

Adjutant Software Customer Support Tech Notes

Document Title: Dummy records for correcting cumulative amounts
Document Number: 023
Applies to: Campaign ToolBox - all versions

SUMMARY

This Tech Note describes how to use “Dummy records” to correct cumulative totals on the statutory reports. Dummy records are used when Campaign ToolBox does not contain records for transactions prior to the start of using the program. The best, and most accurate method would be to simply enter all records from the very beginning of a campaign. In some cases, however, this is not practical or even possible. In those cases, we need to account for the un-entered contributions and expenses.

PROCEDURE

Create and save a record similar to the sample shown in the illustration; do this for both Contributions and Expenses. The dummy record must have the following attributes:

1. The Amount field contains the total for all transactions that were not entered into the Campaign ToolBox database file, but have already been reported in previous reports.
2. The Date field must contain a date that is:
 - 2.1. Earlier than the Start Date for the current reporting period - and -
 - 2.2. Later than the Campaign Start Date (entered in Initial Program Setup or Options)
3. The Organization field must be a fictitious name. “DUMMY RECORD” would be a good logical choice.

Test.mdb - Contribution - Expire date = 12/31/2004

Contribution | More demographic | Association, misc.

DUMMY RECORD
Organization

12/30/2003
Date

Occupation required for amounts greater than \$100.

Last Name First Name Mid Name Suffix Prefix

Address - major (required) Entity Type Informal Name

Address - minor (optional)

City State Zip Code

1480.00 CHE Check N/A

Amount Type In Kind Description Source

Occupation (must be specific) Employer

DUMMY RECORD for cumulative contributions prior to start of program use.

Comments (for this transaction)

Add
Save
Cancel
Delete
<< < > >>

NOTES

1. The Dummy record will not appear on the statutory report, but the amount will be included in the cumulative totals.
2. Disregard the Dummy Record on the Flagged Items report.
3. Cumulative amount calculations for an individual contributor whose contribution is included in the dummy record will not be correct, so you will need to set up a manual method to catch over-limit contributions.