

Donations Field Descriptions

04/21/2014

Amount	Amount of donation. [AMOUNT : Numeric (12;2)]
Campaign Activity	The Campaign Activity that resulted in this donation. [ACTIVITY : Character (30)]
Campaign Activity#	The Campaign Activity# that resulted in this donation. [ACTIVITYNO : Numeric (2)]
Campaign Name	Select a Campaign Name from the drop-down menu. [CAMPNAME : Character (40)]
Campaigno	PastPerfect will automatically assign the Campaign# associated with the Campaign Name. [CAMPAIGNO : Numeric (6)]
Check#	For reference enter the check number or cash, cc-visa, cc-mc, cc-ax, cc-disc, or other. [CHECKNO : Character (25)]
Company	Company, corporation, or organization name. If the Company field is populated on the associated contact record, this field will be automatically filled in by PastPerfect. [COMPANY : Character (50)]
Custom Form	[CUSTOMFORM : Numeric (1)]
Date	<p>This date is used to record the date on which the donation was made. The system automatically fills in today's date, however you may change the date manually. Your system may be set to enter dates in the following formats:</p> <p>ANSI - YYYY.MM.DD American - MM/DD/YYYY British - DD/MM/YYYY German - DD.MM.YYYY Italian - DD-MM-YYYY Japan - YYYY/MM/DD US - MM/DD/YYYY</p> <p>To set the type of date you wish to use, go to the Setup screen and choose System Parameters. Make your selection from the Date Style drop-down menu. [DATE : Date]</p>
Day	The day (number) of the month, of the donation. [DAY : Numeric (2)]
First Name	First name of the contact. This field is only for search and display purposes. By default, it is not printed on mailing labels. [FIRSTNAME : Character (30)]
Fund	Name of the fund for which a donation is made. [FUND : Character (40)]
Fund Code	Each fund can be assigned a code. Each code can be assigned to one or more funds. These codes can be used to produce reports subtotaling donations by code. [FUNDCODE : Character (10)]
Group	The Group associated with the donating contact. Contact Groups are defined by going to Main Menu Setup Contacts. [GROUP : Character (30)]
ID#	This field represents the ID# of the contact making the donation. [IDNO : Numeric (6)]
In Honor of	The In Memory of field is used to record the name of a person, organization, or entity that the donor wishes the pledge to be made in honor of. [INHONOR : Character (100)]
In Memory of	The In Memory of field is used to record the name of a person, organization, or entity

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that the donor wishes the donation to be made in memory of. [INMEMORY : Character (100)]

Last Name Last name of the contact. This field is only for search and display purposes. By default, it is not printed on mailing labels. [LASTNAME : Character (40)]

Month The month (number) of the year, of the donation.

To view total donations by month, click the Pledges & Receipts button on the Main Menu and click the month tabs at the top of the screen. [MONTH : Numeric (2)]

Notes The Notes field may be used to record any additional information. There is no limit to the number of lines or the type of information recorded in this field. [DONNOTES : Memo]

Pledge Detail If the donation is associated with a pledge, PastPerfect will enter a reference to the pledged amounts. [PLEDETAIL : Memo]

Pledgeno The Pledge# associated with the pledge. This number is automatically assigned when the pledge is entered. [PLEDGENO : Numeric (7)]

Receipt # The Receipt# for the donation. This number is automatically assigned when the donation is entered. [RECEIPTNO : Numeric (8)]

Revenue Restriction This field can be used to denote restrictions on the use of the donated funds. Restriction options are permanently, temporarily or unrestricted. [RESTRICT : Character (15)]

Revenue Source This field can be used to create reports summarizing income from different sources. This field is controlled by a drop-down menu. Click on the downward pointing arrow to the right of the field to view entries in the authority file. Click on your choice to select an entry for the field. You can add, edit, or delete items on this list from Main Menu | Setup | Authority Files. [REVENUE : Character (40)]

Solicitor Record the name of the person responsible for soliciting a particular donation. [SOLICITOR : Character (30)]

Tax Deductible Amount Amount of the donation that is tax deductible. [amt deduct : Numeric (12;2)]

Thank You Letter In the Contacts screen, click the Print button on the Navigation Bar. A list of available letters will appear. Select your donation thank you letter and click Preview or Print. Default letters for contacts are created and modified from Main Menu | Setup | Contacts. [THANKYOU : Memo]

Type of Payment The Type field is controlled by an Authority File from which you may choose predefined payment types. Select how the payment was made, e.g., check, cash, cc-visa, PayPal, lockbox, other, etc. [TYPEPAY : Character (8)]

Year The year of the donation.

To view total donations by year, click the Pledges & Receipts button on the Main Menu and click the year or fiscal year tab in the top right corner of the screen. [YEAR :

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Numeric (4)]