



## Administration

### **Overview**

- Peer to Peer Setup*
- Client/Server Setup*
- Log In*

### **Navigation**

- People and Organizations*
- Gifts and Pledges*
- Quick Reports*
- Quick Mailings*
- Administration*
- Help and Support*

### **Application Setup**

- Codes*
- Settings*
- Gift Size Table*
- Letters*
- Gift Defaults*
- Mailing Options*

### **Security Setup**

- System Users*
- User Rights*

### **Tasks Menu**

- Master Biographical*
- Gifts and Pledges*
- Reports*
- Mailings*
- Batch Maintenance*
- QuickBooks Interface*
- Year End Processing*

### **Utilities Menu**

- Search*
- Global Affiliation Code Replacement*
- Reindex Files*
- Assign Custom Totals*
- Check E-mail Addresses*
- Import E-mail Status Changes*
- Tickler Calendar*

### **Setup Wizard**

- Welcome*
- Name*
- User Defined Fields*
- Settings*
- Mailings*
- Codes*

### **Data Maintenance**

- Backup & Restore*
- Exceed! Basic Backup Feature*
- Removable Media Options*
- Restoring*
- UPS (Uninterrupted Power Supply)*
- Reindexing*

### **Codes**

- Master Biographical Codes*
- Gifts & Pledges Codes*
- User Defined Fields*