I. Welcome

A. Welcome to the Quick Start Guide – Mastering the Basics. In this video we will cover some fundamental activities using the software explaining how to navigate, enter new constituents and contributions, and perform administrative tasks.

1. We'll start with a tour of the workspace and we'll review key terms
2. Then we will look at the CRM module, which is the hub of the software. Remember that this is a Constituent Relationship Management software that does much more than just manage donations, so understanding the core features will help you throughout the software.
3. After the CRM module, we will look at the Fundraising module and show you how to perform standard tasks like entering a contribution and sending thank you letters.
4. Next we will review some basic administrative tasks in the Account Settings and show you the links and resources available in the User Settings.
5. Since this video just covers the basics, we'll wrap up with next steps to continue training on your own to learn more advanced features.
6. You can pause this video anytime and rewind as needed.

II. Workspace Tour – Customer Database

A. Workspace – this information was provided in the first video in this series, so this is a review

1. Modules, Dashboards, Grids and Pages
    a. The software is organized into modules for the different activities.
    b. Each module is a specific kind of activity, like managing memberships or events.
    c. Each module has a dashboard giving you a snapshot of a few key indicators.
    d. Within each module there is a sub-menu to access the various reporting grids and tools used to build your pages, emails, letters, and invoices.
    e. A "grid" is how the data is displayed. It looks like a spreadsheet, for example, on the Gifts grid we see the data related to all of the transactions recorded in the software.
    f. The views displayed on your grid can be customized to filter for specific sub-sets of your data, for example to see a list of all transactions recorded this month.
    g. We use the word "pages" to describe how to software generates an online form to be used for registrations, donations, and information collection like volunteer applications.
        i. There must be a page created to accept any event or membership registrations.
        ii. Donation pages allow you to collect donations and set up pledges with a credit card, but you can also manually enter donations and pledges directly in a constituents record.
    h. Each page you create in the software has its own unique URL and QR code that you can share on social media or via links you send out in emails or texts. There is

also an embed code provided if you would like to embed this page within your website.

i. Information completed on these forms is automatically uploaded to your database and your grids will be updated with the new information as it happens.

j. A key feature is that the software uses email and name to link to existing records to maintain transaction history for each constituent.

k. Be sure to review the Module Guides and Glossary of Terms to get more familiar with the functions of the software and the terminology used.

III. Key Terms

A. What is a constituent?

1. One key term we use is "constituent." A constituent is any contact in your database, which includes people and organizations.
2. People are labeled as "individual constituents."
3. Organizations, groups, businesses, churches, foundations, government agencies, etc. are labeled as "company constituents."
4. You also have the option of creating a third type of constituent record called a "household" which is a grouping of individual records who are typically part of the same family.
    a. If you track spouses and family members separately, this allows you to link together all members of the family and see their entire giving history in one place
    b. One constituent is identified as the "head of household" and the other members can all be assigned to user-defined relationship categories like spouse, son, or daughter.
5. Each of these types of constituents is their own record.
6. Constituents can be donors, members, granting agencies, sponsors, event attendees, email list subscribers, volunteers, and any other person or organization you wish to track in the database. Think of constituents very broadly, it is your entire universe of contacts.

B. What is a member?

1. If your organization offers memberships, members are a specific subset of constituents. All members are constituents, but not all constituents have to be members.
2. In order to be considered a member, the constituent must have a membership transaction related to their record.
3. Memberships can be single or group memberships, like family memberships.
4. Your implementation manager will help you determine the best types and setup for your organization's membership structure.

C. Companies versus Individuals

1. Data collected for individual and company records is different.
2. Individual constituents have fields like first name, title, gender, and birthdate.

3. Company constituent records have fields like industry, number of employees, and EIN number.
4. Companies and individuals can be connected via an employer-employee relationship.
5. On the company record you will see a list of Company Contacts, which is all employees related to that company.
6. On the individual's record, you will see the name of the company to which they are connected.
7. An important distinction is that the list of Company Contacts is not a list of members, these are strictly employees. To see membership information and any constituents that are part of this company's group membership, you should look at the Membership tab.

D. Last Name/Constituent

1. On the grids, the Last Name/Constituent field will display either the last name of an individual or the name of the company record. This field is used interchangeably for both types of records.
    a. The column Profile Type will tell you what kind of record this is, whether that is a company or individual record.
2. The column labeled "Company" will only display information for Individual types of profile records. It shows the name of the Company record that individual is related to. Think of it as "employer."

IV. Constituent Relationship Management (CRM) Module

A. The CRM Module is where you can find a list of all contacts in the database

B. It shows summary information on the Constituents grid, and you can find details about each constituent in their profile pages

C. Key activities performed in the CRM Module include:

1. Searching and viewing constituent profile information to see their entire history of giving, memberships, events, interactions, email clicks and more.
2. Allows you to link together constituents showing their business, community, and personal connections.
3. Track and plan interactions with your constituents like planning meetings with prospective donors and sponsors or following up after meetings.
4. Entering new constituents to add them to segmented categories, email lists, and track and plan communications.
5. Create reports on things like top donors and volunteers or lapsed donor lists.

D. Constituents grid

1. Includes summary and historical information
2. Provides access to details about each constituent
3. Similar to Excel
    a. Each row is a data record, like one constituent or one transaction

   b. Columns are fields of data associated with that record
   c. Summary data fields – no specific details, only sum totals
      i. First & Last Gift Amounts and Dates
      ii. Cumulative giving this year, last year, last five years, and lifetime
      iii. Cumulative time tracking
      iv. Number of events attended and date of last event
      v. Number of emails opened
      vi. Date of first membership and current membership expiration date
4. Search Bar - Search for specific constituents or groups
5. View specific constituent information on their profile pages
   a. Basic and custom contact information
   b. Histories for transactions, documents, relationships, memberships, events, emails, time tracking records, and other interactions located under each tab
   c. Can add new information for a constituent by using the Add buttons available in each of the tabs
   d. For example, to add some volunteer time, we can go to the constituent's record to their time tracking tab and click "Add Service" to record the details about their volunteer time.
6. You can record and plan interactions with constituents.
   a. Document any contact you had and add details about the interaction.
   b. Create tasks to follow-ups with the constituents at a later date – often used for managing prospective major donors and sponsors.
   c. See your own task list under My Follow ups.
7. You can track relationships by linking constituents via business, community, and personal connections.
   a. All of the lists are user-defined so you can customize for your organization's needs
   b. You can also establish automatic soft credits, which is great for individual spouses if you choose to track them separately.
8. You can also record and plan interactions with constituents.
   a. Document any contact you had and add details about the interaction.
   b. Create tasks to follow-ups with the constituents at a later date – often used for managing prospective major donors and sponsors.
   c. See your own task list under My Follow ups.
9. Besides specific details for each constituent, you can also see global grids for all relationships, documents, interactions, and time tracking.
   a. You can also add new records from the global grids and produce custom views.

10. Add New
    a. Create new constituents who are not in your database yet.
        i. Add new individual or company constituents. You can also create new household records after the head of household has been added to the database.
        ii. New constituents will also be created through any pages by making a donation, registering for an event or membership, responding to a survey, or signing up for your email marketing if the software does not find an existing constituent record by matching the email and name entered.
    b. Add New lets you search to see if they are already in the database, so duplicates are not inadvertently created.
11. Create custom views and reports to see specific groups of data
    a. Building views
        i. View Builder – select the columns to view
        ii. View library – use a pre-built view
        iii. On the grid, drag & drop columns into the preferred location
        iv. Use Column Settings to lock/unlock columns on the left
        v. Adding Queries, Filters, Sorts
        vi. Share views with other users
    b. Example views you might create on the Constituents grid could be:
        i. Long time donors
        ii. Top level volunteers
        iii. Frequent event attendees
        iv. Lapsed donors
        v. Donors who should receive an End of Year Tax letter
12. This grid also has an Actions menu, like all the main grids, which gives you the opportunity to communicate with the constituents showing in your view.
    a. The Actions menus work the same throughout the software, although there are some activities that can only be performed on one grid.
    b. For example, you can only merge duplicate records from the Constituents grid.
13. Let's look at an example of how we can use the Actions menu by first creating a custom view for our Board of Directors
    a. We can export this data to Excel
        i. The export will only include the constituent records included in your view
        ii. You can share the data offline or use this for a historical snapshot of the data

iii. If you use pivot tables, you can also update an existing pivot table, just be sure to use the exact same view where you created the original table

b. We can create an email list for this group or start an email campaign.
   i. This will sync with the email marketing module to be able to send colorful newsletters, invites, and announcements.
   ii. Note that email lists are static, so if someone new joins this list, they will not automatically be added to the email list just by virtue of meeting the view criteria.
   iii. Your pages can be set up to automatically add people to email lists when they make a donation, register for an event or become a member.

c. You can also send quick emails via Direct Mail.
   i. This is like a typical text-based message, but you can add an attachment
   ii. A copy of the direct email will be saved in the constituent's record

d. If you have text messaging activated, you can also send text messages from the Actions menu
   i. Texts can be sent in a variety of ways including SMS, MMS, and video messages
   ii. Texts can be sent immediately or scheduled for a future date/time

e. The Actions menu is also how you can send letters to your constituents and we will look at this feature in more detail when we talk about sending thank you letters in the next section on the Fundraising module

f. The Constituents grid also gives you an opportunity to run duplicate record reports
   i. If any duplicates are found, you can use the Merge column to merge together the records
   ii. You can only merge two records at a time and any transactions, documents, or relationships will be saved in the combined record.
   iii. Check out the article "Duplicate Record Search Criteria, Prevention & Identification" to learn more about database hygiene and reducing potential duplicate records.

V. Fundraising Module

A. The Fundraising Module shows you the specific details for each transaction on the Gifts grid.
   1. This includes any transaction whether it is a donation, event registration, membership purchase, auction bid, or pledge.
   2. A separate record is created for each transaction, so someone who gives multiple gifts will show up several times on this grid.
      a. This grid shows details; the Constituents grid is where you find summary information.

   b. This grid produces reports for things like total revenue in a specific time period, like total revenue this month.
   c. You could also produce reports for total revenue to a specific fund, fundraising campaign, or donation page.

B. The Pledges grid shows specifically just pledges and has two views: a detail view showing all payments associated with a pledge and a summary view showing just one row for each pledge with total pledge information.

C. It is also where you can create unlimited donation pages.
   1. Each page has its own unique URL, QR Code, and html code to share.
   2. These pages generate automatic thank you messages for your donors.

D. The Goal Progress page allows you to create html widgets to add to your website to show progress towards a fundraising goal.

E. The Sponsorships and Grants pages allows you to track information specific to those types of contributions.

F. The Mail Merge Template libraries are where you create your manual thank you letters.

G. Key activities performed in the Fundraising module include:
   1. Entering contributions and pledges
   2. Sending thank you letters
   3. Creating your donation pages
   4. Creating detailed revenue reports with the Gifts grid

H. Let's start with how to enter a donation or pledge
   1. You can enter a contribution from the constituent's Gifts tab or from the Gifts grid.
   2. From the constituent's Gifts tab, click on Add Gift. If you have the constituent's credit card, you can also use a donation page if desired.
   3. Select the kind of contribution and enter the amount, payment type, and applicable dates.
   4. Enter the appropriate revenue categories for the For-Fund-Event-Appeal fields.
   5. Can also do specialty contributions like tributes, matching, soft credits and links to grant funding.
   6. Click Save to just Save the record.
      a. Save & New to save this entry and add a new one for the same constituent.
      b. Save & Acknowledge to save the entry and generate the thank you letter.
   7. For pledges, you will create a pledge schedule and once the pledge is created, you can enter pledge payments for this pledge.
   8. Similar entry process from the Gifts grid, you just need to select the constituent record.
   9. You can do batch entries, but only for general-type entries. You cannot use this for in-kind, pledge payments or pledges.

I. Once those entries are made, we can send an acknowledgement either one at a time, or in a batch.

1. You must first create the letters in the Mail Merge Gift Templates page.
2. There are no included templates but creating them is very similar to Word mail merge letters.
3. You can copy and paste text in using your keyboard and the Control C and Control V functions.
4. You can also insert images, hyperlinks, and customize the layout.
5. To add merge fields, click on the Mail Merge tab, then Insert Mail Merge to select which fields to include in your letter.
6. The fields available are those that are shown on the Gifts grid.
7. Each mail merge letter template library is linked to a specific grid, and you can only insert data from that grid.
8. You can include fields like the constituents name and address, today's date, the gift amount, and gift date.
    a. The Amount field must be formatted to display as a currency value so that it includes the $ sign and only has two decimal places.
    b. You only need to do this formatting on the letters, not with thank you email, email marketing, or direct emails.
9. Once you have one letter created, you can use the Save As button to make copies for the various thank you letters you would like to create.
10. You will need at least one letter created to send your manual thank you letters.
11. With your letter created, you can now send single or batch acknowledgement letters.
12. Single letters can be selected and printed at the time of the entry or by using the Mail Merge envelope icon.
13. You will use the Actions menu to send batch acknowledgements.
    a. First you will need to filter the list to include only those contributions that need this specific letter.
    b. You cannot send different letters to the same list of donors.
    c. We can use the Date as our filter to show just those letters received in the last week.
    d. Next you will select Print/Email Mail Merge from the Actions menu
        i. Choose the letter to send
        ii. Mark the gifts as acknowledged
        iii. Choose the delivery method, print or email.
        iv. Decide if you would like to archive or not.
        v. Click OK to generate the letter or email.

vi. If there are a lot of letters in the batch, you may get a message that it will work on the merge in the background. You can recover the letters from the Mail Merge Queue in the Reports module.

J. Donation pages are created using the page wizard that can build the page for you, or if you want to make a more customized page, you can use the Advanced Page builder.

K. And the last thing we will cover about the Fundraising module in this video is creating revenue reports.

1. Reports from the Gifts grid include all the details about the gift and do not include summary information.
    a. If your date range is a whole year for example, you may see several lines for the same constituent if they made multiple gifts in that date range.
    b. Summary reports are created from the Constituents grid.
2. You can use the View Builder and the View Library to utilize any existing views like Weekly General Donations, Monthly Revenue, Weekly Online Transactions, or Not Acknowledged.
3. You can also create your views from scratch using the Queries, Filters and Sorts.
    a. In our example we will look for all general donations to a specific fund in the past year.
    b. Add a query by the Date first.
    c. Then add a query for the Fund.
    d. This gives us the total contributions assigned to this fund for this date range.
    e. If we were sending acknowledgements, we could also add a filter to the Acknowledged column to filter out any gifts that have already received a thank you letter.
    f. Each view can be saved so that you can use it any time. So if you create a special view to show gifts to a specific revenue category or donation page for example, it will always refresh to show the latest information.

VI. Organizational Account Settings

A. Must have Admin Level access to view

B. Account Settings

1. Logos – add your logo to display on pages
2. Options Section
    a. Duplicate records management
    b. Manage Picklists
3. Saved Credit Cards and Expiring Card Reminders

C. Users

1. Adding new from the DonorView Users grid

2. Security settings can be set for each user

D. Constituent Portal

1. The link to share your portal
2. For advanced portal, can determine what modules are displayed
3. For basic portal, constituents can only see invoices and auctions modules.
4. For both basic and advanced, users can update their personal information

E. Billing

1. Invoices show payments made to DonorView for your subscription
2. The Statements tab will show a weekly report for credit card payments and deposits for bank reconciliation
3. Services will show any add-on subscriptions and services you have purchased
4. Support time will track phone support minutes

F. Accounting – for QuickBooks interface

VII. User Settings

A. Can update your personal information and Two-factor authentication phone number

B. Can update your password but must know your existing password. Can always reset your password by clicking "Forgot Password" at login.

C. Cannot change email address – would need to create a new user

D. Can set up options for:

1. Follow up Email Notifications
2. Sending Direct Email from the software

E. Also have links to:

1. Support site - https://support.DonorView.com/support/home
2. Support videos - pop up shows password "DVOnDemand" https://vimeo.com/showcase/DonorView
3. Support Academy – structure learning plan to walk through all the details in the software
4. Recent changes – shows recent software updates with links to articles and videos

VIII. Next Steps

A. Complete your data conversion

B. Watch the next video on training options and support plans

C. This video only covered some basic information. You can find additional information about the CRM and Fundraising modules in the training resource links. Other priority modules you will want to plan on learning include:

1. Events – to set up and manage any type of event where you want to collect registrations and track attendance

2. Surveys/Forms – to create membership and volunteer applications or event and membership satisfaction surveys
3. Email Marketing – to send newsletters, event invitations, fundraising campaign announcements, and other communications to targeted email lists
4. Volunteer – where you can manage volunteer applications, volunteer event registrations, time tracking, and schedule your volunteers for different events internally

D. Need more help? You can send a question to support@donorview.com.