



**SUNGARD** SCT HIGHER EDUCATION

# **SCT Banner Advancemnet Overview Training Workbook**

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## Section A: Introduction

### Lesson: Overview

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#### Workbook goal

The goal of this workbook is to provide you with an overview of the SCT Banner Advancement module processes, menus, and terminology. Separate workbooks detailing the topics found within the Advancement module are available. The workbooks contain detailed information about the forms and processes required for set up and day-to-day operations.

#### Intended audience

Advancement office administrators and staff and anyone who needs a general overview of the processes covered in the SCT Banner 7 Advancement module.

#### Objectives

At the end of this workbook, you will be able to

- Identify the features and functions of the Advancement System
- Describe the main features and primary forms for the following Advancement System modules:
  - Constituent Processing
  - Organizations
  - Campaigns
  - Designations
  - Gift Processing
  - Pledge Processing
  - Gift Society
  - Acknowledgement Processing
  - Population Selection
  - Letter Generation
  - Matching Gift Processing
    - Prospect Management
  - Self Service for Advancement Officers
    - Membership
    - Solicitor Organizations
    - Event Management
    - Self Service for Alumni and Friends
- Describe some of the additional services provided by the Advancement System

#### Prerequisites

To complete this workbook, you should have completed the SCT Education Practices computer-based training (CBT) tutorial “SCT Banner 7 Fundamentals,” or have equivalent experience navigating in the SCT Banner system.



## Section A: Introduction

### Lesson: The Advancement Process

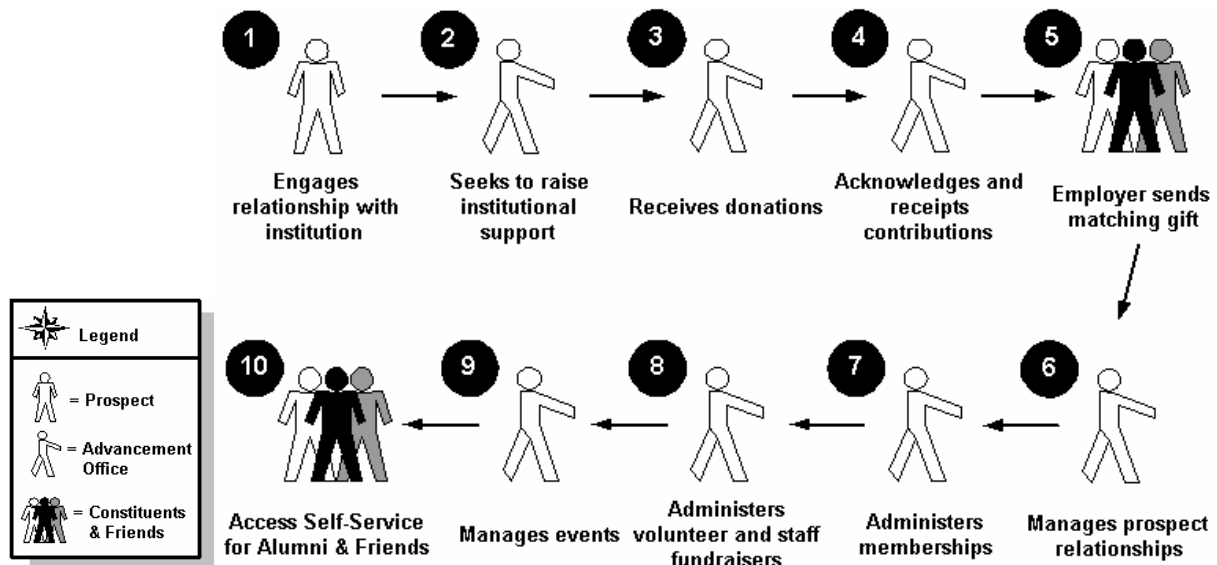
◀ Jump to TOC

#### Introduction

The SCT Banner Advancement process begins when an individual or organization show an interest in an institution and follows through the creation of fund raising efforts and the ability to manage fund raiser and the staff to support them.

#### Flow diagram

This diagram highlights the overall Advancement process.





## Section A: Introduction

### Lesson: The Advancement Process (Continued)

◀ Jump to TOC

#### What happens

This table identifies the people, institutions, and systems that play a role in the Advancement process.

Stage	Description
1	A person or organization has a relationship with or show an interest in the College. These individuals must become constituents and organization must be created in Banner.
2	The Advancement Office seeks to raise institutional support.
3	Donations start to come into the College.
4	Advancement Office wishes to acknowledge and receipt constituents and organizations.
5	A constituent's employer will match their contributions.
6	Need to manage all advancement prospects.
7	Advancement office sends out and processes memberships (if applicable).
8	Advancement creates a structure to manage fundraisers with volunteers and staff.
9	Managing advancement event.
10	Constituent and Friends of the college access the web for advancement information.

#### Interfaces

##### Interface to the SCT Banner Finance System

The Advancement Interface to Finance provides an automated flow of pledge and gift information from SCT Banner Advancement to SCT Banner Finance. It also allows pledges, gifts and dues data to flow automatically to a site-specific finance system via a generic feed table.

##### Interface to the SCT Banner Human Resource System

This interface allows for deductions from payroll in SCT Banner HR to become gifts/installment payments in SCT Banner Advancement. The interface runs two ways: SCT Banner Advancement first feeds pledges to SCT Banner HR, and then SCT Banner HR feeds the deductions back to create the gift/installment payment records.

##### Interface to the SCT Banner Student System

This interface adds records to SCT Banner Advancement from SCT Banner Student that define individuals as constituents, and updates information on existing constituents. The interface selects individuals who meet criteria based on the values entered.



## Section A: Introduction

### Lesson: The Advancement Process (Continued)

◀ [Jump to TOC](#)

#### **Data Standards**

Prior to implementing SCT Banner Advancement, it's important that your institution develop some standards for the entry of data. For example, the use of post office boxes when entering your addresses – use P.O. Box or PO Box. You'll need to also consider the use of capitalization and punctuation. As in any computerized system, it is imperative to be consistent in how you enter your data because it may affect the outcome of your queries and reports.



## Section A: Introduction

### Lesson: Advancement System Menu

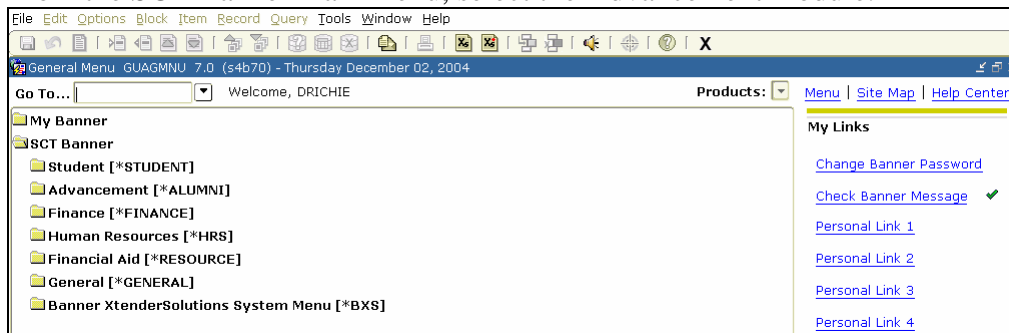
◀ Jump to TOC

#### Introduction

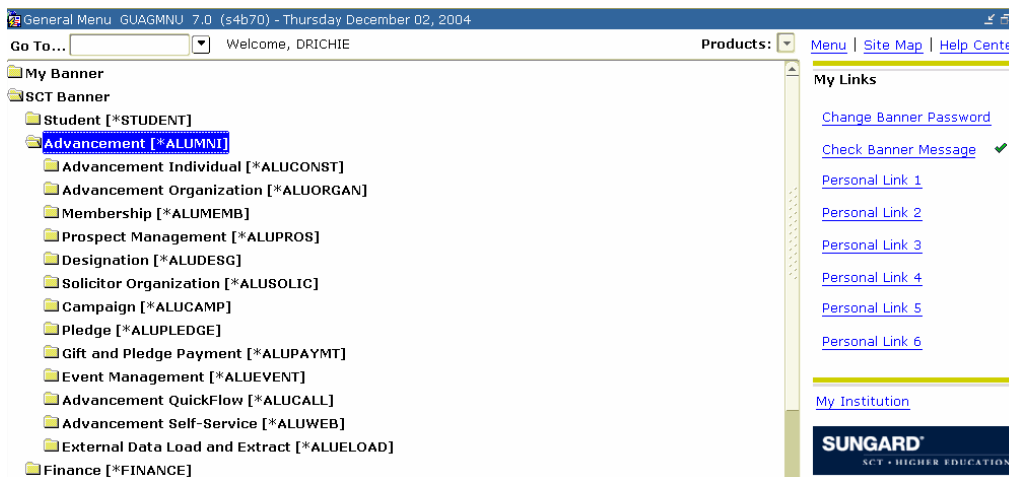
You can use the SCT Banner Advancement main menu to select from a list of the menus, forms, jobs, and quickflows. The main menu shows the various levels of menus and submenus available at your institution. Menus are nested. You can easily navigate through SCT Banner by expanding these menus. Personal menus can be tailored to individual needs.

#### SCT Banner form

From the SCT Banner main menu, select the Advancement module.



The main menu structure displays the topics that make up the Advancement module.





## Section A: Introduction

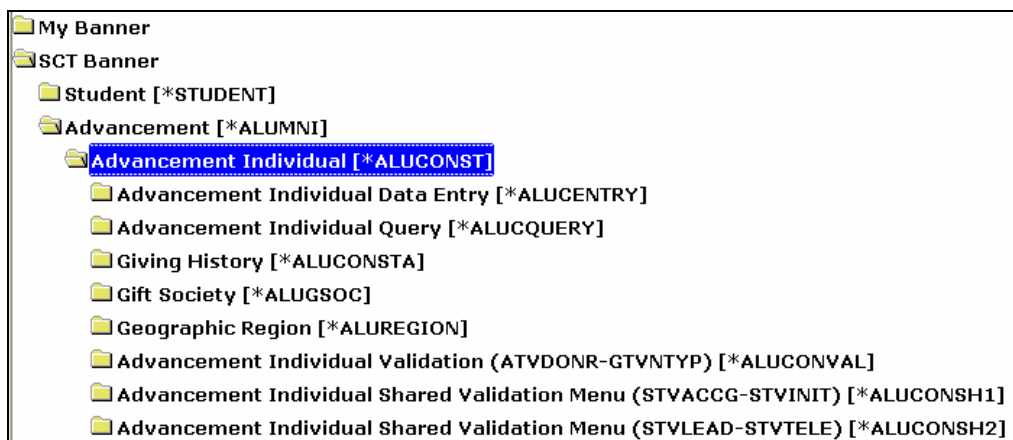
### Lesson: Advancement Individual Menu

◀ Jump to TOC

#### SCT Banner module purpose

Advancement Individual distinguishes the alumni and development population from others by establishing and maintaining comprehensive records on all individuals. Those in the population include alumni, donors, and friends. Forms contained in Advancement Individual provide important information on each individual in the system.

#### SCT Banner menu



#### Primary forms

Advancement Identification Form (APAIDEN)

- Used to generate IDs and add names for new person and non-person records

General Person Form (APAPERS)

- Used to maintain biographical information

Constituent Information Form (APACONS)

- Used to add and maintain constituent information.
- Used to add required information to person records, which enables Advancement personnel to track and maintain additional information on the ID, like pledge and gift information.

Contact Form (APACONT)

- Used to add and maintain interactions with constituents
- Used to track and maintain call reports for constituents



## Section A: Introduction

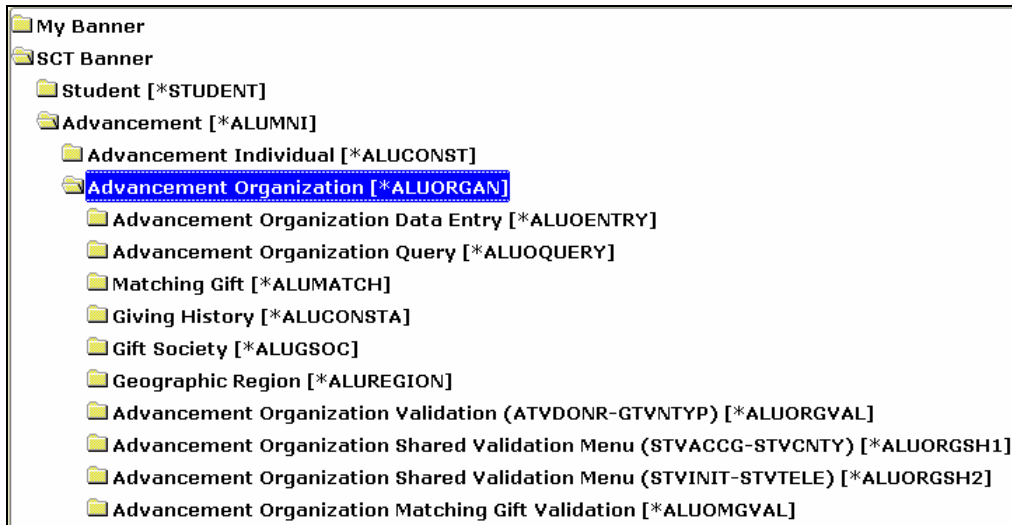
### Lesson: Advancement Organization Menu

◀ Jump to TOC

#### SCT Banner module purpose

Advancement Organization processing establishes and maintains records for corporations, foundations, and other organizations.

#### SCT Banner Advancement Organization menu



#### Primary Forms

##### Organization Header Form (AOAORGN)

- Use to add an ID as an organization, and to maintain organization information.
- Use to make an organization a matching gift organization or link and organization to its matching gift foundation.



## Section A: Introduction

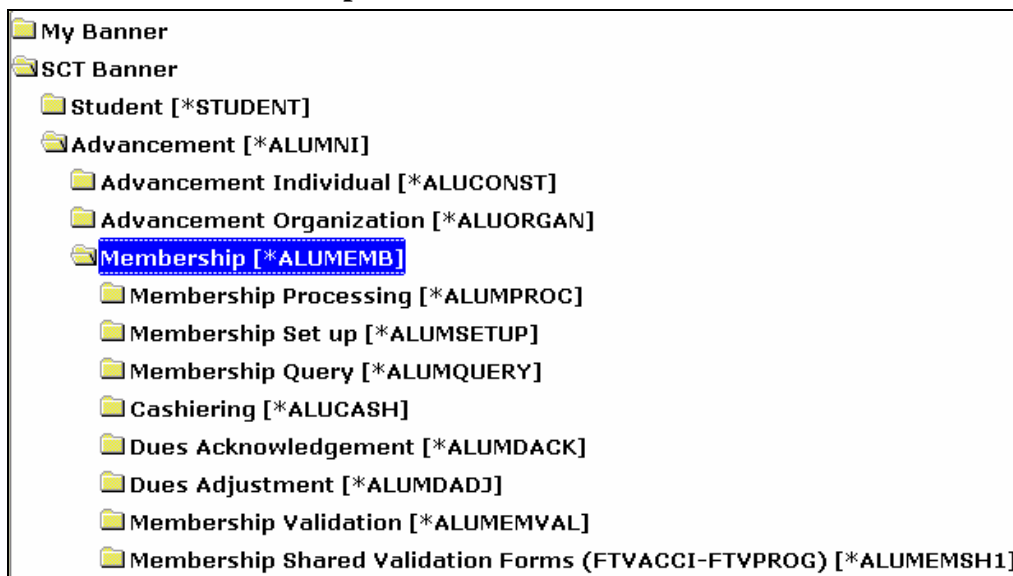
### Lesson: Membership Menu

◀ Jump to TOC

#### SCT Banner module purpose

The Membership processing module allows an institution to track donors' involvement in membership programs, due payment entry, reminder and renewal notice mailings, and acknowledgement.

#### SCT Banner Membership menu



#### Primary Forms

##### Membership Form (AAAMEMB)

- Used to create, query and update memberships in programs. This is useful for creating memberships prior to the receipt of dues payments (for dues based memberships) or for creating memberships that do not require a dues payment.

##### Dues Entry Form (AAADUES)

- Used to enter membership programs. Entering an initial creates a program membership for the ID entered in the Dues window, using a rule established on the membership Rule Form (AAAMBRL)



## Section A: Introduction

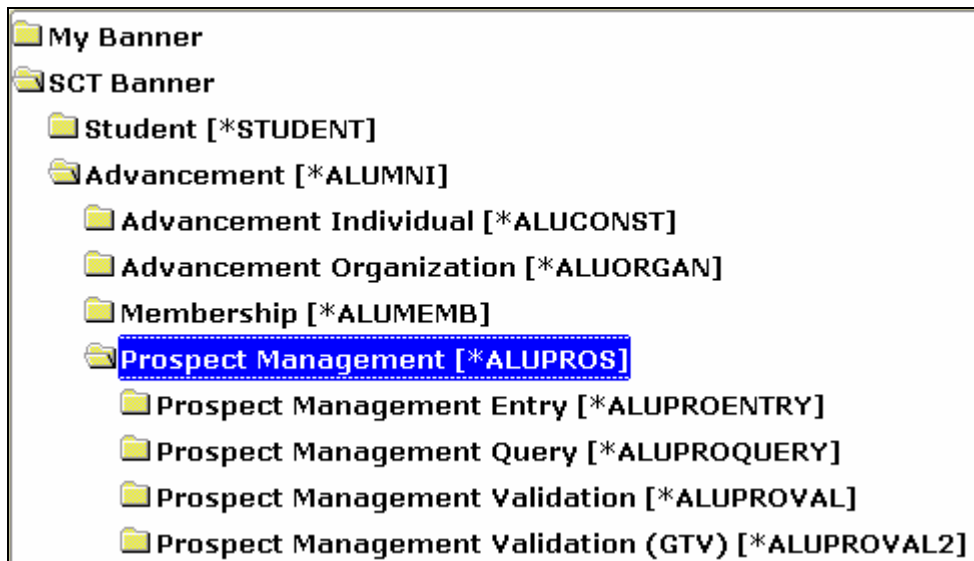
### Lesson: Prospect Management Menu

◀ Jump to TOC

#### SCT Banner module purpose

The Prospect Management module contains features that support prospect identification, pool segmentation, research, and tracking.

#### SCT Banner Prospect Management menu



#### Primary forms

Advancement Prospect Information Form (AMAINFO)

- Used to create a prospect record for an already established constituent or organization ID. This form is also used to associate a prospect with screening processes and projects and/or interests.

Prospect Contact Form (AMACONT)

- Associates a prospect with contacts follow-up actions. Each contact is associated with a project(s) or interest area and a move and can result in a follow-up action. From this form, a message on the General Message Form (GUAMESG) can be created regarding a follow-up action.



## Section A: Introduction

### Lesson: Designation Menu

◀ Jump to TOC

#### SCT Banner module purpose

Designation Processing is used to establish relationships between gift designations, the finance system, and VSE gift categories. In this module you define pledge and gift purposes. Designation is a basic building block of pledge and gift accounting. Designation processing provides online analysis of the status of a designation, and maps gifts and pledge payments to specific fund accounts in the SCT Banner Finance System or an institution specific finance system.

#### SCT Banner Designation menu

- 📁 Designation [\*ALUDES~~G~~]
- 📄 Designation [ADADES~~G~~]
- 📄 Designation Adjustments [ADAADA~~J~~]
- 📄 Designation Comments [ADACOM~~T~~]
- 📄 Designation Fiscal Summary [ADASUM~~M~~]
- 📄 Designation List [ADCDES~~G~~]
- 📄 Designation Pledges [ADAPLD~~G~~]
- 📄 Designation Gifts [ADAGIF~~T~~]
- 📄 Designation Financial Aid Query [ADIAWR~~D~~]
- 📄 Financial Aid Award Query [ADISAW~~D~~]
- 📄 Advancement Control [AGACTR~~L~~]
- 📄 User Identification Control [GUAIDEN]
- 📁 Designation Validation [\*ALUDES~~VAL~~]
- 📁 Designation Shared Validation (FTVACCI-FTVPROG) [\*ALUDES~~SH1~~]



## Section A: Introduction

### Lesson: Designation Menu (Continued)

◀ [Jump to TOC](#)

#### Primary forms

##### Designation Form (ADADESG)

- Use the designation form to create new designations and query existing ones.

##### Designation Comment Form (ADACOMT)

- Lets you enter comments about a designation. The form:
- Identifies if the user is a Prospect Comment Supervisor (defined on AGACTRL). Supervisors have a red User Status: Supervisor indicator.
- Allows only the originator and supervisor to read a comment if it has been marked Confidential.
- Identifies the last user who updated the form Comment or Subject
- Automatically wraps text as you type it. You can also cut and past text from another document.
- Lets you use keywords to search for comments. Each comment can have an unlimited number of keywords.



## Section A: Introduction

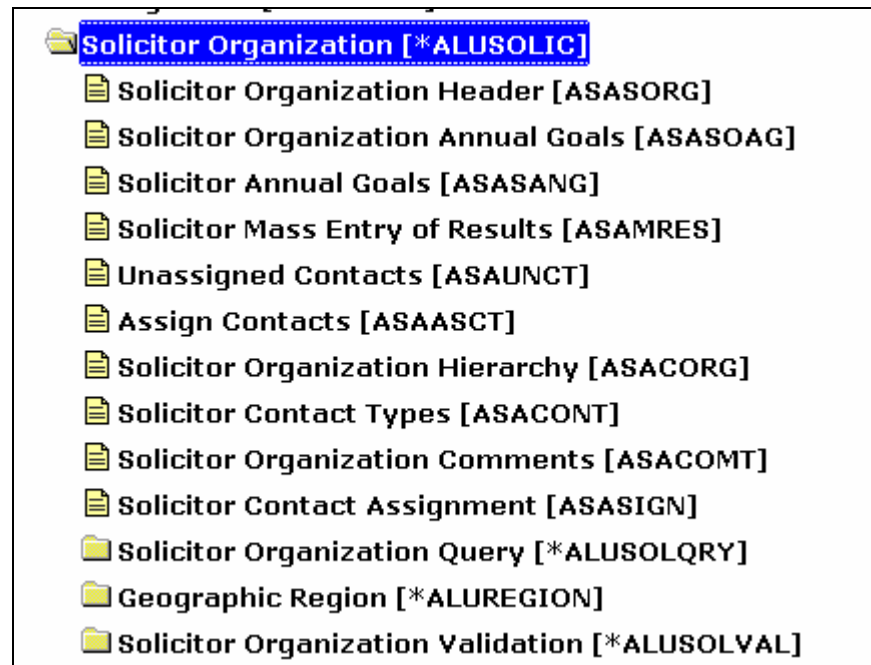
### Lesson: Solicitor Organizations Menu

◀ Jump to TOC

#### SCT Banner module purpose

Solicitor Organizations Processing is designed to assist in effectively managing fund raising organizations.

#### SCT Banner Solicitor Organizations menu



#### Primary forms

Solicitor Organization Header Form (ASASORG)

- Enables you to create and query solicitor organizations, and define goals for volunteer organizations.

Solicitor Contact Types Form (ASACONT)

- Used to establish parameters for assigning constituents to solicitors in the campaign Solicitor Assignment report (AFPSOLA)



## Section A: Introduction










### Lesson: Campaign Menu

◀ Jump to TOC

#### SCT Banner module purpose

Campaign processing serves two main functions in the area of tracking and controlling fundraising activity. First, it allows you to create campaigns that reflect the structure and priorities of your fundraising program. Next, it provides managers with the information that they need to run efficient, goal-oriented campaigns.

#### SCT Banner Campaign menu

 <b>Campaign [*ALUCAMP]</b>
 <b>Campaign Header [AFACAMP]</b>
 <b>Campaign Solicitation Types [AFACSOL]</b>
 <b>Campaign Designations [AFADESG]</b>
 <b>Campaign Solicitor Organizations [AFACORG]</b>
 <b>Campaign Solicitors [AFACSLT]</b>
 <b>Solicitor Contact Assignment [ASASIGN]</b>
 <b>Campaign Expenses [AFAEXPN]</b>
 <b>Campaign Comments [AFACOMT]</b>
 <b>Campaign Pledges [AFAPLDG]</b>
 <b>Campaign Gifts [AFAGIFT]</b>
 <b>Campaign List [AFCCAMP]</b>
 <b>Campaign Query [*ALUCAMQRY]</b>
 <b>Campaign Validation [*ALUCAMVAL]</b>

#### Primary forms

Campaign Header Form (AFACAMP)

- Used to create new campaigns and query existing ones.

Campaign Designations Form (AFADESG)

- Used to add and maintain designations associated with a campaign.

Campaign Pledges Form (AFAPLDG)

- This is a query only form that displays all pledges to a campaign.

Campaign Gifts Form (AFAGIFT)

- This is a query-only form that displays all gifts to a campaign.



## Section A: Introduction

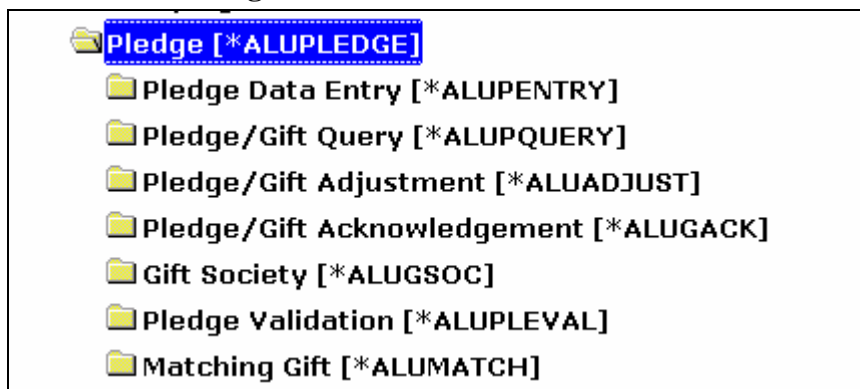
### Lesson: Pledge Menu

◀ Jump to TOC

#### SCT Banner module purpose

Pledge Processing establishes and maintains pledges for constituents and organizations. It creates installments based on regular or customized payments plans, and allows you to review balances by campaign and designation.

#### SCT Banner Pledge menu



#### Primary forms

Pledge Form (AGAPLDG)

- Allows you to enter new pledges and query existing pledges.

Pledge/Gift Adjustment Form (AGAADJS)

- Allows you to adjust/void pledges and gifts or information linked to pledges and gifts.



## Section A: Introduction

### Lesson: Gift and Pledge Payment Menu

◀ Jump to TOC

#### SCT Banner module purpose

Gift and Pledge Payment Processing records and tracks gifts, pledge payments, and matching gifts. It also analyzes solicitation methods and reviews cashiering activity.

#### SCT Banner Gift and Pledge Payment menu

- 📁 Gift and Pledge Payment [\*ALUPAYMT]
  - 📁 Gift and Pledge Payment Entry [\*ALUGENTRY]
  - 📁 Pledge/Gift Query [\*ALUPQUERY]
  - 📁 Cashiering [\*ALUCASH]
  - 📁 Matching Gift [\*ALUMATCH]
  - 📁 Pledge/Gift Adjustment [\*ALUADJUST]
  - 📁 Pledge/Gift Acknowledgement [\*ALUGACK]
  - 📁 Gift Society [\*ALUGSOC]
  - 📁 Gift and Pledge Payment Validation [\*ALUPAYVAL]

#### Primary forms

##### Gift Form (AGAGIFT)

- Used to enter one time gift, pledge payments and new pledges with their initial pledge payments. It can also be used to update address and telephone information.

##### Institutional Split Rules Form (AGASPRL)

- Allows you to define rules that automatically assign pledge and gift credit among cross-references.

##### Advancement Cashier Session Review Form (AGACREV)

- Allows you to review and update the status of specific cashier sessions containing gifts (one-time gifts and pledge payments) and program membership dues payments.



## Section A: Introduction

### Lesson: Gift Societies Menu

◀ Jump to TOC

#### SCT Banner module purpose

Gift Society Processing is used to establish gift societies, to set up rules for membership qualification, and to track gift society members. The Gift Society Menu appears on the main menus of four Advancement modules: Constituent, Organization, Pledge, and Gift and Pledge Payment.

- **SCT Banner Gift Societies menu**

- **Gift and Pledge Payment [\*ALUPAYMT]**
  - Gift and Pledge Payment Entry [\*ALUGENTRY]
  - Pledge/Gift Query [\*ALUPQUERY]
  - Cashiering [\*ALUCASH]
  - Matching Gift [\*ALUMATCH]
  - Pledge/Gift Adjustment [\*ALUADJUST]
  - Pledge/Gift Acknowledgement [\*ALUGACK]
  - **Gift Society [\*ALUGSOC]**
    - Gift Society Membership [APADCLB]
    - Gift Society List [APACLUB]
    - Gift Society Rules [APADCRL]
    - Gift Society Default Premiums Rules [APADCDP]
    - Gift Society Member Goals [APADCGL]
    - Gift Society Validation [\*ALUGSVAL]

#### Primary forms

Gift Society Membership Form (APADCLB)

- Contains summary and detail information for present and past gift society memberships.

Gift Society Rule Form (APADCRL)

- Used to establish the rules for an institution's gift societies. The form provides great flexibility in defining multiple gift societies.



## Section A: Introduction

### Lesson: Matching Gift Menu

◀ Jump to TOC

#### SCT Banner module purpose

Matching Gift processing allows an institution to track gifts that are eligible to receive matching gift payment from organizations. Organizations often match gifts given to an institution by their employees. They can make very specific stipulations as to which gifts they will match, at what percentage they will match and when they will make matching gift payments. All of these stipulations can be entered in SCT Banner Advancement.

#### SCT Banner Matching Gift menu

📁 Gift and Pledge Payment [*ALUPAYMT]
📁 Gift and Pledge Payment Entry [*ALUGENTRY]
📁 Pledge/Gift Query [*ALUPQUERY]
📁 Cashiering [*ALUCASH]
📁 <b>Matching Gift [*ALUMATCH]</b>
📄 Employer Matching Gift Payment [AGAMATG]
📄 Employer Waiting Matching Gift Review [AGIMATG]
📄 Matching Gifts by Employee [AGAMGIF]
📄 Paid Matched Gifts by Employer [AGAMATP]
📄 Employer Waiting Matching Gift Query [AGAMTCH]
📄 Waiting Matching Gift Adjustment [AGAMGAJ]
📄 Expected Matching Gift Adjustment [AXAMGAJ]
📄 Matching Gift Reason [AXAMGRN]
📄 Advancement Control [AGACTRL]
📄 Data Field Position Rules [AGATPFD]

#### Primary forms

Employer Matching Gift Payment Form (AGAMATG)

- Used to enter organization matching gift payments and query anticipated matching gifts. You can allocate a matching gift towards one or more outstanding pledges.

Matching Gifts by Employee Form (AGAMGIF)

- This is a query-only form that displays, by employee, both waiting matching gifts and partially/fully matched gifts with their corresponding matching gift payments.



## Section A: Introduction

### Lesson: Cashiering Menu

◀ Jump to TOC

#### SCT Banner module purpose

Cashiering allows an institution to track transaction entry sessions. Entry sessions include adjustments to transactions. A transaction is any one-time gift, pledge payment, membership dues payment or organization matching gift payment that is entered into the Advancement system.

Cashiering also requires that certain user IDs be identified in the system as supervisors, granting them certain control privileges.

#### SCT Banner Cashiering menu

- 📁 Gift and Pledge Payment [\*ALUPAYMT]
  - 📁 Gift and Pledge Payment Entry [\*ALUGENTRY]
  - 📁 Pledge/Gift Query [\*ALUPQUERY]
  - 📁 **Cashiering [\*ALUCASH]**
    - 📄 Advancement Cashier Session Review [AGACREV]
    - 📄 Advancement Control [AGACTRL]
    - 📄 User Identification Control [GUAIDEN]

#### Primary forms

Advancement Cashier Session Review Form (AGACREV)

- Lets you review and update the status of specific cashier sessions containing gifts (one-time and pledge payments) and program memberships.



## Section A: Introduction

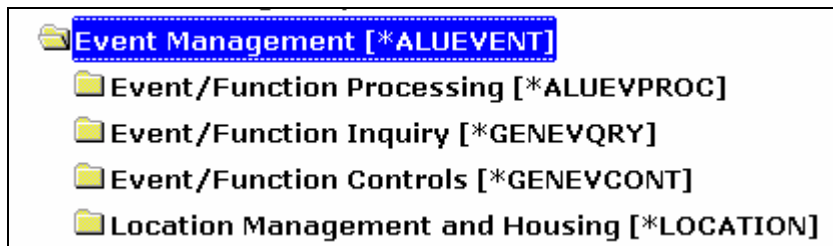
### Lesson: Event Management Menu

◀ Jump to TOC

#### SCT Banner module purpose

Event management helps you manage events and functions, tasks and participants associated with the event.

#### SCT Banner Event Management menu



#### Primary forms

Event Form (SLAEVNT)

- Defines the various events that your institution offers or sponsors.

Attendance Form (GEAATTD)

- Allows you to track event attendees and their guests.

Function Attendance Inquiry Form (GEIATTD)

- Allows you to create various lists of attendees.



## Section A: Introduction

### Lesson: Additional Services

◀ Jump to TOC

#### **Advancement Officers Self Service**

Self Service for Advancement Officers is a tool that your advancement staff and officers can use to access your institution's constituent records through a secured portal on the Web. It provides Web access to a constituent profile, including a constituent's giving information, prospect profiles, and all biographic information.

#### **Alumni and Friends Self Service**

Self Service for Alumni and Friends is a Web tool that connects the constituent to the SCT Advancement database and allows your institution to communicate with your constituents using the convenience, speed, and technology of the World Wide Web. This tool enables your constituents to provide updated information for your organization allows them to find a mentor for career development, gives them the opportunity to advertise a job opening in their company, and to make pledges and gifts via the Web.

Self Service for Alumni and Friends enables your institution to deliver current information and optimal service to your constituents, that is, persons who have a defined relationship to the Advancement offices in the SCT Banner system. Examples of constituents include alumni, parents, friends, volunteers, staff, faculty, and trustees. The application gives constituents access to information in the SCT Banner Advancement System and permits them to update their own records, reducing the amount of data entry required by the institution's staff.

#### **Data Extracts**

You can extract data from a Banner form to a spreadsheet. You can extract detail data from the current block with or without data from the key block. Once Banner data is in a spreadsheet, you can easily graph and report the data.

Your system administrator can use the Object Maintenance Form (GUAOBS) to enable the extract feature on any form where the extract has been tested.

In Internet Native Banner, you can save the data to a file with a .csv extension or you can display it as text in a new browser window, depending on what is set up in the Directory Options window on the General User Preferences Maintenance Form (GUAUPRF)



## Section A: Introduction

### Lesson: Quick Flows

◀ Jump to TOC

#### Description

The Quick Flow Form (GTVQUIK) lets you define Quick Flow codes and descriptions. Values you enter are used to create lists on the Quick Flow Definition Form (GUAQUIK).

Note: You can only execute Quick Flow lists that were defined in the GUAQUIK form. Define the quick flow code with the Quick Flow Code Validation Form (GTVQUIK).

#### SCT Banner form

Code	Description	Activity Date
ADM	Admissions List	10-SEP-1990
ADMR	Define Applicant Codes	03-JUL-1997
AHR	Define Grade Processing Rules	03-JUL-1997
APP	Application Procedure	04-MAR-1991
ASQTESTTEN	TESTING	12-JUL-2004
BUDG	Budget Inquiry	14-MAY-1997
CAT	Build Course Catalog	07-JAN-1995
CATR	Define Codes for Course Data	03-JUL-1997
CHKS	Process Checks	05-MAY-1995
CMS	Cindy's test quick flow	06-FEB-2004
CNCT	Create New Communication Track	08-JUL-1997
COBR	COBRA Procedure	06-MAR-1991
COST	Identify Employees for Billing	07-JUL-1997
CYNDY	Cyndys Test1234567890123456789	30-AUG-2004
DGR	Define Degree Codes	03-JUL-1997
DROP	Follow-Up on Installments	10-JUL-1997
ENT	Constituent Entry	13-MAY-1998
F-AW	Financial Aid Awarding	02-AUG-1993
F/A	F/A Record Creation	02-AUG-1993
FAC	Create Faculty	16-JAN-1995
FAID	Financial Aid Pell Processing	02-AUG-1993
FAPP	Faculty Application Procedure	30-JAN-1991

#### Procedure

Create a quick flow for a process that requires many different forms to be completed.

Step	Action
1	Access the Quick Flow Code Validation Form (GTVQUIK).
2	Select the <b>Insert Record</b> function.
3	Enter a Quick Flow code in the <b>Quick Flow</b> field. <u>Note:</u> The code can be up to 4 characters.
4	Enter a description in the <b>Description</b> field of the Quick Flow code. <u>Note:</u> The description can be up to 30 characters.

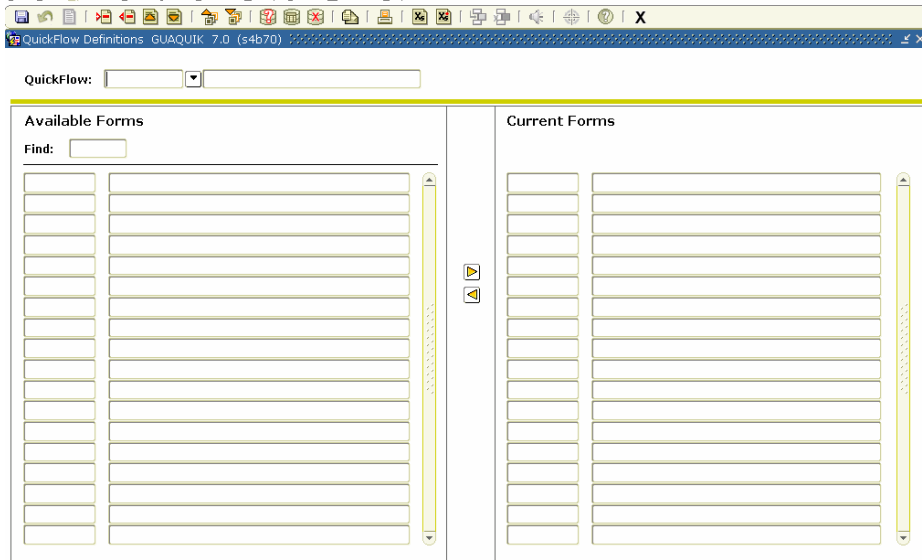


## Section A: Introduction

### Lesson: Quick Flows (Continued)

◀ Jump to TOC

#### Procedure, continued

Step	Action				
5	Click the <b>Save</b> icon.				
6	Click the <b>Exit</b> icon.				
7	<p>Access the Quick Flow Definition Form (GUAQUIK).</p> 				
8	Enter the code in the <b>Quick Flow</b> field you just created on the Quick Flow Code Validation Form (GTVQUIK).				
9	Select the <b>Next Block</b> function.				
10	<p>Enter the form name(s) required for the Quick Flow process in the <b>Existing</b> field.</p> <p><u>Note:</u> Make sure to enter the forms in the order they should be accessed. You can use the <u>Find</u> option to locate the required form.</p> <p><u>Example:</u> Here is a sample.</p> <table border="1" data-bbox="565 1558 1149 1654"> <tbody> <tr> <td>PGEN</td> <td>Pledge - Gift Entry</td> </tr> <tr> <td>PLDG</td> <td>Pledge Processing</td> </tr> </tbody> </table>	PGEN	Pledge - Gift Entry	PLDG	Pledge Processing
PGEN	Pledge - Gift Entry				
PLDG	Pledge Processing				
11	Click the <b>Save</b> icon.				
12	Click the <b>Exit</b> icon.				
13	Access the Quick Flow form (GUAQFLW).				
14	Enter the name of the Quick Flow process that you created in Step 3 in the <b>Quick Flow</b> field.				



## Section A: Introduction

### Lesson: Quick Flows (Continued)

◀ [Jump to TOC](#)

#### Procedure, continued

Step	Action
15	Click the <b>Start</b> button.
16	Exit through each of the forms in the process to return to the Quick Flow form.
17	Click the <b>Exit</b> icon.



## Section A: Introduction

### Lesson: Self Check

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#### Directions

Match the Banner module from the list on the left with the description on the right. Try to do this without using your workbook notes.

#### Question 1

- |                            |     |   |
|----------------------------|-----|---|
| a. Individual Processing   | ___ | 1. Contains features that support prospect identification, pool segmentation, research, and tracking.   |
| b. Organizations           | ___ | 2. Creates installments based on regular or customized payments plans, and allows you to review balances by campaign and designation.                       |
| c. Membership              | ___ | 3. Serves two main functions in the area of tracking and controlling fundraising activity   |
| d. Prospect Management     | ___ | 4. Distinguishes the alumni and development population from other by establishing and maintaining comprehensive records on all constituents.                |
| e. Designation             | ___ | 5. Allows an institution to track donors' involvement in membership programs, due payment entry, reminder and renewal notice mailings, and acknowledgement. |
| f. Solicitor Organizations | ___ | 6. Helps you manage events and functions  |
| g. Campaigns               | ___ | 7. Designed to assist in effectively managing fund raising organizations.   |
| h. Pledge Processing       | ___ | 8. Allows an institution to track gifts that are eligible to receive matching gift payment from organizations   |
| i. Gift Societies          | ___ | 9. Establishes and maintains records for corporations, foundations, and other organizations.  |
| j. Matching Gift           | ___ | 10. Used to establish relationships between gift designations, the finance system, and VSE gift categories.   |
| k. Cashiering              | ___ | 11. Allows an institution to track transaction entry sessions   |
| l. Event Management        | ___ | 12. Appears on the main menus of four Advancement modules   |



## Section A: Introduction

### Lesson: Self Check (Continued)

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#### **Exercise**

Create a Quick flow for one of the modules. Try to do this without looking at the steps presented in the Quick flow exercise.



## Section A: Introduction

### Lesson: Answer Key

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#### Question 1

- |                            |          |   |
|----------------------------|----------|---|
| d. Individual Processing   | <b>d</b> | 1. Contains features that support prospect identification, pool segmentation, research, and tracking.   |
| e. Organizations           | <b>h</b> | 2. Creates installments based on regular or customized payments plans, and allows you to review balances by campaign and designation.                       |
| f. Membership              | <b>g</b> | 3. Serves two main functions in the area of tracking and controlling fundraising activity   |
| d. Prospect Management     | <b>a</b> | 4. Distinguishes the alumni and development population from other by establishing and maintaining comprehensive records on all constituents.                |
| f. Designation             | <b>c</b> | 5. Allows an institution to track donors' involvement in membership programs, due payment entry, reminder and renewal notice mailings, and acknowledgement. |
| f. Solicitor Organizations | <b>l</b> | 6. Helps you manage events and functions  |
| l. Campaigns               | <b>f</b> | 7. Designed to assist in effectively managing fund raising organizations.   |
| m. Pledge Processing       | <b>j</b> | 8. Allows an institution to track gifts that are eligible to receive matching gift payment from organizations   |
| n. Gift Societies          | <b>b</b> | 9. Establishes and maintains records for corporations, foundations, and other organizations.  |
| o. Matching Gift           | <b>e</b> | 10. Used to establish relationships between gift designations, the finance system, and VSE gift categories.   |
| p. Cashiering              | <b>k</b> | 11. Allows an institution to track transaction entry sessions   |
| l. Event Management        | <b>i</b> | 12. Appears on the main menus of four Advancement modules   |



## Release Date

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This workbook was last updated on 11/3/2005.