Creating a Donation Campaign
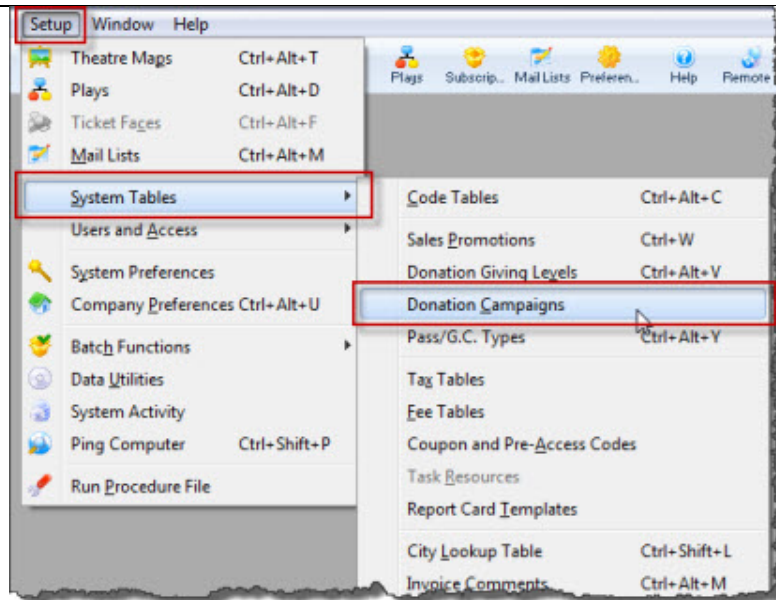
A Donation Campaign categorizes how and why a donation is received by your organization. For example: Donors who give at an Individual Giving Level may give Annually, to a Special Benefit or to convert an unused ticket into a donation. Each of which represents a type of a Donation Campaign within the Individual Giving Levels.

1. To start, click **Setup>System Tables> Donation Campaign**. The Donation campaign List window opens.
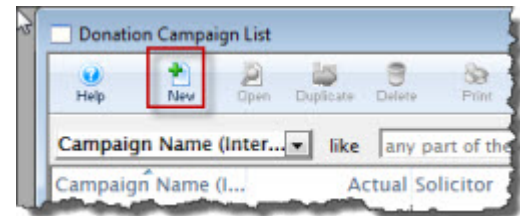
2. Click the **New** New button. The Campaign window opens to the Description tab.
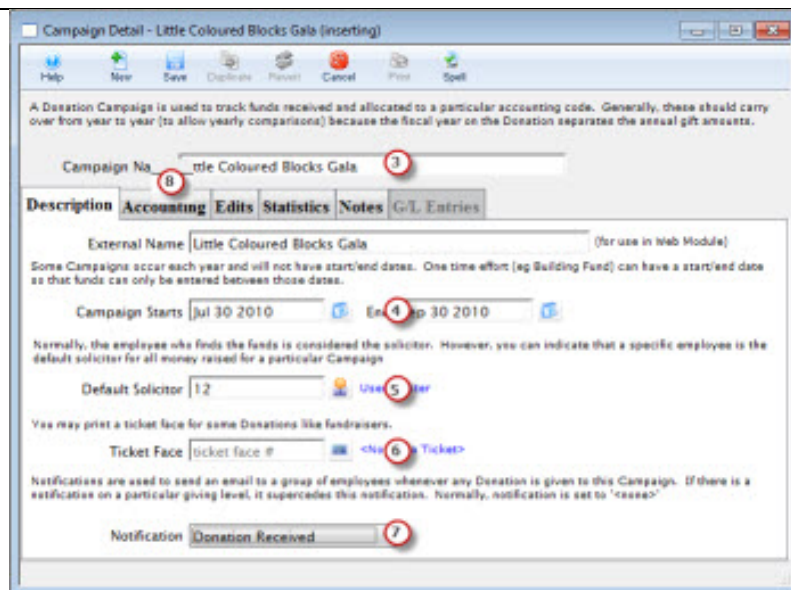
3. Enter the **Name** of the campaign.
4. Enter the **Time Period** of the campaign.
5. Enter the **Solicitor** for this campaign.
   This field is defaulted to the current user. The Employee Lookup button can be used to display a list of all current Employees.
6. Select a **Ticket Face**.
   This prints an extra ticket for a donation and can only be used by thermal printers.
7. Select the **Notification** type.
   This will send an email to whomever has been setup to receive emails based on type of notification.
8. Click the **Accounting** Accounting tab.

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9. Enter the Accounting information for this campaign. Different G/L Accounts can be selected for prior fiscal years, current fiscal year and future fiscal years.
For more information see the online help:
http://www.theatremanagerhelp.com/general-ledger-adding-accounts-to-the-general-ledger

9b. You can also enable or disable benefit amounts. Benefits are the non-deductable portion of a donation. If you choose to enable, you will need to enter a Benefit Account Number.

10. Select the **Edits** | Edits | tab.

The Edits tab allows you to:
     a. Set the access for the campaign.
     b. Choose if all receipts should be printed.
     c. Determine if this campaign is to be included in yearly statistics
     d. Set the Giving Levels

11. Select the giving level matrix to use for the campaign.
For more information see the online help:
http://www.theatremanagerhelp.com/theatre-manager-help/system-setup-giving-levels-creating-giving-levels

12. Click the **Statistics** | Statistics | Tab.

13. Enter the target amount for the campaign.
14. Click the **Save** button.
15. Close the Campaign Detail window.
16. The campaign will be saved and displayed on the Donation Campaign window.