Lesson 12 –

The Donor Trophy Program in Extension Database (ED)

In this lesson, you will learn how to:

- Enter donor information in the Extension Database
  - As Administrator
  - General User
- Enter the Setup data
- Enter a donor record
- Edit a donor record
- Delete a donor record
- Print out donor labels
- Print out donor reports

Richard, check out the Trophy Shop button in the Donor Print Outs screen. It appears to me it does not list the trophy shops. It displays the same report as the Group/Category.
The Donor section of the Extension Database (ED) is used to keep track of trophies for any project that has a sponsor. Trophies are anything from banners, bowls, plaques, statuettes and most generally has a tag of some sort attached with text describing the date and why this trophy was awarded. As with anything you must purchase these trophies and this section keeps track of the people and money who donate such money. You can also use this section to keep track of manuals that need to be purchased and have sponsors that help with the purchase of such manuals.

Opening the Donor Setup Screen

To display the Donor Setup screen press the Setup button from the Main Menu then select the Donor button.

NOTE:
- The Group fields assigns all Like projects the same group number. The data you enter here becomes a drop down list on your Donor General screen. You have a numeric
field and an alpha/numeric description field. For example, you have Grand Champion Steer, Reserve Grand Champion Steer, Champion Crossbreed Steer and Champion Charolais Steer. So, you could assign them the same Group Number off 100 and Beef as the description field.

- The **Award Type** is a mandatory 2 digit numeric field along with an alpha/numeric description field. The data you enter here becomes a drop down list for the type of trophy on your Donor General screen. For example, the trophy type bought could be a Plaque, Small Statuette, Large Statuette, Bowl – Silver, Bowl – Bronze, or Champion Trophy.
- The **Category** field is used to further explain the type of Award and is an *optional* field. The data you enter here becomes a drop down list for the type of trophy on your Donor General screen. For example you may want the Bronze Bowl award to only go the 6 – 10 year olds in the Haltered class.
- The **Description** field is the text you want engraved on the trophy.
- The **Amount** field is the price of the trophy.
- The **Year** field is used for the automatic fill-in of the trophy price and used when the **Update Year Pricing** button is clicked.
- The **Pull down list** Yes/No option indicated whether or not you want this trophy information to show on the pull down list(s) when entering data in the **Donor General** screen.

### Entering a New Record in the Setup Screen

As with all screen you need to check to make sure the record you wish to enter into the database in not already created. Make sure you use the **Find** button to check for such records and if you do not find the record complete the steps below.

1. Click on the **New** button.
2. Click on the **Group** field to select a numbered option. Click on the number field if it is available. If it is not listed then:
   a. Press the **ESC** key to get rid of the pull down list and display a blank field. (You can also click on the field to close the pull down list).
   b. Enter in a **unique number** from 100 to 999 and press the **Tab** key.
3. Click on the **Group Description** field and enter text that best describes this group description. This field will be outlined with grey dotted lines.
4. Select the **Award Type** by clicking on a number in the **Award Type** field if it is available. If it is not listed then:
   a. Click on the **Next Award Type #** button to select the next available number. You will get a few confirmation messages.
   b. Click on the **Yes** button on these messages until the new number is displayed in the field.

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5. Click on the **Award Type Description** field and enter text that briefly describes this award, i.e. Grand, Reserve, or Reserve Champion. This field will be outlined with grey dotted lines.

6. Select the **Description** field and enter a description of this award. If it is not listed then:
   a. Press the **ESC** key to get rid of the pull down list and display a blank field.
   b. Enter a Description that best described this award.

5. Select the **Category** field and enter a description of the category for this award to further describe this award. This is an optional field. For example, you may have a couple of Grand Champion Steer awards but this one is for 12 to 18 years only. You can enter 12 to 18 years in this Category field. If a category is not listed and you want to use this field then:
   a. Press the **ESC** key to get rid of the pull down list
   b. Type in the new description.

6. Enter a **cost** figure in the Amount field. This is the amount needed to purchase the award.
7. The **current year** is entered automatically in the Year field. You can change this if need be by clicking in the field and typing in the year change.
8. Select **Yes** if you want this record to show on the pull down list otherwise select **No**.
9. You can repeat the above steps for another setup record or press the **Back** button to return to the previous screen.
10. Click on the **Main** button to return to the Main Menu or on the **Back** button to go to the General Donor screen.

**NOTE:**
Making changes to the setup record does not change any trophy records that have previously been enter. Once you have your trophy sponsors entered on this setup screen, you shouldn’t change any of these records. after you start entering data into the Donor General screen. If you need to make changes on this screen then you must go back to the records you entered prior to the change, reselect them and correct the changes.

When you have completed entering records in the set up screen you can begin to enter data in the Donor General screen.
The Donor General Screen

As with most sections of ED you will have a general info screen. The Donor General screen is used to enter data on any person or company who chooses to sponsor an award for your county.

Keep in mind:
- This information is the same as in all of the other general info screens.
- So if you make a change here it will show on all of the other General info screens within ED.
- It is important to always do a Find for a person before creating a New record.

To access the Donor General Screen select the Donor button from the Main Menu.

NOTE:
- The Info button will go to the Donor Info screen and display the trophy records this particular person is sponsoring.
- The Check button will go to the Check Info screen and display the financial records for this sponsor.

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The Donor Info Screen

NOTE:

- The function of the Main, Print, Setup Labels, Find, Sort, New and Delete buttons remain the same as other ED screens.
- The Trophy Sponsor Name field is a new field displaying information on the person sponsoring the trophy item. You need to enter text exactly how you want the information to be displayed. This information can be printed on the trophy, any banner, or the show program.

Entering a new record

1. First scroll the Trophy records to make sure you do not already have a record for this sponsor this year. The scroll bar is located to the right of the white record area.
2. Click on the New Trophy button to display a blank record with the current date displayed.
3. Click on the number field under Group and select a group from the drop down list.
4. Click in the Award Type field and select an option from the drop down list. When you make a selection the Award description will be displayed also.
5. The Qty field displays the quantity of awards the sponsor funding for this type of trophy.
6. Enter the cost of one trophy in the Amount field.  
   - The Total will automatically calculate for the total field if you have more than one total.
   - The Trophy Year Total will be automatically displayed directly below the Last name field. This figure displays the total of all trophies’ this sponsor has funded this year.
7. The Trophy shop field displays the name/location of the business where you purchase the trophy.

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If the shop is not in the pull down list, then press the ESC key and type in the shop name field and type in the name. The shop will now show up in the pull down list for future records.

8. The **Class link** field is for the Fair section of ED. If you link this entry to a class using this field then you can ask for this sponsor’s information to be printed on the show program. This will be discussed in the show program section.

9. The **Trophy** and **Category** drop down lists are dependent upon what group you selected. This is why you must first select a group. Click on each to select an option from their drop down list.

10. Repeat the above steps for any other trophy group this sponsor will be funding.

When you are finished entering trophy data you can do one of the following:

- Click on the **General Info** button to return to the Donor General screen.
- Click on the Check button to display the Check screen.
- Click on the Main, Print, Setup or Labels button to display their respective screens.

For this document let’s go ahead and click on the **Check** button to display the Check screen.
The Check Info Screen

The Donor check (Check Info Screen) is where we keep track of the money this sponsor has paid or not paid. The only field that needs to be explained on this screen is the Donor/Manual entry. Since both the Inventory and Donor takes in money then the check screen has to handle both. You just need to tell ED which area this check goes and this screen keeps track of the check.

NOTE:
- The function of the Main, Print, Setup Labels, Find, Sort, New, Back, and Delete buttons remain the same as other ED screens.
- The Check Year manual total and Check Year Donor Total are automatically displayed on the screen. These figures are based on the total entered on the Donor Info screen.
Entering a New Record

1. Click in the Year field and type in the four digit current year.
2. Click in the Type field and enter the method of payment. For example, this sponsor will pay by check so select “check”.
   - If the method of payment is not listed, scroll and select the “Edit… “ option. When the Edit Value List window appears, press the return key to place the cursor on a blank line and type a brief description for the method of payment. Click the OK when finished.
3. Type the Check # or any identifying info in the Check # field.
4. Type in the amount paid in the Amount field.
5. Select either the Donor or Manual option.
   - Depending upon which option you choose you will notice that amount is automatically added to the Check Year Total field and other total fields on this screen.
   - The Donor/Manual option also allows you to enter more records if the sponsor should happen to make installments or alter the method of payment on paying for his/her trophy/awards. For example, the next record could pay another $25.00 and it would be in cash.

When you are finished entering trophy data you can do one of the following:

- Click on the Back button to return to the Donor General screen. Or,
- Click on the Main, Print, Setup or Labels button to display their respective screens.

For this document let’s go ahead and click on the Back button to display the Donor Info screen.
Donor Print outs

To display the Donor Print outs screen select any **Print** button, select the Donor button, Complete a Find then select the Print Outs button.

- In order to print out Donor information you will first have to find the records you wish to work with before going to the Donor Print outs screen.
Printing a Donor Report

1. Click the **Print** button from the Donor General screen.
2. Click the **Donor** button to display the Donor find/Options screen.
3. Click the **General Find** button to display the Trophy find screen
   - Notice that you are automatically put into the *find* sequence.
4. Select a **project** from the drop down list in the Group field.
5. Enter the **current year** in the Year field.
6. Click on any of the other fields if you want to include them in the find sequence. This step is optional.
7. Click on the **Continue** button.
8. Click on the **Print Outs** button to display the Donor Printout screen.
   - The *General* button prints a report on general trophy data.
   - The *Award* Type button prints an Award Type report.
   - The *Group/Category* button displays each Group/Category for a report.
   - The *Trophy Shop* button displays a report on all trophy Shops found.
9. Click on the **File, Print** menu buttons to print out your report.

Click on the Main button to return to the Main Menu. Or, Click on the Back button to return to the Extension Database Print Outs screen.
To Print Checks

To display the Check print out screen select any **Print** button, select the **Check** button, Complete a Find then select the Print Outs button.

- In order to print out Donor information you will first have to find the records you wish to work with before going to the Donor Print outs screen.

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Printing a Check Report

10. Click the Print button from the Donor General screen.
11. Click the Check button to display the Donor find/Options screen.
12. Click the General Find button to display the Trophy find screen
   ❖ Notice that you are automatically put into the find sequence.
13. Enter the current year in the Year field.
14. Click on any of the other fields if you want to include them in the find sequence. This step is optional.
15. Click on the Continue button.
16. Click on the Print Outs button to display the Donor Printout screen.
   ❖ The By Name button prints a report sorted by name.
   ❖ The By Date button prints report sorted by the Date.
17. Click on the File, Print menu buttons to print out your report.