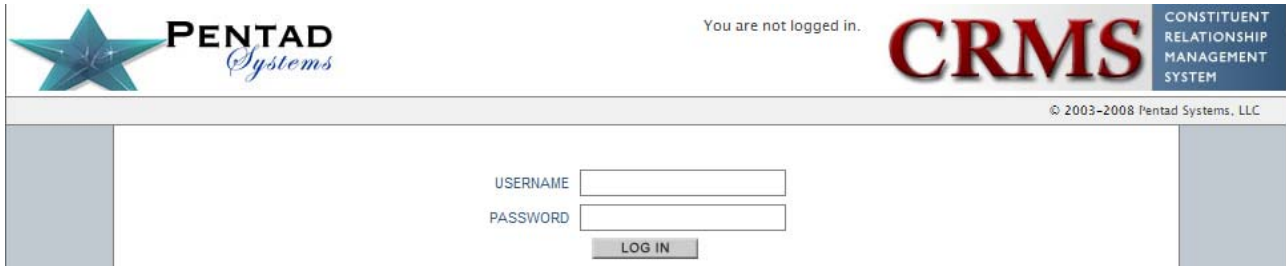




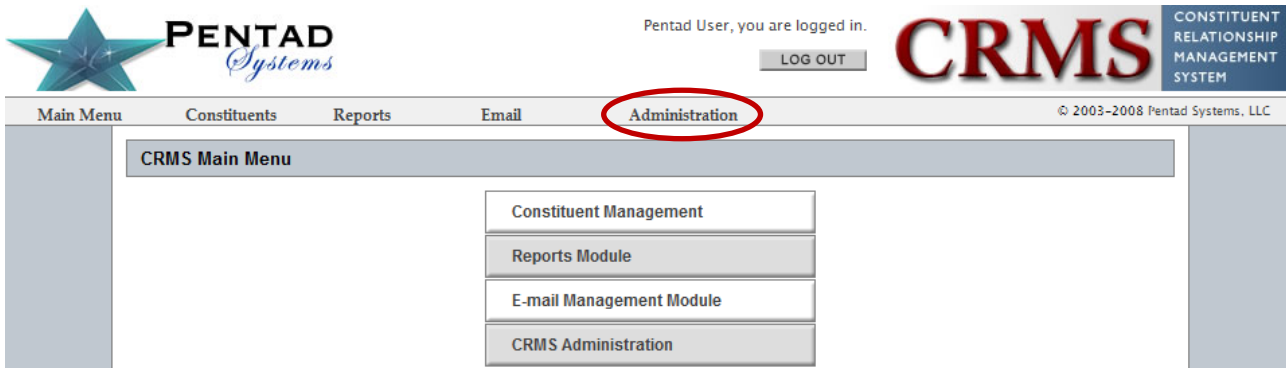
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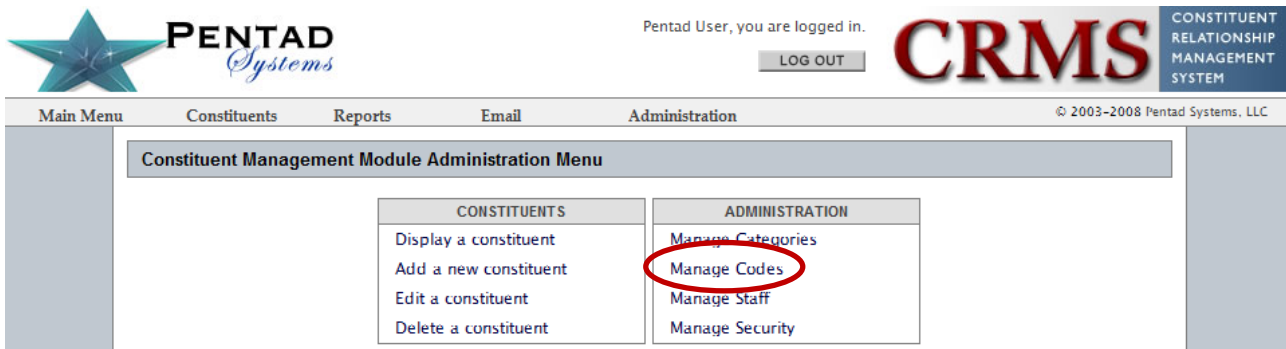
Adding Codes



1. Log into the Pentad CRMS.



2. In the top Menu Bar, click on "Administration".



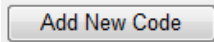
3. In the right pane, under "Administration", click on "Manage Codes".

Main Menu Constituents Reports Email Administration © 2003-2008 Pentad Systems, LLC

Codes Administration

CODES **Add New Code**

- NOTE TYPES
 - LABOR CODE
 - HR-DIVISION
- TITLE
- CATEGORY-SOURCE
 - SOURCE SAMPLE
 - TESTING1
- CATEGORY-VOLUNTEER
- CONTRIBUTION TYPE
- ADDRESS LOCATIONS
- TEST

4. To Add a New Code, click on .

Main Menu Constituents Reports Email Administration © 2003-2008 Pentad Systems, LLC

Codes Administration

CODES Add New Code

- NOTE TYPES
 - LABOR CODE
 - HR-DIVISION
 - HR-STATE
- ADDRESS LOCATIONS
- TITLE
- CATEGORY-SOURCE
- CATEGORY-ISSUES
- CATEGORY-VOLUNTEER
- CONTRIBUTION TYPE
 - CREDIT CARD
 - CHECK
 - OTHER

PARENT ITEM

- ROOT
 - NOTE TYPES
 - LABOR CODE
 - HR-DIVISION
 - HR-STATE
 - ADDRESS LOCATIONS
 - TITLE
 - CATEGORY-SOURCE**
 - ASSN
 - ASSNEDU
 - 07 PINK FLAMINGO
 - 07 TOP O' MORNING
 - 07 ADAMS COUNTY LTR
 - 07 CDA NRCC EVENT
 - 08 PLEDGED
 - 08 PROSPECTIVE DONORS

CODE ID

DESCRIPTION

ACTIVE

5. In the middle pane, choose the immediate Parent Item that your Code will be listed under. In this example, we selected Category-Source.

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Codes Administration

CODES Add New Code

- NOTE TYPES
 - LABOR CODE
 - HR-DIVISION
 - HR-STATE
- ADDRESS LOCATIONS
- TITLE
- CATEGORY-SOURCE
- CATEGORY-ISSUES
- CATEGORY-VOLUNTEER
- CONTRIBUTION TYPE
 - CREDIT CARD
 - CHECK
 - OTHER

PARENT ITEM


- ROOT
 - NOTE TYPES
 - LABOR CODE
 - HR-DIVISION
 - HR-STATE
 - ADDRESS LOCATIONS
 - TITLE
 - CATEGORY-SOURCE
 - ASSN
 - ASSNEDU
 - 07 PINK FLAMINGO
 - 07 TOP O' MORNING
 - 07 ADAMS COUNTY LTR
 - 07 CDA NRCC EVENT
 - 08 PLEDGED
 - 08 PROSPECTIVE DONORS

CODE ID


DESCRIPTION

ACTIVE

- In the Right Pane, add the Code Description for your new Code. Keep the Active check-box checked for the new Code. When you are finished adding the Description, click on .



Pentad Support, you are logged in. LOG OUT



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Codes Administration

CODES Add New Code

- ADDRESS LOCATIONS
- TITLE
- CATEGORY-SOURCE
 - ASSN
 - ASSNEDU
 - 07 PINK FLAMINGO
 - 07 TOP O' MORNING
 - 07 ADAMS COUNTY LTR
 - 07 CDA NRCC EVENT
 - 08 PLEDGED
 - 08 PROSPECTIVE DONORS
 - 08 DOCTOR COALITION
 - TESTING

PARENT ITEM

- ROOT
 - NOTE TYPES
 - LABOR CODE
 - HR-DIVISION
 - HR-STATE
 - ADDRESS LOCATIONS
 - TITLE
 - CATEGORY-SOURCE
 - CATEGORY-ISSUES
 - CATEGORY-VOLUNTEER
 - CONTRIBUTION TYPE

CODE ID 138

DESCRIPTION

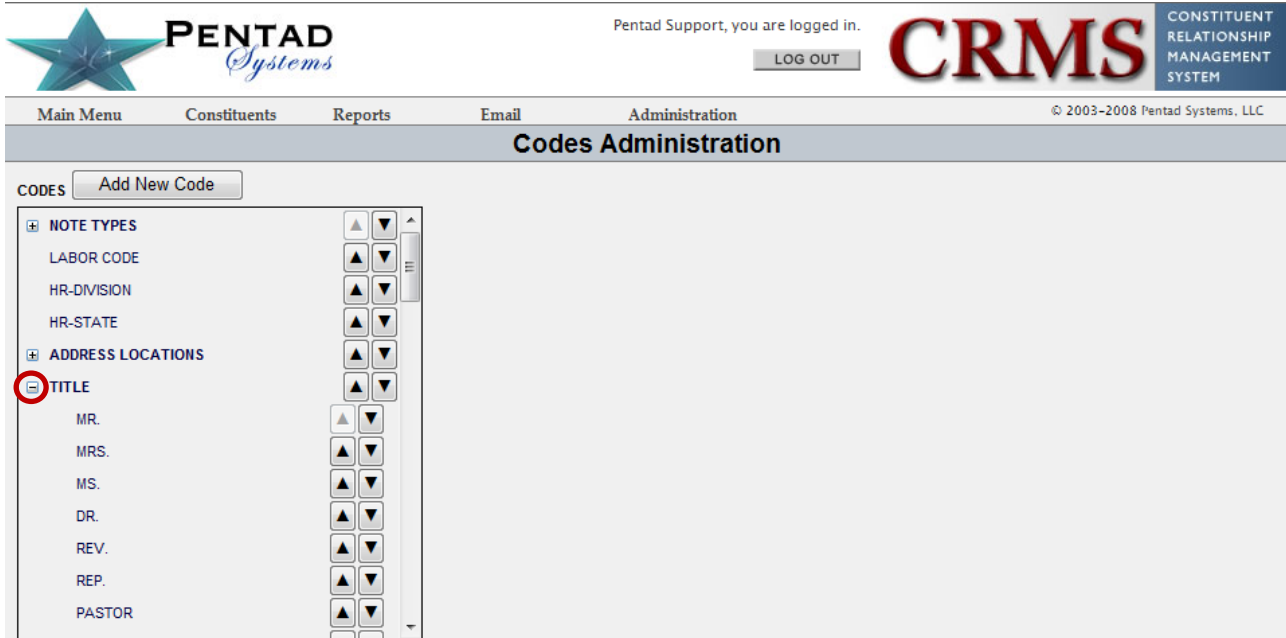
ACTIVE

ADD CHILD CODE


DESCRIPTION

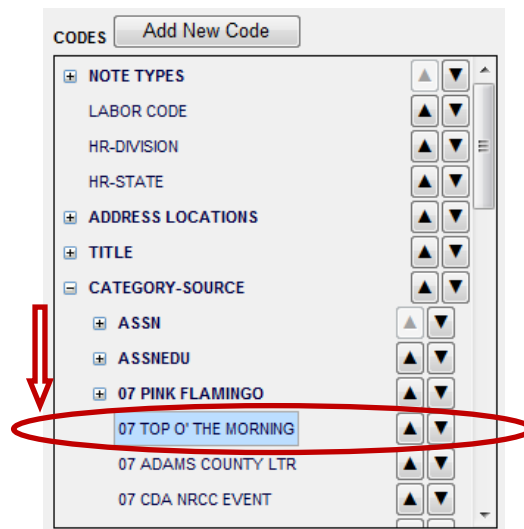
- Expand the Left Pane Category to see the new Code that was just added.

Editing Codes



The screenshot shows the Pentad Systems CRMS interface. At the top, there is a navigation bar with 'Main Menu', 'Constituents', 'Reports', 'Email', and 'Administration'. The 'Administration' section is active, and the page title is 'Codes Administration'. The left pane shows a tree view of codes with the following items: NOTE TYPES, LABOR CODE, HR-DIVISION, HR-STATE, ADDRESS LOCATIONS, TITLE (circled in red), MR., MRS., MS., DR., REV., REP., and PASTOR. The right pane is empty.

1. Clicking on the plus-signs () next to a Code in the Left Pane will display the Child list.



The screenshot shows the Pentad Systems CRMS interface with the 'TITLE' code expanded. The child list includes: ASSN, ASSNEDU, 07 PINK FLAMINGO, 07 TOP O' THE MORNING (circled in red), 07 ADAMS COUNTY LTR, and 07 CDA NRCC EVENT. A red arrow points to the plus sign next to the 'TITLE' code.

2. Clicking the UP and DOWN arrows will change the order of the entries here and in all areas throughout the system.

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Codes Administration

CODES Add New Code

- ⊕ ADDRESS LOCATIONS
- ⊕ TITLE
- ⊖ CATEGORY-SOURCE
 - ⊕ ASSN
 - ⊕ ASSNEDU
 - ⊕ 07 PINK FLAMINGO
 - 07 TOP O' MORNING
 - 07 ADAMS COUNTY LTR
 - 07 CDA NRCC EVENT
 - 08 PLEDGED
 - 08 PROSPECTIVE DONORS
 - 08 DOCTOR COALITION
 - TESTING

3. Expand the desired Parent Code to edit a Child Code. For this example, we expanded Category-Source.

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Codes Administration

CODES Add New Code

- ⊕ NOTE TYPES
- LABOR CODE
- HR-DIVISION
- HR-STATE
- ⊕ ADDRESS LOCATIONS
- ⊕ TITLE
- ⊖ CATEGORY-SOURCE
 - ⊕ ASSN
 - ⊕ ASSNEDU
 - ⊕ 07 PINK FLAMINGO
 - 07 TOP O' MORNING
 - 07 ADAMS COUNTY LTR
 - 07 CDA NRCC EVENT

PARENT ITEM

- ⊖ ROOT
 - ⊕ NOTE TYPES
 - LABOR CODE
 - HR-DIVISION
 - HR-STATE
 - ⊕ ADDRESS LOCATIONS
 - ⊕ TITLE
 - ⊕ CATEGORY-SOURCE
 - ⊕ CATEGORY-ISSUES
 - ⊕ CATEGORY-VOLUNTEER
 - ⊕ CONTRIBUTION TYPE

CODE ID 65

DESCRIPTION

ACTIVE

Update Cancel

ADD CHILD CODE

DESCRIPTION

Add Child Code


4. Select the Child Code that you wish to edit. In this example, we selected "07 Top O' Morning".

Codes Administration

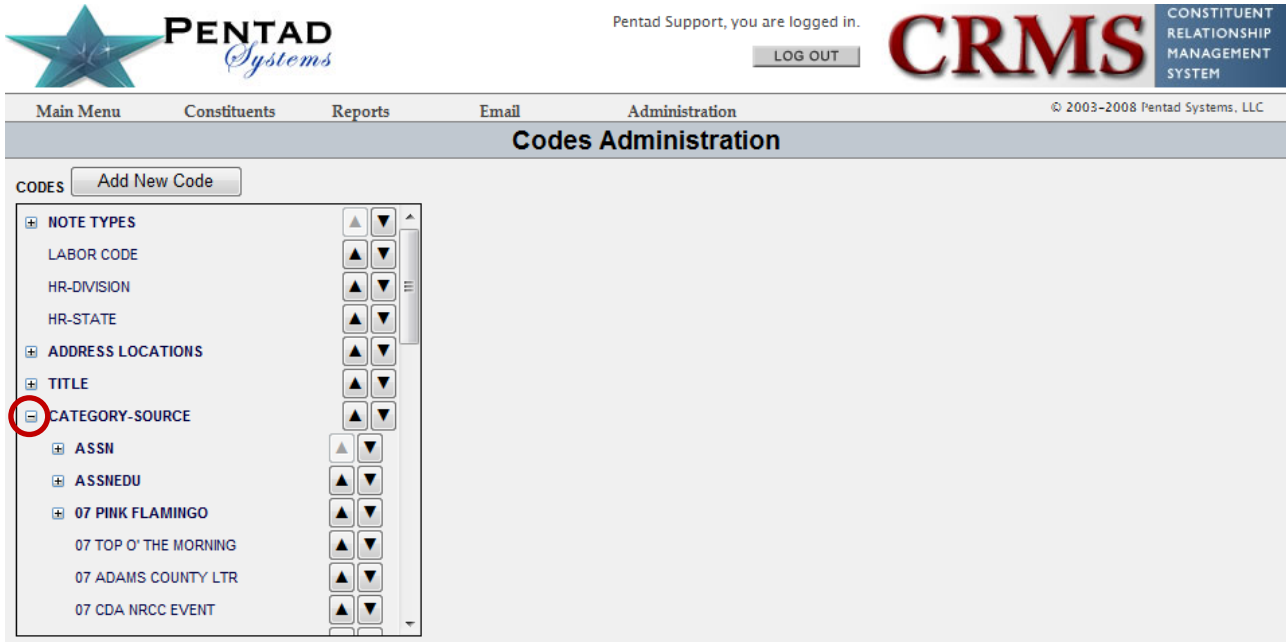
CODES Add New Code

PARENT ITEM

<p>NOTE TYPES</p> <ul style="list-style-type: none">LABOR CODEHR-DIVISIONHR-STATE <p>ADDRESS LOCATIONS</p> <p>TITLE</p> <p>CATEGORY-SOURCE</p> <ul style="list-style-type: none">ASSNASSNEDU07 PINK FLAMINGO07 TOP O' THE MORNING07 ADAMS COUNTY LTR07 CDA NRCC EVENT	<p>ROOT</p> <ul style="list-style-type: none">NOTE TYPESLABOR CODEHR-DIVISIONHR-STATE <p>ADDRESS LOCATIONS</p> <p>TITLE</p> <p>CATEGORY-SOURCE</p> <ul style="list-style-type: none">CATEGORY-ISSUESCATEGORY-VOLUNTEERCONTRIBUTION TYPE	<p>CODE ID 65</p> <p>DESCRIPTION 07 Top O' the Morning</p> <p>ACTIVE <input checked="" type="checkbox"/></p> <p>Update Cancel</p> <p>ADD CHILD CODE</p> <p>DESCRIPTION <input type="text"/></p> <p>Add Child Code</p>
--	---	--

- In the Right Pane, you see the Description of the Code. Edit the Description and click  .
Note the changed Code Description at the Left Pane.

Adding Grandchildren and Great-Grandchildren



Pentad Support, you are logged in. [LOG OUT](#) **CRMS** CONSTITUENT RELATIONSHIP MANAGEMENT SYSTEM

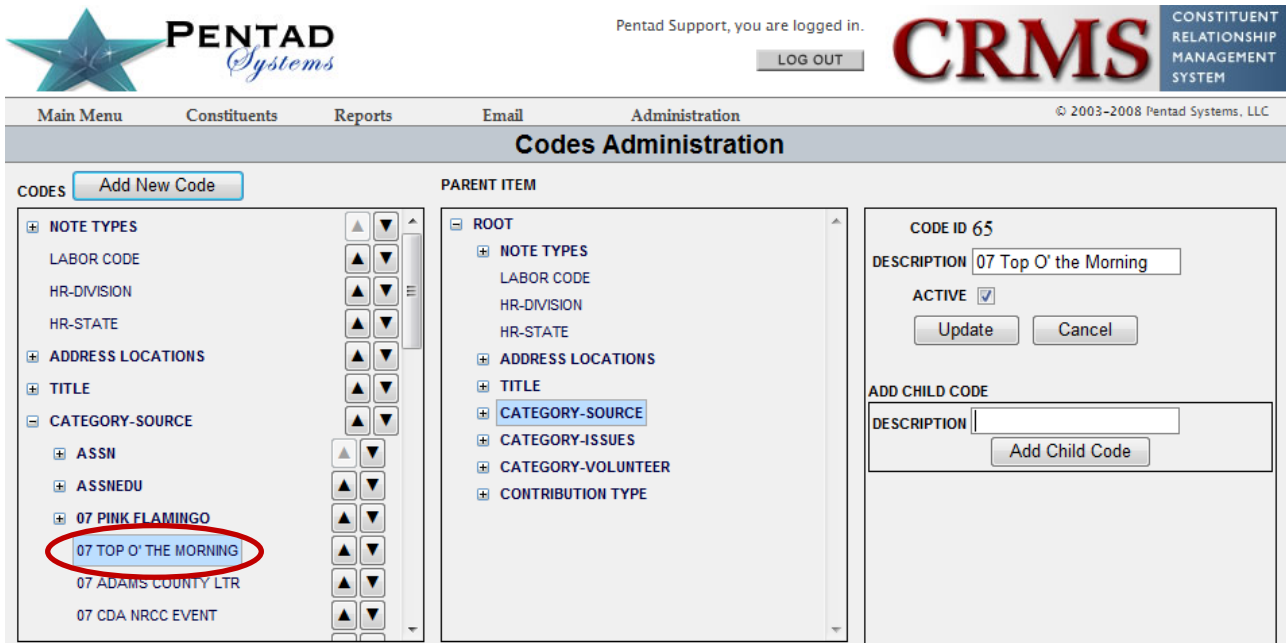
Main Menu Constituents Reports Email Administration © 2003-2008 Pentad Systems, LLC

Codes Administration

CODES [Add New Code](#)

- NOTE TYPES
 - LABOR CODE
 - HR-DIVISION
 - HR-STATE
- ADDRESS LOCATIONS
- TITLE
- CATEGORY-SOURCE**
 - ASSN
 - ASSNEDU
 - 07 PINK FLAMINGO
 - 07 TOP O' THE MORNING
 - 07 ADAMS COUNTY LTR
 - 07 CDA NRCC EVENT

1. In the Left Pane, expand desired Parent Code. In this example, we expanded Category-Source.



Pentad Support, you are logged in. [LOG OUT](#) **CRMS** CONSTITUENT RELATIONSHIP MANAGEMENT SYSTEM

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Codes Administration

CODES [Add New Code](#)

- NOTE TYPES
 - LABOR CODE
 - HR-DIVISION
 - HR-STATE
- ADDRESS LOCATIONS
- TITLE
- CATEGORY-SOURCE
 - ASSN
 - ASSNEDU
 - 07 PINK FLAMINGO
 - 07 TOP O' THE MORNING**
 - 07 ADAMS COUNTY LTR
 - 07 CDA NRCC EVENT

PARENT ITEM

- ROOT
 - NOTE TYPES
 - LABOR CODE
 - HR-DIVISION
 - HR-STATE
 - ADDRESS LOCATIONS
 - TITLE
 - CATEGORY-SOURCE**
 - CATEGORY-ISSUES
 - CATEGORY-VOLUNTEER
 - CONTRIBUTION TYPE

CODE ID 65

DESCRIPTION

ACTIVE

[Update](#) [Cancel](#)

ADD CHILD CODE

DESCRIPTION

[Add Child Code](#)

2. Select the desired Child Code. In this example, we selected "07 Top O' the Morning".

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Codes Administration

CODES Add New Code

PARENT ITEM

NOTE TYPES

- LABOR CODE
- HR-DIVISION
- HR-STATE

ADDRESS LOCATIONS

TITLE

CATEGORY-SOURCE

- ASSN
- ASSNEDU
- 07 PINK FLAMINGO**
- 07 TOP O' THE MORNING**
- 07 ADAMS COUNTY LTR
- 07 CDA NRCC EVENT

ROOT

- NOTE TYPES
- LABOR CODE
- HR-DIVISION
- HR-STATE

ADDRESS LOCATIONS

TITLE

CATEGORY-SOURCE

- CATEGORY-ISSUES
- CATEGORY-VOLUNTEER
- CONTRIBUTION TYPE

CODE ID 65

DESCRIPTION

ACTIVE

ADD CHILD CODE

DESCRIPTION

- In the Right Pane, add the Code Description for your new Code. When you are finished with the Code Description, click .

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Codes Administration

CODES Add New Code

PARENT ITEM

NOTE TYPES

- LABOR CODE
- HR-DIVISION
- HR-STATE

ADDRESS LOCATIONS

TITLE

CATEGORY-SOURCE

- ASSN
- ASSNEDU
- 07 PINK FLAMINGO
- 07 TOP O' THE MORNING**
- ATTENDEE
- 07 ADAMS COUNTY LTR
- 07 CDA NRCC EVENT

ROOT

- NOTE TYPES
- LABOR CODE
- HR-DIVISION
- HR-STATE

ADDRESS LOCATIONS

TITLE

CATEGORY-SOURCE

- CATEGORY-ISSUES
- CATEGORY-VOLUNTEER
- CONTRIBUTION TYPE

CODE ID 65

DESCRIPTION

ACTIVE

ADD CHILD CODE

DESCRIPTION

- Note the addition of a Grandchild in the Left Pane.

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Codes Administration

CODES Add New Code PARENT ITEM

<p>NOTE TYPES</p> <p>LABOR CODE</p> <p>HR-DIVISION</p> <p>HR-STATE</p> <p>ADDRESS LOCATIONS</p> <p>TITLE</p> <p>CATEGORY-SOURCE</p> <p>ASSN</p> <p>ASSNEDU</p> <p>07 PINK FLAMINGO</p> <p>07 TOP O' THE MORNING</p> <p style="border: 2px solid red; border-radius: 50%; padding: 2px;">ATTENDEE</p> <p>07 ADAMS COUNTY LTR</p> <p>07 CDA NRCC EVENT</p>	<p>07 TOP O' THE MORNING</p> <p>07 ADAMS COUNTY LTR</p> <p>07 CDA NRCC EVENT</p> <p>08 PLEDGED</p> <p>08 PROSPECTIVE DONORS</p> <p>08 DOCTOR COALITION</p> <p>07/08 - EVENTS (HECLA)</p> <p>07/08 - EVENT (NEWT VC)</p> <p>07/08 - VICTORY CLUB</p> <p>07/08 - WVA EVENTS</p> <p>DUNN DOME CLUB 2004</p> <p>FERRY COUNTY KETTLE FALLS</p> <p>HOGAN ADVISORY BOARD</p> <p>CAMAS PRECINCT</p> <p>WAITTS LAKE PRECINCT</p> <p>SILZEL/BUSH/NRCC/PEOPLE 04</p>	<p>CODE ID 140</p> <p>DESCRIPTION <input type="text" value="Attendee"/></p> <p>ACTIVE <input checked="" type="checkbox"/></p> <p><input type="button" value="Update"/> <input type="button" value="Cancel"/></p> <p>ADD CHILD CODE</p> <p>DESCRIPTION <input type="text"/></p> <p style="text-align: center;"><input type="button" value="Add Child Code"/></p>
---	--	--

- You can add a Great-Grandchild Code to a Grandchild Code by selecting the Child Code in the Left Pane. In this example, we are selecting Attendee.

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Codes Administration

CODES Add New Code PARENT ITEM

<p>NOTE TYPES</p> <p>LABOR CODE</p> <p>HR-DIVISION</p> <p>HR-STATE</p> <p>ADDRESS LOCATIONS</p> <p>TITLE</p> <p>CATEGORY-SOURCE</p> <p>ASSN</p> <p>ASSNEDU</p> <p>07 PINK FLAMINGO</p> <p>07 TOP O' THE MORNING</p> <p>ATTENDEE</p> <p>07 ADAMS COUNTY LTR</p> <p>07 CDA NRCC EVENT</p>	<p>ROOT</p> <p>NOTE TYPES</p> <p>LABOR CODE</p> <p>HR-DIVISION</p> <p>HR-STATE</p> <p>ADDRESS LOCATIONS</p> <p>TITLE</p> <p>CATEGORY-SOURCE</p> <p>CATEGORY-ISSUES</p> <p>CATEGORY-VOLUNTEER</p> <p>CONTRIBUTION TYPE</p>	<p>CODE ID 65</p> <p>DESCRIPTION <input type="text" value="07 Top O' the Morning"/></p> <p>ACTIVE <input checked="" type="checkbox"/></p> <p><input type="button" value="Update"/> <input type="button" value="Cancel"/></p> <p>ADD CHILD CODE</p> <p>DESCRIPTION <input type="text" value="Attendee"/></p> <p style="text-align: center;"><input style="border: 2px solid red; border-radius: 50%; padding: 2px;" type="button" value="Add Child Code"/></p>
--	--	--

- In the Right Pane, add the Code Description for your new Code. When you are finished with the Code Description, click .

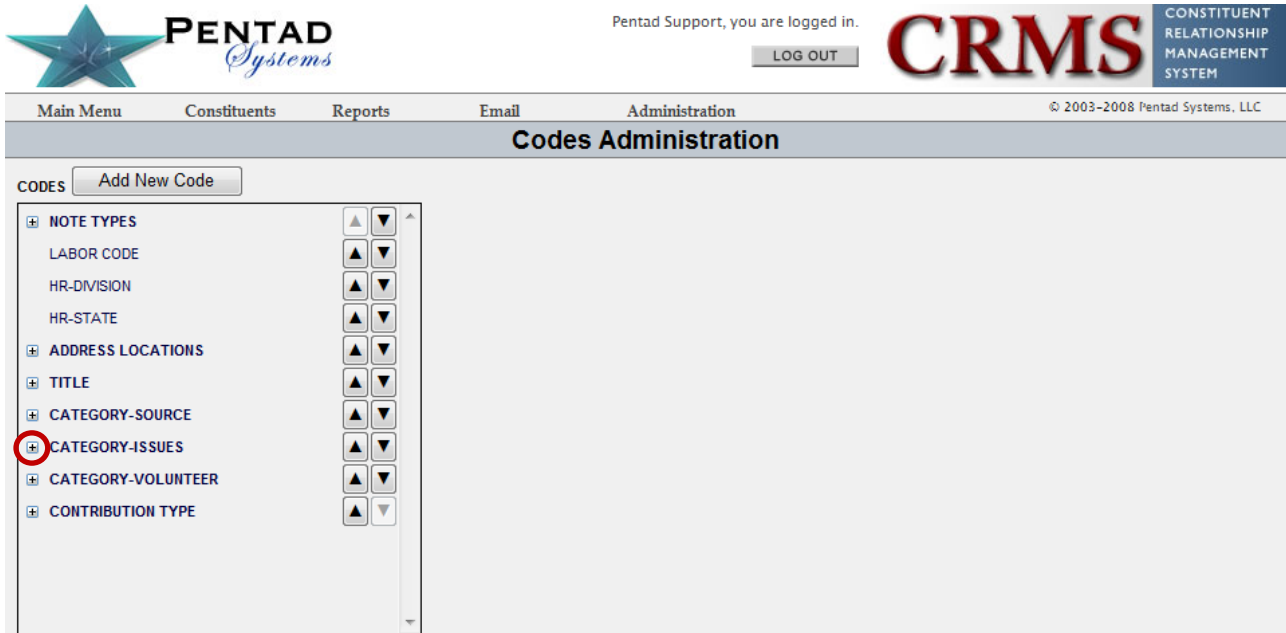
Codes Administration

CODES Add New Code PARENT ITEM

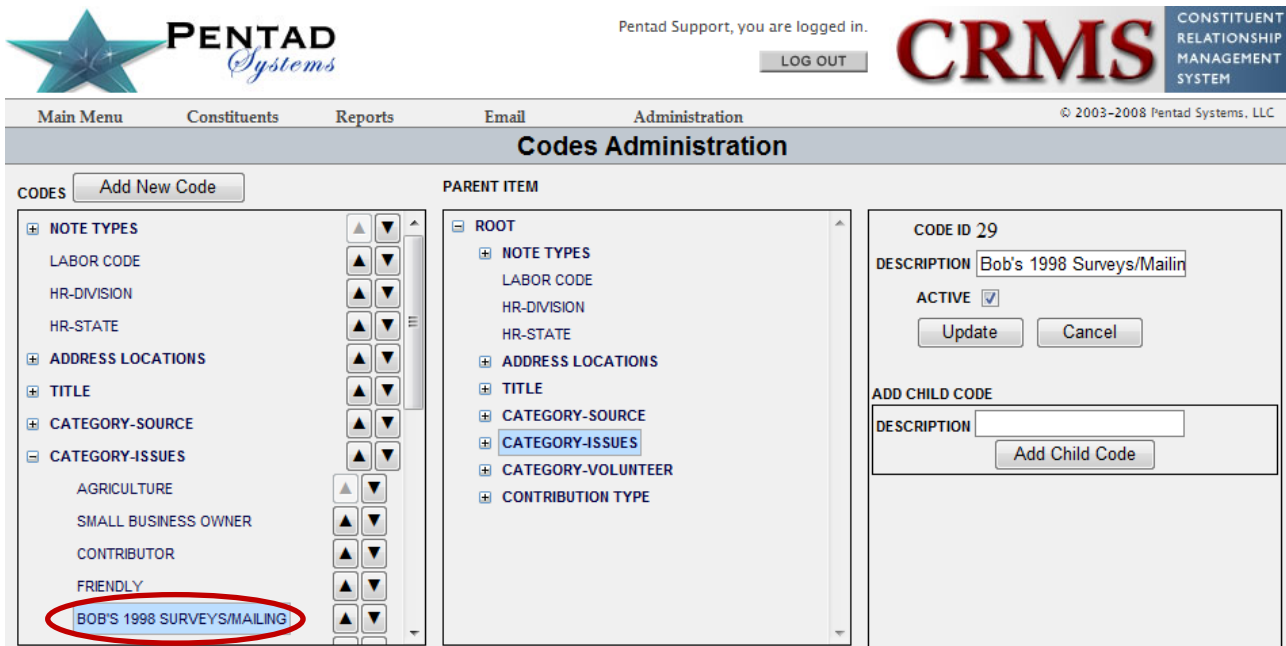
<p>LABOR CODE</p> <p>HR-DIVISION</p> <p>HR-STATE</p> <p>ADDRESS LOCATIONS</p> <p>TITLE</p> <p>CATEGORY-SOURCE</p> <p>ASSN</p> <p>ASSNEDU</p> <p>07 PINK FLAMINGO</p> <p>07 TOP O' THE MORNING</p> <p>ATTENDEE</p> <p>FAIR ATTENDEE</p> <p>07 ADAMS COUNTY LTR</p>	<p>07 TOP O' THE MORNING</p> <p>07 ADAMS COUNTY LTR</p> <p>07 CDA NRCC EVENT</p> <p>08 PLEDGED</p> <p>08 PROSPECTIVE DONORS</p> <p>08 DOCTOR COALITION</p> <p>07/08 - EVENTS (HECLA)</p> <p>07/08 - EVENT (NEWT VC)</p> <p>07/08 - VICTORY CLUB</p> <p>07/08 - WWA EVENTS</p> <p>DUNN DOME CLUB 2004</p> <p>FERRY COUNTY KETTLE FALLS</p> <p>HOGAN ADVISORY BOARD</p> <p>CAMAS PRECINCT</p> <p>WAITTS LAKE PRECINCT</p> <p>SILZEL/BUSH/NRCC/PEOPLE 04</p>	<p>CODE ID 140</p> <p>DESCRIPTION <input type="text" value="Attendee"/></p> <p>ACTIVE <input checked="" type="checkbox"/></p> <p><input type="button" value="Update"/> <input type="button" value="Cancel"/></p> <p>ADD CHILD CODE</p> <p>DESCRIPTION <input type="text" value="Fair Attendee"/></p> <p><input type="button" value="Add Child Code"/></p>
--	---	--

7. Note the addition of a Great-Grandchild Code in the Left Pane.

De-Activating Codes



1. Expand the desired Parent Code.



2. Select the Child Code that you wish to deactivate. In this example, we selected "Bob's 1998 Surveys/Mailing".

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Codes Administration

CODES Add New Code PARENT ITEM

<ul style="list-style-type: none">NOTE TYPES<ul style="list-style-type: none">LABOR CODEHR-DIVISIONHR-STATEADDRESS LOCATIONSTITLECATEGORY-SOURCECATEGORY-ISSUES<ul style="list-style-type: none">AGRICULTURESMALL BUSINESS OWNERCONTRIBUTORFRIENDLYBOB'S 1998 SURVEYS/MAILING	<ul style="list-style-type: none">ROOT<ul style="list-style-type: none">NOTE TYPES<ul style="list-style-type: none">LABOR CODEHR-DIVISIONHR-STATEADDRESS LOCATIONSTITLECATEGORY-SOURCECATEGORY-ISSUESCATEGORY-VOLUNTEERCONTRIBUTION TYPE	<p>CODE ID 29</p> <p>DESCRIPTION <input type="text" value="Bob's 1998 Surveys/Mailin"/></p> <p>ACTIVE <input checked="" type="checkbox"/></p> <p><input type="button" value="Update"/> <input type="button" value="Cancel"/></p> <p>ADD CHILD CODE</p> <p>DESCRIPTION <input type="text"/></p> <p><input type="button" value="Add Child Code"/></p>
---	--	--

3. In the right pane, you see a checkbox next to "ACTIVE". To de-activate the Code, un-check this checkbox and click .

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Codes Administration

CODES Add New Code PARENT ITEM

<ul style="list-style-type: none">NOTE TYPES<ul style="list-style-type: none">LABOR CODEHR-DIVISIONHR-STATEADDRESS LOCATIONSTITLECATEGORY-SOURCECATEGORY-ISSUES<ul style="list-style-type: none">AGRICULTURESMALL BUSINESS OWNERCONTRIBUTORFRIENDLYMOVERS & SHAKERS -STEVENS CO	<ul style="list-style-type: none">ROOT<ul style="list-style-type: none">NOTE TYPES<ul style="list-style-type: none">LABOR CODEHR-DIVISIONHR-STATEADDRESS LOCATIONSTITLECATEGORY-SOURCECATEGORY-ISSUESCATEGORY-VOLUNTEERCONTRIBUTION TYPE	<p>CODE ID 29</p> <p>DESCRIPTION <input type="text" value="Bob's 1998 Surveys/Mailin"/></p> <p>ACTIVE <input type="checkbox"/></p> <p><input type="button" value="Update"/> <input type="button" value="Cancel"/></p> <p>ADD CHILD CODE</p> <p>DESCRIPTION <input type="text"/></p> <p><input type="button" value="Add Child Code"/></p>
---	--	---

4. The code will disappear from the left pane.