

Tips for Creating a Good Coding System

DonorPerfect Online

SofterWare, Inc.
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Introduction

User-defined codes are extremely important in DonorPerfect Online because they help ensure consistency in the way information is stored in the database. Moreover, this consistency facilitates the effective use of filters and sorts, which are critical to the operation of DonorPerfect Online.

Indeed, it would be very difficult to make any sense of the information in your database if it lacked a high degree of consistency. Imagine, for example, what would happen if the description that is entered into the Solicitation field in the gift record were left up to the whim of each data entry person. It is very likely that a wide variety of terms would be used to describe the *same* fund raising event. Then imagine how confusing the resulting Solicitation Analysis report would be. It is to avoid exactly this type of confusion that DonorPerfect Online uses codes.

A code is a pre-defined, systematic and concise way for representing information that is repetitively used. An example of a code we all use frequently is the two digit state code that the post office insists that we put in mailing addresses. By default DonorPerfect Online uses the exact same set of codes in the State field found on the Main screen.

DonorPerfect Online employs user-defined codes in a wide variety of fields. For example, there are codes to represent:

- Each of your fund raising solicitations (e.g., Annual Appeal, Banquet, Golf Outing, Phonathon, etc.). These codes are used in the **Solicitation** field (field name = solicit_code).
- Each of the accounts toward which donations are directed (e.g., Building Fund, Education, Unrestricted, etc.). These codes are used in the **General Ledger** field (gl_code) in the Gift and Pledge entry screens.
- Each of the types of acknowledgment/receipt letter that need to be produced (e.g., Standard Acknowledgement, Pledge Payment Thank-You, New Member Thank-You, etc.) These codes are used in the **Thank-You #** and **Thank You Letter** fields (ty_letter_no) in the Gift and Pledge entry screens, respectively.
- Each of the many descriptors used to explain the relationship of a donor to your organization (e.g., Board Member, Volunteer, Alumnus, etc.). These codes are used in the **Flags** field (flag) in the Main screen.
- Each of the types of gift that must be recorded (e.g., Cash, Check, In Kind Gift, etc.). These codes are used in the **Type of Gift** field (gift_type) in the Gift Screen.
- And many many more items of information.

General Considerations

There are several issues that you should consider as you define codes for your system.

Plan Ahead

When establishing your system of codes, it is a good idea to try to anticipate what your future needs may be. That would lean towards having somewhat longer codes, even when a shorter code length would work initially. For example, if you choose a single numeric character as your code, you will be restricted to only ten codes (i.e., 0, 1, ..., 9). If subsequently you needed to define more than ten codes, you would have to expand the code length. However, if you initially choose a two digit numeric, you would have 100 codes to use before needing to expand.

An additional value to having longer codes, especially those that are alphabetic, is that longer codes can be made a bit more intelligible to the humans that interface with the system.

Finally, it is helpful if all the codes for a given field use the same number of characters. Thus, by anticipating the number of codes you will need and the information they will have to represent, you can plan for a code length that will satisfy those needs.

Regularly Maintain Codes

It is natural that the number of codes in your system will expand with time. This can happen, for example, if the codes you define for solicitations that are repeated annually include characters that identify the year of the particular solicitation, such as BQ04, BQ05, etc. for the annual fund raising banquets in 2004, 2005, etc. After a while, the number of the entries in the **Solicitation** pull-down menu can increase to the point where unnecessary delays and possible mistakes are introduced into the data entry process.

Thus, if you are no longer using a code and don't want it to get in the way of data entry, make it *inactive* as discussed below. It is a good idea to regularly review the frequently used codes (e.g., `solicit_code`, `gl_code`, `flag`, etc.) in your system to determine which ones can be made inactive.

Indeed the code definition itself, which is also discussed below, enables you to set up a date after which the code will be automatically set to *inactive*. Thus, when you are creating a new code, if you can reasonably anticipate when that code will no longer be needed, set the inactive date appropriately.

Note that a code that has been tagged as *inactive* will still appear in the donor records and in reports, but not in the pull-down menus and other selection screens.

Managing Codes in Your System

Because the user-defined codes in your system are critical to ensuring the consistency of your data, you'll need to manage them over time to make sure they are up-to-date and accurate. Managing your codes involves adding new codes and editing, inactivating or deleting existing codes in the Code Maintenance screen as shown below in Figure 1. The Code Maintenance screen is accessed by clicking the **Settings** button in the Navigation Bar and **Code Maintenance** in the Settings menu.

The screenshot shows the 'Code Maintenance' interface. At the top, there are controls for filtering and saving: 'Show only' (set to '(Show all fields)'), 'Go', 'Export to Excel', 'Share code with' (set to '- NO FIELD SHARED -'), 'Reciprocal Relationship?' (unchecked), and 'Save'. Below these is an 'Add' button. The main part of the screen is a table with columns: Field Name, Code, Description, Inactive, and a 'Delete' button with a checkbox. The table lists various codes such as ACCT_NUM (14-4000 to 14-4500) and ACTIVITY_CODE (CD, CS, EI).

	Field Name	Code	Description	Inactive	
Edit	ACCT_NUM	14-4000	Unrestricted	N	Delete <input type="checkbox"/>
Edit	ACCT_NUM	14-4030	Education	N	Delete <input type="checkbox"/>
Edit	ACCT_NUM	14-4050	Membership	N	Delete <input type="checkbox"/>
Edit	ACCT_NUM	14-4060	In Kind Donation	N	Delete <input type="checkbox"/>
Edit	ACCT_NUM	14-4100	Outreach	N	Delete <input type="checkbox"/>
Edit	ACCT_NUM	14-4200	Scholarship	N	Delete <input type="checkbox"/>
Edit	ACCT_NUM	14-4500	Building Fund	N	Delete <input type="checkbox"/>
Edit	ACTIVITY_CODE	CD	Call DonorPerfect	N	Delete <input type="checkbox"/>
Edit	ACTIVITY_CODE	CS	Sales: 800-220-8111	N	Delete <input type="checkbox"/>
Edit	ACTIVITY_CODE	EI	Email In	N	Delete <input type="checkbox"/>

Figure 1. Code Maintenance Screen

Searching for Codes for Specific Fields

You can search for the codes used in specific fields (e.g., GL, Activity) in your system.

► **To search for codes for specific fields**

1. Select the field/screen whose codes you want to display from the **Show only** pull-down menu of the Code Maintenance screen (Fig. 1) and, click **Go**. (To see a list of all fields/screens, leave the default, “Show all fields,” in the **Show only** field.)
2. The system will display all the codes for the selected field as shown below in Figure 2 for the GL field. You can sort by any of the columns by clicking on the column heading. To return to displaying all the codes, select “Show all fields” in the **Show only** field and click **Go**.
3. To export a list of the displayed codes including the detailed definition of each code and information on when it was created and modified, click **Export to Excel**. The system will create the dpexport.xls file which can be opened in Excel. An example of dpexport.xls is shown in Figure 3 below.

Note: Dpexport.xls contains columns for *all* of the fields that could be present in any code definition. Thus, you may see columns for fields, such as “mcat_hi,” “mcat_lo,” and “mailed” shown in Figure 3, that do not pertain to the particular field whose codes you have exported.

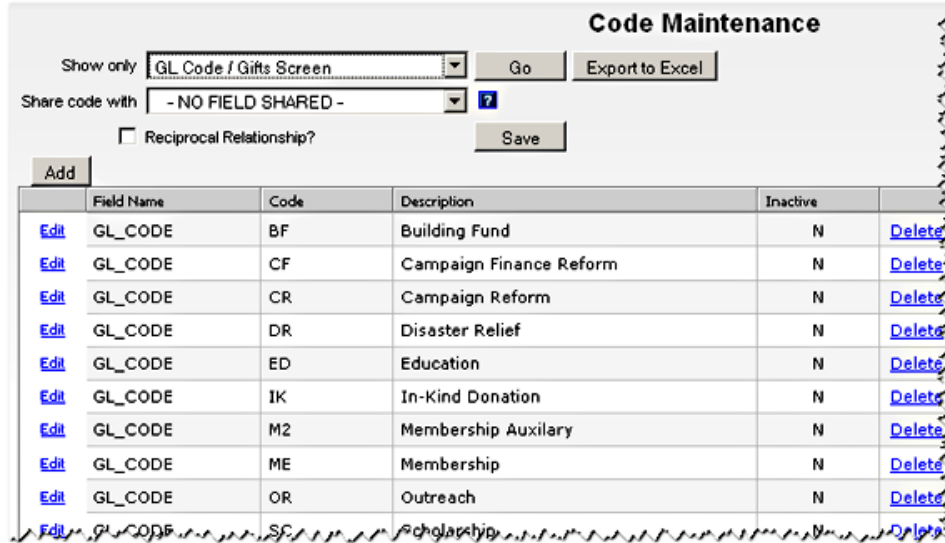


Figure 2. Code Maintenance Screen for the GL Field

	A	B	C	D	E	F	G	H	I	J
1	code	description	field_name	mcat_hi	mcat_lo	mcat_gl	reciprocal	code_date	mailed	pr
2	BF	Building Fund	GL_CODE	0	0	N				0
3	CF	Campaign Finance Reform	GL_CODE	0	0	N				0
4	CR	Campaign Reform	GL_CODE	0	0	N				0
5	DR	Disaster Relief	GL_CODE	0	0	N				0
6	ED	Education	GL_CODE	0	0	N				0
7	IK	In-Kind Donation	GL_CODE	0	0	N				0
8	M2	Membership Auxiliary	GL_CODE	0	0	Y				0
9	ME	Membership	GL_CODE	0	0	Y				0
10	OR	Outreach	GL_CODE	0	0	N				0
11	SC	Scholarship	GL_CODE	0	0	N				0
12	SEE_SPLIT	See Split for Detail	GL_CODE	0	0					0
13	TEST	test	GL_CODE	0	0	N				0
14	TR	Transportation	GL_CODE	0	0					0
15	UN	Unrestricted	GL_CODE	0	0	N				0

Figure 3. Dpexport.xls Example

Adding Codes

You can easily add codes to your system. For example, if you will be sending out a new mailing or have started a new committee, you may need to add a new code.

► To add codes

1. Click **Add** on the Code Maintenance screen (Fig. 2) to display the screen for adding (or editing) a code, as shown below for a new Solicitation Code in Figure 4.

The screenshot shows a web form for adding a solicitation code. The fields are as follows:

- Field Name:** Solicitation Code (dropdown menu)
- Code:** BQ09 (text input)
- Description:** Banquet 2009 (text input)
- Comments:** Banquet is on 12/5/09. (It's black tie this year!) (text input)
- Inactive:**
- Begin Date:** (empty text input)
- End Date:** 12/31/2010 (text input with calendar icon)
- Total Mailed:** (empty text input)
- Printing Costs:** \$0.00 (text input)
- Other Costs:** \$0.00 (text input)
- Goal:** \$0.00 (text input)
- Date:** (empty text input with calendar icon)
- Campaign:** Capital Campaign (dropdown menu)
- Save:** (button)

Figure 4. Add Code Screen for Solicitation Codes

Complete the fields as needed. If you entered a field name in the **Show only** field on the Code Maintenance screen prior to clicking **Add**, that field will be displayed in the **Field Name** field. Otherwise, select the appropriate field name.

Enter the new **Code** in a format that is consistent with that of the existing codes for this field. Such consistency will facilitate more effective sorts and reports.

Set the new code as **Inactive** if you don't want it to appear in selection menus until some later time. At that point you can reset **Inactive** and the code will appear.

Alternatively, you can specify the **Begin Date** and **End Date** of the date range during which the code will be active. If don't enter a **Begin Date**, the new code will be active as soon as it is saved. If you enter an **End Date** while you are creating the code, you will not have to remember to go back at a later time to set it as **Inactive**.

Some codes, including those for the Solicitation field shown in Figure 4, may have additional information that can be completed. (The **Total Mailed**, **Goal**, and other additional fields in the definition of the Solicitation code are used to hold information that is used in the Solicitation Analysis report.)

2. Click **Save**. When you return to the Code Maintenance screen the newly defined code will be listed.

Editing Codes

The steps for editing a code are very similar to those for Adding Codes discussed above and will not be repeated here. All you need to do is click **Edit** next to the code you want to modify in Step 1 above to open the code definition screen shown in Figure 4 above.



Note: If you attempt to edit a code that has already been used in a constituent record, the system will respond with a warning. If you continue, the code will be changed in Code Maintenance and in the existing records.

You can edit the other fields (e.g., Description, Comments, etc.) in the definition of a code, but no warning will be given.

Inactivating Codes

You can cause a code to be Inactive by simply editing the definition for the code and setting the **Inactive** check box.

As stated above, codes that are marked as inactive will not be available for selection. However, you can override the inactive setting for *all* codes by selecting the **Allow inactive codes in data entry, filters, contact manager, membership and global updates** parameter on the General Parameters screen (accessed by clicking **Settings** in the Navigation Bar and **Parameters** in the Settings menu).

Deleting Codes

Occasionally you may need to delete *unused* codes from your system.



Note: You cannot delete a code that has been used in an existing constituent record. If you attempt to do so, you will receive an error message.

► To delete a code

1. Click **Delete** next to the code in the Code Maintenance screen (Fig. 1) that you want to remove.
2. The system will display a warning message.

Click **OK** to confirm the deletion. The system will delete the code from the Code Maintenance screen.

Sharing Codes

The DPO code sharing function enables you to establish a set of codes that will be used by two fields. If a new code is added to one field, a corresponding code is automatically added to the second as well. Similarly, if you edit or delete a code, the matching codes would also be modified or removed from the second field. Furthermore, the sharing can be set up to be “reciprocal” so that changes made in the codes for either of the fields will appear in the code set for the other.

For example, suppose the local public radio station wanted to run a “College Challenge” in which donors could vote for their favorite college when they made a gift or pledge. The station would first add a College Challenge field to both the Gift and Pledge screens. Then they would establish a set of codes for the various colleges for which the donors can vote. Code sharing would allow them to enter those codes for the College Challenge/Gifts Screen field in Code Maintenance and automatically cause the same set of codes to be available for the College Challenge/Pledge Screen field. By sharing the codes between the College Challenge/Gifts Screen and College Challenge/Pledges Screen, the station can insure the consistency that would be needed to easily tally the results of the challenge.

► **To set up code sharing between fields**

1. Open the Code Maintenance screen as discussed above and select the field that will *receive* the shared codes in the **Show only** pull-down menu. In our example, the College Challenge/Pledges Screen will receive the shared codes from the College Challenge/Gifts Screen.

Click **Go**. The system will list any codes that already exist for the field selected in the **Show only** pull-down.

2. Select the field that will be the *source* of the shared codes in the **Share code with** pull-down. In our example, the College Challenge/Gifts Screen is the source of the shared codes, as shown below in Figure 5.

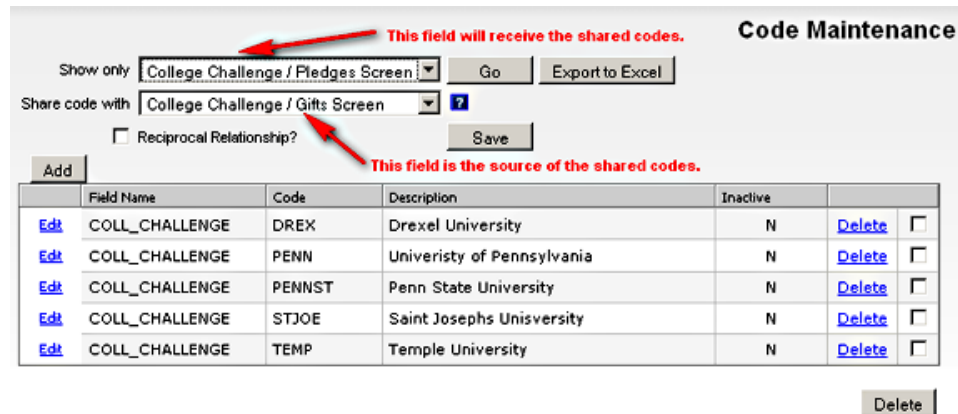


Figure 5. Code Sharing Setup

3. If you want the sharing arrangement to be reciprocal, select **Reciprocal Relationship**.
4. Click **Save**. Henceforth, any changes made in the code list for the field selected in the **Share code with** pull-down (College Challenge/Gifts Screen) will automatically appear in the code list for the field selected in the **Show only** pull-down (College Challenge/Pledge Screen). If we had selected **Reciprocal Relationship** the codes would be shared in both directions.



Note: Certain fields are forced by the system to use the same set of codes. For example, the codes for the Address Type/Donor Screen field will always be the same as those for the Address Type/Addresses Screen field. Similarly, the codes for the Country/Donor Screen field will be the same as those for the Country/Addresses Screen.

For more information on coding refer to the “Code Maintenance” and “Appendix B – Sample Coding” sections of the *DonorPerfect Online User Manual*.