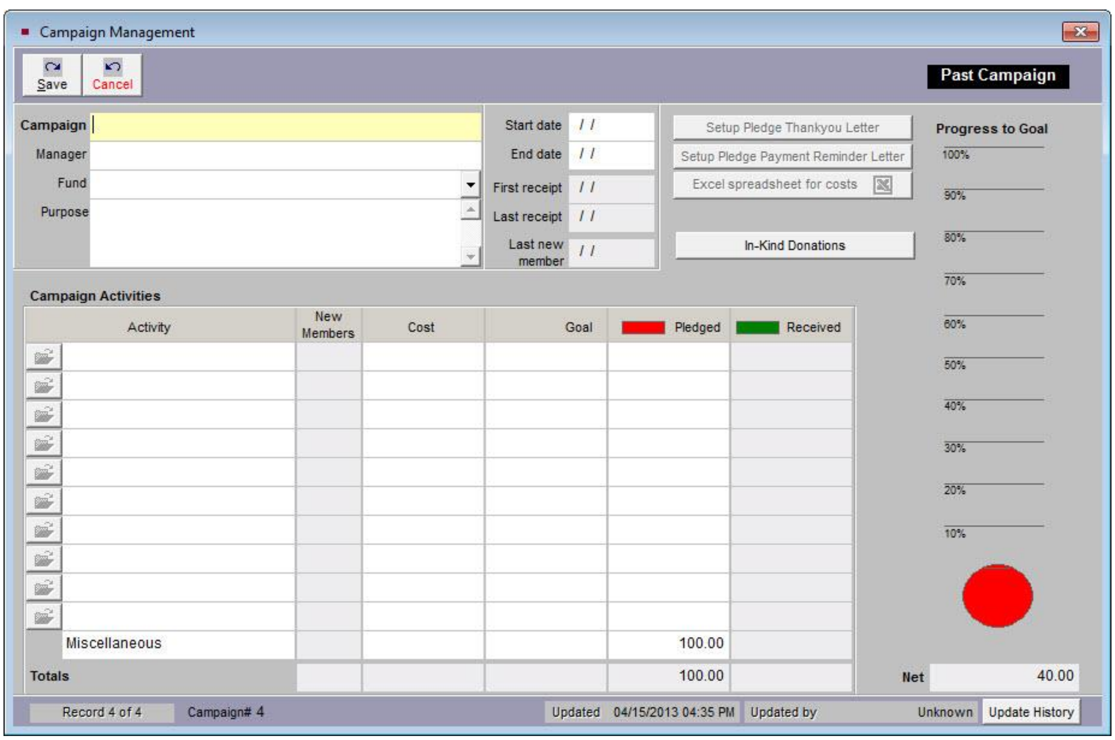
How do I set up a Campaign?
Version 4.0

1. From the Main Menu, click Campaigns.
2. Click Add at the top of the screen.
3. Fill in the Campaign, Start Date and End Date fields.
   Tip: The campaign will be set as an Active Campaign as long as today's date falls between the Start and End Dates. The campaign must be Active in order to enter pledges and post donations towards this campaign. Once the End Date has passed, the campaign will become a Past Campaign, and this campaign will not be available in the Campaign drop-down menu when adding pledges and donations.
4. Enter a Manager for this Campaign.
5. Choose a Fund that will be the default fund when entering a donation or pledge towards this campaign. If the fund you want is not included in the drop-down menu, you will need to go to Setup | Contacts | Donation Funds & Pledges to set up the new fund.
   Tip: If some donations should be credited toward a different fund, you can select that fund when entering the pledge or donation. You are not locked into using the fund chosen on this screen.
6. The Purpose field can be used to describe the goals of this campaign.



7. The First Receipt, Last Receipt and Last New Member fields will be filled in automatically when donations are received or new memberships are added as a result of the campaign.

8. If there are fundraising activities associated with the campaign, please enter them before posting any pledges or donations to the campaign. To enter a new Activity, simply type the activity name into the Activity field while in Edit mode. To add details about activities, click the file folder icon next to the Activity name after clicking Save.

Note: If there are no Activities added for this Campaign, or no Activity is chosen when posting a pledge, donation or new membership, the transaction will be recorded under Miscellaneous.

9. The New Members field will automatically be filled in with a count of members who joined as a result of the Activity. Be sure to choose the Campaign and Activity when entering new memberships so PastPerfect can fill in this field.
10. Enter the amount of the activity's cost to your organization in the Cost field.
11. Enter how much you hope to raise from this activity in the Goal field.
12. The Pledged and Received fields will update automatically when you enter pledges or donations associated with this campaign.
13. Click Save when you are finished entering information about this Campaign.

To change the Campaign name

1. The campaign name can be changed before you post any pledges or donations and before any memberships are created with this campaign name.
   Tip: If you change the name after you have entered pledges, donations or memberships, you will need to manually change the campaign name on each pledge, donation and membership.
2. Click Edit, and then click Change Name.
3. Click Save, and then click Save again.

Additional Actions

1. Click on Setup Pledge Thank You Letter and Setup Pledge Payment Reminder Letter to modify letters for this campaign.
   a. To set up the Default Pledge Thank You letter and the Default Pledge Payment Reminder letter (as a template for all future pledge letters), go to Main Menu | Setup | Contacts | Campaigns & Pledges.
2. If you have the MultiMedia Upgrade for PastPerfect, you can view a customizable Excel spreadsheet to track accounting and other information about each activity by clicking on Excel Spreadsheet for Costs.
3. Click on In-Kind Donations to view a list of all the in-kind gifts that you have associated with this campaign.
4. To see progress on the "Progress to Goal" chart on the right, please be sure that you enter Goals for your fundraising activities. The chart's red line shows how close the pledges total is to reaching the overall goal. The green bar shows the total donations' progress.

For more information on campaigns, please review Chapter 16 in your PastPerfect 4.0 User's Guide. If you have any questions, please contact our Support Office at 1-800-562-6080 or email support@museumsoftware.com. Thank you for using PastPerfect!