



Contributor Relations Rel 9

This course provides an overview of each component in the Contributor Relations product and discusses in depth the major business processes that customers might need to set up, administer, and use.

Learn To:

- Managing prospects and constituent information
- Managing initiatives, including campaigns, events, and volunteer efforts
- Managing gifts, pledges, and memberships
- Managing communications, such as acknowledgements

The course also provides an overview of self-service Involvement and Outreach functionality.

Audience

- Implementer
- Manager

Objectives

- Manage constituent information
- Set up initiatives
- Design audiences
- Manage campaigns
- Manage volunteers
- Manage events
- Manage prospects
- Manage gifts and pledges
- Manage memberships
- Manage business units and setIDs
- Generate acknowledgements
- Process credit card transactions

Topics

- Managing Constituent Information
 - Searching for Constituent Records
 - Entering and Tracking Person Data
 - Entering and Tracking Organization Data
 - Establishing Relationships
- Setting Up Initiatives
 - Defining and Assigning Staff, Volunteer, and Unit Roles
 - Defining Other Supporting Information for Initiatives
- Designing Audiences
 - Setting Up Audiences
 - Assigning Audiences to Initiatives
- Managing Campaigns
 - Creating Campaign Initiatives
 - Defining Appeals
 - Managing Initiative Actions
 - Tracking Campaign Details
 - Managing Campaign Budgets
- Managing Volunteers
 - Creating a Volunteer Initiative
 - Defining a Volunteer Structure
 - Assigning Volunteers to Tasks and Roles
 - Viewing a Volunteer's Previous Involvement
- Managing Events
 - Entering Events and Associated Meetings
 - Managing Events in Conjunction with the 3Cs
 - Managing CR Events
- Managing Prospects
 - Assigning Resources to Prospects
 - Managing Prospect Strategies
 - Managing Prospect Actions
 - Managing Planned Giving Prospects
 - Managing Prospects with Self-Service Outreach
- Managing Gifts and Pledges
 - Setting up Commitment Entry
 - Working with Sessions
 - Managing Matching Gifts
 - Managing Pledges and Conditional Pledges
 - Queuing and Posting Sessions
 - Making Adjustments
 - Working with Self-Service Involvement
 - Managing Giving Clubs
- Managing Memberships
 - Setting Up Membership Programs
 - Creating Membership Initiatives
 - Entering Member Dues
 - Assigning Members to a Member Organization
- Managing Business Units and SetIDs in Contributor Relations
 - Managing BUs
 - Securing BUs
 - Using SetIDs and TableSets
- Generating Acknowledgements
 - Setting Up Acknowledgements in CR

- Defining Acknowledgement Rules
- Processing Acknowledgements
- Generating Letters
- Processing Credit Card Transactions
 - Setting up Credit Card Processing
 - Enabling Self-Service Credit Card Transactions
 - Processing Online Credit Card and Membership Payments