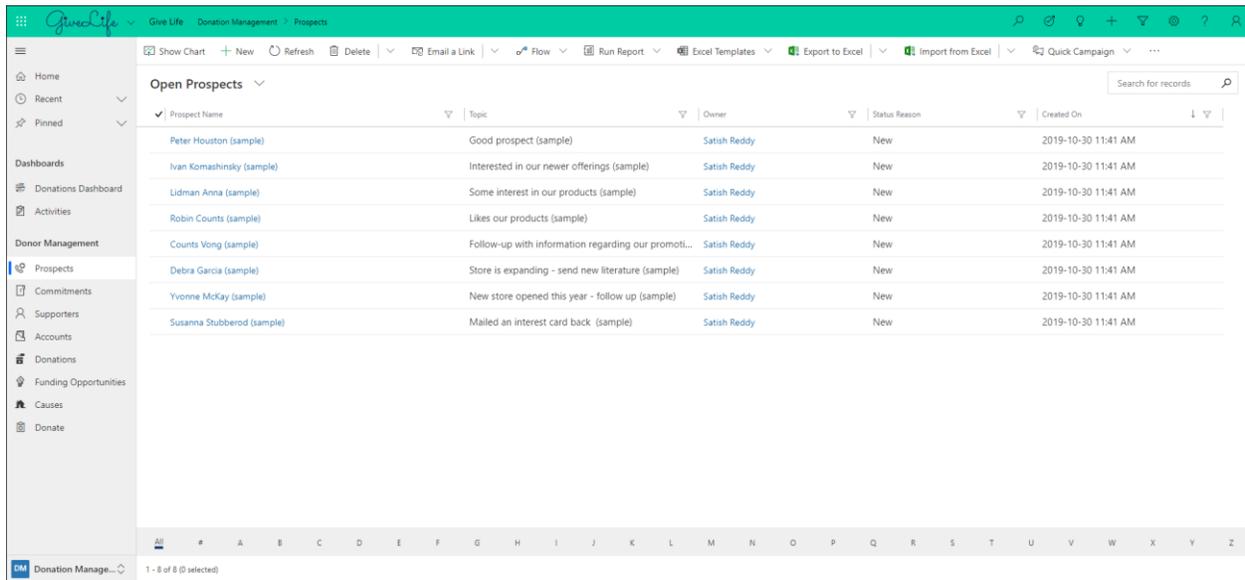


User Guide

Donor Management

1. Creating the prospect -> Commitment Life cycle.

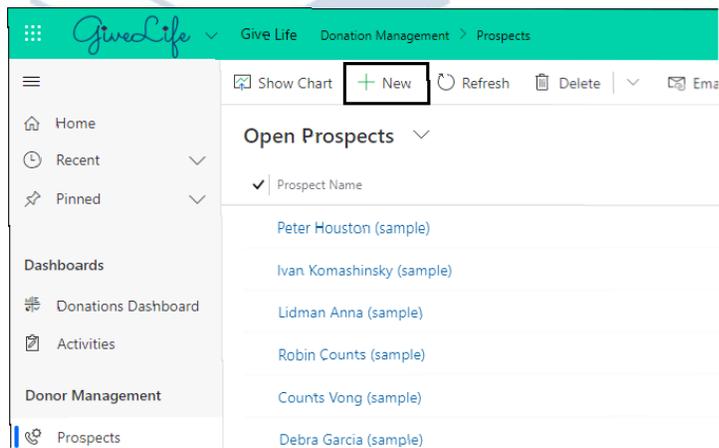
Click on the “Prospect” in left hand navigation pane.



The screenshot shows the 'Open Prospects' view in the GiveLife application. The interface includes a left-hand navigation pane with 'Prospects' selected under 'Donor Management'. The main area displays a table of prospects with the following data:

Prospect Name	Topic	Owner	Status Reason	Created On
Peter Houston (sample)	Good prospect (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Ivan Komashinsky (sample)	Interested in our newer offerings (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Lidman Anna (sample)	Some interest in our products (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Robin Counts (sample)	Likes our products (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Counts Vong (sample)	Follow-up with information regarding our promoti...	Satish Reddy	New	2019-10-30 11:41 AM
Debra Garcia (sample)	Store is expanding - send new literature (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Yvonne McKay (sample)	New store opened this year - follow up (sample)	Satish Reddy	New	2019-10-30 11:41 AM
Susanna Stubberod (sample)	Mailed an interest card back (sample)	Satish Reddy	New	2019-10-30 11:41 AM

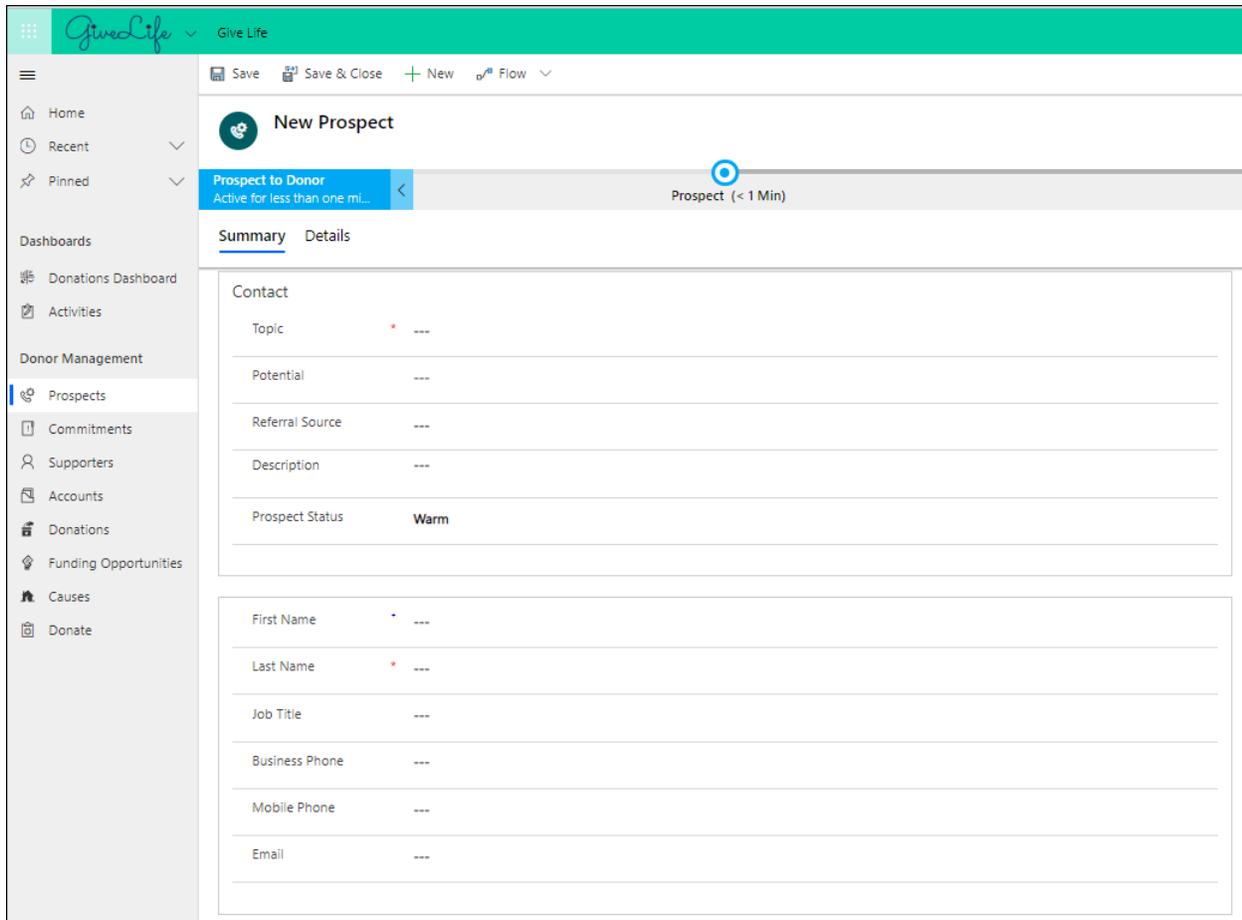
Click +New Click +New button located on the ribbon above prospects view, it will open a new prospect creation form.



This screenshot shows the same 'Open Prospects' view, but with the '+ New' button on the top ribbon highlighted with a red box. The table below shows the first few rows of the prospect list:

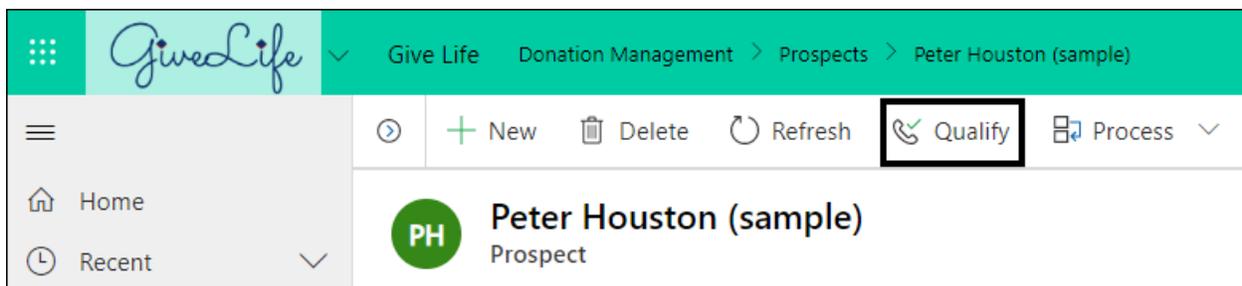
Prospect Name
Peter Houston (sample)
Ivan Komashinsky (sample)
Lidman Anna (sample)
Robin Counts (sample)
Counts Vong (sample)
Debra Garcia (sample)

Enter the required details in prospect form and click save button.



The screenshot shows the 'New Prospect' form in the GiveLife system. The form is titled 'New Prospect' and has a ribbon with 'Prospect to Donor' and 'Prospect (< 1 Min)'. The form fields are: Contact (Topic, Potential, Referral Source, Description, Prospect Status: Warm), First Name, Last Name, Job Title, Business Phone, Mobile Phone, and Email.

Once the prospect is created you can qualify it to convert it into a commitment by clicking Qualify button in the ribbon above the Prospect form.

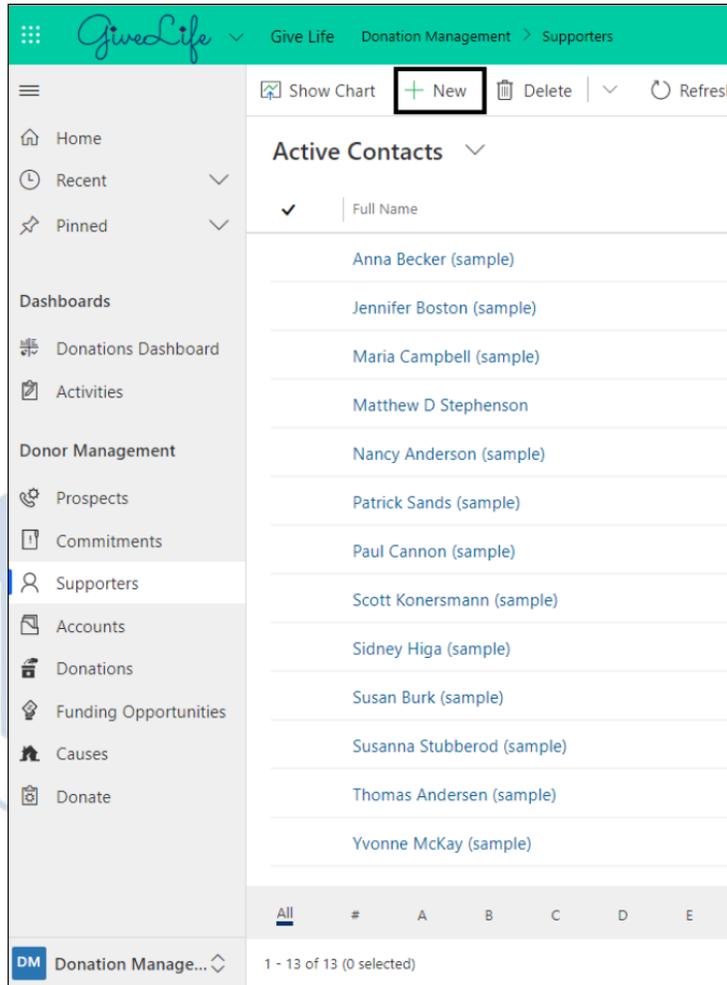


The screenshot shows the 'Peter Houston (sample)' prospect record in the GiveLife system. The ribbon shows 'Qualify' and 'Process' buttons. The prospect name is 'Peter Houston (sample)' and the status is 'Prospect'.

Once qualified a commitment record shall be created in the system.

2. Creating a Supporter Record:

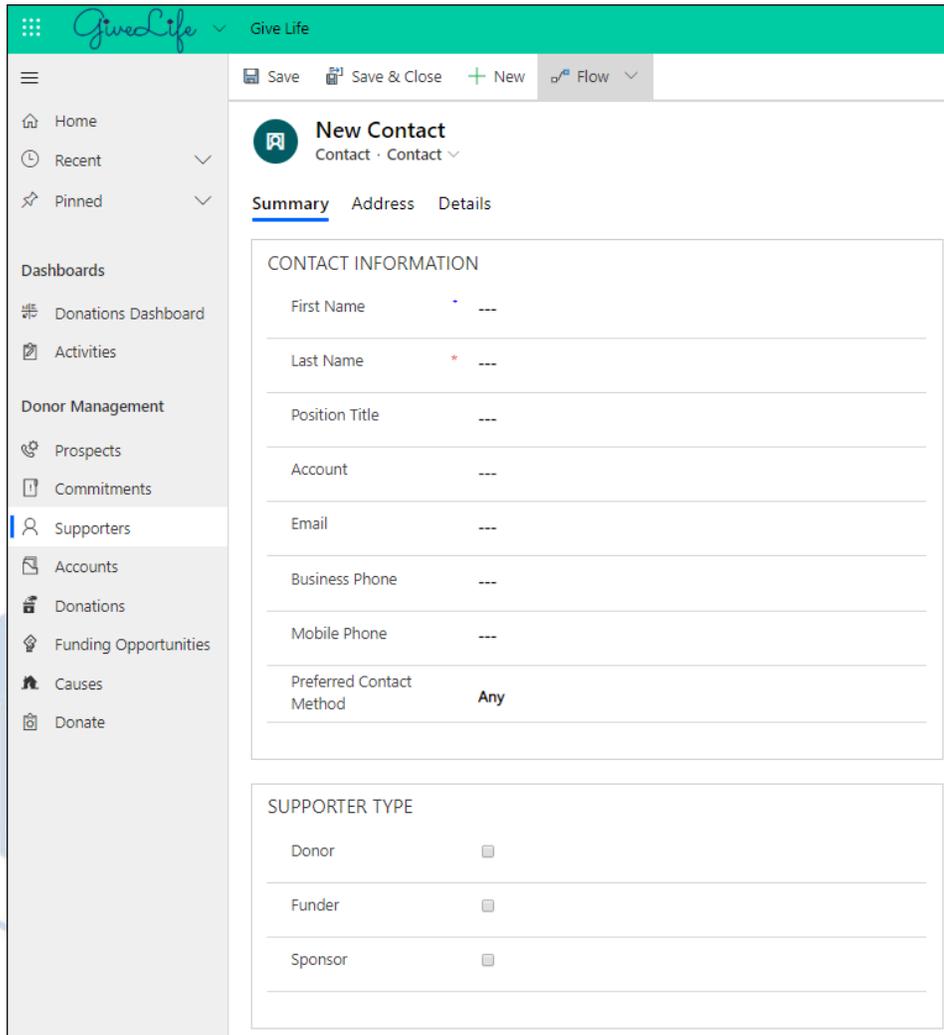
Click on the Supporter from Left hand navigation pane



The screenshot shows the GiveLife Donor Management interface. The left-hand navigation pane is open, and the 'Supporters' option is selected. The main content area displays a list of 'Active Contacts'. The '+ New' button is highlighted with a red box. The list of contacts includes:

Full Name
Anna Becker (sample)
Jennifer Boston (sample)
Maria Campbell (sample)
Matthew D Stephenson
Nancy Anderson (sample)
Patrick Sands (sample)
Paul Cannon (sample)
Scott Konersmann (sample)
Sidney Higa (sample)
Susan Burk (sample)
Susanna Stubberod (sample)
Thomas Andersen (sample)
Yvonne McKay (sample)

Click +New button located on the ribbon above contacts view, it will open a new contact creation form.



New Contact
Contact · Contact

Summary Address Details

CONTACT INFORMATION

First Name * ---

Last Name * ---

Position Title ---

Account ---

Email ---

Business Phone ---

Mobile Phone ---

Preferred Contact Method **Any**

SUPPORTER TYPE

Donor

Funder

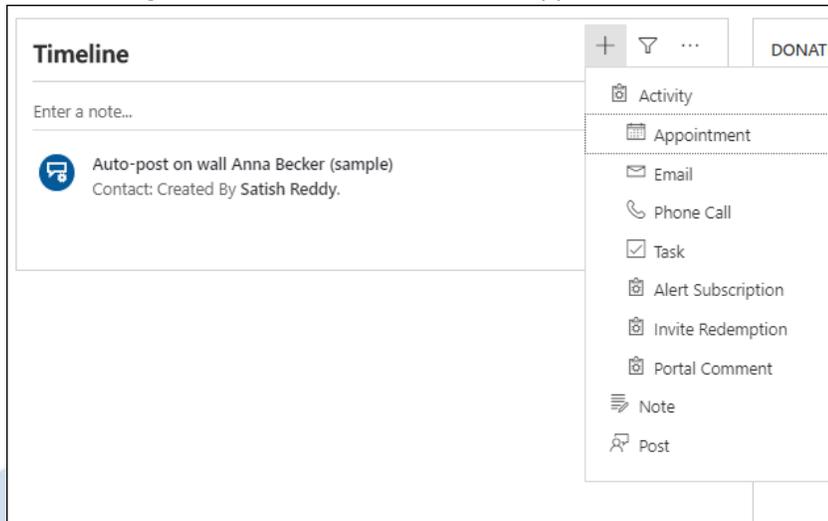
Sponsor

Enter the required details and specify the supporter type by checking appropriate checkbox checked and click on save.

You can also add activities for a donor record and add attachments if any.

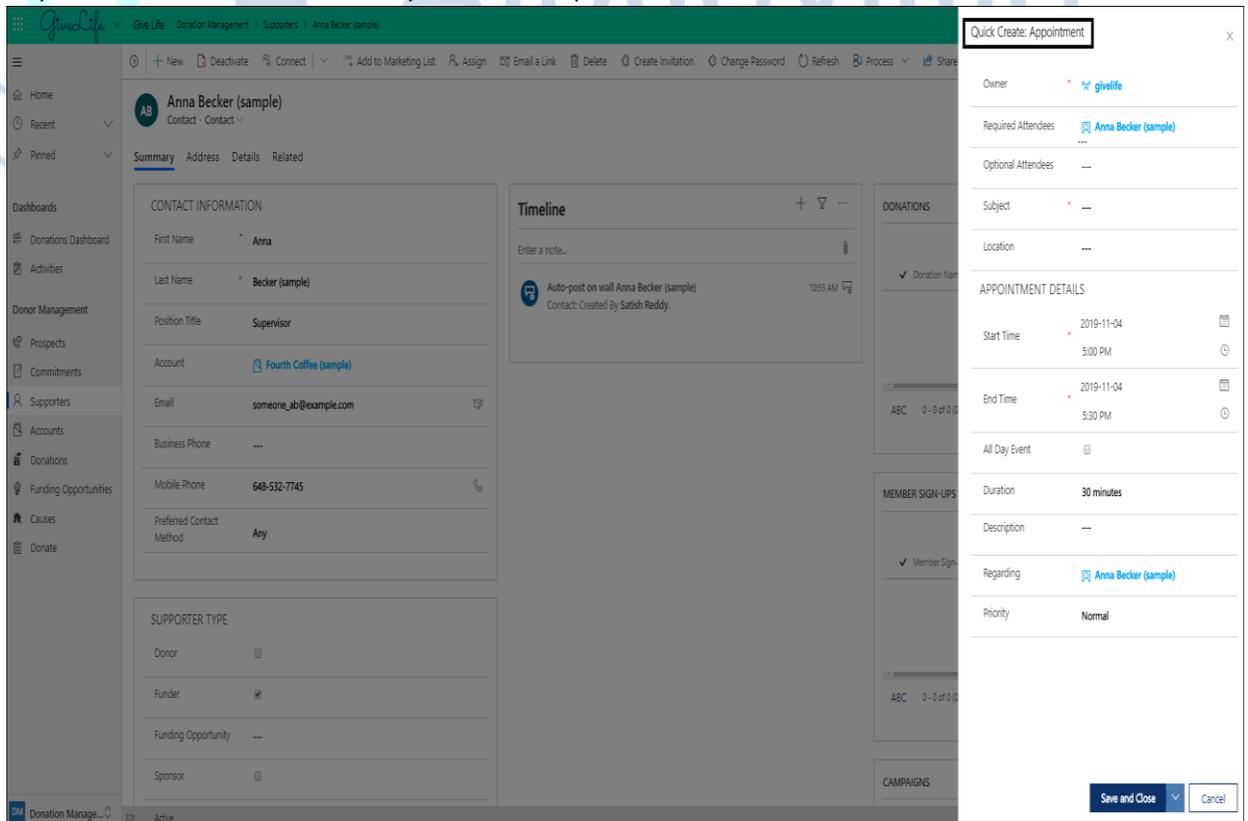
a. Add activities:

Click on + sign on the timeline section of a Supporter record



Select the activity that you want to add from the list of Appointment, Email, Phone call etc.

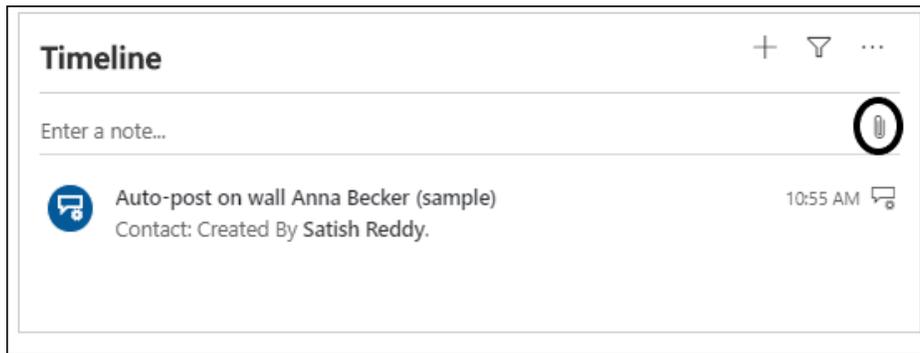
A quick create form for the activity details will open.



Enter the required details and click “Save and Close”

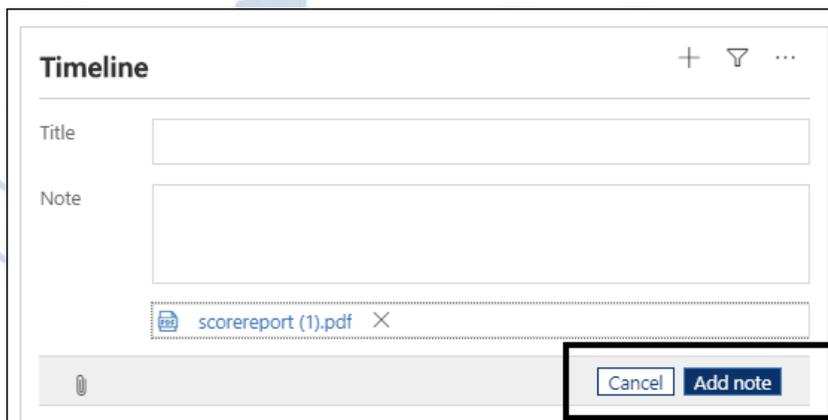
b. Add Attachment

Click on attach sign in the Timeline Section of donor Record



Select the file you wish to upload from your local directory

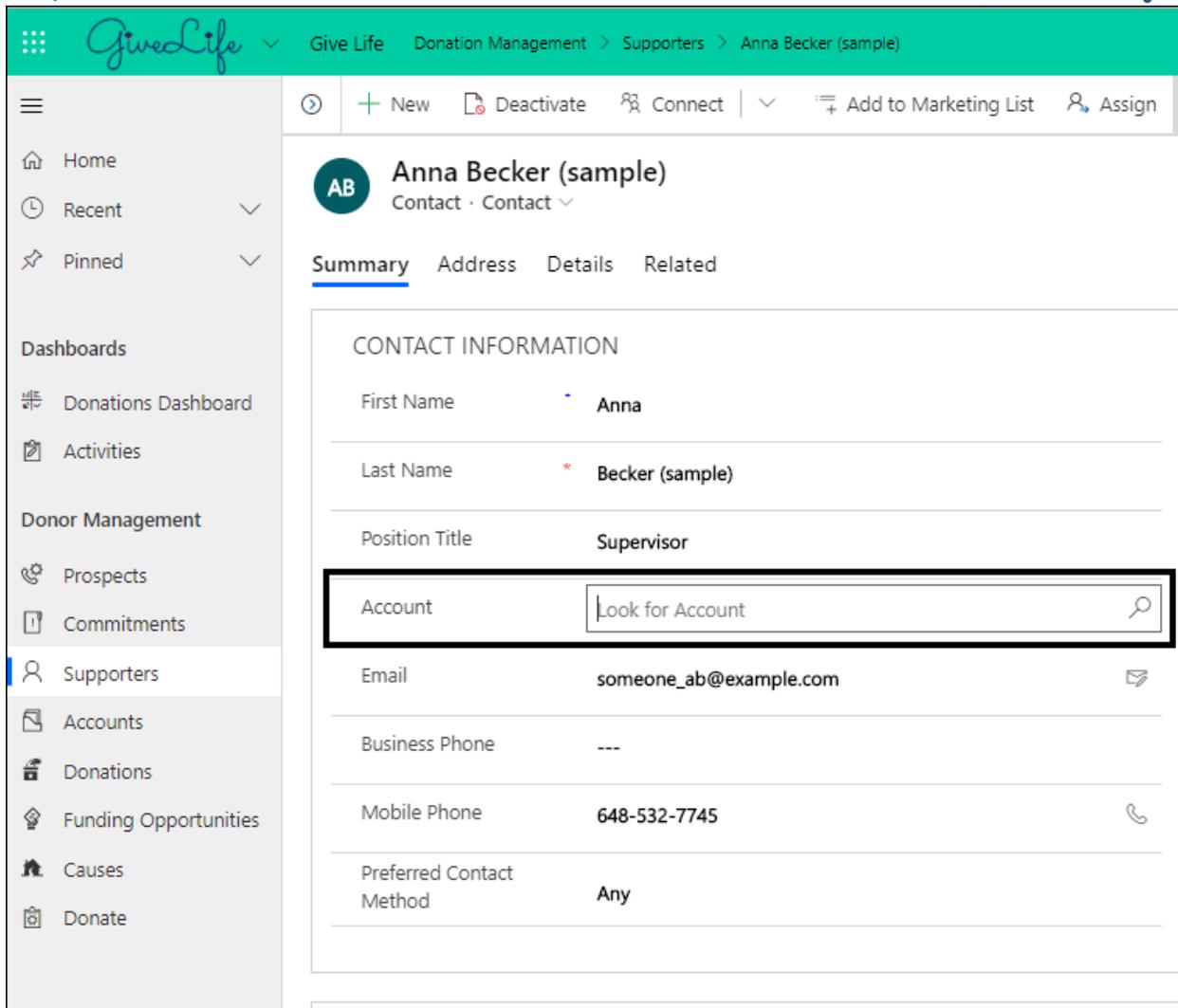
Click open button in the dialogue box and click “Add Note” button to attach the selected file.



3. Associate the Supporter to an account

Click on the desired Supporter from Supporter view

Type the account name on the account field, it will populate the list of accounts by the name searched.



The screenshot shows the GiveLife CRM interface. The top navigation bar includes 'Give Life', 'Donation Management', 'Supporters', and 'Anna Becker (sample)'. The left sidebar contains navigation options like 'Home', 'Recent', 'Pinned', 'Dashboards', 'Donations Dashboard', 'Activities', 'Donor Management', 'Prospects', 'Commitments', 'Supporters', 'Accounts', 'Donations', 'Funding Opportunities', 'Causes', and 'Donate'. The main content area displays the contact profile for Anna Becker (sample). The 'Account' field is highlighted with a red box, and a search input field is visible next to it.

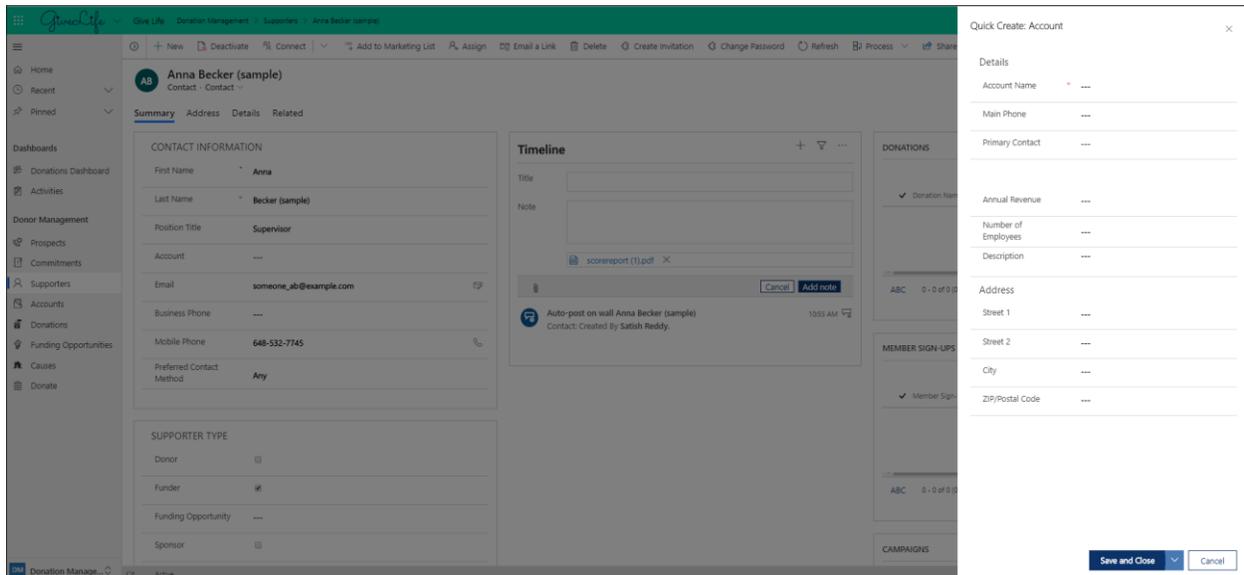
CONTACT INFORMATION	
First Name	Anna
Last Name	Becker (sample)
Position Title	Supervisor
Account	<input type="text" value="Look for Account"/>
Email	someone_ab@example.com
Business Phone	---
Mobile Phone	648-532-7745
Preferred Contact Method	Any

Select the desired account.

If desired account record does not exist in the system. You can create the account record from contacts page itself.

Click on the account name field, click on +New Record

A new account quick create form shall open



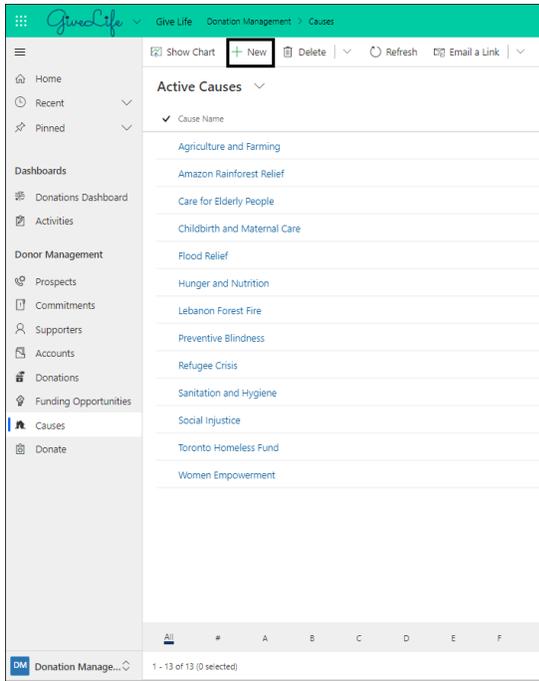
The screenshot displays the GivesLife CRM interface. On the left, a navigation pane lists various modules including Home, Recent, Pinned, Dashboards, Donations Dashboard, Activities, Donor Management, Prospects, Commitments, Supporters, Accounts, Donations, Funding Opportunities, Causes, and Donate. The main content area shows the profile for 'Anna Becker (sample)', a contact. The profile includes contact information (First Name: Anna, Last Name: Becker (sample), Position Title: Supervisor, Account: ---, Email: someone_ab@example.com, Business Phone: ---, Mobile Phone: 648-532-7745, Preferred Contact Method: Any) and supporter type (Donor, Funder, Funding Opportunity, Sponsor). A timeline shows an auto-post on the wall for Anna Becker (sample) created by Satish Reddy at 10:55 AM. A 'Quick Create: Account' modal form is open on the right, containing fields for Account Name, Main Phone, Primary Contact, Annual Revenue, Number of Employees, Description, Address (Street 1, Street 2, City, ZIP/Postal Code), and buttons for 'Save and Close' and 'Cancel'.

Enter the required details and click “Save and Close”. The contact shall get associated with the newly created account.

4. Creating the Cause records

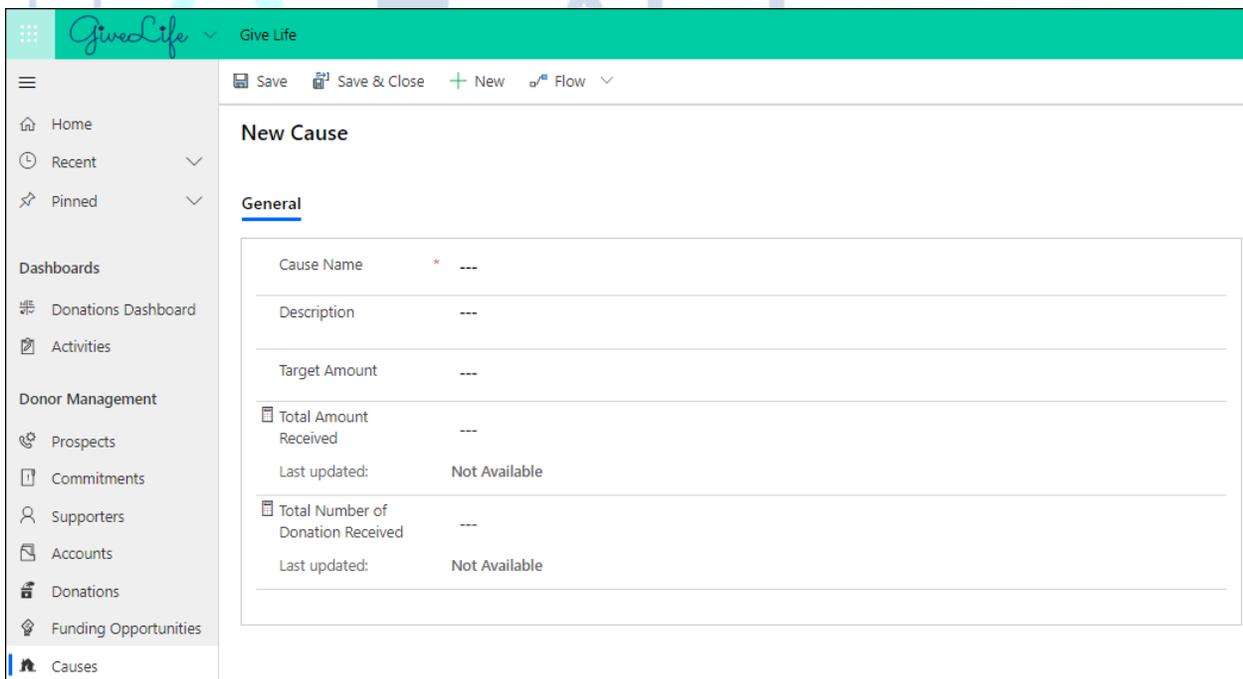
Causes are the records for which the Non Profit organization is accepting the donations.

Click on Funds in left hand Navigation Pane.



Click on +New Button on the ribbon above Funds View page.

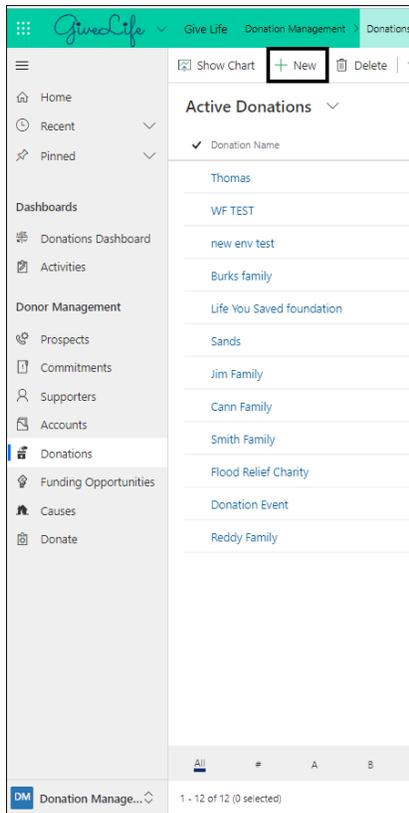
A new Fund creation form will open on the screen.



Enter the required details and click on “Save”.

5. Creating the Donation record

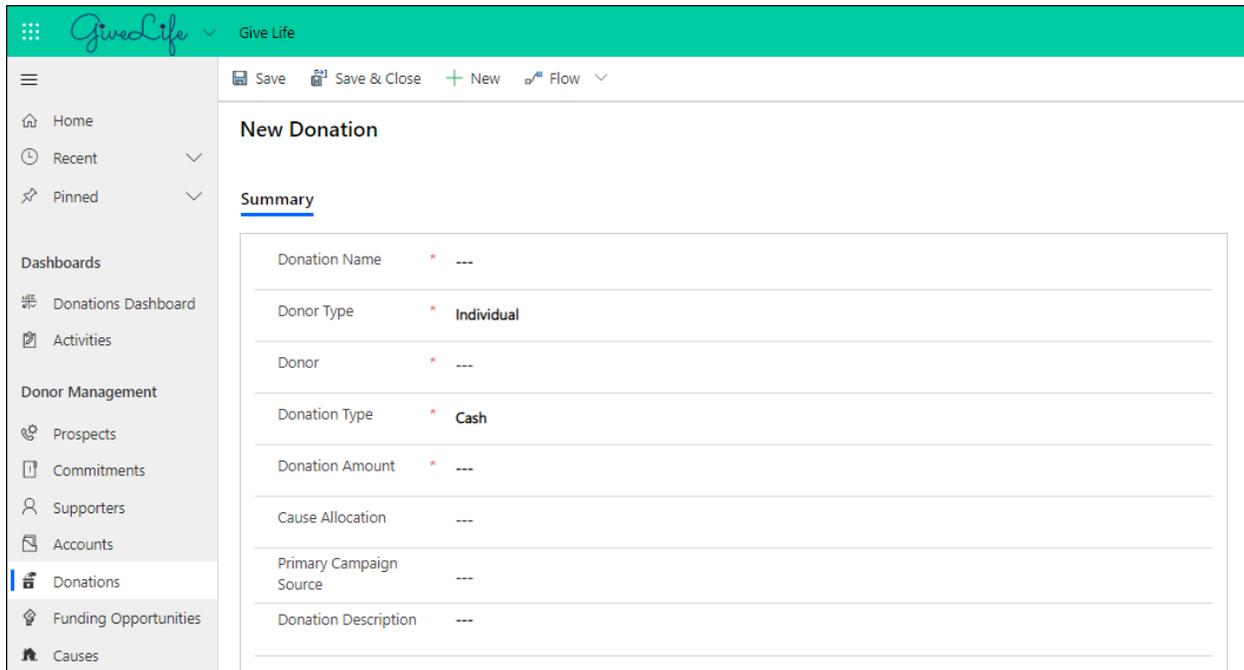
You can create the donation record by clicking on “Donations” in left hand navigation pane.



Alphavima

Click on +New Button on the ribbon above Donations View page.

A new donation creation form will open on the screen



Enter the required details. You can also select the donor for this donation record by choosing the donor type.

If donor type is individual system allows you to select a contact for donor.



If the donor type selected is corporate the system allows you to select the corresponding account.



You can also define the Donation type i.e. Cash or In-Kind using the donation type field.



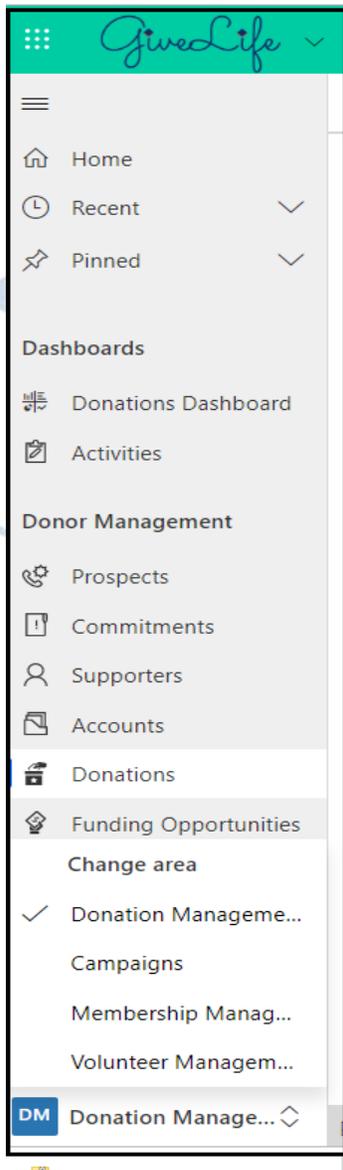
Click “Save” to save the record.

Volunteer Management

You shall be able to create the Volunteers and assign the organization to them using the volunteer management.

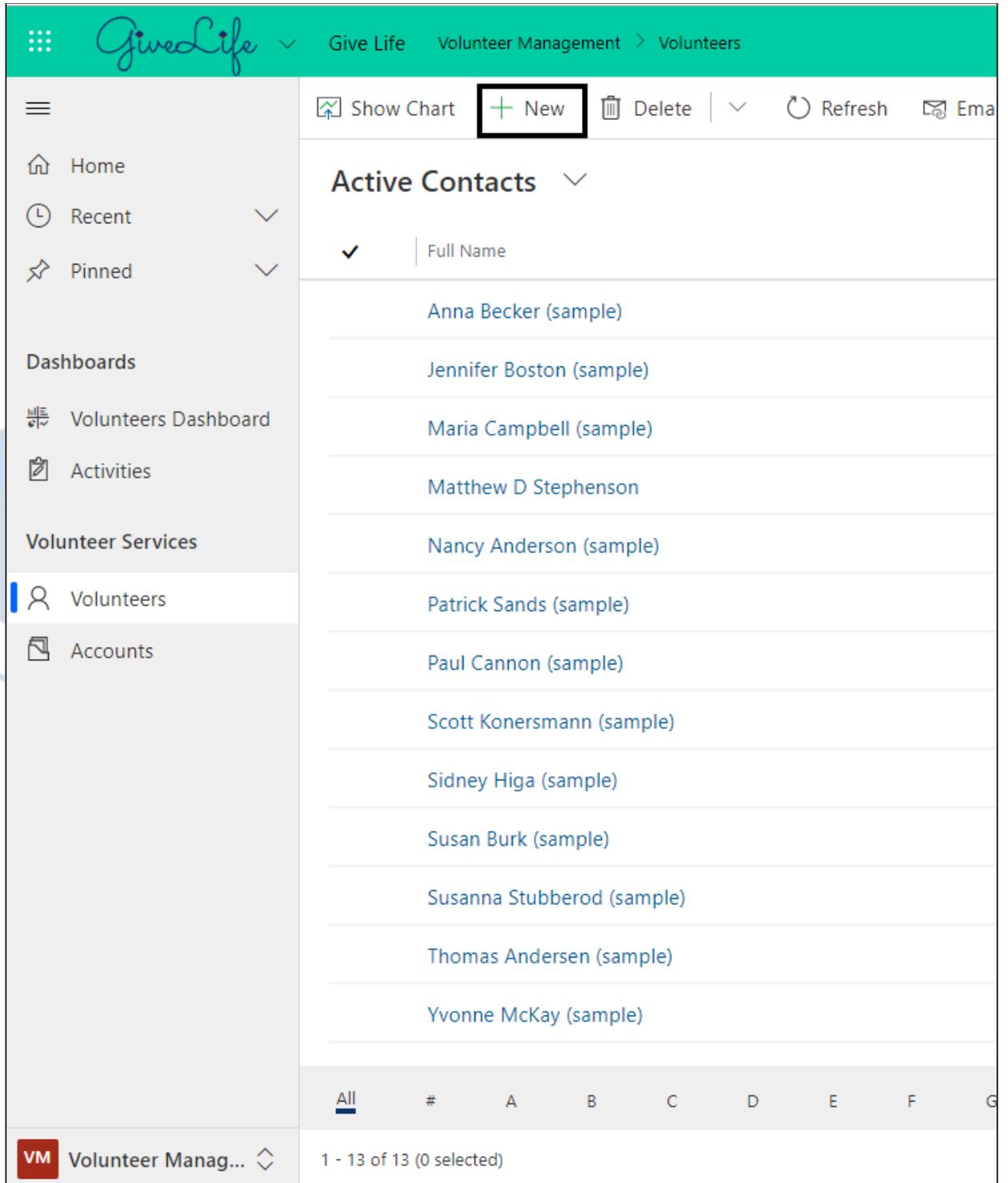
6. Creating a new Volunteer Record:

Go to the volunteer section by clicking on Volunteer management from the sitemap dropdown located at bottom left corner of the screen.



Alphavima

Click on the Volunteer from Left hand navigation pane.

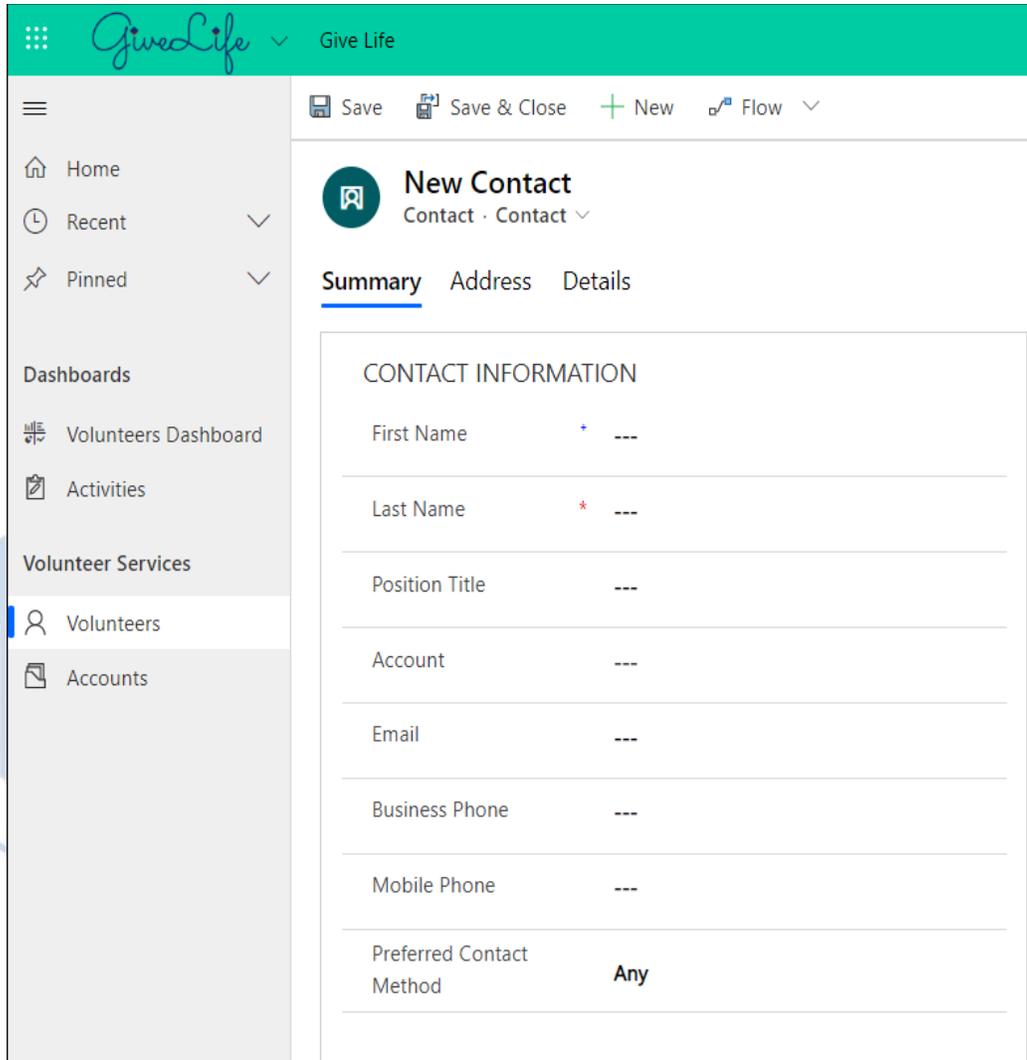


The screenshot shows the GiveLife Volunteer Management interface. The left navigation pane is open, and the 'Volunteers' option is selected. The main content area displays a list of active contacts. The '+ New' button is highlighted with a black box. The list of contacts includes:

Full Name
Anna Becker (sample)
Jennifer Boston (sample)
Maria Campbell (sample)
Matthew D Stephenson
Nancy Anderson (sample)
Patrick Sands (sample)
Paul Cannon (sample)
Scott Konersmann (sample)
Sidney Higa (sample)
Susan Burk (sample)
Susanna Stubberod (sample)
Thomas Andersen (sample)
Yvonne McKay (sample)

The bottom of the interface shows a status bar with '1 - 13 of 13 (0 selected)' and a navigation bar with 'All', '#', 'A', 'B', 'C', 'D', 'E', 'F', 'G'.

Click +New button located on the ribbon above Volunteer view, it will open a new Volunteer creation form.



The screenshot shows the 'New Contact' form in the GiveLife application. The form is titled 'New Contact' and has tabs for 'Summary', 'Address', and 'Details'. The 'Summary' tab is active, showing a 'CONTACT INFORMATION' section with the following fields:

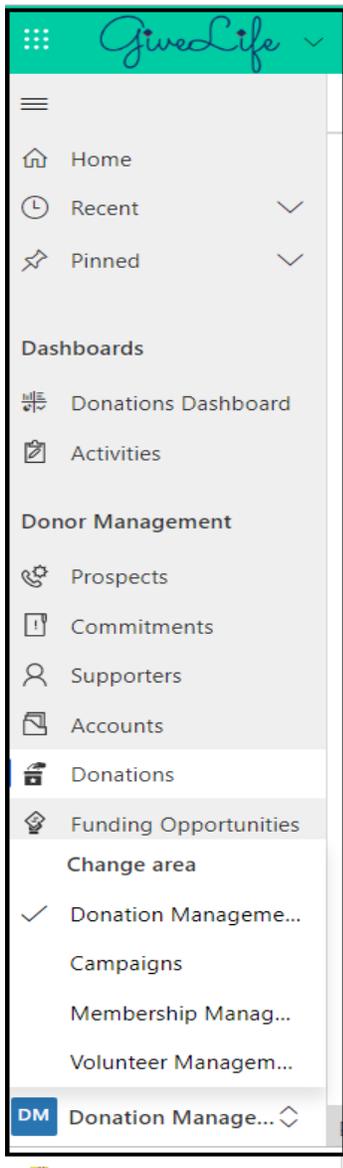
Field	Value
First Name	---
Last Name	---
Position Title	---
Account	---
Email	---
Business Phone	---
Mobile Phone	---
Preferred Contact Method	Any

Enter the required details Checkbox checked. and click on save.

Membership Management:

You can create the customized membership plans and subscribe your donors to these plans using the membership Signup.

Go to the Membership section by clicking on Membership Management from the sitemap Dropdown located at the bottom left corner of the screen.

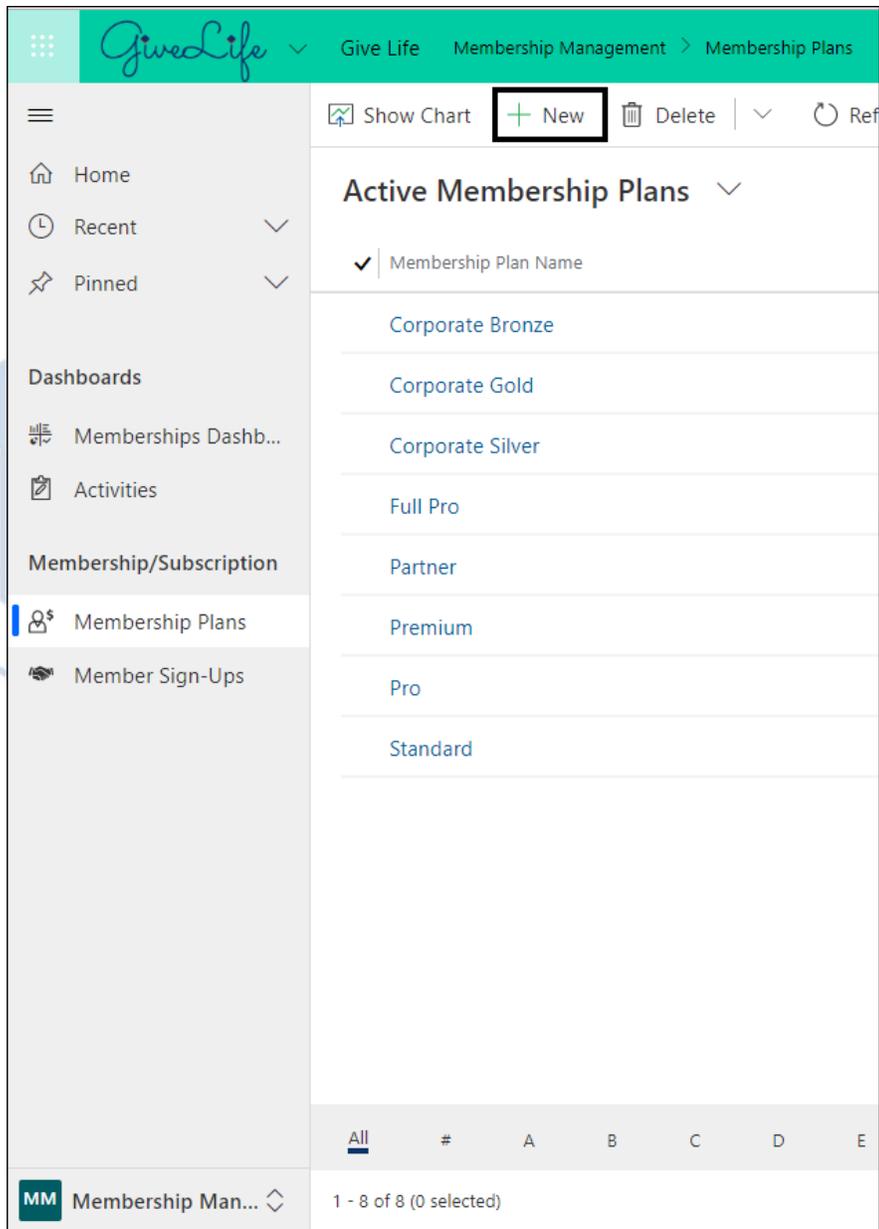


Alphavima

You can create Membership Plans and Subscribe your donors to specific membership plans using Member Signup.

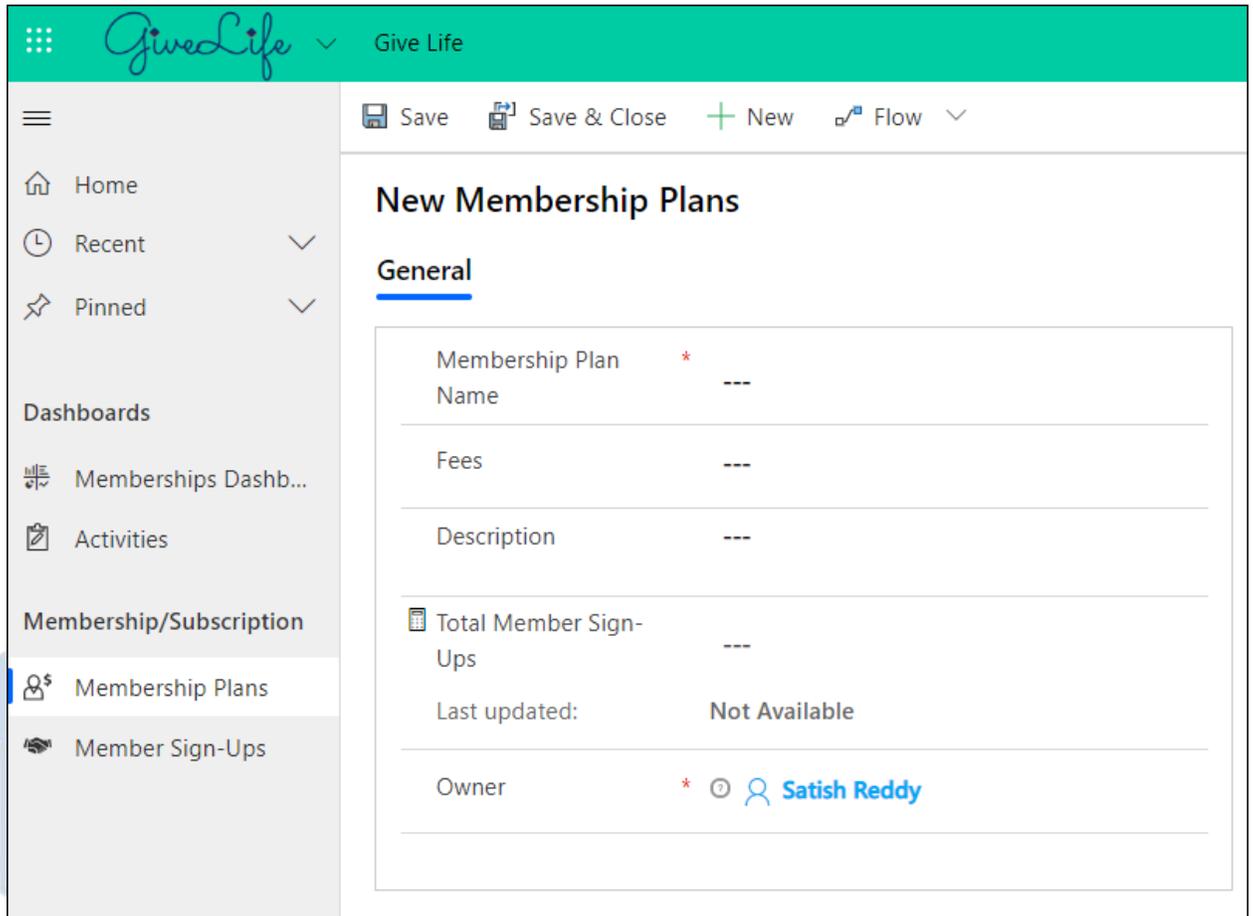
7. Create Membership Plans:

Click on Membership Plans from left hand navigation pane



The screenshot displays the GiveLife Membership Management interface. The top navigation bar includes the GiveLife logo, 'Give Life', 'Membership Management', and 'Membership Plans'. The left-hand navigation pane is open, showing options like Home, Recent, Pinned, Dashboards, Memberships Dashb..., Activities, Membership/Subscription, Membership Plans (highlighted), and Member Sign-Ups. The main content area shows a list of 'Active Membership Plans' with a search bar and a '+ New' button highlighted. The list includes plans such as Corporate Bronze, Corporate Gold, Corporate Silver, Full Pro, Partner, Premium, Pro, and Standard. The bottom status bar indicates '1 - 8 of 8 (0 selected)'.

Click +New button located on the ribbon above Membership Plans view, it will open a new Membership Plan creation form.



GiveLife Give Life

Save Save & Close New Flow

New Membership Plans

General

Membership Plan *	---
Name	---
Fees	---
Description	---
Total Member Sign-Ups	---
Last updated:	Not Available
Owner *	 Satish Reddy

Enter required details and click on Save.

8. Create Member Signup:

Click on the Member Signup from Left hand navigation pane

GiveLife Give Life Membership Management Member Sign-Ups

Show Chart **+ New** Delete Ref

Active Member Sign-Up

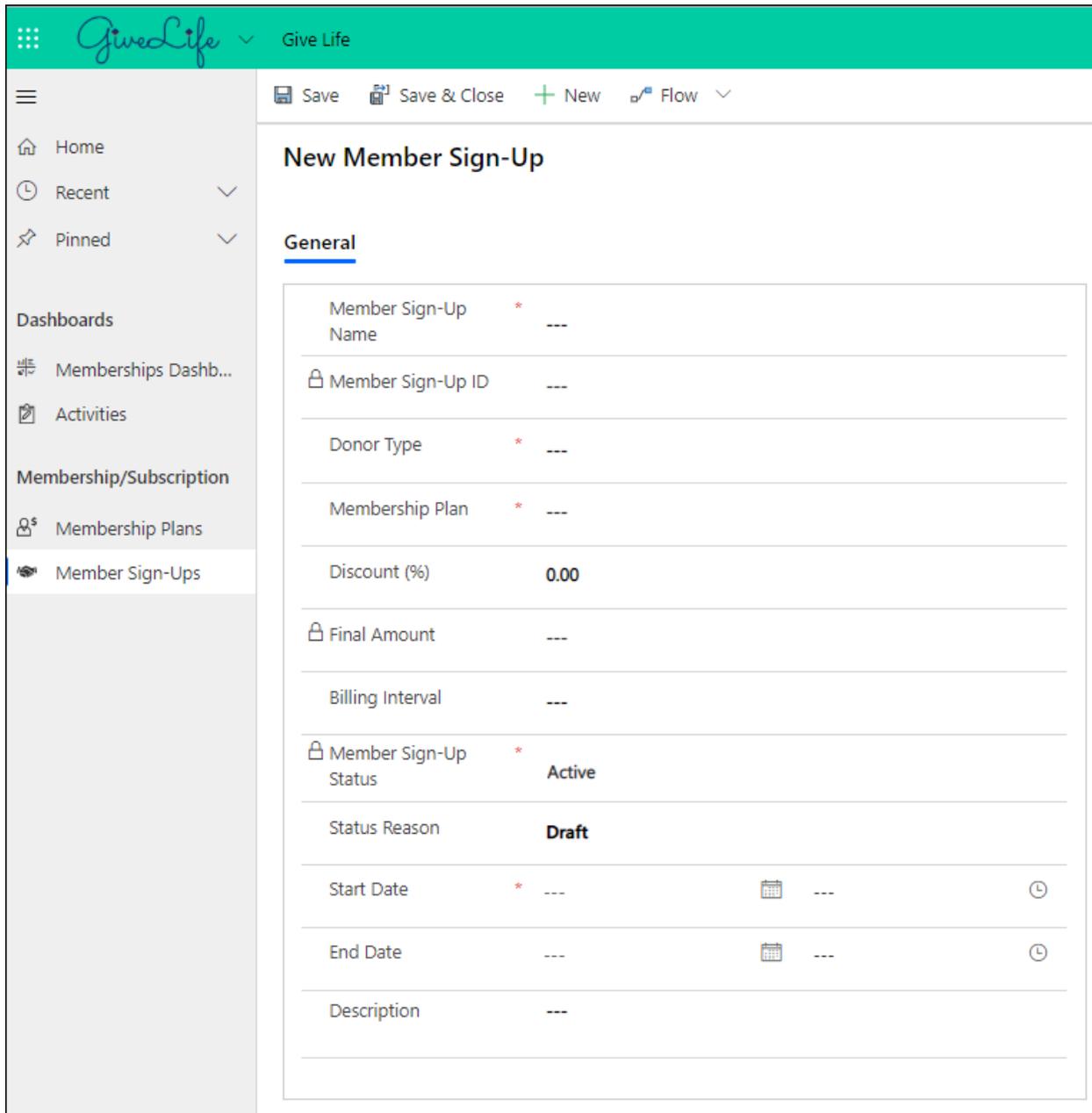
Member Sign-Up Name

Cann Family
Anonymous Donation
World Vision
Boston Family
Smith Family
Anne-Franço
Paul Cannon
Canada Helps
Animal Protection Corp
Mississauga Food Bank
Datum Corp
Food Share
Feeding Americans

All # A B C D E

MM Membership Man... 1 - 13 of 13 (0 selected)

Click +New button located on the ribbon above Subscription view, it will open a new subscription creation form.



The screenshot shows the 'New Member Sign-Up' form in the GiveLife application. The form is titled 'New Member Sign-Up' and is under the 'General' tab. The form contains several input fields for member details, including Name, ID, Donor Type, Membership Plan, Discount, Final Amount, Billing Interval, Status, Status Reason, Start Date, End Date, and Description. The Status is set to 'Active' and Status Reason is 'Draft'.

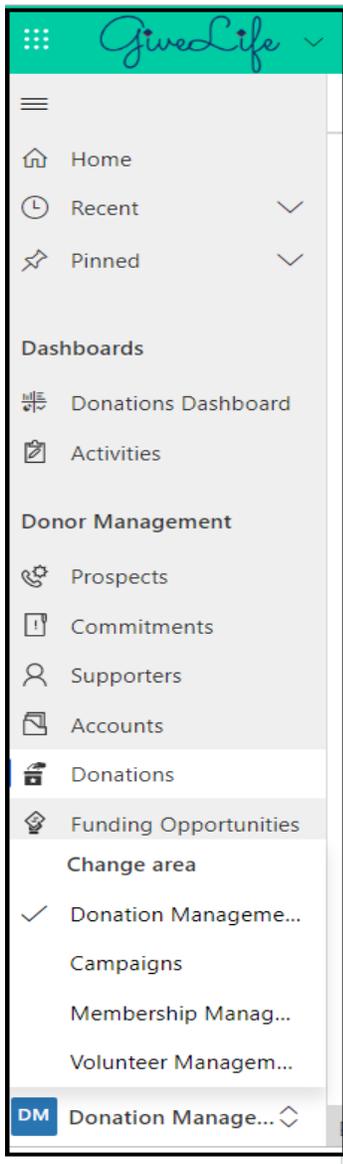
Field	Value	Required	Default
Member Sign-Up Name	---	*	---
Member Sign-Up ID	---	---	---
Donor Type	---	*	---
Membership Plan	---	*	---
Discount (%)	0.00	---	---
Final Amount	---	---	---
Billing Interval	---	---	---
Member Sign-Up Status	Active	*	---
Status Reason	Draft	---	---
Start Date	---	*	---
End Date	---	---	---
Description	---	---	---

Enter the required details and click save.

Campaign Management

You shall be able to create the various fundraising events using the campaign management, segment the target list and add various campaign activity to a campaign like bulk email, Phone calls using this module.

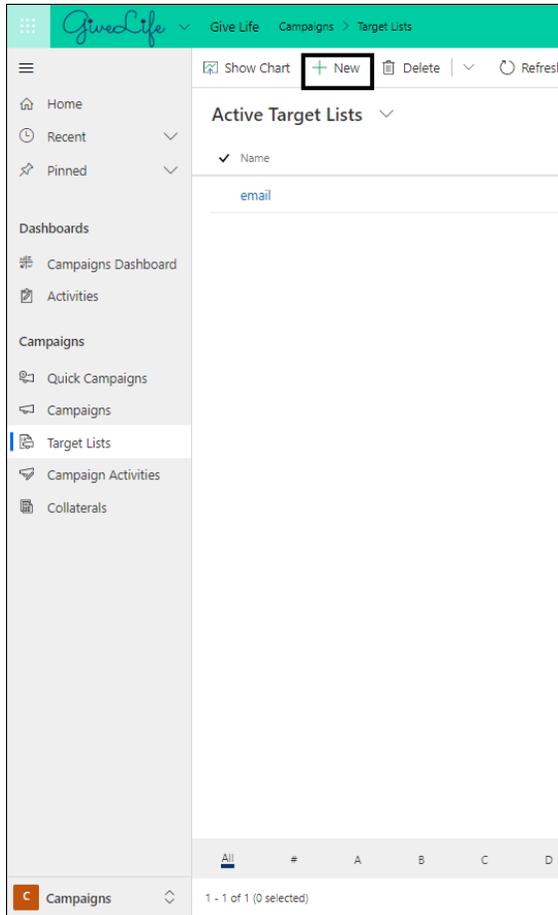
Go to the campaign management section by clicking on the campaign from the sitemap dropdown located at the bottom left corner of the screen.



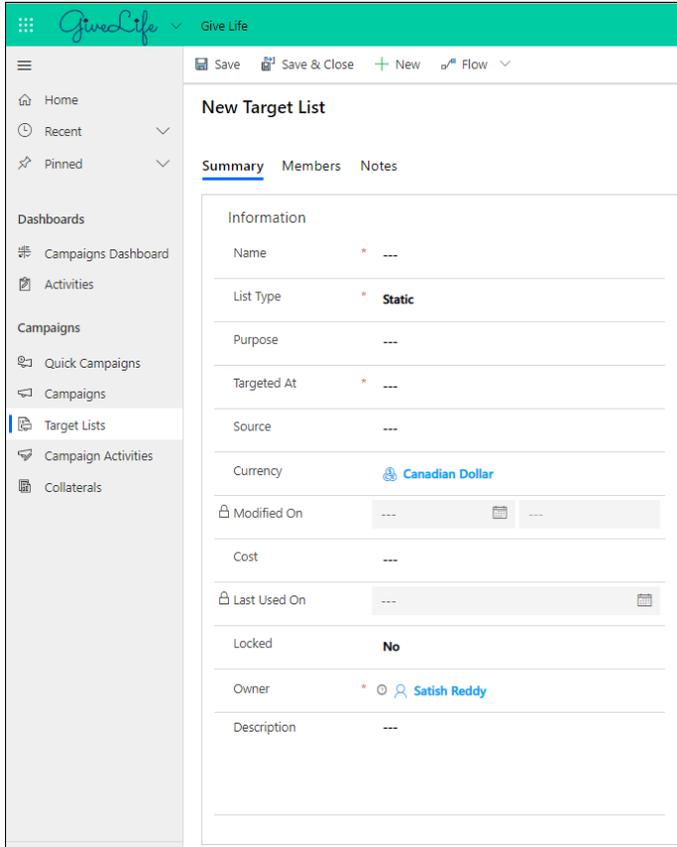
Alphavima

9. Create Target List

Click on the Target list from left hand navigation pane



Click +New button location in the ribbon above Target list view, it will open a new target list creation form.



New Target List

Summary Members Notes

Information

Name * ---

List Type * **Static**

Purpose ---

Targeted At * ---

Source ---

Currency  **Canadian Dollar**

Modified On ---  ---

Cost ---

Last Used On --- 

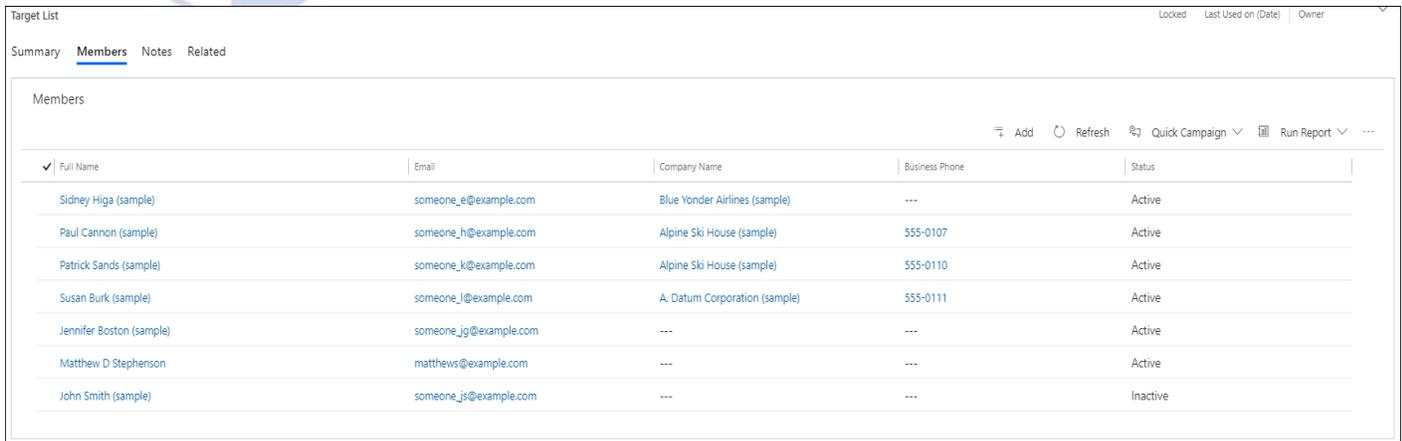
Locked **No**

Owner *  **Satish Reddy**

Description ---

Enter the Required details and click Save.

Once the record is saved. Click on the Members tab



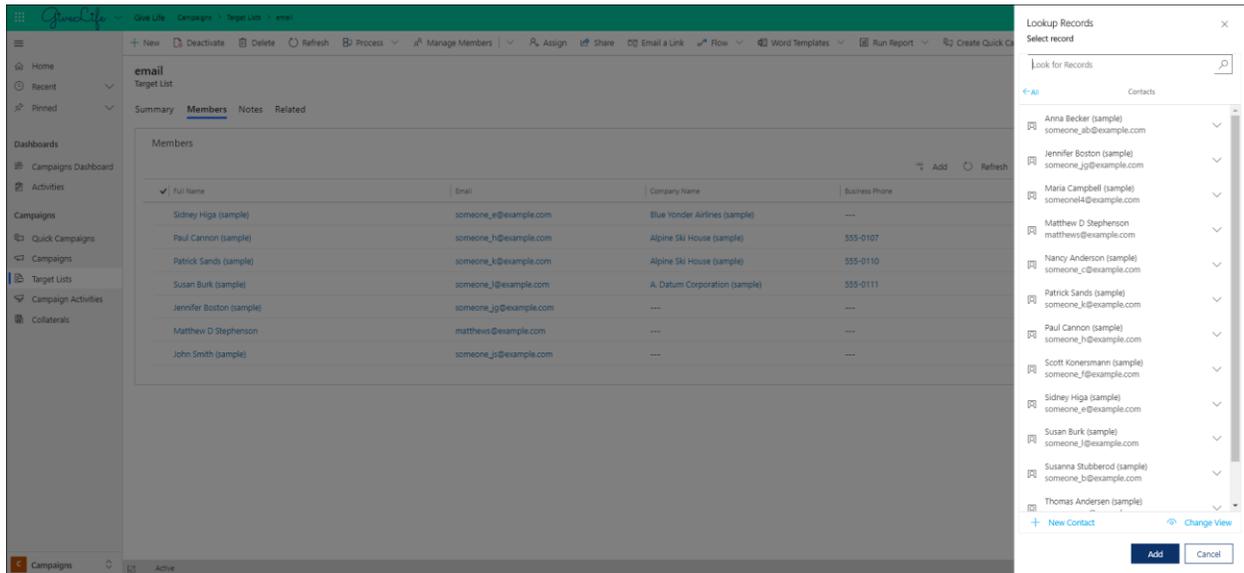
Target List Locked Last Used on (Date) Owner

Summary **Members** Notes Related

Members  Add  Refresh  Quick Campaign  Run Report ...

Full Name	Email	Company Name	Business Phone	Status
Sidney Higa (sample)	someone_e@example.com	Blue Yonder Airlines (sample)	---	Active
Paul Cannon (sample)	someone_h@example.com	Alpine Ski House (sample)	555-0107	Active
Patrick Sands (sample)	someone_k@example.com	Alpine Ski House (sample)	555-0110	Active
Susan Burk (sample)	someone_l@example.com	A. Datum Corporation (sample)	555-0111	Active
Jennifer Boston (sample)	someone_jg@example.com	---	---	Active
Matthew D Stephenson	matthews@example.com	---	---	Active
John Smith (sample)	someone_js@example.com	---	---	Inactive

In the members tab, click on the +Add to choose the records to be added to this target list.



The screenshot shows the GiveLife interface. On the left is a navigation menu with options like Home, Recent, Pinned, Campaigns Dashboard, Activities, Campaigns, Quick Campaigns, Campaigns, Target Lists, Campaign Activities, and Collaterals. The main area displays an 'email Target List' with a 'Members' tab selected. A table lists members with columns for Full Name, Email, Company Name, and Business Phone. A '+ Add' button is visible in the top right of the table. A 'Lookup Records' dialog box is open on the right, showing a search bar and a list of contacts with checkboxes for selection. The dialog has 'Add' and 'Cancel' buttons at the bottom.

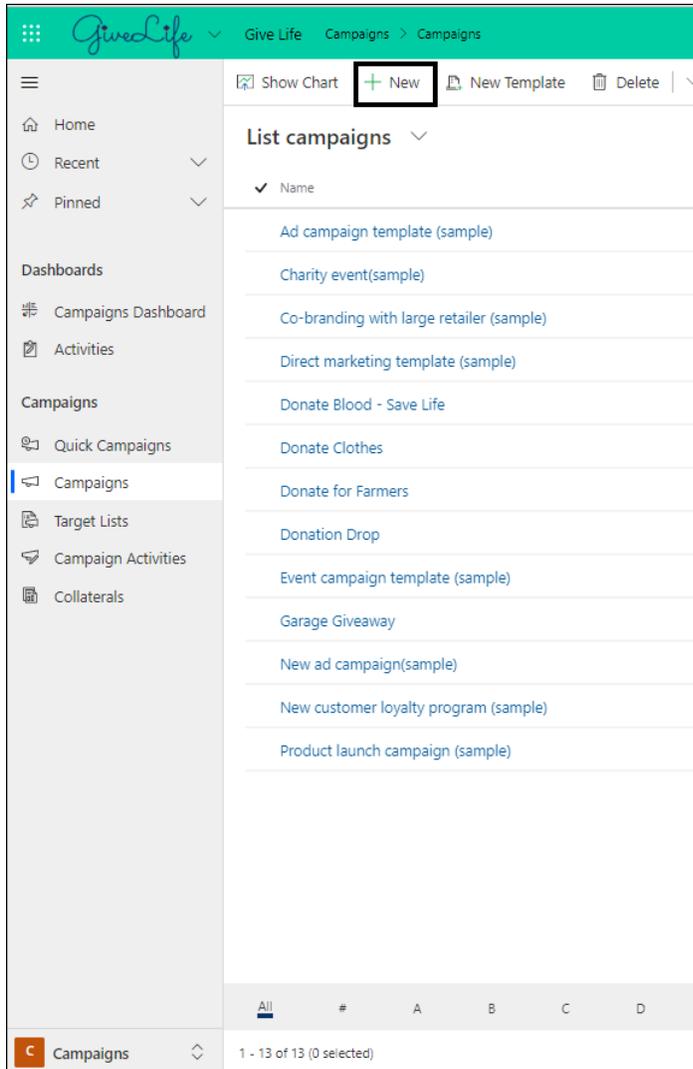
Full Name	Email	Company Name	Business Phone
Sidney Higa (sample)	someone_e@example.com	Blue Yonder Airlines (sample)	---
Paul Cannon (sample)	someone_h@example.com	Alpine Ski House (sample)	555-0107
Patrick Sands (sample)	someone_k@example.com	Alpine Ski House (sample)	555-0110
Susan Burk (sample)	someone_j@example.com	A. Datum Corporation (sample)	555-0111
Jennifer Boston (sample)	someone_jg@example.com	---	---
Matthew D Stephenson	matthews@example.com	---	---
John Smith (sample)	someone_js@example.com	---	---

Click Add once you have selected the desired target records to add them in the target list.



10. Create Campaigns

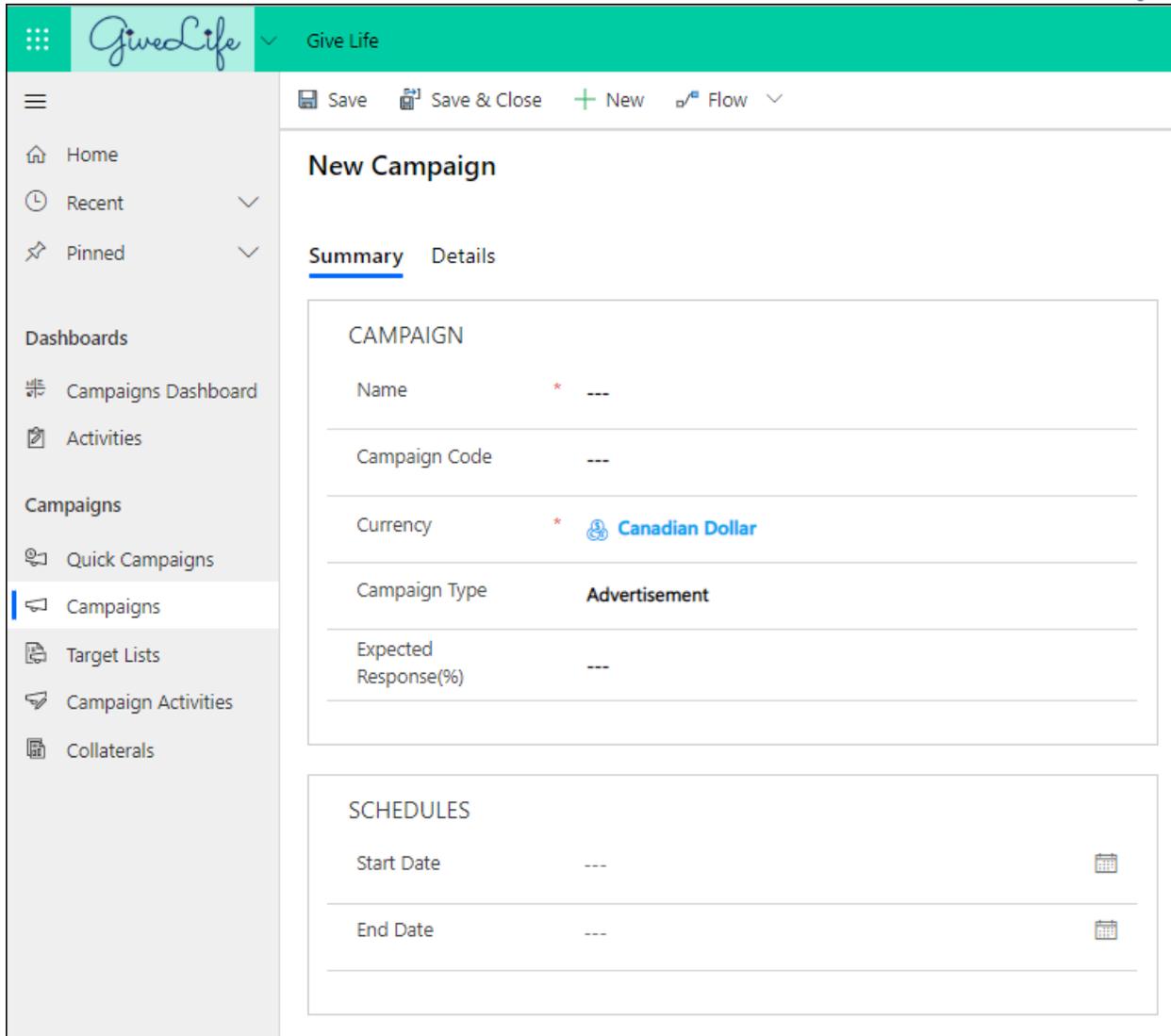
Click on the Campaigns from left hand navigation pane



The screenshot shows the GiveLife Campaigns management interface. The left navigation pane is open, and 'Campaigns' is selected. The main area displays a list of campaigns with a '+ New' button highlighted in the ribbon above the list.

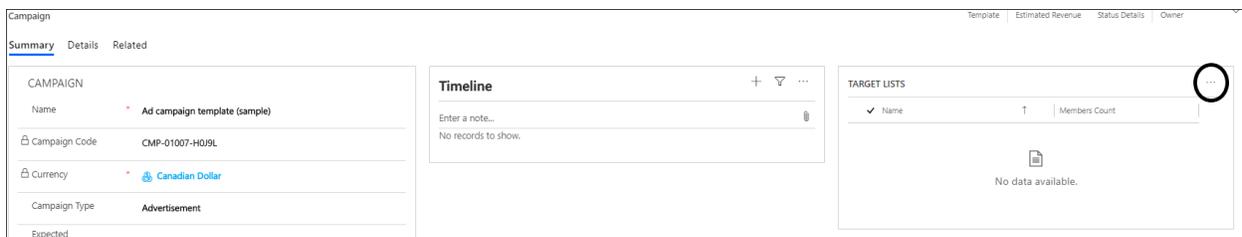
Name
Ad campaign template (sample)
Charity event(sample)
Co-branding with large retailer (sample)
Direct marketing template (sample)
Donate Blood - Save Life
Donate Clothes
Donate for Farmers
Donation Drop
Event campaign template (sample)
Garage Giveaway
New ad campaign(sample)
New customer loyalty program (sample)
Product launch campaign (sample)

Click +New button location in the ribbon above campaign view, it will open a new campaign creation form



Enter the required details and click save.

Once the record is saved, go to the Target List section and click on ellipsis sign



Click on Add Existing Target List and choose the previously saved target list. You can also add activities to a Campaign by clicking on the ellipsis sign on Campaign activities section in Campaign detail page.