

# How to do Expense Tracking in Sage Fundraising 50



Article: 106242 from Sage NPS Knowledge base  
This article applies to: Sage Fundraising 50 – all versions

## Question

How does Fundraising 50 track expenses for campaigns?

## Answer

Fundraising 50 associates expenses with a Solicitation code. To track any expense, you must link every Solicitation to a Campaign. Then, you can use Fundraising 50's Campaign Overview.

This feature allows you to see complete, up to the minute information on your Campaigns, Solicitations, Funds and Purposes without the need to run a financial report. This feature provides an ideal way for Executive Directors, Fund Managers, Solicitation Managers, and others to monitor progress on a daily basis.

## To create an expense:

1. From the Navigator column select Campaign

The screenshot shows the Sage Fundraising 50 interface. The top navigation bar includes 'Sage Fundraising 50', 'File', 'Module', 'Navigator', 'Campaign Card', 'Administration', 'User', 'History', and 'Help'. The main header displays 'SAGE FUNDRAISING' and 'sage software'. Below this, there is a 'Navigator' sidebar on the left and a 'Campaign Overview' section on the right. The 'Campaign Overview' section has two tabs: 'Campaign' (selected) and 'Solicitation'. It also has two radio buttons: 'Campaign Data' (selected) and 'Fund Data'. A table is displayed with the following data:

Campaign	Abbrev.	Group	Goal	Start Date	End Date
→ 01 Annual Campaign	01AC	A	\$400,000.00	01/01/01	12/31/01
02 Annual Campaign	02AC	A	\$500,000.00	01/01/02	12/31/02
03 Annual Campaign	03AC	A	\$600,000.00	01/01/03	12/31/03
04 Annual Campaign	04AC	A	\$650,000.00	01/01/04	12/31/04
05 Annual Campaign	05AC	A	\$675,000.00	01/01/05	12/31/05
05-09 CC	09CC	C	\$40,000,000.00	01/01/05	12/31/09


2. Select the Campaign you are interested in.

3. Amounts related to the campaign will display (see note for explanation).

Campaign Data    Fund Data

Campaign   Solicitation

Campaign: <b>01 Annual Campaign</b>	Start Date: <b>01/01/01</b>
	End Date: <b>12/31/01</b>
Goal: <b>\$400,000.00</b>	
Total Committed: <b>\$131,869.00</b>	Percent of Goal: <b>32.97%</b>
Remaining: <b>\$268,131.00</b>	
Gifts and Payments: <b>\$131,869.00</b>	
Pledges Due: <b>\$0.00</b>	
Number of Donors: <b>433</b>	
First Gift: <b>01/01/01</b>	
Last Gift: <b>11/30/01</b>	
Largest Gift: <b>\$50,000.00</b>	
Average Gift: <b>\$253.11</b>	

 Hierarchy Report

**Campaign Summary Report**

**Note:** This card displays up to the minute information for this specific campaign. (It may take a few seconds for Sage Fundraising 50 to display this card, as it completes online calculations.) Some information ( Start Date, End Date, and Goal) i is entered in the Campaign Table when this campaign was set up. Other information: Total Committed, Percent of Goal, and Gifts and Payments is calculated with this feature by Fundraising 50.

Notice the Hierarchy Report icon at the lower left of the card. If you are using the Campaign Hierarchy feature to track this campaign, you can quickly view and print a Campaign Hierarchy Summary right from this card by clicking the icon.

	<u>Amount</u>	<u>Donors</u>		
Goal:	<b>\$400,000.00</b>			
Total Committed:	<b>\$131,869.00</b>	<b>433</b>	Average Committed Gift:	<b>\$253.11</b>
Gifts and Payments Received:	<b>\$131,869.00</b>	<b>433</b>	Average Dollar Per Donor:	<b>\$304.55</b>
Outstanding:	<b>\$0.00</b>	<b>0</b>	Percentage of Goal Met:	<b>33%</b>
Remaining:	<b>\$268,131.00</b>		Gifts Required to Meet Goal:	<b>1,059</b>

4. Select the Solicitation tab. Fundraising 50 displays the solicitations for the campaign you selected.  
Click on the solicitation for which you would like to track expenses.



Campaign Data     Fund Data

**Campaign**    Solicitation

Solicitation: <b>01 Gala on the Green</b>		Date Sent: <b>04/15/01</b>
Number Sent: <b>350 (321 From Sage Fundraising)</b>		
Responses: <b>108</b>	Response Rate: <b>30.86%</b>	
Gifts and Payments: <b>\$45,935.00</b>	Cost Per Dollar Raised: <b>\$0.49</b>	
Pledges Due: <b>\$0.00</b>		
Total Committed: <b>\$45,935.00</b>		
Total Expenses: <b>\$22,591.50</b>		
Net Income: <b>\$23,343.50</b>		
Goal: <b>\$55,000.00</b>		
First Gift: <b>05/10/01</b>	Largest Gift: <b>\$1,500.00</b>	
Last Gift: <b>05/31/01</b>	Average Gift: <b>\$425.32</b>	

**Campaign Summary Report**

**Note:** This card displays up to the minute information on this specific Solicitation. Some information (Number Sent and Goal) was entered in the Solicitation table when this Solicitation was set up. Other information (Gifts, Payments, Pledges Dues, Total Committed, Total Expenses, and Net Income) is calculated with this feature by Fundraising 50.

	Amount	Donors		
Goal:	<b>\$400,000.00</b>			
Total Committed:	<b>\$131,869.00</b>	<b>433</b>	Average Committed Gift:	<b>\$253.11</b>
Gifts and Payments Received:	<b>\$131,869.00</b>	<b>433</b>	Average Dollar Per Donor:	<b>\$304.55</b>
Outstanding:	<b>\$0.00</b>	<b>0</b>	Percentage of Goal Met:	<b>33%</b>
Remaining:	<b>\$268,131.00</b>		Gifts Required to Meet Goal:	<b>1,059</b>

- From the Navigator Column select Expenses. You can add an expense by clicking the New Expenses button. Then enter in a date, and expense amount, and expense type, and a note (optional). Click Save Changes and repeat as necessary.

Campaign Data     Fund Data

Campaign     Solicitation

Solicitation Expenses For: 01 Gala on the Green

Date	Amount	Type	Note
06/15/01	\$10,000.00	Greens Fees	
06/14/01	\$1,080.00	Food	
06/09/01	\$4,000.00	Auctioneer	
06/07/01	\$5,000.00	Facility Rental	
05/17/01	\$1,500.00	Band	
04/30/01	\$136.50	Postage	
04/27/01	\$875.00	Printing	

**Note:** Before you can add an expense under Type, the expense must be added in the Expense Type Table in Table Maintenance.

**Campaign Summary Report**

	Amount	Donors		
Goal:	\$400,000.00			
Total Committed:	\$131,869.00	433	Average Committed Gift:	\$253.11
Gifts and Payments Received:	\$131,869.00	433	Average Dollar Per Donor:	\$304.55
Outstanding:	\$0.00	0	Percentage of Goal Met:	33%
Remaining:	\$268,131.00		Gifts Required to Meet Goal:	1,059

7. Once you are finished adding expenses, you can select the Solicitation option from the Navigator column to return to the Solicitation card. Click on the Table button on the lower right to choose another Solicitation or make any selection from the Navigator column to return to other areas in Fundraising 50.