



Getting started guide

The purpose of this guide is to walk you through all of the steps to implement CharityMaster in your organization.

Install / reinstall CharityMaster

When you did your evaluation of CharityMaster, you probably installed it on a single workstation. Both the system and the back end data store and other back end files will have been installed on that computer. Now you must install it in the configuration that will enable you to use the system the way you want.

If you are going to use the system on a network, see the “How do we move our database to a new location?” FAQ under the Support Menu on our web site.

Note that each workstation must have Microsoft Word installed and, if that workstation will be used to send e-mails, it must be connected to the internet.

Keep a copy of the demo data for training

Your data are stored in a “back end” database file called **charitymaster_be.accdb**. When you installed CharityMaster on each machine, this file and all of the Word templates were installed in the **C:\CharityMaster** folder. Some organizations have decided to store the back end data and Word templates on a server or on a computer on the network where the back end is shared by several workstations.

If you want to keep a copy of the demo data, make a copy of **charitymaster_be.accdb** and save it in the same folder but with a new name such as *charitymaster_demo.accdb*.

If you want one of your workstations to start using this file, open CharityMaster and press the {F12} function key. Navigate to where *charitymaster_demo.accdb* is stored and click on *charitymaster_demo.accdb*. Then press **Open**. You can now start entering data into the demo system. When you are finished with the training, you can use the {F12} function key to point CharityMaster back to the **charitymaster_be.accdb** file.

Data conversion

There are many approaches to converting your existing data. Ideally you should try and convert *all* of your existing donors, members, etc. and their donation history into CharityMaster. Depending on the system you are currently using, this may not be possible – or even desirable. Based on how your existing data are stored, we may be able to load some or all of the data into your new system. At the least, you

should aim to transfer the demographic data of all of your existing supporters.

Pick a logical changeover date. Either the end of a calendar year or your fiscal year end are good choices. Use your old system to record all donations, etc. right up to the changeover date. Make sure everything balances with your accounting system. Then start using CharityMaster for all new entries.

Make an archive copy (on a CD or DVD) of all of your old data. Make sure that you keep the install disk of the program that you have been using to date (and all related manuals) or, if the program you have been using was custom developed for your organization, copy the program file(s) onto the same disk as your data files. Remember that, several years from now, you may have to go back to research some particulars. Of course, if you have a paper copy of *everything* (including income tax receipts you have issued), then this step is not that important.

In many cases, we will be able to convert much of your existing data for you. In this case, we will send you by e-mail the CharityMaster back end data store. Save this file *in place of* the **charitymaster_be.accdb** file that was created when you installed the demo of CharityMaster – in other words overwrite the existing file. If we have converted your data for you, proceed to the “Next steps” section below.

No data conversion necessary or possible

Before you start using CharityMaster, you should clean out all of the sample data that were included when you installed CharityMaster. Proceed as follows: start CharityMaster and then press the **Ctrl** and **F12** keys together. The **Delete all data** screen will appear. Enter the password “Wizard” and then click the **Empty tables** button. All of the demo data including the entries in all of the configuration tables will be deleted leaving just the minimal data required to start the system.

The password for this process should be carefully protected because you don’t want some user using this feature to delete all your data at some point in the future.

Next steps

1. Start CharityMaster. Each of your computers will require a license key that is specific to that computer. Follow the instructions in the ReadMe file that was installed with CharityMaster to obtain a license key for each computer. (Click the Start button and look for the Readme file in the CharityMaster folder.)
2. Some organizations have decided to store the back end data and Word templates on a server or on a computer on the network where the data file is shared by several workstations. When you installed CharityMaster, the main data file **charitymaster_be.accdb** and all of the Word templates were installed in the **C:\CharityMaster** folder. If you are going to be using CharityMaster on a network in your office, you must now *copy* all of the “back end” files to the server. Then, with CharityMaster open, press the {F12} function key, navigate to where **charitymaster_be.accdb** is stored and click on **charitymaster_be.accdb**. Then press **Open**. CharityMaster will establish a link to all of the tables in the back end data store and then close. Reopen CharityMaster and check that the system is “pointing” to the correct file by clicking on the **About** button on the **Home** tab.
3. On the **Setup** tab, click **System Setup**. Enter all of the required data for your organization and review each of the tabs on this screen to ensure the system is set appropriately. Press **F1** on each tab to display the help system to get instructions on what to enter.

4. Set up the system security. Start by reviewing the “Overview” topic in the help file. (Press F1 and look in the table of contents for “System security.”) On the **Setup** tab, click **Security**. Add users and assign each user to a security group as appropriate.
5. On the **Setup** tab, click **Setup tables** then click **General** then click **Letter signatories** and the **Maintain list of signatories** screen will appear. Enter the names and titles of all people who will be signing individual letters. (At least one person.)
6. If you have purchased the optional QuickBooks interface module, you should set up the interface now. Carefully review the topic “Set up CharityMaster’s interface to QuickBooks” topic in the help file before you proceed since you may wish to relocate the QuickBooks company file. (Press **F1** to display the help.) On the **Setup** tab, click **User options** and enter the required settings to connect to QuickBooks.
7. On the **Setup** tab, click **Setup tables** then click **Sponsorships / donations** then click **Sponsorship types** and the **Maintain sponsorship types** screen will appear. Press **F1** for instructions on how to proceed. This setup will apply to all workstations. Note that if you have purchased the QuickBooks module, the QuickBooks interface must have been activated before you perform this step.
8. (This step is required only if you have purchased the QuickBooks module and have activated the interface as detailed above.) On the **Setup** tab, click **Setup tables** then click **General** then click **Payment methods** and the **Maintain payment methods** screen will appear. Press **F1** and follow the instructions in the help file to relate the various payment methods to the QuickBooks payment methods.
9. There are a number of other tables that you will have to update to suit your organization. These do not have to be set up right away so a checklist is attached to help you be sure everything has been considered.

On each workstation

After you have set up the first workstation, you must do a CharityMaster install and setup on each workstation on your network that will be using CharityMaster. Proceed as follows:

1. Install then start CharityMaster. Each of your computers will require a license key that is specific to that computer. Follow the instructions in the ReadMe file that was installed with CharityMaster to obtain a license key for each computer. (Click the Start button and look for the Readme file in the CharityMaster folder.)
2. “Point” CharityMaster to the location of the “back end” files. See step 2 above.
3. If you have purchased the QuickBooks interface module, you must start QuickBooks before you take the next step. On the **Setup** tab, click **User options** and enter the required settings to connect to QuickBooks.
4. When you have finished, all of the setup steps, we suggest that you immediately make a backup copy of **all** of the files in the “back end” folder. This will include your data store (the charitymaster_be.accdb file), and all of the Word templates (*filename.dot* files) that you have customized. At this time, you should also set up a reminder or a system to back up all of the files in

this directory on a regular basis. (We recommend daily.)

Configuration checklist

The following is a listing of all of the setup tables in CharityMaster that you may have to customize for your organization at some point. All of these tables are shared by all workstations.

You may wish to leave these until you come to use the related CharityMaster feature for the first time.

General

- Entity types
- Name categories
- Prospect / communication flags
- Name titles
- Notes subjects
- Payment methods
- Letter signatories
- Country list

Sponsorships / donations

- Sponsorship types
- Sponsorship sources
- Designated sponsorships
- Donor category table

Events

You cannot record the sale of any event tickets until you have set up at least one event. On the **Home** tab, click **Event Manager**. On the **Event Manager** screen, click the **Add Event** button and the **Add Event** screen will appear. Press F1 to get full instructions for the completion of this screen.

Volunteers (if module activated)

- Volunteer preference flags
- Qualification list

Performing arts (if module activated)

- Concerts: season parameters
- Concerts: ticket package parameters

Memberships (if module activated)

- Memberships: categories
- Memberships: GL accounts

Store management (if module activated)

- Setup
- Maintain categories
- Maintain items
- Maintain units of sale

You should also consider whether or not to create some of the templates that you will be using for individual letters and mail merges. Select **File | Maintenance | Templates** and either of the following to add custom templates to CharityMaster:

- Individual letter templates
- Mail merge templates