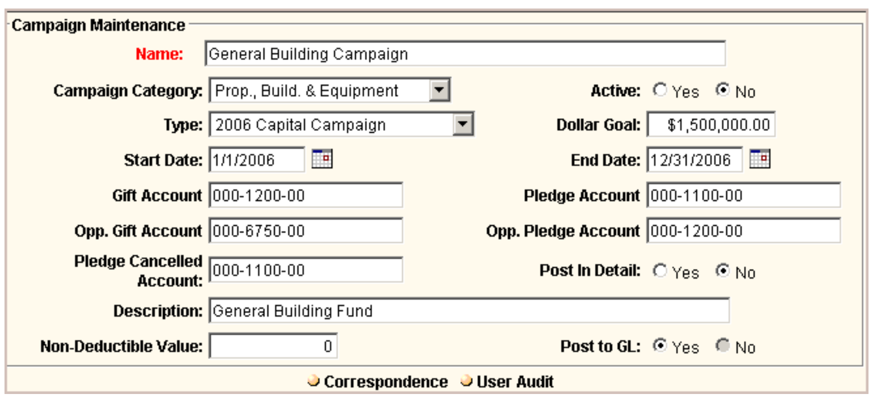


Figure 4: Campaign Maintenance window

2. Type the **Name** of the campaign / account. The campaign **Active** option defaults to **Yes**. If the campaign is inactive, click **No**.

The Name is the defining field that stores all the account numbers for a particular campaign / account. Total amounts for each campaign / account can be determined for each using the BYOR. Each campaign / account can be grouped together using the Type field.

3. Select the **Campaign Category** (Glossary: Campaign Category). Campaign Category can be used to further group campaigns and must be used in order to utilize the CAMS VSE (Voluntary Support of

Education) report from Development >Reports >Ledger BYOR to produce the information required to participate in the CAE's (Council for Aid to Education) Voluntary Support of Education (VSE) survey.

4. Select the **Type** (Glossary: Campaign Type).

The Type field can be considered a way to group campaigns / accounts. A constituent can give money for a major campaign but decide where the money should be used. To accomplish this you would set up the different campaigns / accounts and group them using the Type field. In **Figure 3** and **Figure 4** above you see that both campaigns / accounts have different account numbers. If these two campaigns / accounts are grouped together for the 2006 Capital Campaign the total amount received for the 2006 Capital Campaign can now be determined.

5. Enter the **Dollar Goal**, as well as the **Start** and **End Dates** for the campaign.
6. Enter the **Gift Account**, **Pledge Account**, **Opposing Gift Account**, **Opposing Pledge Account**, and **Pledge Cancelled Account** associated with this campaign. These are the account numbers used when posting transactions to the General Ledger.
7. Enter a **Description** for the campaign.
8. Click **Yes** for the **Post in Detail** option if you want to send details of every transaction to the general ledger, or leave the default of **No** to send a summary to the general ledger. Detailed information is always maintained and available, but posting a summary in the general ledger will display one line per Campaign type.
9. Enter the **Non-deductible amount** (if applicable).
10. Click the **Correspondence** option to associate default correspondence such as thank you and reminder letters (see Creating Constituent Activities later in this document).

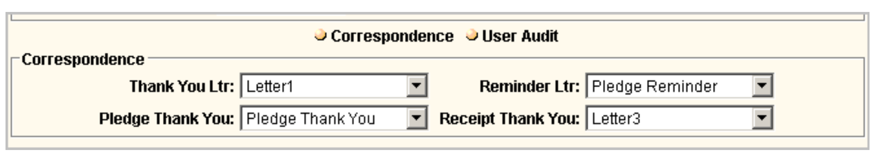


Figure 5: Correspondence Fields

Note: *If you want mail merge activities, such as, Thank You letters or Pledge Reminder letters to automatically add themselves to a constituent's account you need to ensure that they are set up in the Correspondence section of the Campaign.*

11. Click the **To-Date** option to view totals to date.
12. Click the **User Audit option** to view the user audit information.
13. Click **Add** to save this information, or **Cancel** to exit without saving.

Associating Memorials with Campaigns

Memorials can be established for a particular campaign. Since memorials are associated with a particular campaign, you can associate a memorial with multiple campaigns if desired.

Step-by-Step: Add a Memorial to a Campaign

1. Access the Campaign Maintenance window from the **CAMS Enterprise Home** page by clicking **Development >Setup >Campaigns/Memorial**. The Campaign Maintenance window opens with the Campaigns tab displayed.
2. Highlight the Campaign to which you wish to add a memorial and then click the **Memorials** tab. Right click in the data-grid to open a select constituents form.
3. Enter your search criteria, then click the **Find** button. Select the appropriate constituent from the list by double-clicking the constituent name. The Memorial entry form displays with the name of the constituent and campaign already populated.

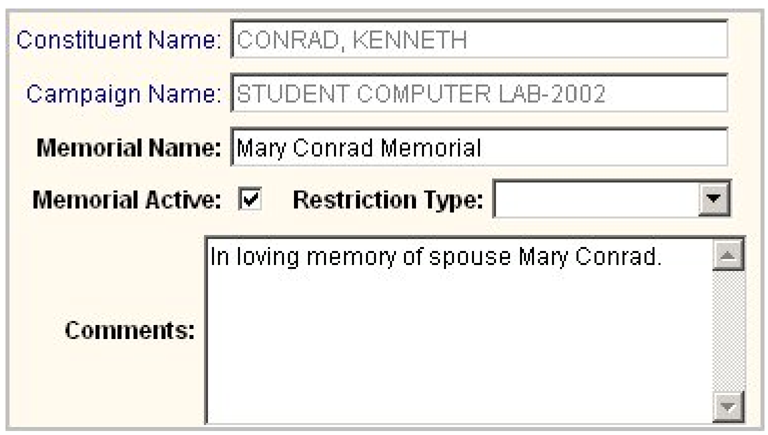


Figure 6: Memorial Entry window

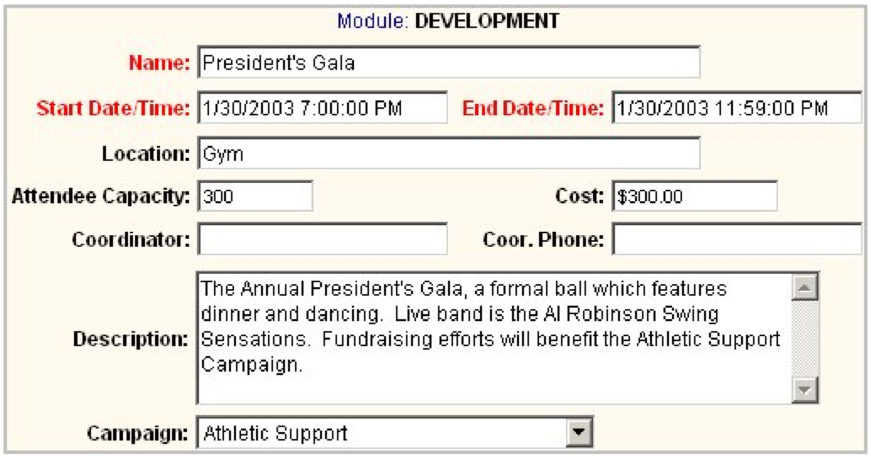
4. Type the name of the Memorial. The **Memorial Active** option defaults to **Yes**. If the memorial is inactive, click the check box to remove the check mark.
5. Select the **Restriction Type**, if applicable (Gift Restriction Typ glossary table).
6. Enter any **Comments**, if desired.
7. Click **Add** to save this information, or **Cancel** to exit without saving.

Creating Events

Use the Event Reference Setup window to create fund-raising events and track attendees.

Step-by-Step: Create an Event

1. From the **CAMS Enterprise Home** page, click **Development >Setup >Events/Attendees**. The Campaign Event Reference Setup window opens with the Events tab displayed. Right-click in the data grid to add a new event or double-click an existing event to modify.



Module: DEVELOPMENT

Name: President's Gala

Start Date/Time: 1/30/2003 7:00:00 PM End Date/Time: 1/30/2003 11:59:00 PM

Location: Gym

Attendee Capacity: 300 Cost: $300.00

Coordinator: Coor. Phone:

Description: The Annual President's Gala, a formal ball which features dinner and dancing. Live band is the Al Robinson Swing Sensations. Fundraising efforts will benefit the Athletic Support Campaign.

Campaign: Athletic Support

Figure 7: Campaign Event Reference Setup window

2. Enter the event **Name** and the **Start Date/Time** and **End Date/Time**.
3. Enter the **Location** of where the event is being held.
4. Enter the **Attendee Capacity**, as well as the **Cost** per attendee.
5. Enter the **Coordinator** of the event and the **Coordinator's Phone** number.
6. Enter details about the event in the **Description** field.
7. Select a **Campaign** with which this event is associated (Development >Setup >Campaigns/Memorial). The correct campaign must be selected in order for attendee pledges to be applied properly.
8. Click **Add** to save this information, or **Cancel** to exit without saving.

Tracking Event Attendees

Use the Event Reference Setup window Attendees tab to track event attendees. Any attendees attached to this event will have a pledge automatically created that is associated with the campaign selected to benefit from the event.

Step-by-Step: Track Event Attendees

1. Access the Event Reference Setup window from the **CAMS Enterprise Home** page by clicking **Development >Setup >Events/Attendees**. The Campaign Event Reference Setup window opens with the Events tab displayed.
2. Highlight the event for which you wish to track attendees, and then click the Attendees tab to open the Event Attendees entry form.
3. Click **Load** to access a select attendee's form.
4. Enter search criteria and then click **Find** to get a list of constituents that match the search criteria.
5. Click the check box in the Select column next to all constituents who attended the event, or click **Select All** to select all constituents on the list.
6. Click **Load** to add the attendees. A confirmation message displays. Click **Yes** to continue adding attendees.

Note: *If auto create event pledges is selected in* ***CAMS Manager > Configuration > Development****, once attendees have been loaded, the cost of event amount is included in a Pledge Batch. This can be viewed and distributed to the constituent's ledger from the Development >Batch window.*

7. Double click the attendee's record to add detailed information. The Attendee Detail form displays.

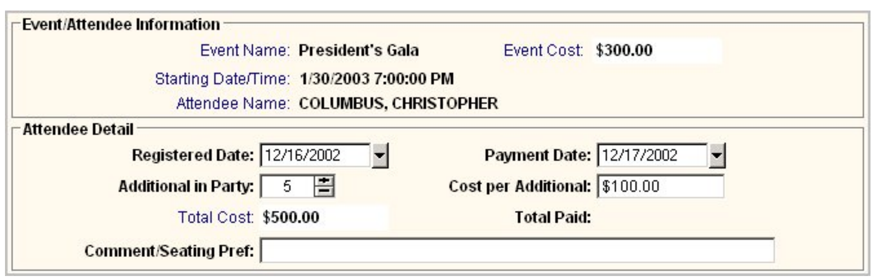


Figure 8: Attendee Detail window

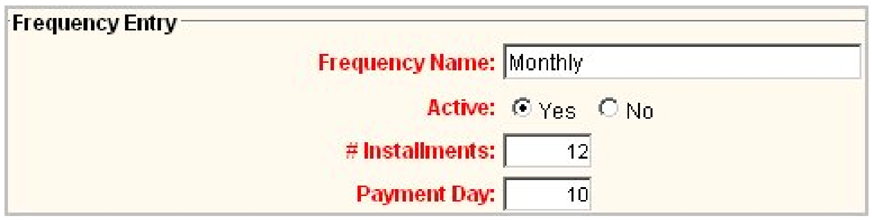
8. If the attendee is making a payment, select the **Payment Date**.
9. If the attendee is bringing a guest or guests to the event, indicate how many in the **Additional in Party** field.
10. Enter the cost for each additional guest in the party.
11. Enter any comments or seating preferences in the **Comment/Seating Pref** field.
12. Click **Update** to save this information, or **Cancel** to exit without saving.

Establishing Pledge Fund Frequency

In order to allow constituents to split large pledges into smaller multiple gifts, installments must exist in the Pledge Frequency Reference table.

Step-by-Step: Add Pledge Frequency/Installments

1. From the **CAMS Enterprise Home** page, click **Development >Setup >Pledge Frequency Ref** to open the Pledge Frequency Reference window.
2. Right-click in the data grid to access the **Frequency Entry** form.


Frequency Entry

Frequency Name: Monthly

Active: Yes No

Installments: 12

Payment Day: 10

Figure 9: Pledge Frequency window

3. Enter the **Frequency Name**. The **Active** option defaults to **Yes**. If the frequency is not active, click **No**.
4. Enter the number of Installments associated with this frequency. For example, if the frequency is "Monthly" then you may have 12 installments. CAMS will automatically calculate the gift amount based on this number.
5. Enter the Payment Day. This is the day of the month on which payment is expected. For example, if the frequency is "Monthly" and there are 12 installments and the Payment Day is 5, then payment would be expected on the fifth day of every month for a year.
6. Click **Add** to save this information, or **Cancel** to exit without saving.

Set Up Development Contact Management

Creating Development activities and activity sequences is crucial to the contact management of the constituents. This will allow you to create activity sequences for targeting particular types of constituents, campaigns, etc.

Creating Constituent Activities

In order to create an activity sequence, you must first enter the activities into the Development Activity Lookup window. These activities function as the base of your contact management with constituents. Activities may be used individually or as part of a sequence.

Step-by-Step: Create Development Activities

1. From the **CAMS Enterprise Home** page, click **Development >Setup >Activity Lookup** to open the Development Activity Lookup window.
2. Right-click the data grid to open the Development Activity Entry window.
3. Select the Activity Type: To-do, Export, or Email. If **To-do** is selected, you will need to enter the Activity Name and Description.

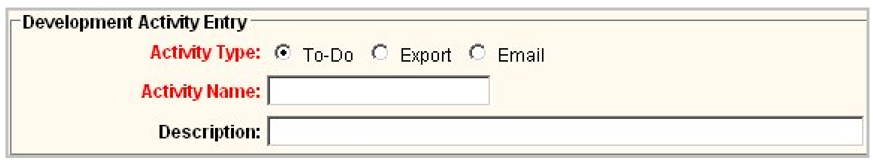


Figure 10: Add Activity window

If **Export** is selected, you will need to enter the Document Name (Fund Document Ref reference table) for which the exported data is to be used. If there is a Crystal report associated with the export, then you will need to enter the Crystal Report Name.

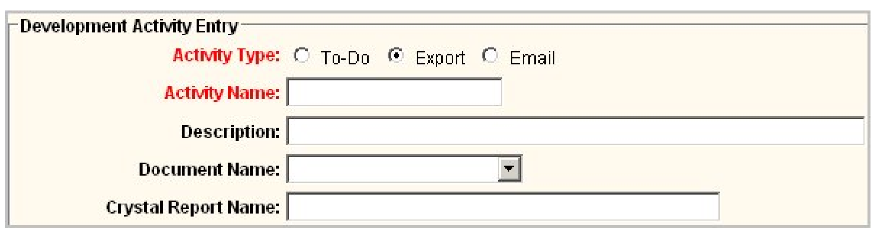


Figure 11: Export Activity window

If **Email** is selected, a drop-down list will appear asking for the appropriate Email Template. More information on creating and maintaining email templates is available in the online help documentation.

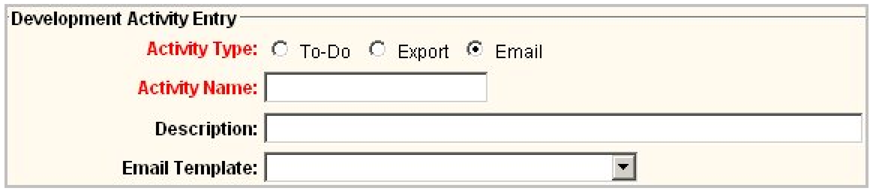


Figure 12: Email Activity window

4. Click **Add** to save entry or **Cancel** to exit without saving.

Note: *Mail Merge Export and Email Activities created directly on the constituent's account will be considered Constituent Correspondence. This is important to know when you access Development >Reports >Correspondence. These activities will only display in the Constituent Correspondence report section. Mail Merge Export and Email activities created from batch or ledger entries will be considered Ledger Correspondence and will only display in the Ledger Correspondence report section.*

Setting Up Constituent Activity Sequences

As part of the Contact Management functions within CAMS, groups of activities can be created so that multiple activities can be added to a constituent record simultaneously. The process of setting up activity sequences, or groups of activities, begins by creating groups (as many as needed) and then assigning all activities applicable to that group.

Step-by-Step: Create a New Group

1. From the **CAMS Enterprise Home** page, click **Development >Setup >Define Activity Sequences**. The Define Activity Sequences window opens with the Groups tab displayed.
2. Right-click in the data grid to add a new group, or double-click a group name to edit an existing group.

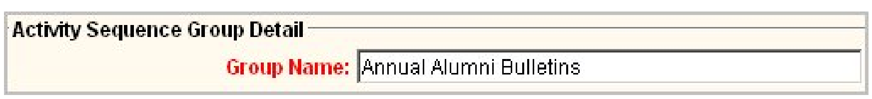


Figure 13: Activity Sequence Group Detail window

3. Enter the Group Name. This is the value that will appear in the group selection drop-down list when adding a group of activities to a constituent's record.
4. Click **Add** to save the new entry (**Update** to save changes), or **Cancel** to exit without saving.

Step-by-Step: Add Activities to Group

1. From the **CAMS Enterprise Home** page, click **Development >Setup >Define Activity Sequences** to access the Define Activity Sequences window.
2. Highlight a group name and then click the **Sequences** tab.
3. Right-click in the sequence data grid to access a blank detail entry form.

4. Select the appropriate activity from the Activity drop-down list (Development>Setup>Activity Lookup window). The information which displays depends on the activity selected.

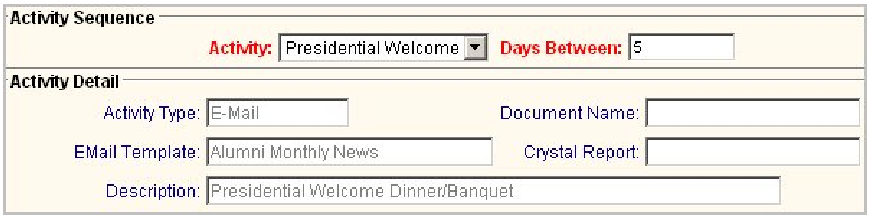


Figure 14: Activity Sequence window

5. Days Between: Enter number of days from the start date that activity is due.
6. Click **Add** to save entry or **Cancel** to exit without saving. Repeat these steps for each activity that is to be added to the group.

Index