

# Adjutant Workshop Customer Support Tech Notes

Document Title: Repeating a Group of Contributions  
Document Number: 053  
Applies to: Campaign ToolBox

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## SUMMARY

Some committees (and even some candidates) may have a group of contributors who give on a regular basis. This Tech Note describes how to set up a group and then repeat that entire group with a few key strokes.

## PROCEDURE

### Create a Master Group Name

The “Master Group” is a set of Contribution records that will be repeated.

1. Open the Contribution form, then click on the menu item “Edt List”.
2. Click on “Contribution Source” in the first field at the top of the Edit List form.
3. In the second field (“Item to ADD...”) enter the name of the group. You might call it GROUP1 or MASTER or something that indicates it is the main group that is to be repeated.
4. Click the “Add current item” button in the bottom right corner of the form.
5. Close the form. Confirm that your new group name appears in the Source field of the Contribution form.

### Create a Repeated Group Name

The “Repeated Group” is a set of all records that have been repeated from the Master Group. This can be any item in the Source list EXCEPT the Master Group Name. You can either create a new item or use an existing item in the Source list.

### Setting up the Master Group

Enter the first group of contributions as you normally would with the following exception: When entering the “Master Group” of records, the Source field must be unique to this group of contributions, so select the Master Group Name that you created in the previous section. Each contributor in this Master Group should normally have only one record with the Source set to the Master Group Name. No other records should have the Master Group Name selected as the Source.

### Repeating the group

1. Click on Activities > Other > Repeat group of contributions.
2. Select the Master Group Name from the Source list that you created in the first section (above)..
3. Enter the date you want to use for the new set of contributions (default is the current date).
4. Enter the amount for the new set of contributions. Leave it at zero or blank to use the same amount as in the first group.
5. Select the Contribution Source you want this new set of contributions to have. This must NOT be the same as the first group.
6. Click on OK.

### Making Changes to the Master Group

Over time, names may need to be added or deleted from the Master Group, or the demographic information for a contributor may need to be edited.

**To ADD** a new contributor to the Master Group – Create a contribution record for the new person, and select the Master Group Name in the Source field, then save the record.

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**To REMOVE** a contributor from the Master Group – Locate the record for that person that is set to the Master Group Name (Using the Spreadsheet View is a good way to locate all the records for that person). When you find that record, change the Source to whatever you normally select when creating the repeated groups, then save the record.

**To EDIT** the demographic information for someone in the Master Group – Click on Activities > Demographic Records, then use Spreadsheet View to locate that person's Demographic record. Make the change and save the record.

## **NOTES**

1. Since this operation can automatically create a large number of records, it is a good practice to always make a backup copy of your database file before doing this. That way, if you find that you made a mistake, it may be faster and easier to simply restore the old copy than to manually go through and delete or correct the new records.