



Development & Salsa CRM Procedure Manual

Last Updated June 23, 2021 by Deven Warvel

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Standards

- **Always search for duplicates** before entering a new constituent. This is one of the most important standards set forth.
- Enter **ALL** provided information available for each constituent.
- Do not abbreviate an organization name except when part of the formal business name. (For example, &, Inc. or Co.)
- Salsa addresses are verified and validated by Smarty Streets, therefore addresses must be entered according to their standards (<https://smartystreets.com/articles/standardization-and-validation>). Smarty Streets adheres to USPS standards:
 - Abbreviate street suffixes without punctuation (Rd, St, Ave, Cir, Blvd, etc).
 - All directionals (South, West, Northeast, etc.) whether preceding or following a street name, are to be entered as abbreviations in capital letters without punctuation. (Example: 123 NW Anywhere St)
 - When entering an apartment number or suite number, put it at the end of the first address line (Example: 123 NW Anywhere St #203).
 - PO Boxes should be entered without periods (Example: PO Box 123).
 - Any questions about address entry can be found on the USPS website <https://pe.usps.com/text/pub28/welcome.htm>.
- Always fix a record with an error.
- Always include the area code when entering a phone number.
- The more information you can enter in a record the better.
- If you are unsure of how to do something, please reference this manual or contact the Development Associate.

Reports

Reports are an important tool to track the progress of the development department as well as to continually check for potential mistakes. Salsa provides several reporting options including prebuilt reports and customizable advanced queries. For the purpose of regularly scheduled reports, advanced queries are primarily used.

Monthly Reports

The Endowment Campaign for Educator Excellence

Finance Reconciliation

Strategic Scorecard

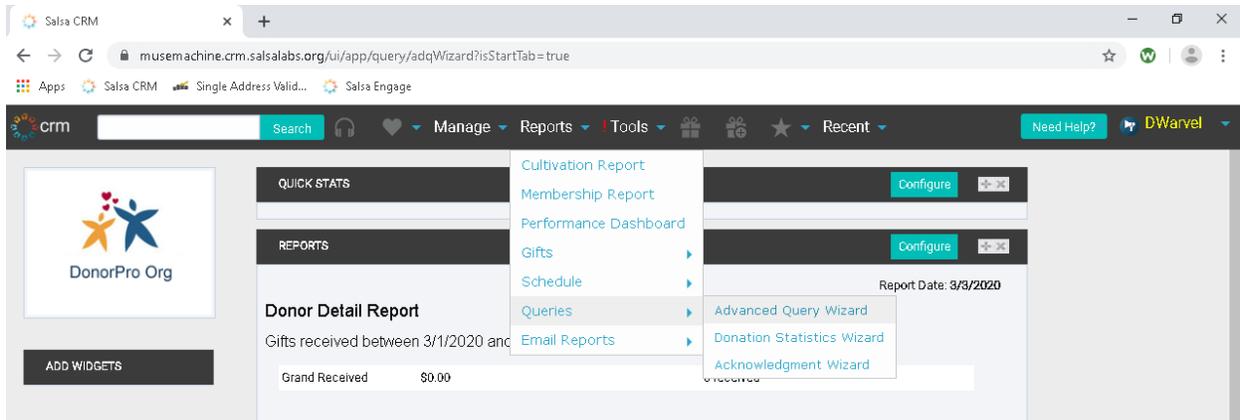
The Strategic Scorecard provides an overall view of Muse Machine. Used internally by staff and confidentially by the Board of Trustees (BoT), the scorecard is updated by program areas, finance, and development. Development is often asked to update the scorecard multiple times throughout the month.

The scorecard is located at \Muse Shared\Reports-Dashboard for Committee-Board\20XX-20XX. Within the appropriate year folder, there is a Previous Versions folder. **The naming standard for the Strategic Scorecard is 2018-19 Muse Machine Strategic Scorecard_20190807-v2**, with “-v2” being added only if there is more than one version made on the same day. As the scorecard is updated the name of the file should be updated using the naming standard and the previous version should be moved into the Previous Versions folder.

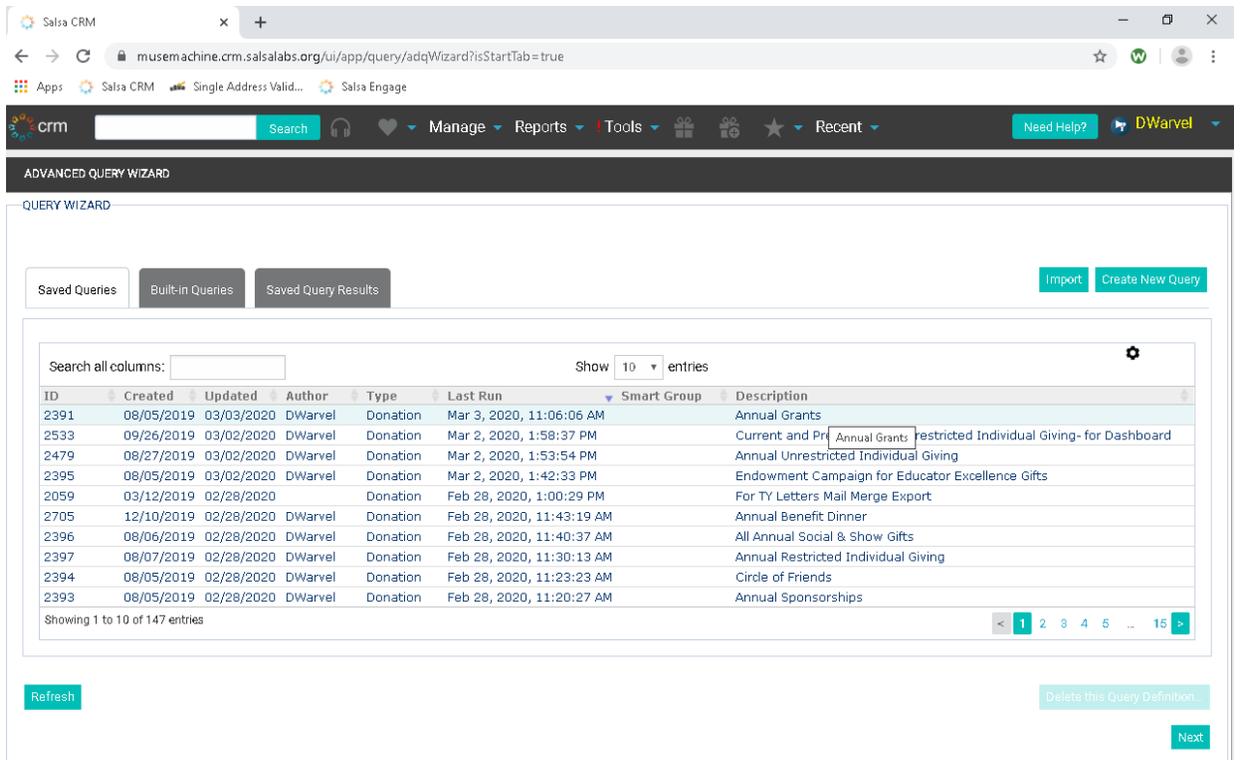
Scorecard Process

The Strategic Scorecard has been formatted to allow for autofill options to help to eliminate data entry errors. Development has a tab dedicated to each section with built-in pivot tables to help with data analysis.

- **Dev- Grants** tab contains all information for current fiscal year grants.
 - o Run the Salsa Advanced Query *Annual Grants*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *Annual Grants* query



- Check that the Campaign ID is for the appropriate year. If the year needs to be changed, double click Campaign ID and choose the appropriate year.

Salsa CRM

musemachine.crm.salsalabs.org/ui/app/query/adqWizard?isStartTab=true

Apps Salsa CRM Single Address Valid... Salsa Engage

Search Manage Reports Tools Recent Need Help? DWarvel

ADVANCED QUERY DONATION

QUERY WIZARD

Step 2: Select Query Criteria. Double-click on Available Fields or use the gear at the left to select Output, Filter, and Sort fields.

Available Fields

- Donation
- Record Status
- Donation ID
- Donation UUID
- Donation Source Activity UUID
- Donation Source Activity
- Donation Source Activity Type
- Donation Transaction Reason
- Donation Transaction Reason Name
- Web Donation ID
- Date Created
- Donation Last Updated
- Updated By
- Donor ID
- Document ID
- Document Description
- Received Date
- Donation Type
- Donation Source ID

Output
 Filter
 Sort

Output Fields

- Donation List As Name
- Donor Last or Org Name
- Donor First Name
- Campaign Campaign Name
- Fund Items Fund Name
- Pledge Fund Items Fund Name
- Appeal Appeal Name
- Donation Received Date
- Donation Donation Amount
- Donation Donation Type
- Paid Installment Installment ID
- Donation Description

Merge Spouses
 Merge Exact Duplicate Results

Filter Fields

Campaign Campaign ID equals '2019-2020 Annual Gifts towards FY20 programs & operations and not attributed to a specific campaign effort. Generally encompasses all gifts, grants, & sponsorships.'
 and Appeal Appeal ID is one of 'Grant Application Grant Application'
 and (Fund Items Payment Type does not equal 'Gift in

Sort Fields

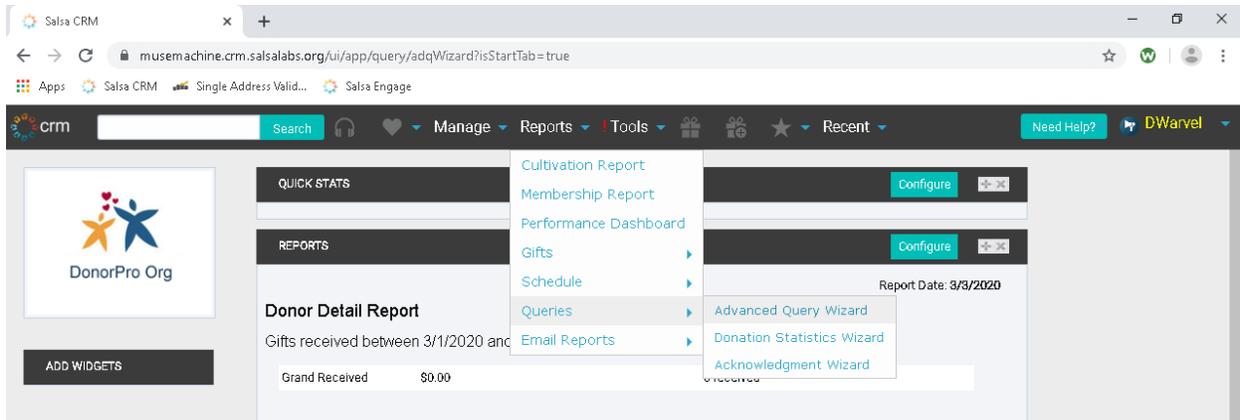
Fund Items Fund Name ascending
 Pledge Fund Items Fund Name ascending
 Donation List As Name ascending

- Click Next
- After the results have populated, click Convert to Spreadsheet

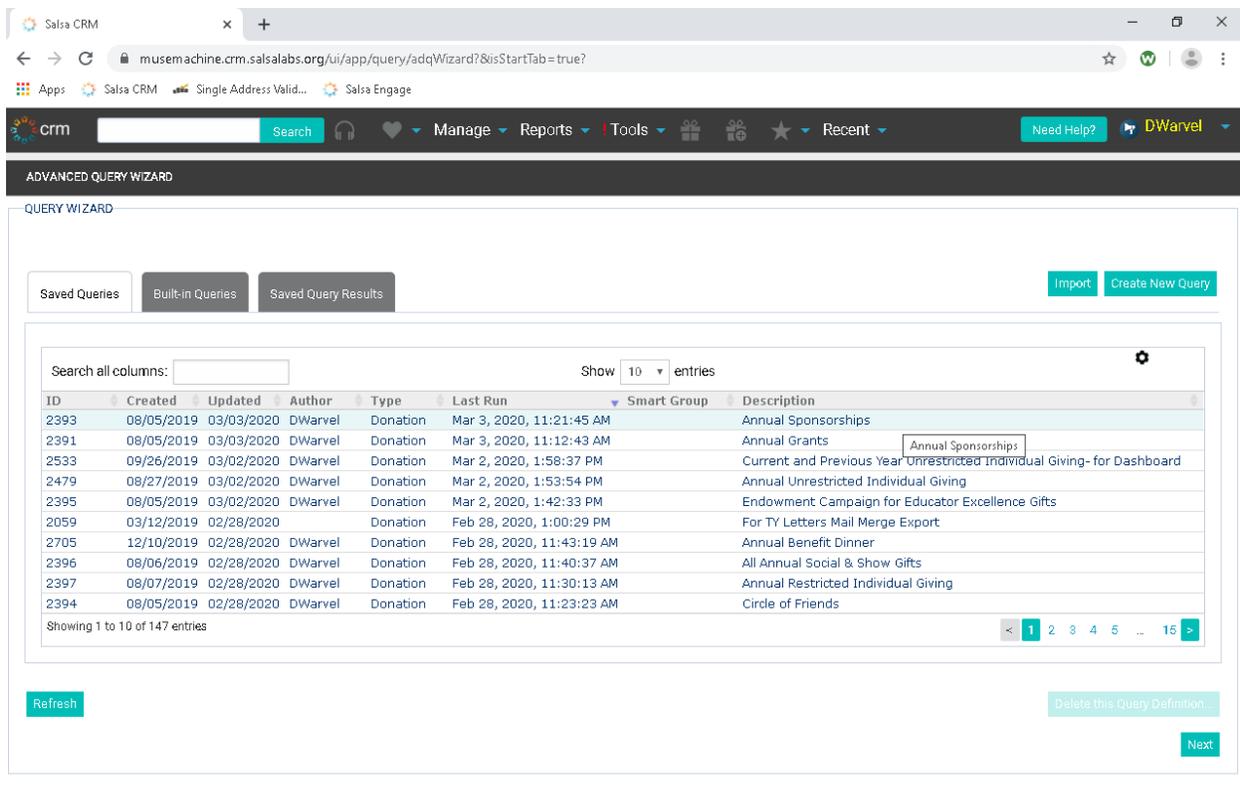
The screenshot shows the Salsa CRM interface at the URL `musemachine.crm.salsalabs.org/ui/app/query/advqWizard?isStartTab=true`. The page title is "ADVANCED QUERY DONATION" and the sub-header is "QUERY WIZARD". The current step is "Step 3: Preview, Exclude, and Modify Data." The main content is a table with the following columns: "List As Name", "Last or Org Name", "First Name", "Campaign Name", "Fund Name", and "Fund Name". The table contains 18 rows of data, each with a checkbox in the "List As Name" column. At the bottom of the table, there are buttons for "Convert to Spreadsheet", "Restart Wizard", "Back", "Next", and "Finish".

List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Fund Name
<input checked="" type="checkbox"/> PNC Foundation	PNC Foundation		2019-2020 Annual		Preschoo
<input checked="" type="checkbox"/> National Endowment for the Arts	National Endowment for the Arts		2019-2020 Annual		Seconda
<input checked="" type="checkbox"/> The Allegro Fund of The Dayton Foundation	The Allegro Fund of The Dayton Foundation		2019-2020 Annual		Seconda
<input checked="" type="checkbox"/> Ohio Arts Council	Ohio Arts Council		2019-2020 Annual		Summer
<input checked="" type="checkbox"/> Culture Works	Culture Works		2019-2020 Annual		Unrestric
<input checked="" type="checkbox"/> Montgomery County Arts & Cultural District	Montgomery County Arts & Cultural District		2019-2020 Annual		Unrestric
<input checked="" type="checkbox"/> Ohio Arts Council	Ohio Arts Council		2019-2020 Annual		Unrestric
<input checked="" type="checkbox"/> Dayton Power & Light Foundation	Dayton Power & Light Foundation		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/> PNC Foundation	PNC Foundation		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/> The Frank M. Tait Foundation	The Frank M. Tait Foundation		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/> Vectren Foundation	Vectren Foundation		2019-2020 Annual	Preschool & Elementary Programs	
<input checked="" type="checkbox"/> Dayton Power & Light Foundation	Dayton Power & Light Foundation		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/> The Allegro Fund of The Dayton Foundation	The Allegro Fund of The Dayton Foundation		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/> The Iddings Foundation	The Iddings Foundation		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/> The Iddings Foundation	The Iddings Foundation		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/> Vectren Foundation	Vectren Foundation		2019-2020 Annual	Secondary Special Projects	
<input checked="" type="checkbox"/> Vectren Foundation	Vectren Foundation		2019-2020 Annual	Secondary Special Projects	

- The raw data that comes out of Salsa will need to be manipulated.
 - Move data in Fund Name2 into the Fund Name column.
 - In the Donation Amount Column *Convert to Number*
 - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
 - Copy the data and paste into the table in the Scorecard, replacing the former data.
 - Refresh both pivot tables.
 - Ensure that the Summary data table total matches the All Grants pivot table total.
- **Dev- Sponsorships** tab contains all information for current fiscal year sponsorships.
 - Run the Salsa Advanced Query *Annual Sponsorships*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *Annual Sponsorships* query



- Check that the Campaign ID is for the appropriate year. If the year needs to be changed, double click Campaign ID and choose the appropriate year.

Salsa CRM

musemachine.crm.salsalabs.org/ui/app/query/advqWizard?&isStartTab=true

Apps Salsa CRM Single Address Valid... Salsa Engage

crm Search Manage Reports Tools Recent Need Help? DWarvel

ADVANCED QUERY DONATION

QUERY WIZARD

Step 2: Select Query Criteria. Double-click on Available Fields or use the gear at the left to select Output, Filter, and Sort fields.

Available Fields

- Donation
- Record Status
- Donation ID
- Donation UUID
- Donation Source Activity UUID
- Donation Source Activity
- Donation Source Activity Type
- Donation Transaction Reason
- Donation Transaction Reason Name
- Web Donation ID
- Date Created
- Donation Last Updated
- Updated By
- Donor ID
- Document ID
- Document Description
- Received Date
- Donation Type
- Donation Source ID

Output Fields

- Donation List As Name
- Donor Last or Org Name
- Donor First Name
- Campaign Campaign Name
- Fund Items Fund Name
- Pledge Fund Items Fund Name
- Appeal Appeal Name
- Donation Received Date
- Donation Donation Amount
- Donation Donation Type
- Paid Installment Installment ID
- Donation Description

Filter Fields

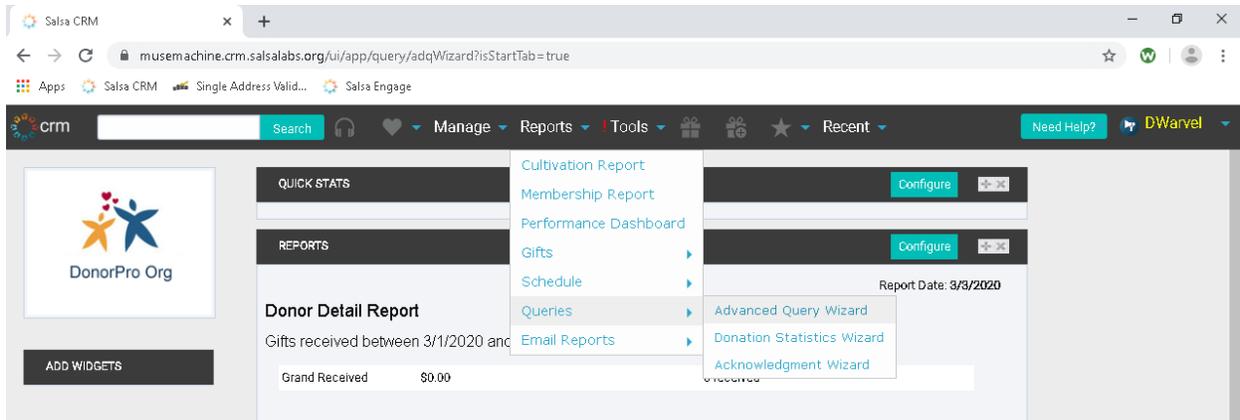
Campaign Campaign ID equals *2019-2020 Annual Gifts towards FY20 programs & operations and not attributed to a specific campaign effort. Generally encompasses all gifts, grants, & sponsorships.* and Appeal Appeal ID equals *Sponsorship Proposal Sponsorship Proposal* and (Fund Items Payment Type does not equal *Gift in

Sort Fields

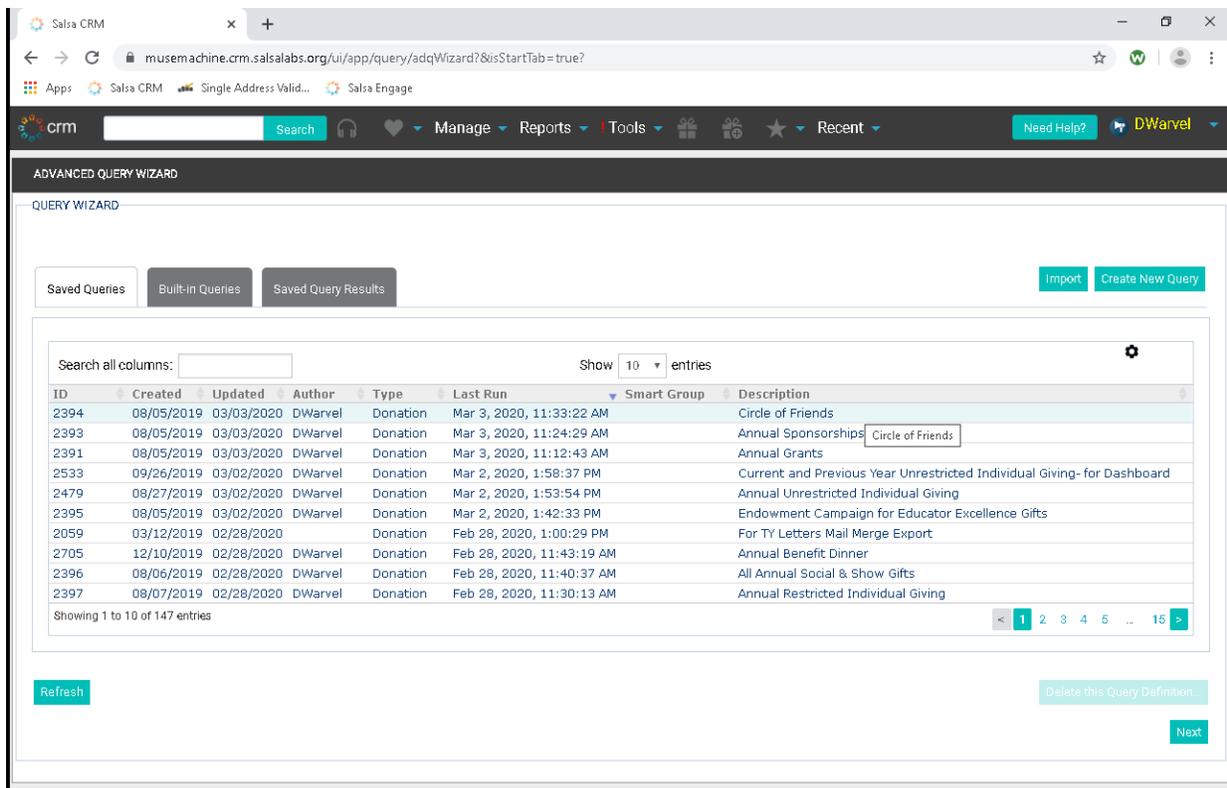
Ascending Descending

Restart Wizard Back Next Finish

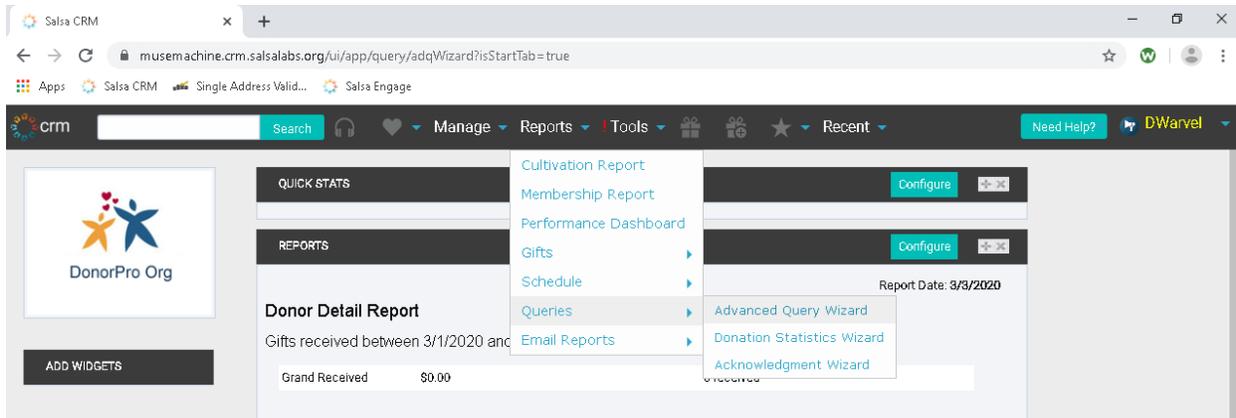
- Click Next
- After the results have populated, click Convert to Spreadsheet



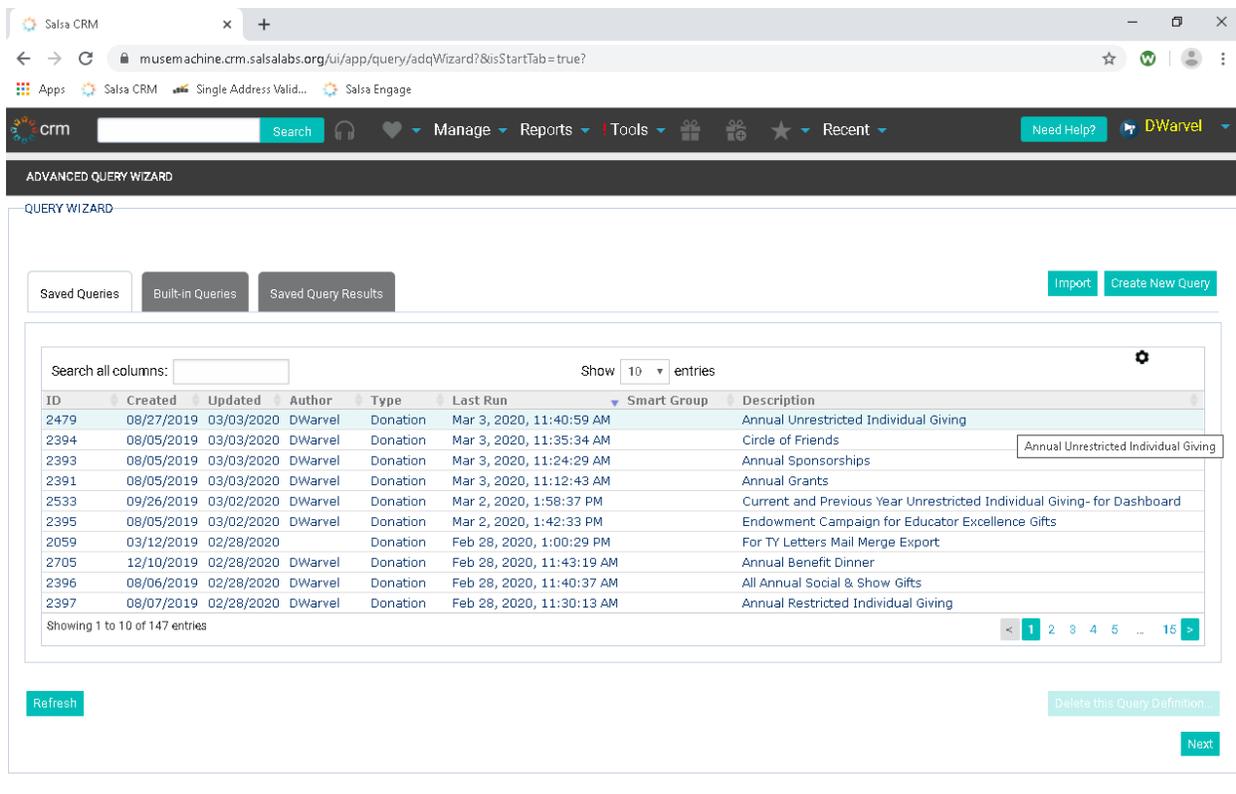
- Choose the *Circle of Friends* query



- Click Next, after the results have populated, click Convert to Spreadsheet



- Choose the *Annual Unrestricted Individual Giving* query



- Check that the Campaign ID is for the appropriate year. If the year needs to be changed, double click Campaign ID and choose the appropriate year.

Step 2: Select Query Criteria. Double-click on Available Fields or use the gear at the left to select Output, Filter, and Sort fields.

Available Fields

- Donation
 - Record Status
 - Donation ID
 - Donation UUID
 - Donation Source Activity UUID
 - Donation Source Activity
 - Donation Source Activity Type
 - Donation Transaction Reason
 - Donation Transaction Reason Name
 - Web Donation ID
 - Donation ID
 - Date Created
 - Donation Last Updated
 - Updated By
 - Donor ID
 - Document ID
 - Document Description
 - Received Date
 - Donation Type
 - Donation Source ID

Output Fields

- Donation List As Name
- Donor Last or Org Name
- Donor First Name
- Campaign Campaign Name
- Fund Items Fund Name
- Pledge Fund Items Fund Name
- Appeal Appeal Name
- Donation Received Date
- Donation Donation Amount
- Donation Donation Type
- Paid Installment Installment ID

Filter Fields

Campaign Campaign ID equals '2019-2020 Annual Gifts towards FY20 programs & operations and not attributed to a specific campaign effort. Generally encompasses all gifts, grants, & sponsorships.' and Appeal Appeal ID is not one of 'Grant Application Grant Application', 'Sponsorship Proposal Sponsorship Proposal'

Sort Fields

Ascending Descending

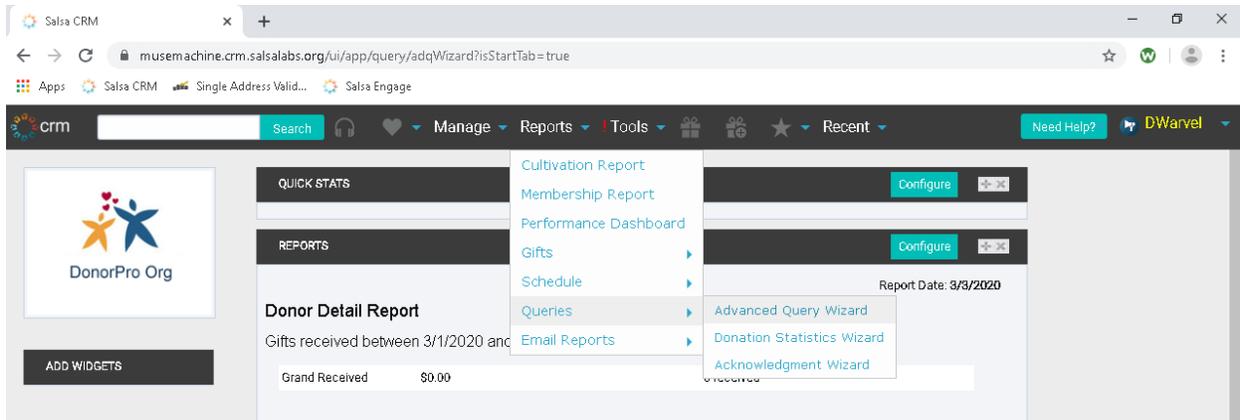
Restart Wizard Back Next Finish

- Click Next
- After the results have populated, click Convert to Spreadsheet

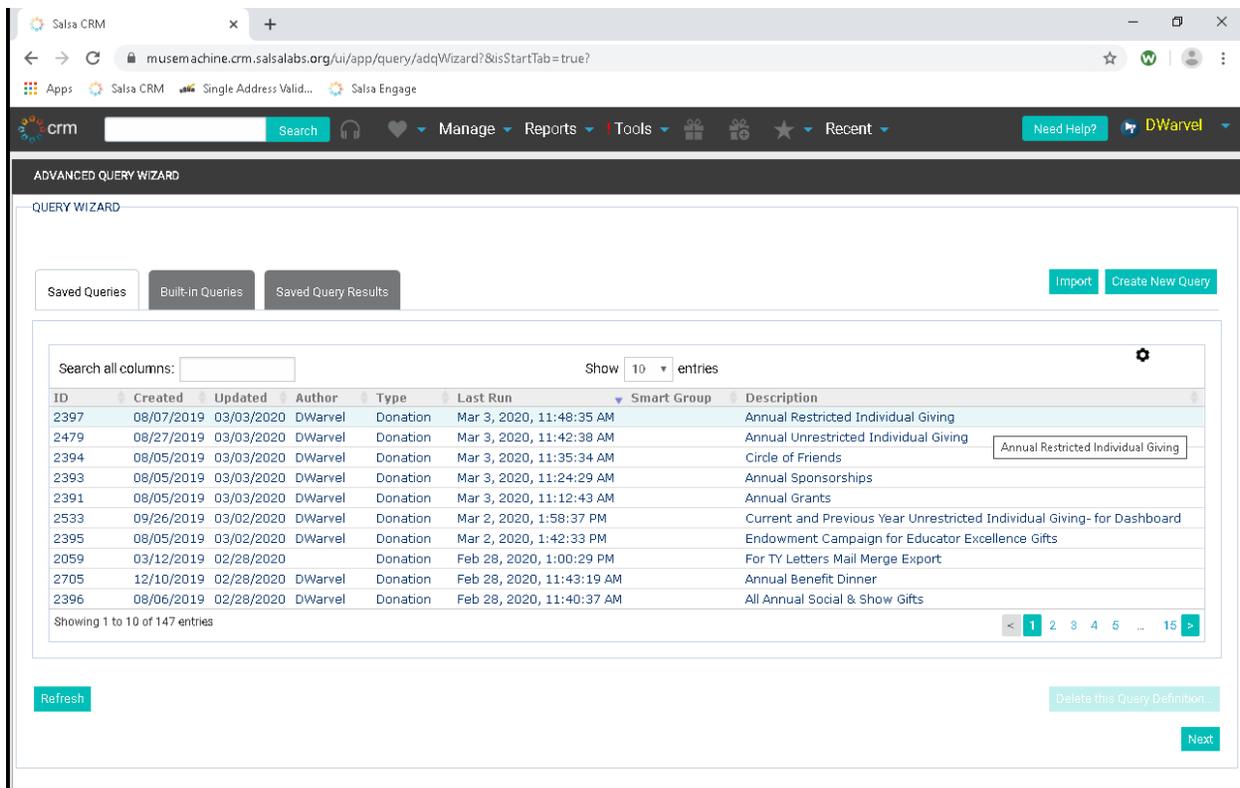
The screenshot shows the Salsa CRM interface with the Advanced Query Wizard open. The wizard is at Step 3: Preview, Exclude, and Modify Data. The table below displays the results of the query, with columns for List As Name, Last or Org Name, First Name, Campaign Name, Fund Name, and Appeal Name. Each row represents a donation record, and all rows are checked for selection.

List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Fund Name	Appeal Name
<input checked="" type="checkbox"/> Patti Giering	Giering	Patricia	2019-2020 Annual	Unrestricted		Unsolicited
<input checked="" type="checkbox"/> Carol Barlage	Barlage	Carol	2019-2020 Annual	Unrestricted		2018 MM2 1718
<input checked="" type="checkbox"/> John & Gail Lyman	Lyman	John	2019-2020 Annual	Unrestricted		2018 MM3 1718
<input checked="" type="checkbox"/> Barbara Kryter Ackerman Fund	Barbara Kryter Ackerman Fund		2019-2020 Annual	Unrestricted		Unsolicited
<input checked="" type="checkbox"/> Robert & Jean Beecher	Beecher	Jean	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> Carol Barlage	Barlage	Carol	2019-2020 Annual	Unrestricted		2018 MM2 1718
<input checked="" type="checkbox"/> John & Gail Lyman	Lyman	John	2019-2020 Annual	Unrestricted		2018 MM3 1718
<input checked="" type="checkbox"/> Rose Fox	Fox	Rose	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> Elizabeth Stryker	Stryker	Elizabeth	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> Robert & Jean Beecher	Beecher	Jean	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> Mary Campbell Zopf	Campbell Zopf	Mary	2019-2020 Annual	Unrestricted		In Memory Of
<input checked="" type="checkbox"/> Drs. Margaret Dunn & William Spohn	Spohn	William	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> Lawrence J. Litscher	Litscher	Lawrence	2019-2020 Annual	Unrestricted		2019 MM41819 A
<input checked="" type="checkbox"/> John & Gail Lyman	Lyman	John	2019-2020 Annual	Unrestricted		2018 MM3 1718
<input checked="" type="checkbox"/> Carol Barlage	Barlage	Carol	2019-2020 Annual	Unrestricted		2018 MM2 1718
<input checked="" type="checkbox"/> Carol Barlage	Barlage	Carol	2019-2020 Annual	Unrestricted		2018 MM2 1718
<input checked="" type="checkbox"/> Tom & Cindy Clark	Clark	Thomas	2019-2020 Annual	Unrestricted		2019 MM41819 A

- The raw data that comes out of Salsa will need to be manipulated.
 - In the Donation Amount Column *Convert to Number*
 - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment or Recurring Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh the pivot tables
- Ensure that the color coding is applied appropriately, and the Summary data table total matches the pivot table total.
- **Dev- Restricted** tab contains all information for current fiscal year individual gifts restricted to a particular program area.
 - Run the Salsa Advanced Query *Annual Restricted Individual Giving*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *Annual Restricted Individual Giving* query



- Check that the Campaign ID is for the appropriate year. If the year needs to be changed, double click Campaign ID and choose the appropriate year.

Step 2: Select Query Criteria. Double-click on Available Fields or use the gear at the left to select Output, Filter, and Sort fields.

Available Fields: Donation Record Status, Donation ID, Donation UUID, Donation Source Activity UUID, Donation Source Activity, Donation Source Activity Type, Donation Transaction Reason, Donation Transaction Reason Name, Web Donation ID, Date Created, Donation Last Updated, Updated By, Donor ID, Document ID, Document Description, Received Date, Donation Type, Donation Source ID.

Output Fields: Donation List As Name, Donor Last or Org Name, Donor First Name, Campaign Campaign Name, Fund Items Fund Name, Pledge Fund Items Fund Name, Appeal Appeal Name, Donation Received Date, Donation Donation Amount, Donation Donation Type, Paid Installment Installment ID.

Filter Fields: Campaign Campaign ID equals '2019-2020 Annual Gifts towards FY20 programs & operations and not attributed to a specific campaign effort. Generally encompasses all gifts, grants, & sponsorships.' and Appeal Appeal ID is not one of 'Grant Application Grant Application', 'Sponsorship Proposal Sponsorship Proposal'.

Sort Fields: (Empty)

Buttons: Edit..., And, Or, (), Ascending, Descending, Restart Wizard, Back, Next, Finish.

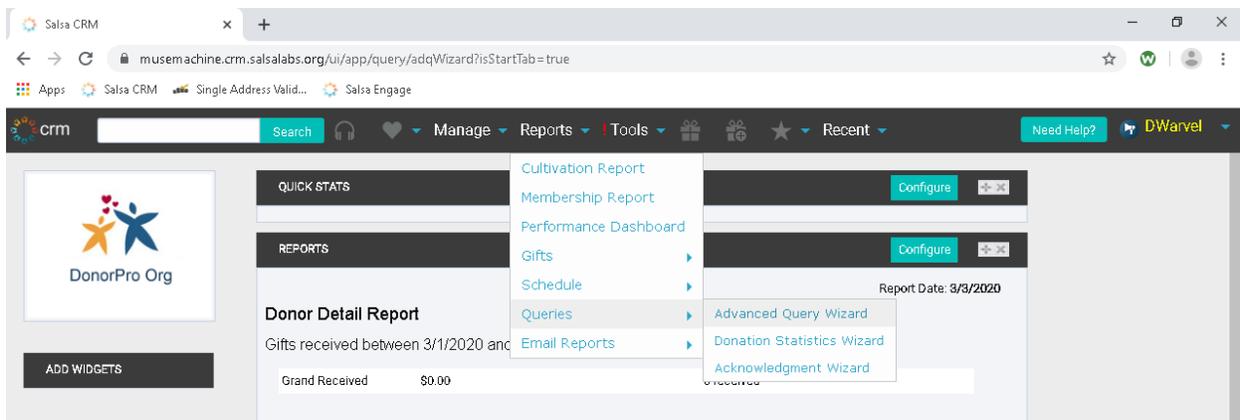
- Click Next
- After the results have populated, click Convert to Spreadsheet

Step 3: Preview, Exclude, and Modify Data.

List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Appeal Name	Re
<input checked="" type="checkbox"/> Stefan & Sharon Neumeister	Neumeister	Stefan	2019-2020 Annual	Preschool & Elementary Programs	Unsolicited	
<input checked="" type="checkbox"/> Tom & Cindy Clark	Clark	Thomas	2019-2020 Annual	Student Performance	2019 MM41819 A	
<input checked="" type="checkbox"/> Tim & Susie Brabender	Brabender	Timothy	2019-2020 Annual	Student Performance	Personal Ask	
<input checked="" type="checkbox"/> Ira & Susan Thomsen	Thomsen	Ira	2019-2020 Annual	Student Performance	Angel Tickets	
<input checked="" type="checkbox"/> PJ & Amy Wagner	Wagner	Amy	2019-2020 Annual	Student Performance	Angel Tickets	
<input checked="" type="checkbox"/> Rosemary Asebrook	Asebrook	Rosemary	2019-2020 Annual	Student Performance	Angel Tickets	
<input checked="" type="checkbox"/> Alison Walker	Walker	Alison	2019-2020 Annual	Student Performance	Angel Tickets	
<input checked="" type="checkbox"/> Angie Winick	Winick	Angie	2019-2020 Annual	Student Performance	Angel Tickets	
<input checked="" type="checkbox"/> Daniel Hoge	Hoge	Daniel	2019-2020 Annual	Student Performance	Angel Tickets	
<input checked="" type="checkbox"/> Andy Wade	Wade	Andy	2019-2020 Annual	Student Performance	Angel Tickets	
<input checked="" type="checkbox"/> Martha & Dale Shields	Shields	Martha	2019-2020 Annual	Student Performance	Unsolicited	
<input checked="" type="checkbox"/> Martha & Dale Shields	Shields	Martha	2019-2020 Annual	Student Performance	Unsolicited	
<input checked="" type="checkbox"/> Dave & Stephanie Dickerson	Dickerson	Dave	2019-2020 Annual	Student Performance	Angel Tickets	
<input checked="" type="checkbox"/> Paul Rogers	Rogers	Paul	2019-2020 Annual	Student Performance	Angel Tickets	
<input checked="" type="checkbox"/> Martha & Dale Shields	Shields	Martha	2019-2020 Annual	Student Performance	Unsolicited	
<input checked="" type="checkbox"/> Mary Campbell Zopf	Campbell Zopf	Mary	2019-2020 Annual	Student Performance	Angel Tickets	
<input checked="" type="checkbox"/> Rosalie Catalano & Paul Ginsburg	Catalano	Rosalie	2019-2020 Annual	Student Performance	Angel Tickets	

Buttons: Convert to Spreadsheet, Restart Wizard, Back, Next, Finish.

- The raw data that comes out of Salsa will need to be manipulated.
 - Move data in Fund Name2 into the Fund Name column.
 - In the Donation Amount Column *Convert to Number*
 - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh both pivot tables.
- **Dev- Social & Show** tab contains all information for current fiscal year Social & Show gifts and event fees.
 - Run the Salsa Advanced Query *All Annual Social & Show Gifts*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *All Annual Social & Show Gifts* query

Salsa CRM

musemachine.crm.salsalabs.org/ui/app/query/adqWizard?&isStartTab=true

Apps Salsa CRM Single Address Valid... Salsa Engage

crm Search Manage Reports Tools Recent Need Help? DWarvel

ADVANCED QUERY WIZARD

QUERY WIZARD

Search all columns: Show 10 entries

ID	Created	Updated	Author	Type	Last Run	Smart Group	Description
2396	08/06/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:54:32 AM		All Annual Social & Show Gifts
2397	08/07/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:50:35 AM		Annual Restricted Individual Giving <input type="text" value="All Annual Social & Show Gifts"/>
2479	08/27/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:42:38 AM		Annual Unrestricted Individual Giving
2394	08/05/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:35:34 AM		Circle of Friends
2393	08/05/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:24:29 AM		Annual Sponsorships
2391	08/05/2019	03/03/2020	DWarvel	Donation	Mar 3, 2020, 11:12:43 AM		Annual Grants
2533	09/26/2019	03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:58:37 PM		Current and Previous Year Unrestricted Individual Giving- for Dashboard
2395	08/05/2019	03/02/2020	DWarvel	Donation	Mar 2, 2020, 1:42:33 PM		Endowment Campaign for Educator Excellence Gifts
2059	03/12/2019	02/28/2020		Donation	Feb 28, 2020, 1:00:29 PM		For TY Letters Mail Merge Export
2705	12/10/2019	02/28/2020	DWarvel	Donation	Feb 28, 2020, 11:43:19 AM		Annual Benefit Dinner

Showing 1 to 10 of 147 entries

- Check that the Fund Items Fund ID and Pledge Fund Items Fund ID is for the appropriate year. If the year needs to be changed, double click each and choose the appropriate year.

Step 2: Select Query Criteria. Double-click on Available Fields or use the gear at the left to select Output, Filter, and Sort fields.

Available Fields

- Donation
 - Record Status
 - Donation ID
 - Donation UUID
 - Donation Source Activity UUID
 - Donation Source Activity
 - Donation Source Activity Type
 - Donation Transaction Reason
 - Donation Transaction Reason Name
 - Web Donation ID
 - Donation ID
 - Date Created
 - Donation Last Updated
 - Updated By
 - Donor ID
 - Document ID
 - Document Description
 - Received Date
 - Donation Type
 - Donation Source ID

Output Fields

- Donation List As Name
- Donor Last or Org Name
- Donor First Name
- Campaign Campaign Name
- Fund Items Fund Name
- Pledge Fund Items Fund Name
- Appeal Appeal Name
- Donation Received Date
- Donation Donation Amount
- Donation Donation Type
- Paid Installment Installment ID

Filter Fields

```
events:  
and ( Fund Items Fund ID equals '2020 Social & Show  
Event fees & gifts made in connection with the 2020 Social  
& Show'  
or Pledge Fund Items Fund ID equals '2020 Social & Show  
Event fees & gifts made in connection with the 2020 Social  
& Show' )
```

Sort Fields

Restart Wizard Back Next Finish

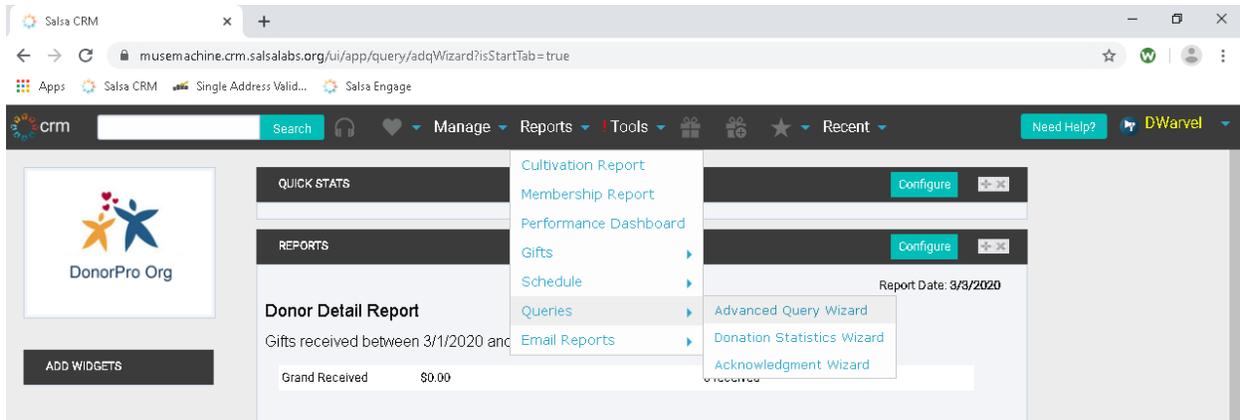
- Click Next
- After the results have populated, click Convert to Spreadsheet

The screenshot shows the Salsa CRM interface with the Advanced Query Wizard open. The wizard is at Step 3: Preview, Exclude, and Modify Data. The table below displays the query results with columns for List As Name, Last or Org Name, First Name, Campaign Name, Fund Name, and Appeal Name. Each row has a checkbox on the left for selection.

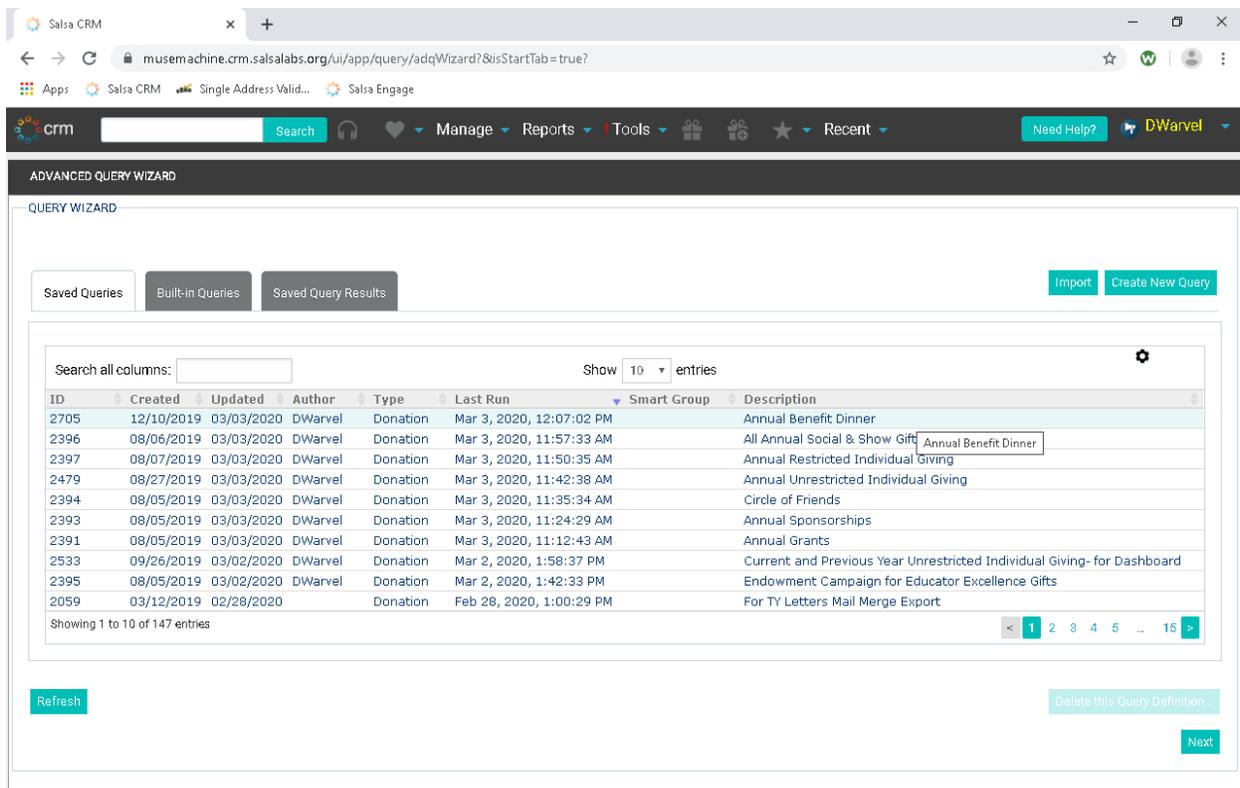
<input type="checkbox"/>	List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Appeal Name
<input checked="" type="checkbox"/>	King Orthodontics	King	Samuel	Special Events	2020 Social & Show	Social Sponsor- GOL
<input checked="" type="checkbox"/>	Kadie & Bob Crawford	Crawford	Katherine	Special Events	2020 Social & Show	Social Sponsor- GOL
<input checked="" type="checkbox"/>	Adam & Andi Hickman	Crawford	Katherine	Special Events	2020 Social & Show	Social Sponsor- BRO
<input checked="" type="checkbox"/>	Jeremy & Megan Fanning	Crawford	Katherine	Special Events	2020 Social & Show	Social Sponsor- BRO
<input checked="" type="checkbox"/>	Doug & Sharon Scholz	Scholz	Douglas	Special Events	2020 Social & Show	Social Sponsor- GOL
<input checked="" type="checkbox"/>	Mary Hutcheson	Hutcheson	Mary	Special Events	2020 Social & Show	Social & Show
<input checked="" type="checkbox"/>	Mary Hutcheson	Hutcheson	Mary	Special Events	2020 Social & Show	Social & Show
<input checked="" type="checkbox"/>	Laurie Westheimer, Realtor, Coldwell Banker Heritage	Westheimer	Laurie	Special Events	2020 Social & Show	Social Sponsor- BRO
<input checked="" type="checkbox"/>	Mark & Martha Shaker	Shaker	Mark	Special Events	2020 Social & Show	Social Gift
<input checked="" type="checkbox"/>	Mark & Martha Shaker	Shaker	Mark	Special Events	2020 Social & Show	Social & Show
<input checked="" type="checkbox"/>	Mark & Martha Shaker	Shaker	Mark	Special Events	2020 Social & Show	Social & Show
<input checked="" type="checkbox"/>	Mark & Martha Shaker	Shaker	Mark	Special Events	2020 Social & Show	Social & Show
<input checked="" type="checkbox"/>	The Polar Group	Crawford	Katherine	Special Events	2020 Social & Show	Social Sponsor- SILV
<input checked="" type="checkbox"/>	Irongate Inc., Realtors	Irongate Inc., Realtors		Special Events	2020 Social & Show	Social Sponsor- BRO
<input checked="" type="checkbox"/>	Doug & Sharon Scholz	Scholz	Douglas	Special Events	2020 Social & Show	Social Sponsor- GOL
<input checked="" type="checkbox"/>	Ira & Susan Thomsen	Thomsen	Ira	Special Events	2020 Social & Show	Social Sponsor- SILV
<input checked="" type="checkbox"/>	Eubel Brady & Suttman Asset Management	Eubel Brady & Suttman Asset Management		Special Events	2020 Social & Show	Social Sponsor- BRO

At the bottom of the wizard, there are buttons for "Convert to Spreadsheet", "Restart Wizard", "Back", "Next", and "Finish".

- The raw data that comes out of Salsa will need to be manipulated.
 - In the Donation Amount Column *Convert to Number*
 - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh the pivot table.
- Ensure that the Summary data table total matches the pivot table total.
- **Dev- Benefit Dinner** tab contains all information for current fiscal year Social & Show gifts and event fees.
 - Run the Salsa Advanced Query *Annual Benefit Dinner*
 - Go to Reports→Queries→Advanced Query Wizard



- Choose the *Annual Benefit Dinner* query



- Check that the Fund Items Fund ID and Pledge Fund Items Fund ID is for the appropriate year. If the year needs to be changed, double click each and choose the appropriate year.

Step 2: Select Query Criteria. Double-click on Available Fields or use the gear at the left to select Output, Filter, and Sort fields.

Available Fields

- Donation
 - Record Status
 - Donation ID
 - Donation UUID
 - Donation Source Activity UUID
 - Donation Source Activity
 - Donation Source Activity Type
 - Donation Transaction Reason
 - Donation Transaction Reason Name
 - Web Donation ID
 - Date Created
 - Donation Last Updated
 - Updated By
 - Donor ID
 - Document ID
 - Document Description
 - Received Date
 - Donation Type
 - Donation Source ID

Output Fields

- Donation List As Name
- Donor Last or Org Name
- Donor First Name
- Campaign Campaign Name
- Fund Items Fund Name
- Pledge Fund Items Fund Name
- Appeal Appeal Name
- Donation Received Date
- Donation Donation Amount
- Donation Donation Type
- Paid Installment Installment ID

Filter Fields

Benefit Dinner, Social & Show, & other small community events.
and (Fund Items Fund ID equals *2020 Benefit Dinner Event fees & gifts made in connection with the 2020 Benefit Dinner.
or Pledge Fund Items Fund ID equals *2020 Benefit Dinner Event fees & gifts made in connection with the 2020 Benefit...

Sort Fields

Ascending Descending

Restart Wizard Back Next Finish

- Click Next
- After the results have populated, click Convert to Spreadsheet

The screenshot shows the Salsa CRM interface with the 'ADVANCED QUERY DONATION' window open. The window title is 'QUERY WIZARD' and the current step is 'Step 3: Preview, Exclude, and Modify Data.' The table below displays the results of the query, with columns for 'List As Name', 'Last or Org Name', 'First Name', 'Campaign Name', 'Fund Name', 'Fund Name', and 'Appeal Name'. The table contains 20 rows of data, each representing a donation record. At the bottom of the window, there are buttons for 'Convert to Spreadsheet', 'Restart Wizard', 'Back', 'Next', and 'Finish'.

List As Name	Last or Org Name	First Name	Campaign Name	Fund Name	Fund Name	Appeal Name
Vectren Foundation	Vectren Foundation		Special Events	2020 Benefit Dinner		BD Table
Suzanne Patterson	Patterson	Suzanne	Special Events	2020 Benefit Dinner		BD Silver Tkt
Anonymous	Kunesh	Sarah	Special Events	2020 Benefit Dinner		BD Gold Tkt
ACCO Brands	ACCO Brands		Special Events		2020 Benefit Dinner	BD Sponsor
Dr. Ron Anderson and Robb Sloan Anderson	Anderson	Ronald	Special Events	2020 Benefit Dinner		BD Silver Tkt
Dr. Ron Anderson and Robb Sloan Anderson	Anderson	Ronald	Special Events	2020 Benefit Dinner		BD Silver Tkt
Bill & Sonnie Kasch	Kasch	Sonnie	Special Events	2020 Benefit Dinner		BD Silver Tkt
Anonymous	Campbell Zopf	Mary	Special Events	2020 Benefit Dinner		BD Sponsor
Pam Houk	Houk	Pam	Special Events	2020 Benefit Dinner		BD Gold Tkt
Steven & Paula Reed in Honor of Susan & Bud Zupp	Reed	Steven	Special Events	2020 Benefit Dinner		BD Gift
Doug & Ann Almoney	Almoney	Anne	Special Events	2020 Benefit Dinner		BD Silver Tkt
Mark & Marilyn Dues	Dues	Marilyn	Special Events	2020 Benefit Dinner		BD Silver Tkt
Meagan Geeting in Honor of Bud & Susan Zupp	Geeting	Meagan	Special Events	2020 Benefit Dinner		BD Gift
Virginia & Edman Gray	Gray	Edman	Special Events	2020 Benefit Dinner		BD Gold Tkt
Julia D. Hobart	Hobart	Julia	Special Events	2020 Benefit Dinner		BD Gold Tkt
Darren McGarvey & Darrell Bickley	McGarvey	Darren	Special Events	2020 Benefit Dinner		BD Silver Tkt
Thom & Penni Meyer	Meyer	Thomas	Special Events	2020 Benefit Dinner		BD Platinum Tk

- The raw data that comes out of Salsa will need to be manipulated.
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 - If there is a number in the Installment ID column, change the Donation Type from Donation to Pledge Payment
- Copy the data and paste into the table in the Scorecard, replacing the former data.
- Refresh the pivot table.
- Ensure that the Summary data table total matches the pivot table total.

Ad Hoc Reports?

Gifts

Cash/Check Gifts

Credit Card Gifts

Recurring Gifts

Recurring Payments

Pledge

Pledge Payments

Gifts in Kind

Dayton Foundation Gifts

Endowments

An endowment is an invested gift that grows over time by accruing interest. There are three types of gifts related to endowments:

- donations given to establish an endowment,
- donations given towards an established endowment, and
- distributions from an established endowment.

While endowments are recorded within the development database they are reported on separately, regardless of how the endowment distributions are to be utilized.

Donations given to establish an endowment or towards an established endowment are not specific to a year. When they are entered into Salsa they are entered within the constituent record of whom made the donation under the

campaign of Endowment (see [Campaigns](#)). The fund to be used will match the name of the endowment (e.g., Suzy and Pino Bassani Endowment Fund). The appeal will change based on how/why the donation was made (see [Appeals](#)).

Endowment distributions are specific to a year. When they are entered into Salsa they are entered within the constituent record of the name of the endowment (e.g., Suzy and Pino Bassani Endowment Fund) under the campaign of Endowment (see [Campaigns](#)). The fund will reflect the area in which the gift is to be designated (see [Funds](#)). The appeal will be 20XX Endowment Distributions based on the year in which the gift is to be used (see [Appeals](#)).

Scholarships

There are three types of gifts related to scholarships:

- donations given to establish a scholarship,
- donations given towards an established scholarship, and
- distributions from an established scholarship.

While scholarships are recorded within the development database they are reported on separately, regardless of how the scholarship distributions are to be utilized.

Donations given to establish a scholarship or towards an established scholarship are not specific to a year. When they are entered into Salsa they are entered within the constituent record of whom made the donation under the campaign of Scholarship (see [Campaigns](#)). The fund to be used will match the name of the scholarship (e.g., Vanderbeek Scholarship Fund). The appeal will change based on how/why the donation was made (see [Appeals](#)).

Scholarship distributions are specific to a year. When they are entered into Salsa they are entered within the constituent record of the name of the scholarship (i.e. Vanderbeek Scholarship Fund) under the campaign of Scholarships (see [Campaigns](#)). The fund used will match the name of the scholarship (e.g., Vanderbeek Scholarship Fund). The appeal will be 20XX Scholarship Distributions based on the year in which the gift is to be used (see [Appeals](#)).

Campaigns, Funds, and Appeals

Campaigns, funds, and appeals allow the organization to categorize gifts in a meaningful way, permitting data to be easily analyzed and accessed. Muse Machine utilizes each of these categorizations in specific ways. **Each gift requires a campaign, fund, and appeal.** If you have a question as to the proper designation of a gift, consult the procedures manual or contact the Director of Development.

Campaigns

Campaigns are the large umbrella under which gifts are organized, representing the **overall objective for fundraising.** There is little variation in the use and number of campaigns. Each year a new annual campaign is to be created.

Name	Description
2019-2020 Annual	Gifts made towards FY 2019-20 and not attributed to a specific campaign effort. Generally encompasses all gifts, grants, and sponsorships used to help cover programmatic and operational expenses while more targeted campaigns focus on specific projects and causes.
Circle of Friends	Gifts made in response to campaign efforts to generate annual funding for four Dayton area middle schools.
Endowment	Donations given to establish an endowment or towards an established endowment.
The Endowment Campaign for Educator Excellence	Gifts made in response to campaign efforts to generate funds for teacher programs and trainings.
Scholarship	Donations given to establish a scholarship or towards an established scholarship.
Special Events	Gifts given in connection with a special event (i.e. Benefit Dinner, Social & Show, and other small community events).

Funds

Funds are the way in which the organization designates the financial purpose of the gift—it tells where the gift will be used and/or how the money will be spent.

Each gift requires a fund. If you have a question as to what fund should be assigned to a gift contact the Director of Development.

Name	Description
2020 Benefit Dinner	Gifts given in connection with the 2020 Benefit Dinner.
2020 Social & Show	Gifts given in connection with the 2020 Social & Show.
ATTS	Gifts made in support of Advanced Teacher Training Seminar (ATTS).
Preschool & Elementary Programs	Gifts made in support of preschool and elementary programs.
Secondary Programs	Gifts made in support of secondary programs.
Secondary Special Projects	Gifts made to special projects and performances (i.e. Feet Speak!, Making Art, Engaging Community).
Student Performance	Gifts made in support of student performances (i.e. winter musical and summer concert).
Summer Institute	Gifts made in support of the Summer Institute.
Unrestricted	Gifts made to general operating (i.e. not designated to a specific program area or special event).
Suzy and Pino Bassani Endowment Fund (one example)	Gifts made towards the Suzy and Pino Bassani Endowment Fund.
Vanderbeek Scholarship Fund (one example)	Gifts made towards the Vanderbeek Scholarship Fund.

Appeals

Appeals are the way in which the organization designates the source of the gift. Why is the donor giving? There is great variation in the use and number of appeals. Most reporting needs are based upon the appeal, so it is important to designate the correct appeal. Each event or appeal to the community will require a new appeal.

Name
2020 Circle of Friends
2020 Endowment Distribution
2020 MM31920 A
2020 Scholarship Distribution
BD Gift
BD Gold Tkt
BD Platinum Tkt
BD Silver Tkt
BD Sponsor
Board Giving
Company Payroll Deduction
Grant Application
In Honor of
In Memory of
Online Donation
Percentage of Sales
Personal Ask
Social
Social & Show
Social Gift
Sponsorship Proposal
Unsolicited

Donor Acknowledgement Letters