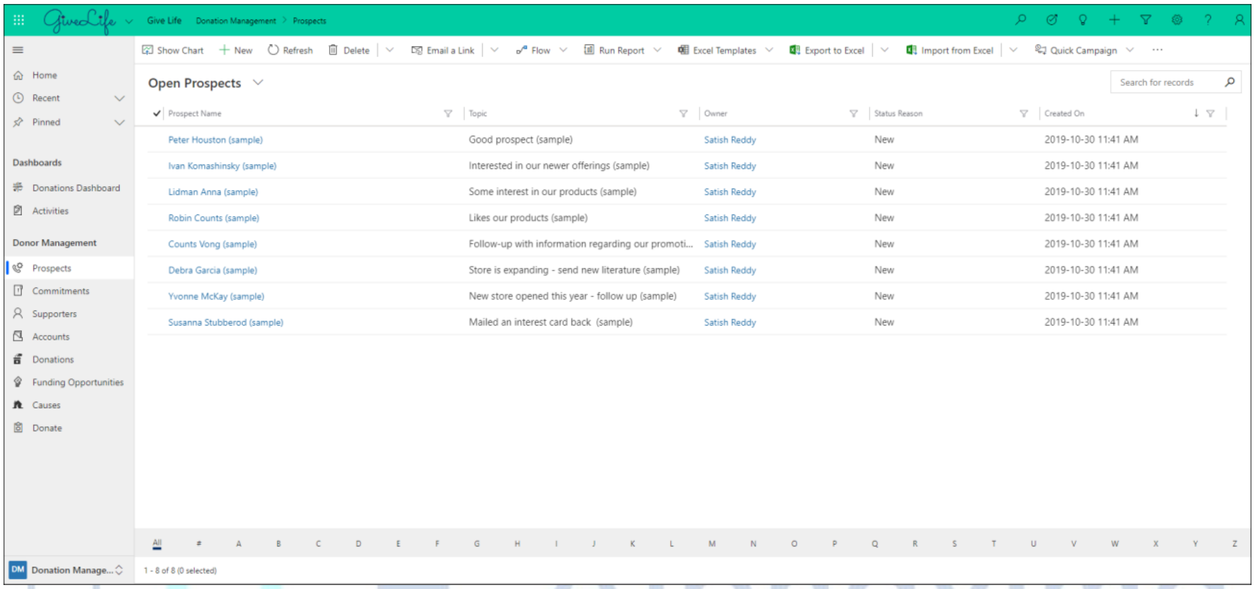
User Guide

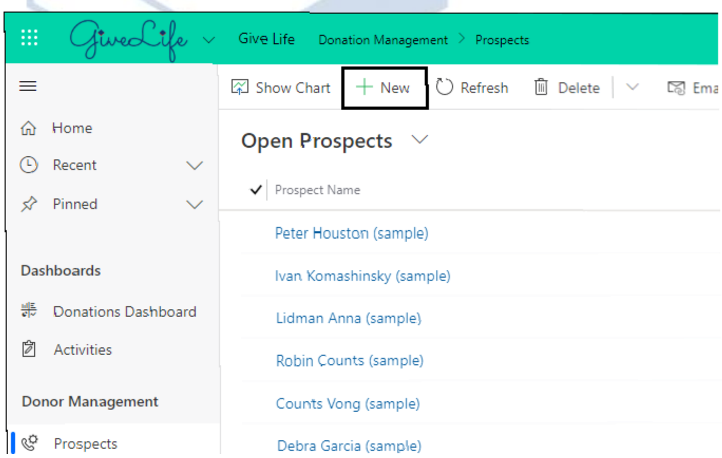
Donor Management

1. Creating the prospect -> Commitment Life cycle.

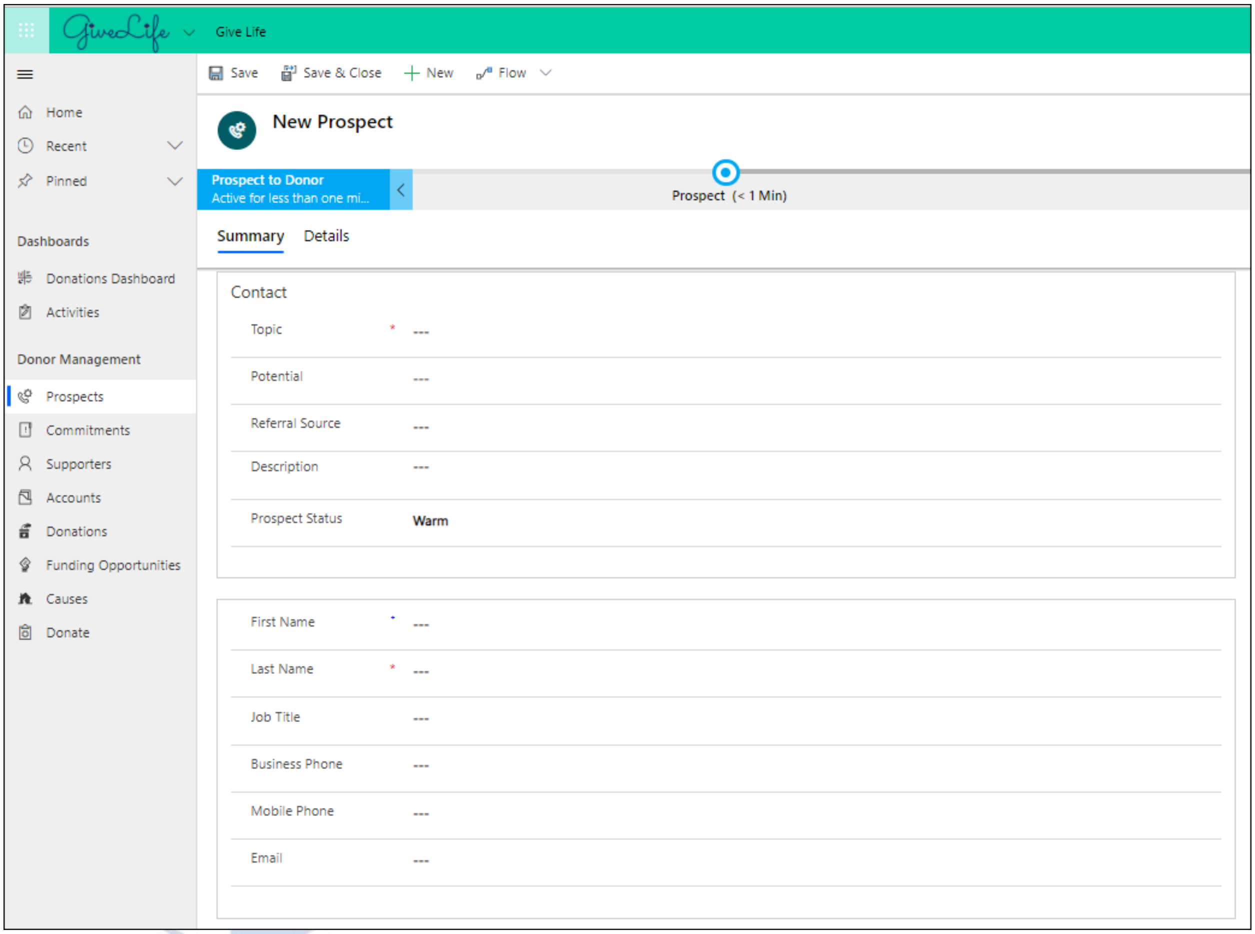
Click on the "Prospect" in left hand navigation pane.



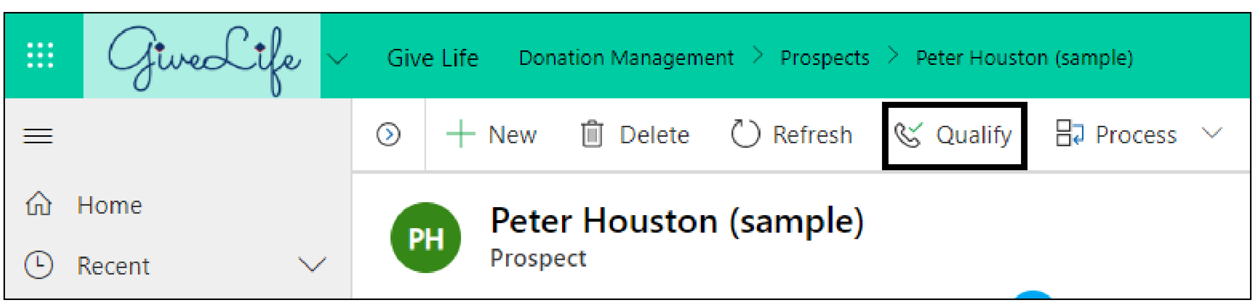
Click +New Click +New button located on the ribbon above prospects view, it will open a new prospect creation form.



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



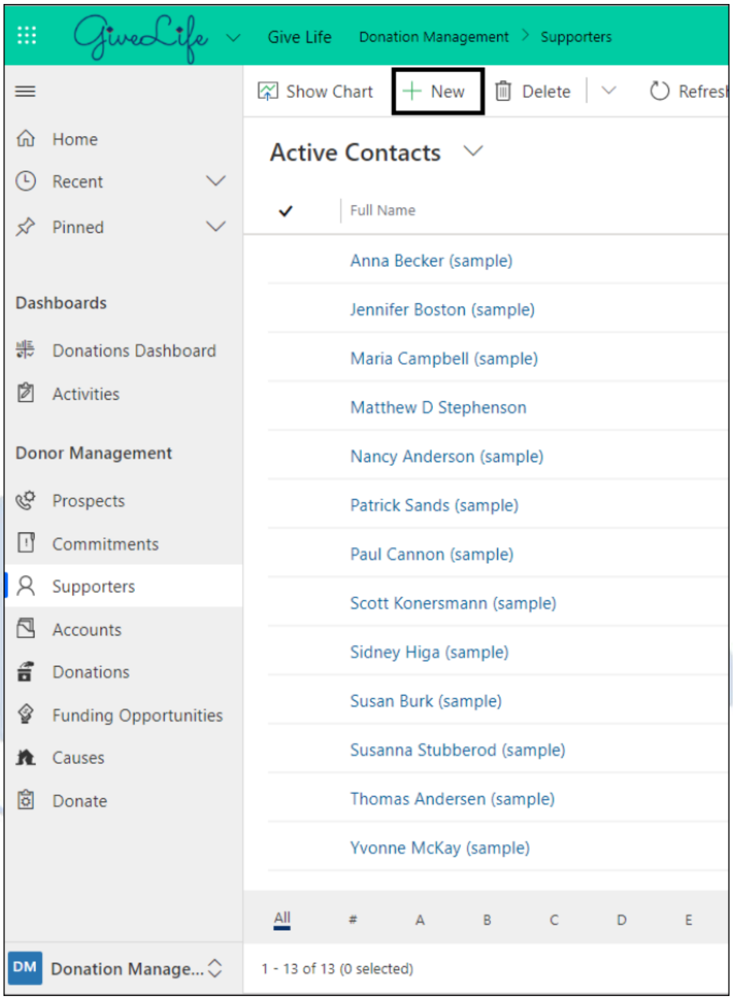
Once the prospect is created you can qualify it to convert it into a commitment by clicking Qualify button in the ribbon above the Prospect form.



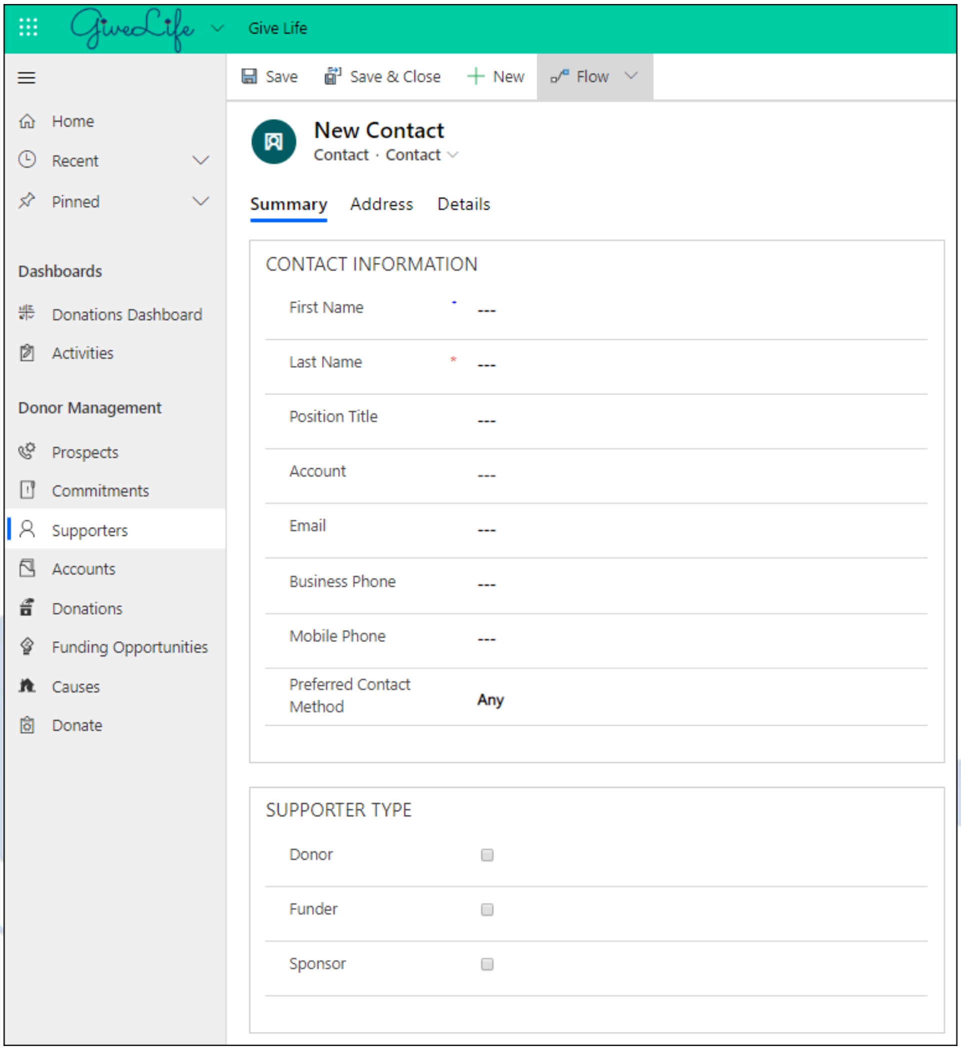
Once qualified a commitment record shall be created in the system.

2. Creating a Supporter Record:

Click on the Supporter from Left hand navigation pane



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

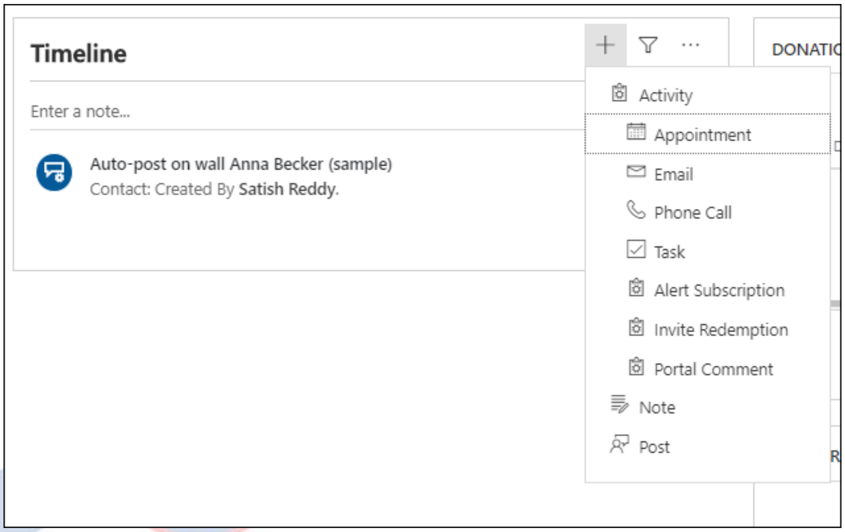


Enter the required details and specify the supporter type by checking appropriate checkbox checked and click on save.

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

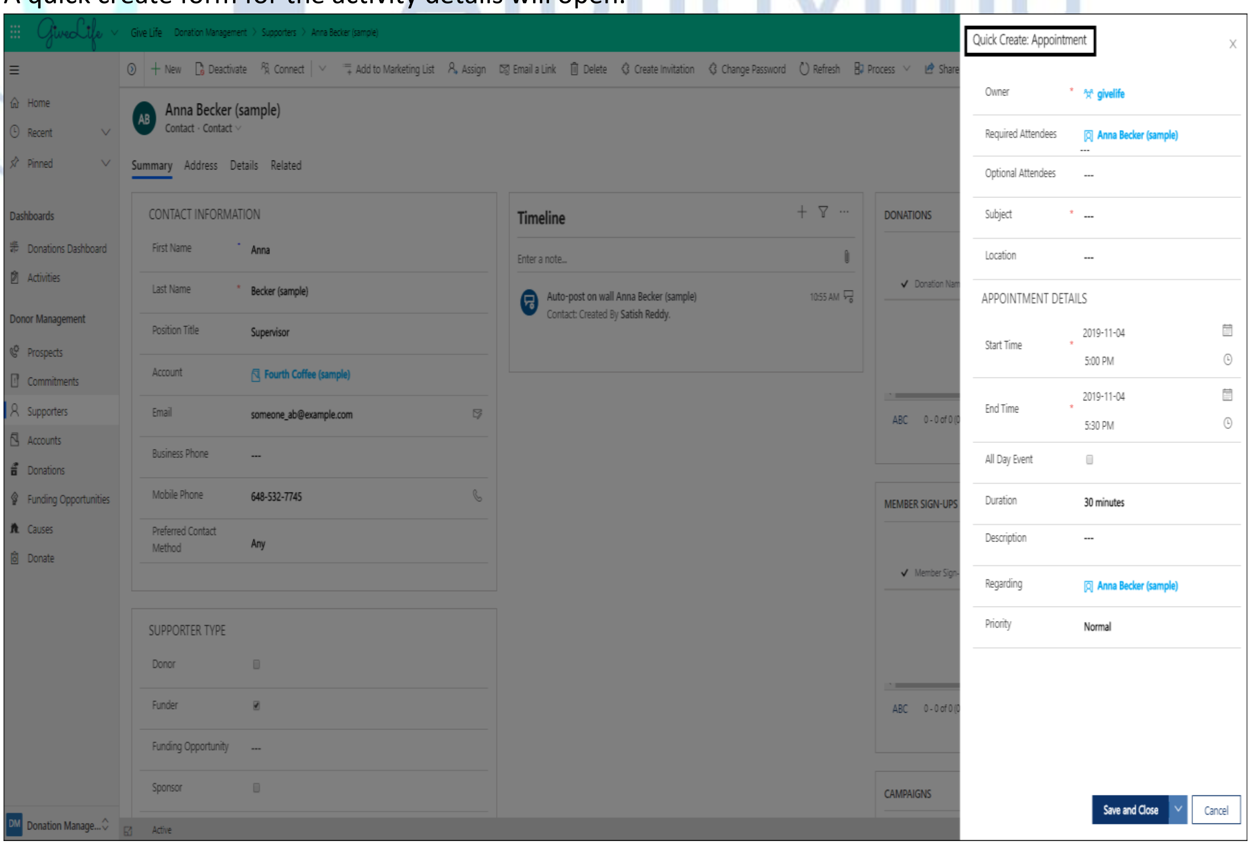
a. **Add activities**:

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.

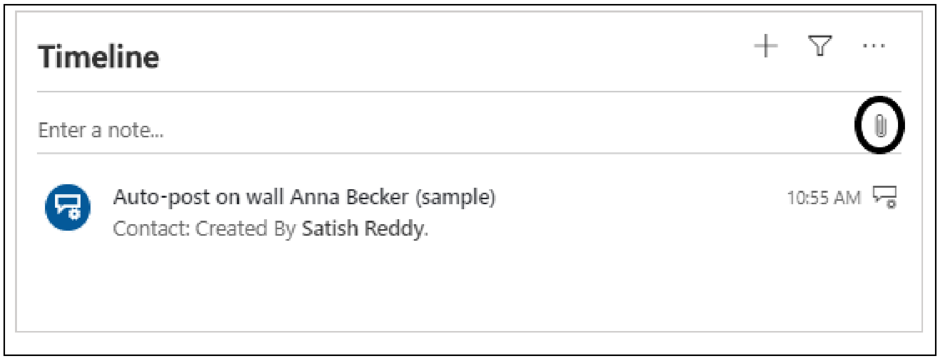
A quick create form for the activity details will open.



Enter the required details and click “Save and Close”

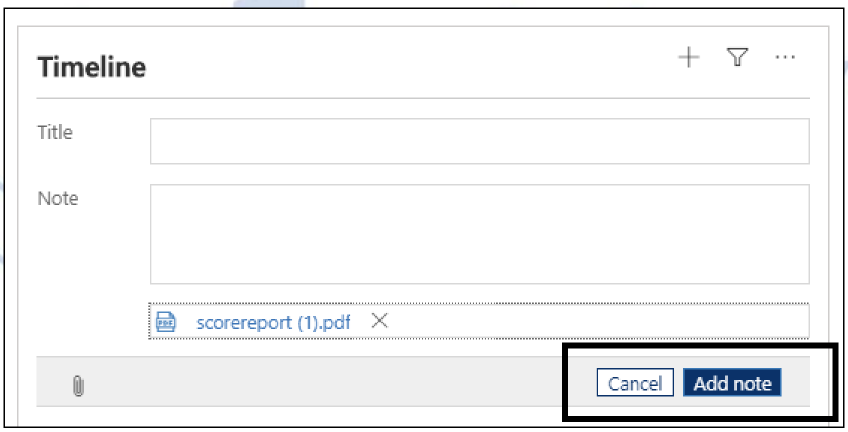
b. Add Attachment

Click on attach sign in the Timeline Section of donor Record



Select the file you wish to upload from your local directory

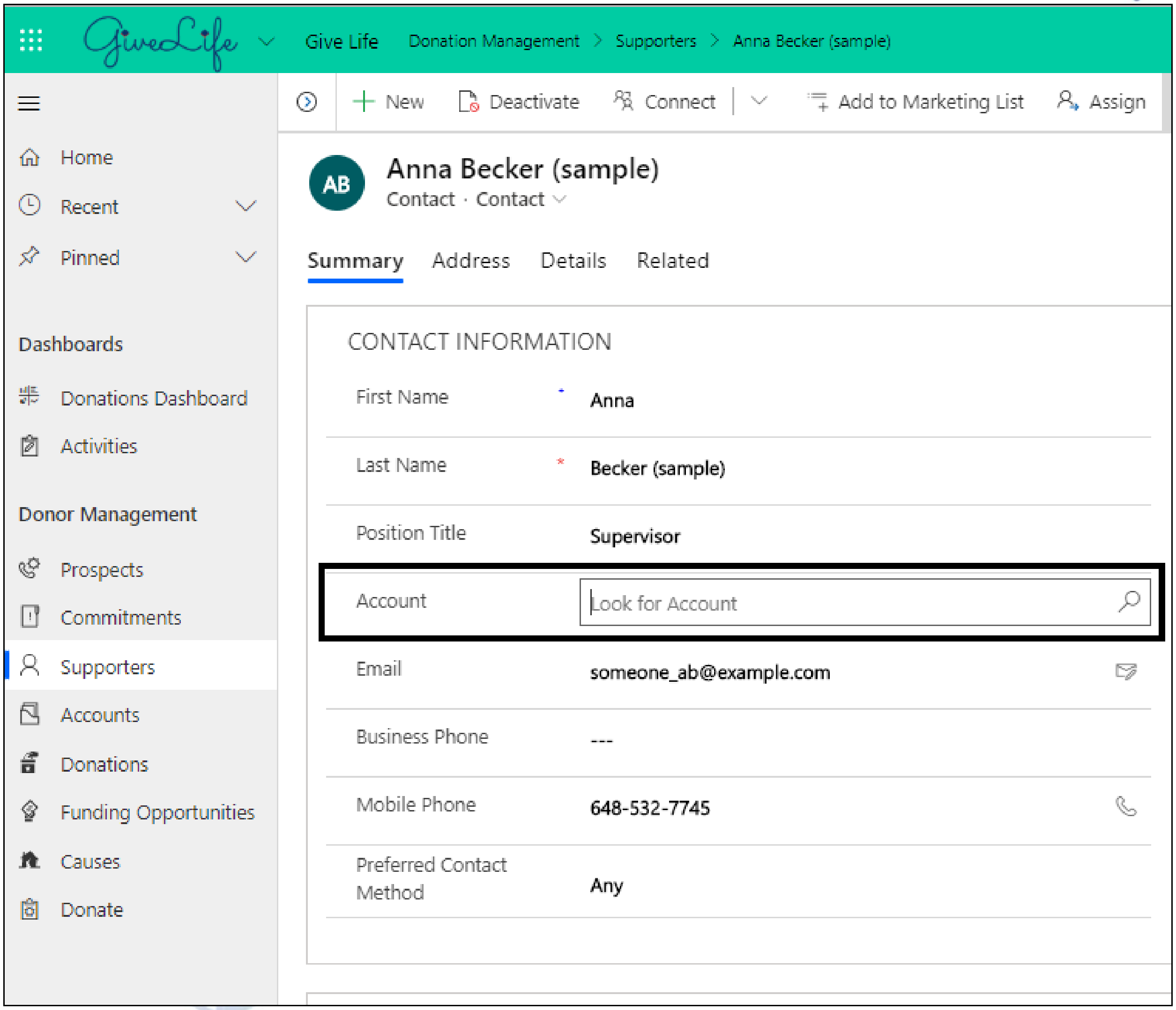
Click open button in the dialogue box and click “Add Note” button to attach the selected file.



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.

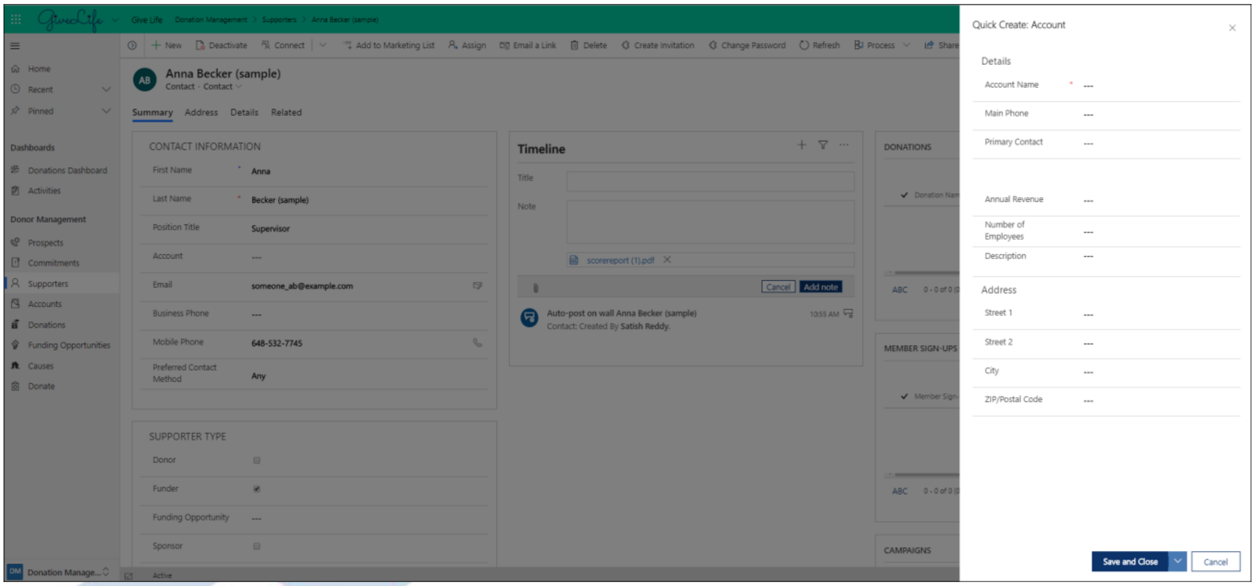


Select the desired account.

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

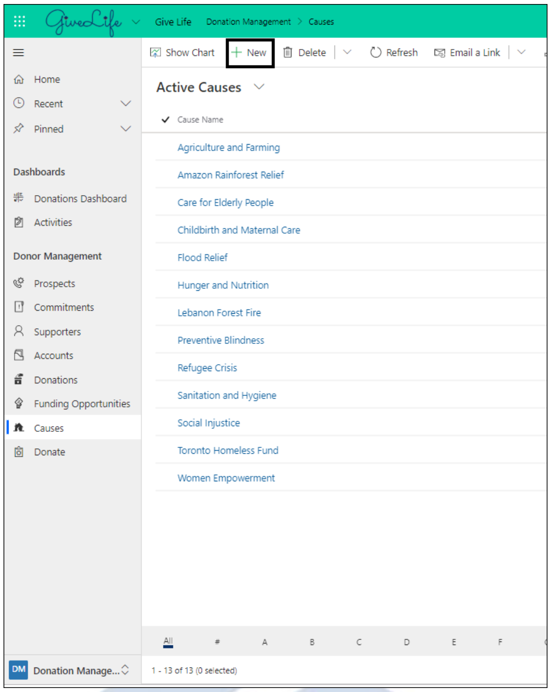


Enter the required details and click “Save and Close”. The contact shall get associated with the newly created account.

4. Creating the Cause records

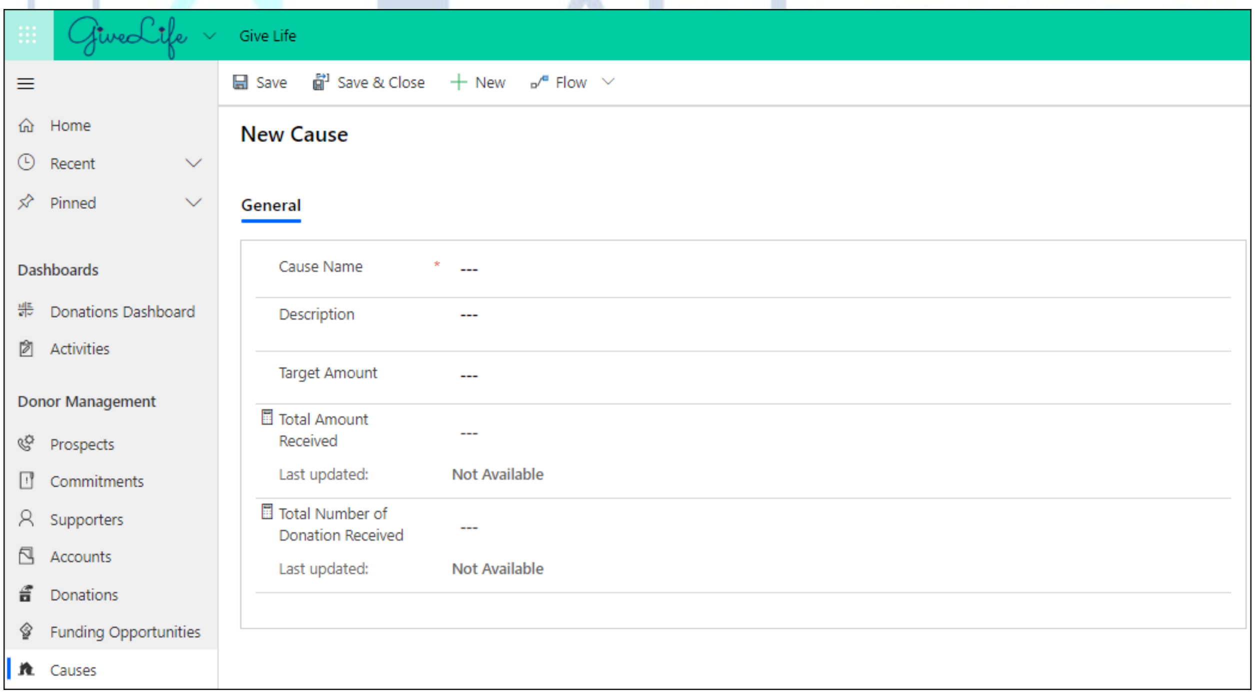
Causes are the records for which the Non Profit organization is accepting the donations.

Click on Funds in left hand Navigation Pane.



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

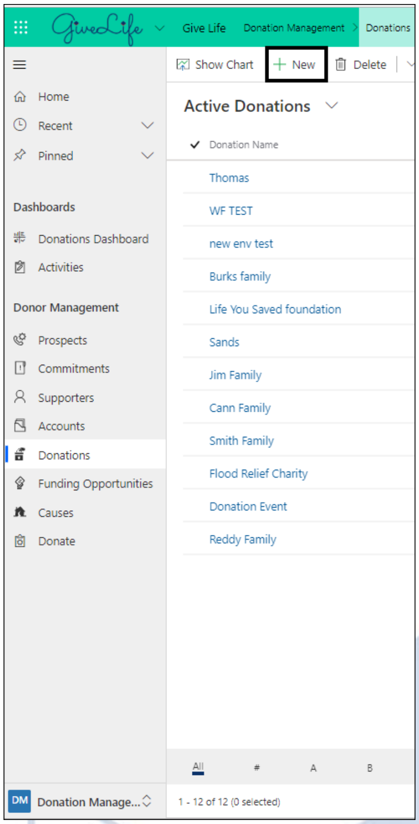
A new Fund creation form will open on the screen.



Enter the required details and click on “Save”.

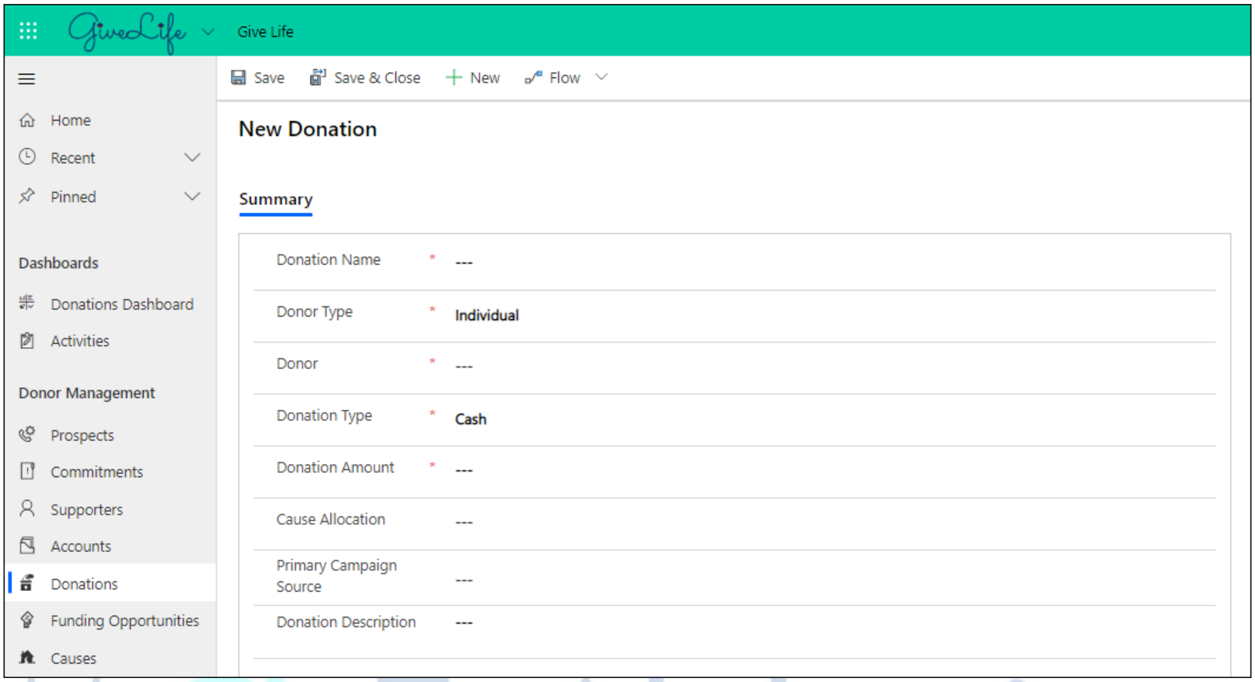
5. Creating the Donation record

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



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

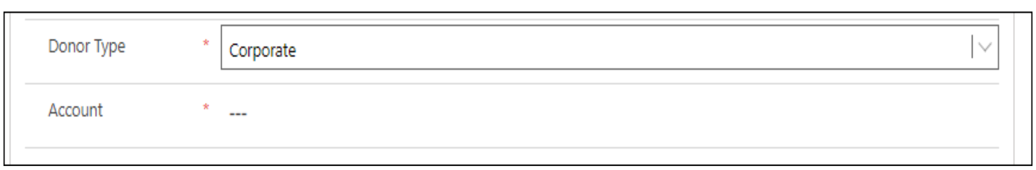
A new donation creation form will open on the screen



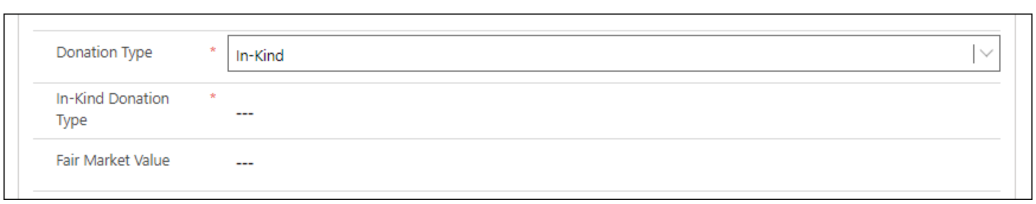
Enter the required details. You can also select the donor for this donation record by choosing the donor type.

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.



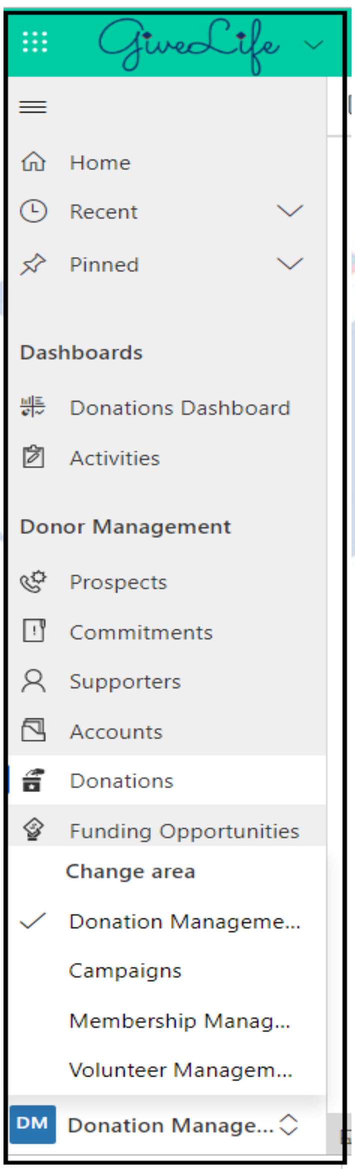
Click “Save” to save the record.

Volunteer Management

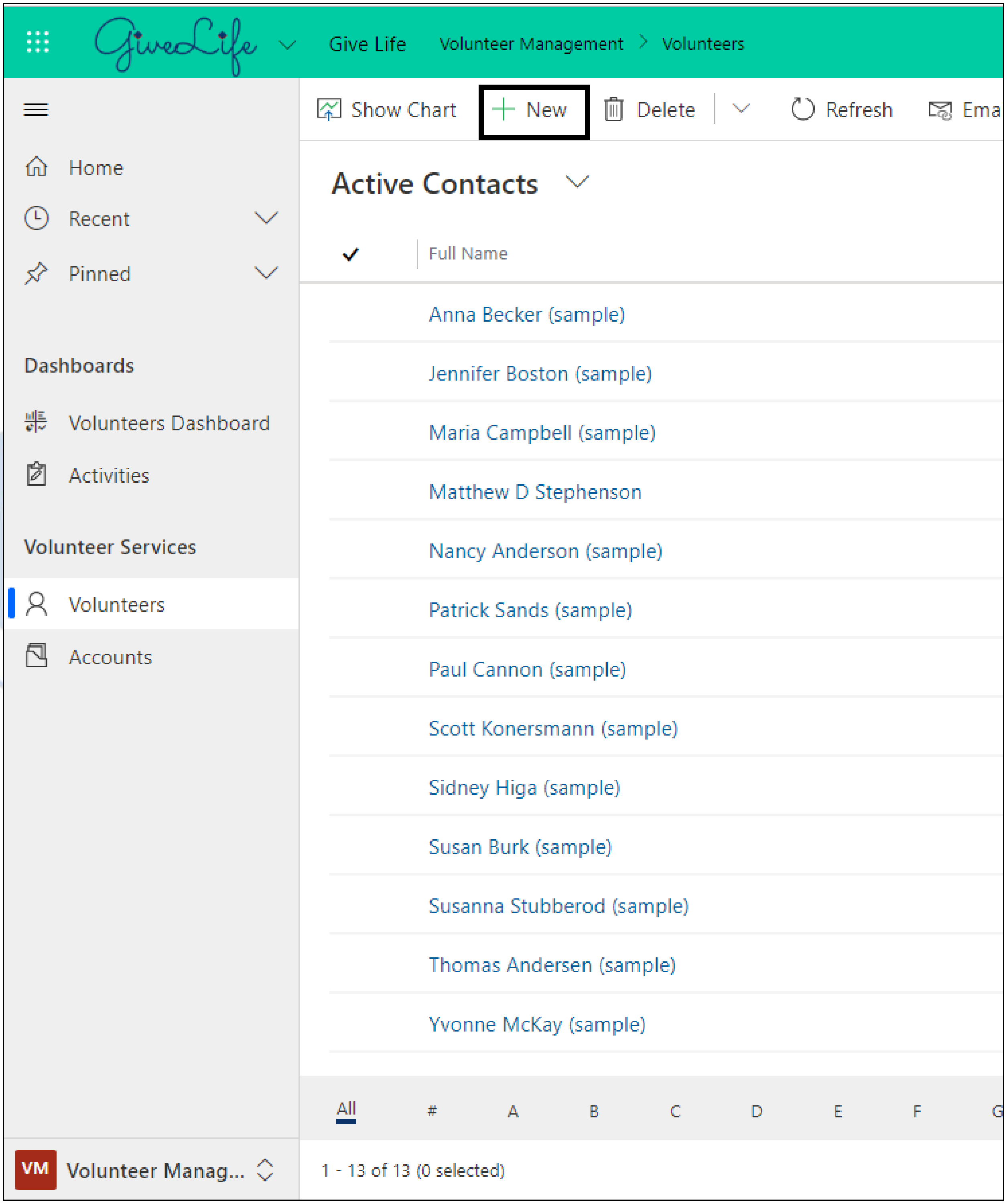
You shall be able to create the Volunteers and assign the organization to them using the volunteer management.

6. **Creating a new Volunteer Record**:

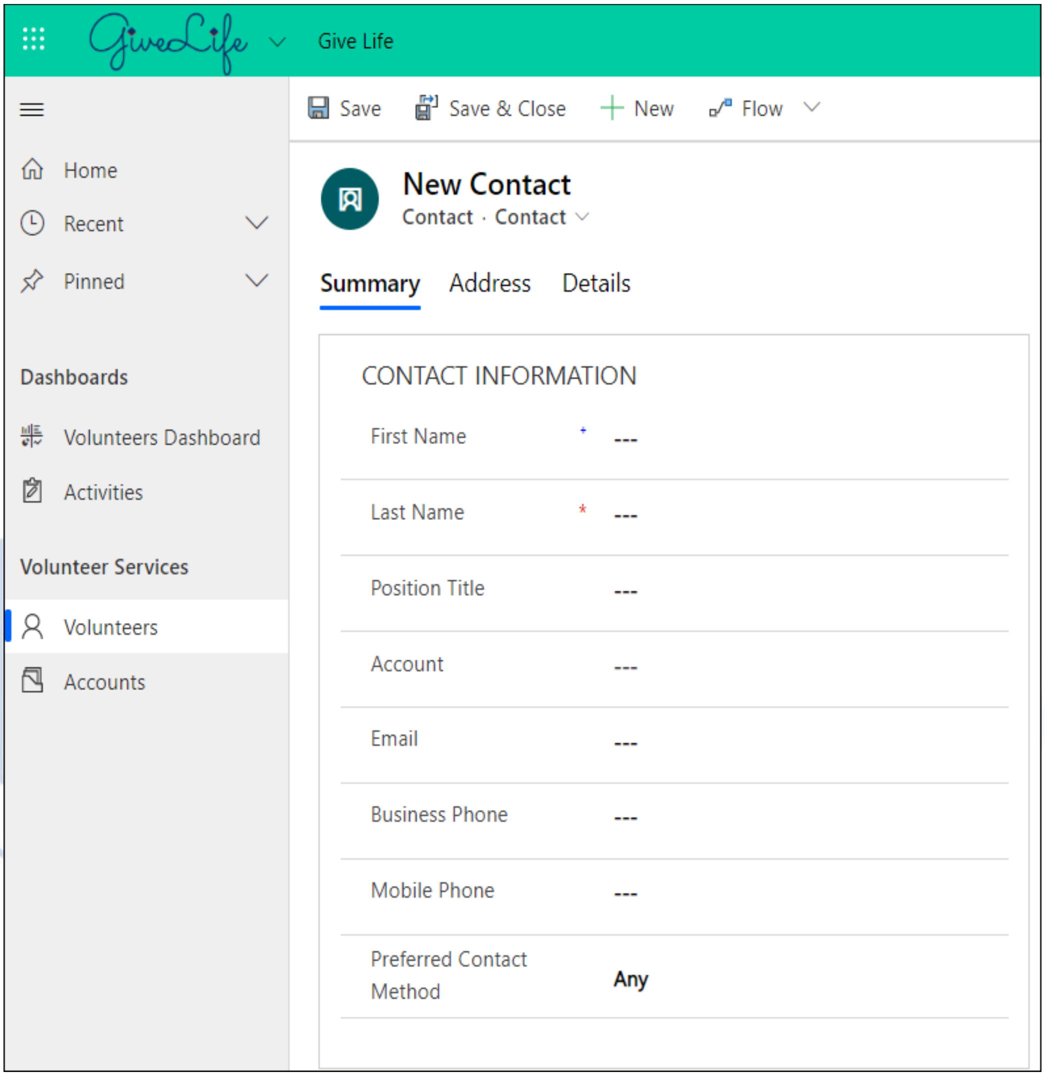
   Go to the volunteer section by clicking on Volunteer management from the sitemap dropdown located at bottom left corner of the screen.



Click on the Volunteer from Left hand navigation pane.



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

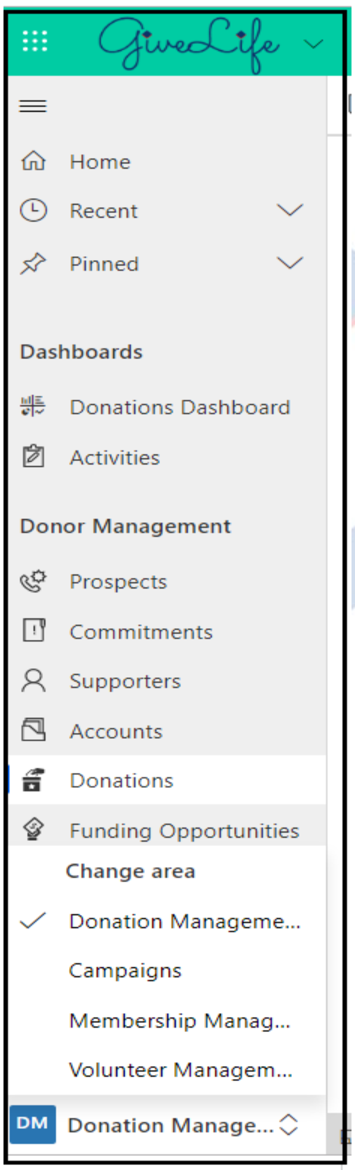


Enter the required details Checkbox checked. and click on save.

Membership Management:

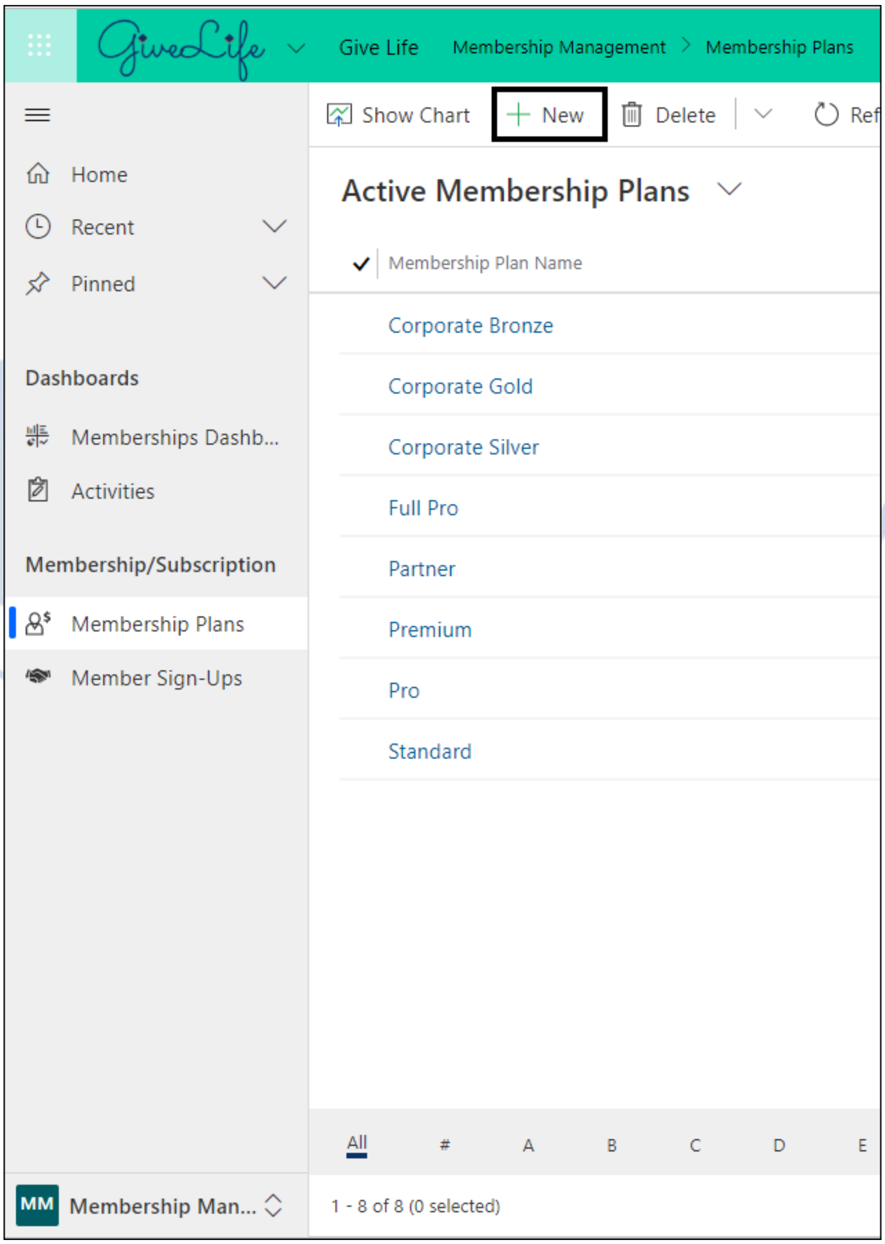
You can create the customized membership plans and subscribe your donors to these plans using the membership Signup.

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

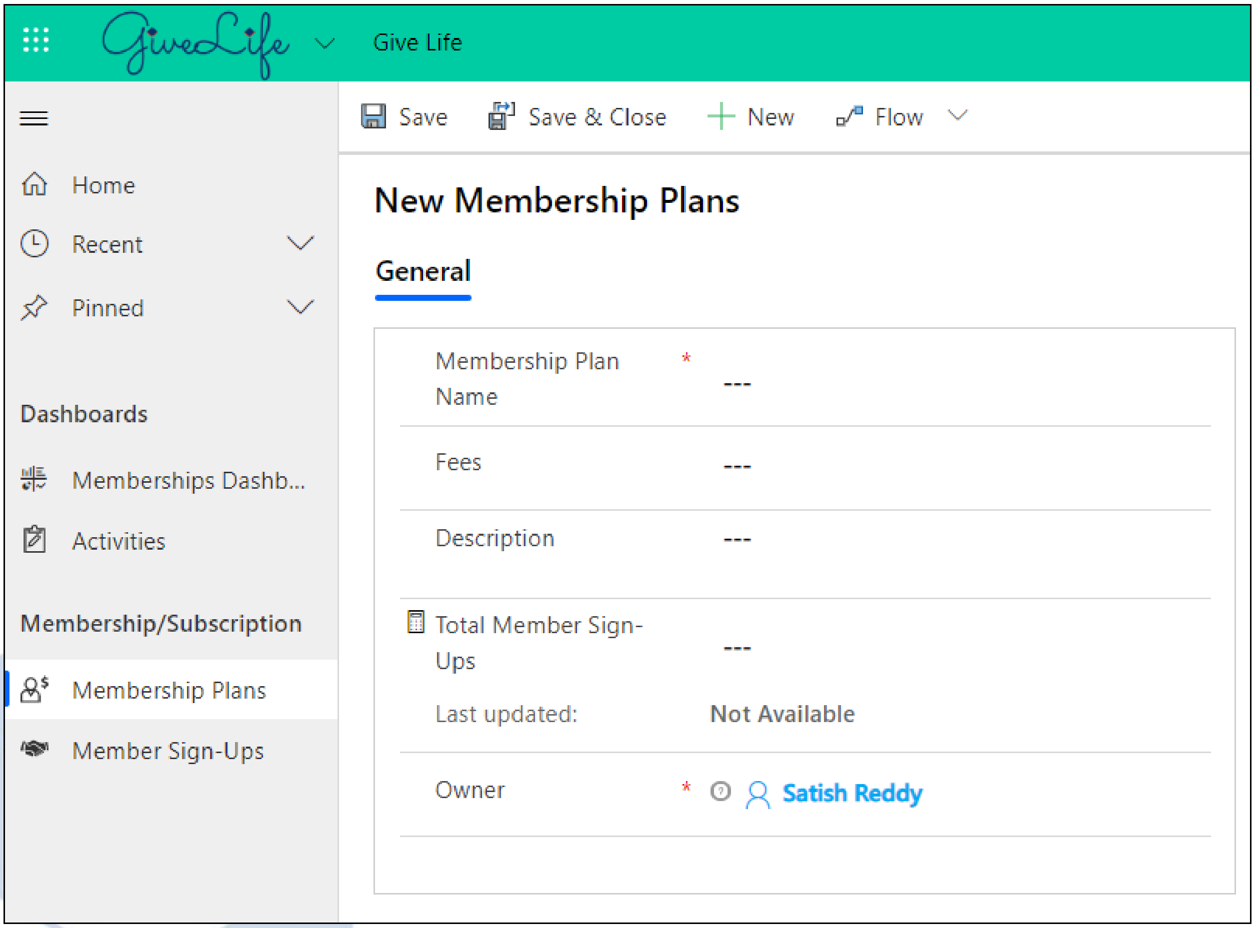


You can create Membership Plans and Subscribe your donors to specific membership plans using Member Signup.

7. **Create Membership Plans**:
Click on Membership Plans from left hand navigation pane



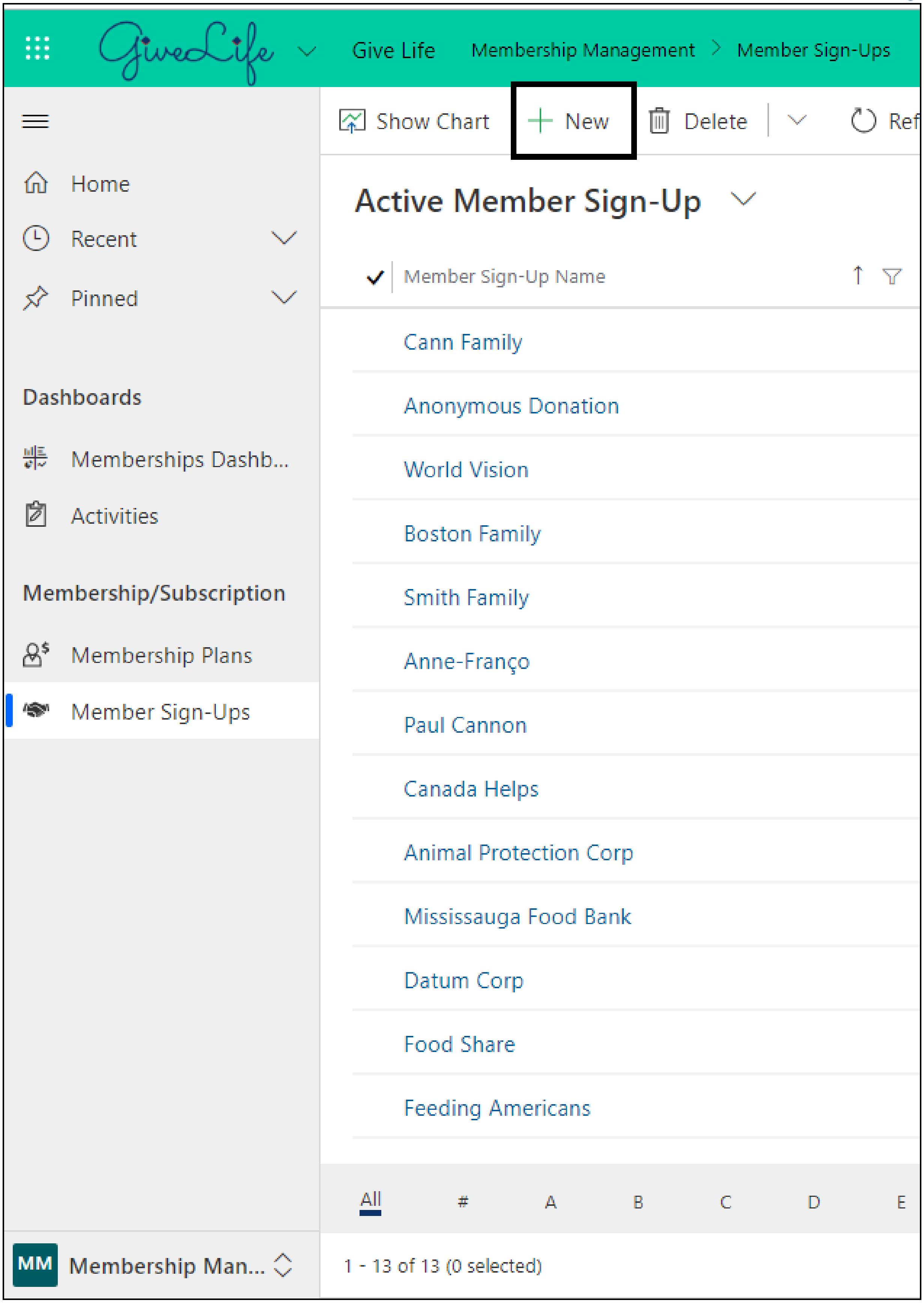
Click +New button located on the ribbon above Membership Plans view, it will open a new Membership Plan creation form.



Enter required details and click on Save.

8. **Create Member Signup**:

Click on the Member Signup from Left hand navigation pane


Give Life
Membership Management
Member Sign-Ups
Show Chart
New
Delete
Ref
Home
Recent
Pinned
Dashboards
Memberships Dashb...
Activities
Membership/Subscription
Membership Plans
Member Sign-Ups
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
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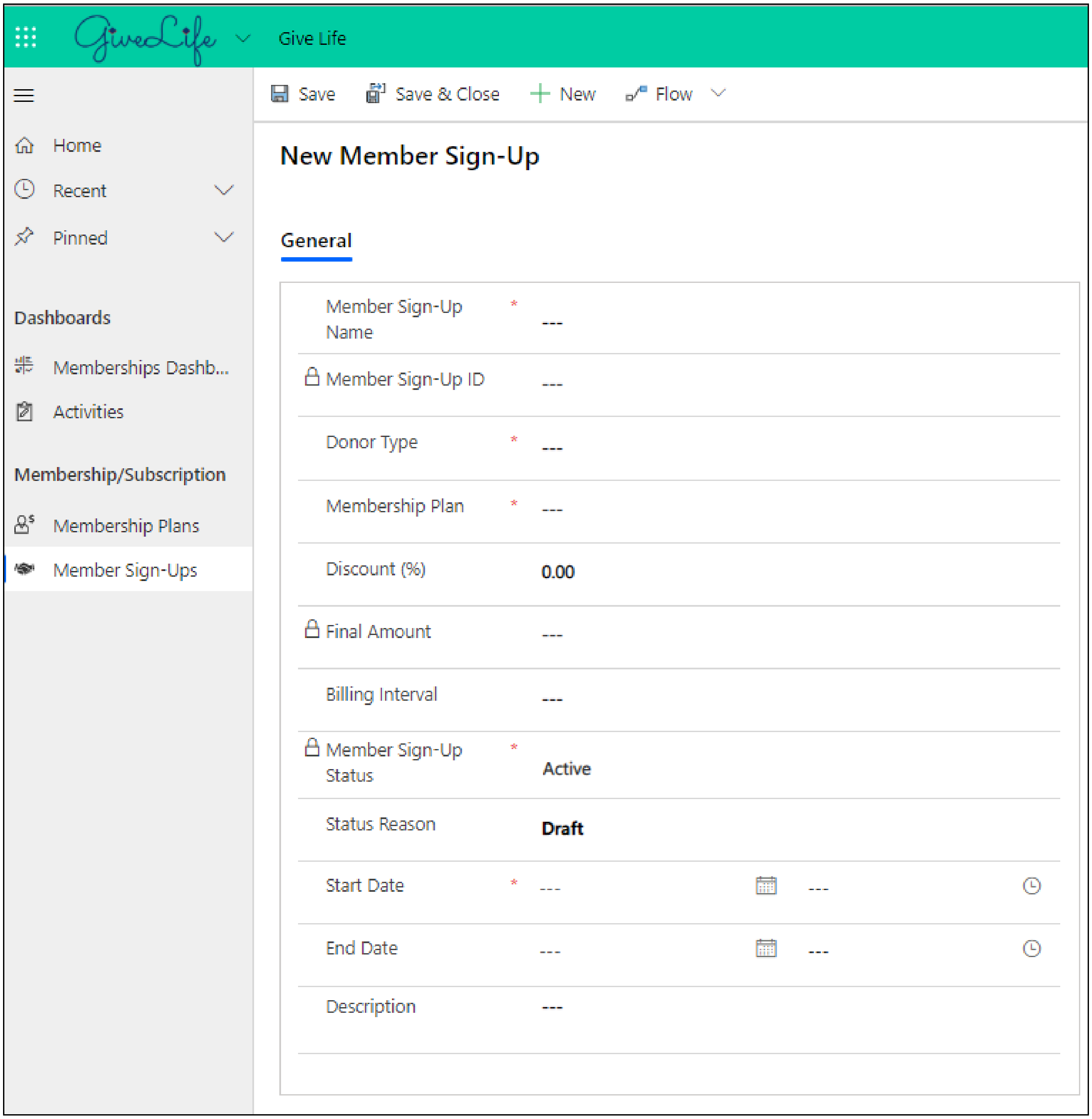
Membership Man...
1 - 13 of 13 (0 selected)

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

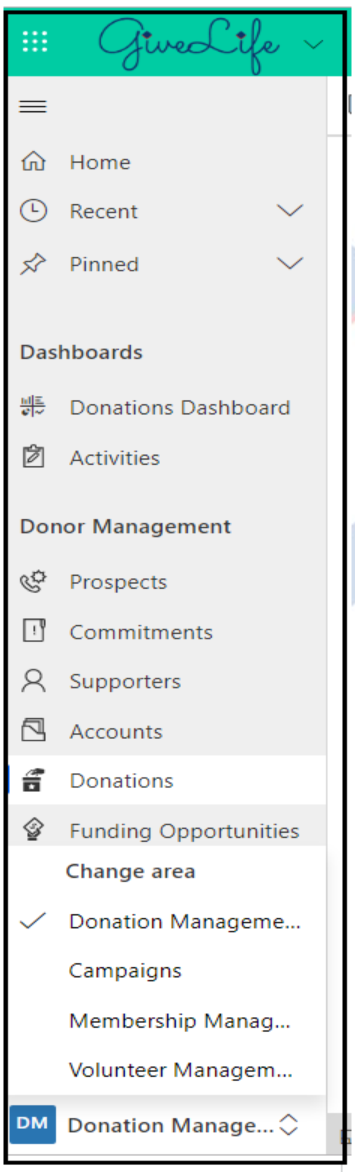


Enter the required details and click save.

Campaign Management

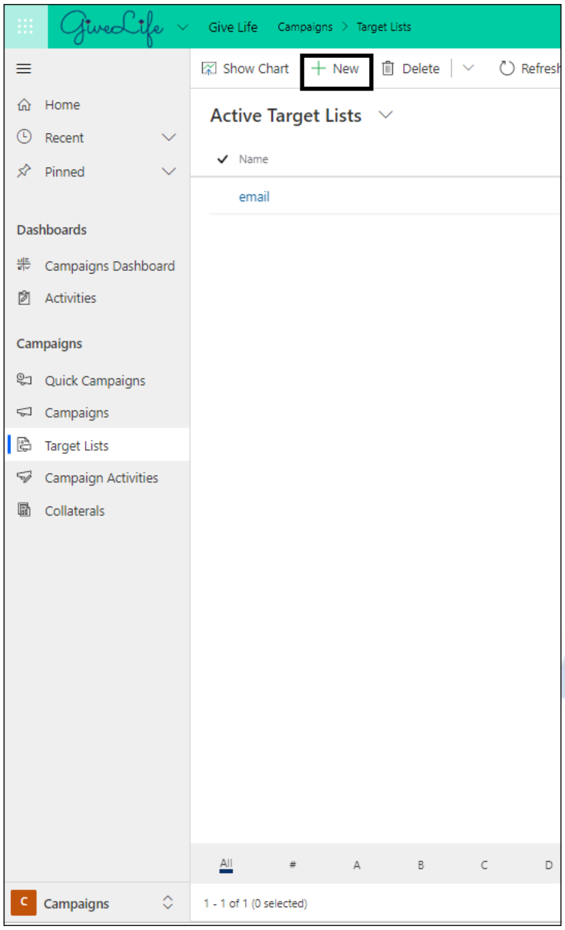
You shall be able to create the various fundraising events using the campaign management, segment the target list and add various campaign activity to a campaign like bulk email, Phone calls using this module.

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

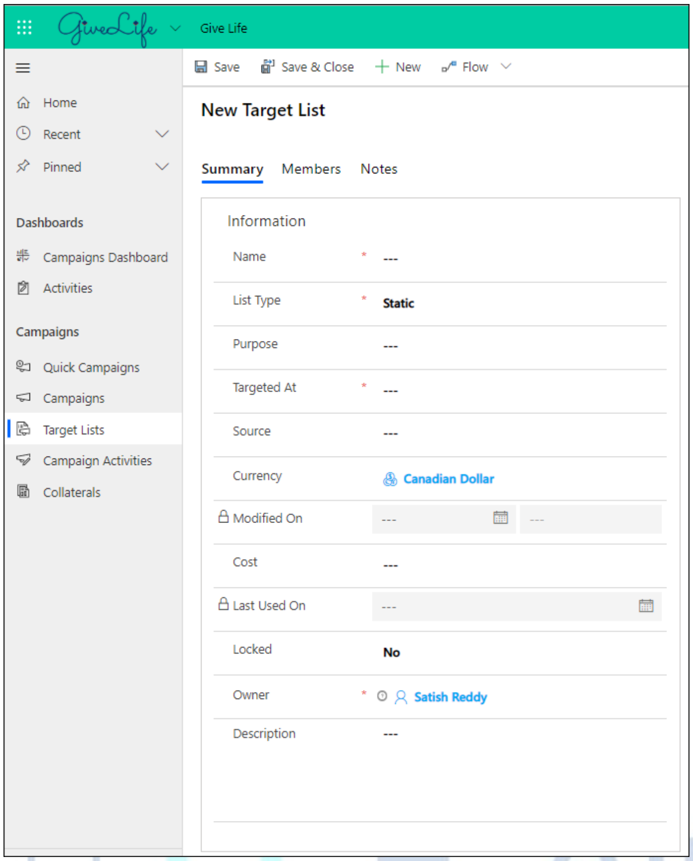


9. **Create Target List**

Click on the Target list from left hand navigation pane

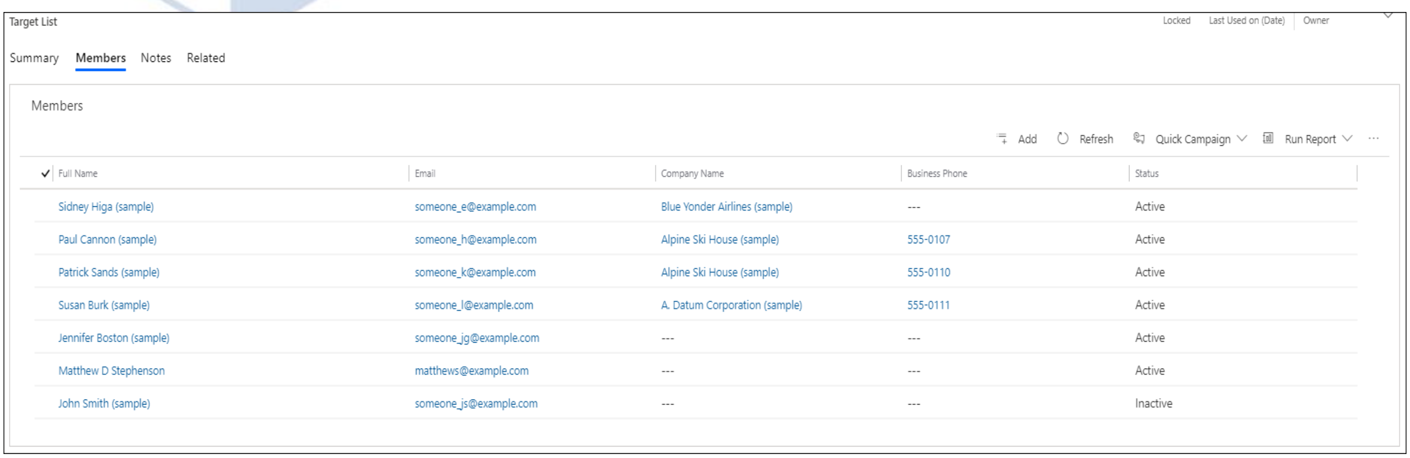


Click +New button location in the ribbon above Target list view, it will open a new target list creation form.

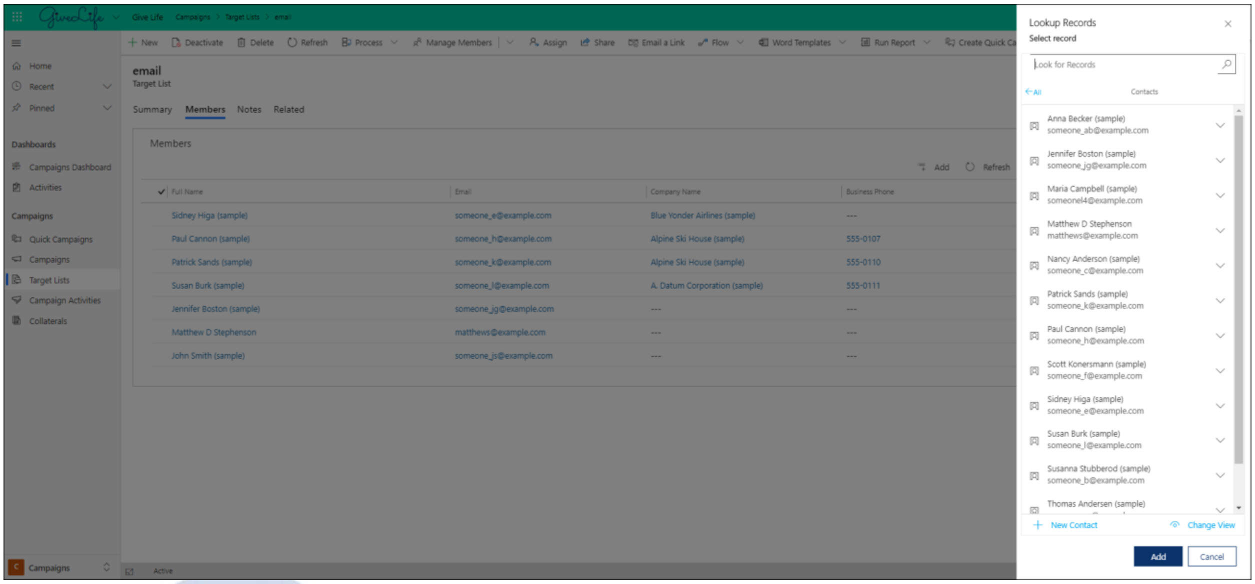


Enter the Required details and click Save.

Once the record is saved. Click on the Members tab



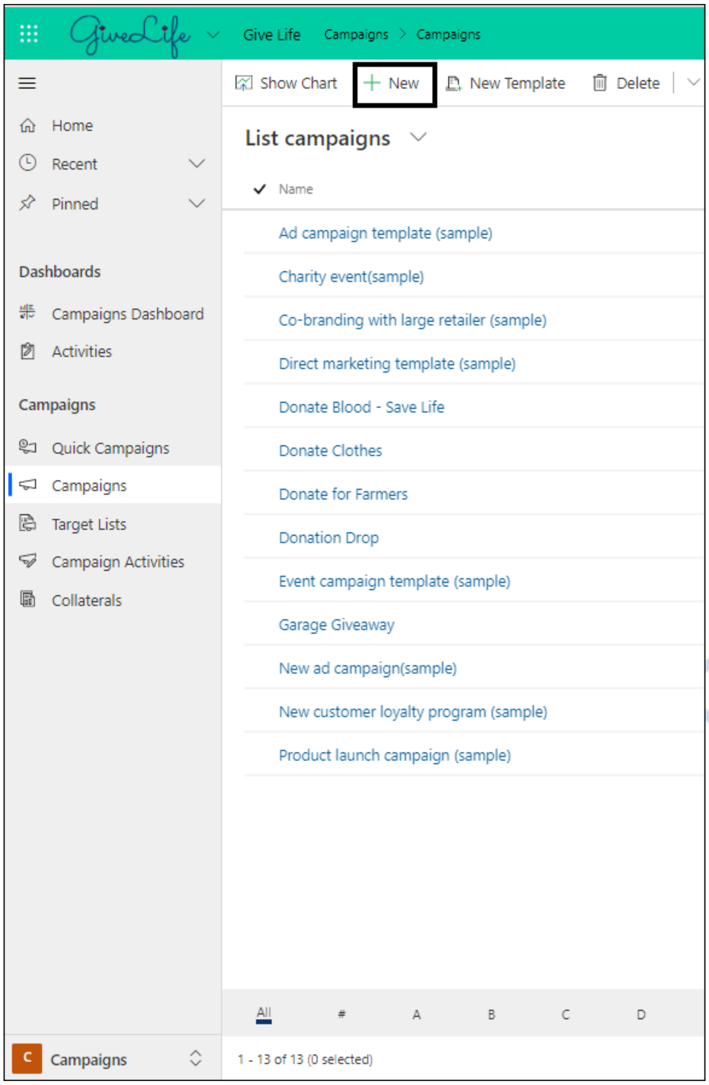
In the members tab, click on the +Add to choose the records to be added to this target list.



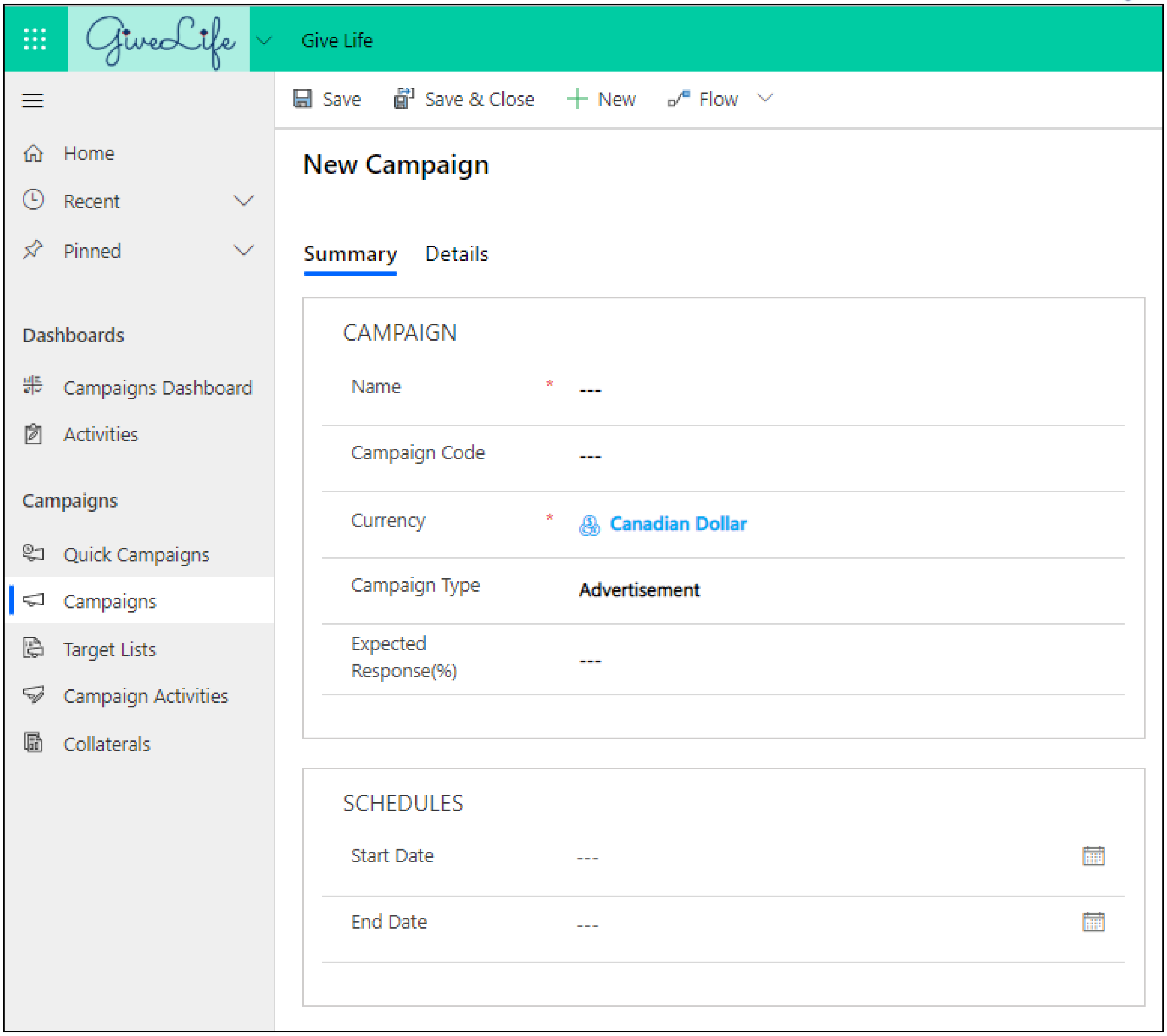
Click Add once you have selected the desired target records to add them in the target list.

10. Create Campaigns

Click on the Campaigns from left hand navigation pane



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.