

Day 5

Day 5 - Morning

Your questions

Install Updated Database

- Install updated/data imported database
- Review any imported data for verification of accuracy

Review of Prior Topics

- Patron Management
- Ticket Sales

Gift Certificates, Memberships, and Passes

- Membership Setup
- Internal vs. External names
- Edits and Controls
- Statistics
- Selling Gift Certificates, Memberships, and Passes
- Redeeming Gift Certificates, Memberships, and Passes

Day 5 – Afternoon

Donation Campaigns

- Internal vs. External names
- Edits and Controls of each Campaign
- Statistics

Donation Giving Levels

- Giving Level Matrix Setup

Day 5

Donation Management

- Introduction to the Donor Marketing Tab
- Entering new donations from the patron window
- Program year versus Fiscal year versus Calendar year
- Matching Gifts & Automatic setup of Matching Gift receivables
- Automatic maintaining of Financial Year for past, current, and future years
- Maintaining Solicitors, and if they received a commission for getting the donation
- Allowing Program Giving Levels to be calculated on donations, soft credits, and/or matching gifts or a combination of them all.
- Customize the donation specific Marketing Fields
- Defaults and customization of Program Names
- Maintaining the next contact date for this patron so the patron can become an annual donor
- Easy maintenance of who your Matching Gift Companies are
- At a glance overview of donor giving history for the past 8 years, averages, maximums, and minimums

- Introduction to the Donor Marketing Tab
- Entering new donations from the patron window
- Program year versus Fiscal year versus Calendar year
- Matching Gifts & Automatic setup of Matching Gift receivables
- Automatic maintaining of Financial Year for past, current, and future years
- Maintaining Solicitors, and if they received a commission for getting the donation
- Allowing Program Giving Levels to be calculated on donations, soft credits, and/or matching gifts or a combination of them all.
- Customize the donation specific Marketing Fields
- Defaults and customization of Program Names
- Maintaining the next contact date for this patron so the patron can become an annual donor
- Easy maintenance of who your Matching Gift Companies are
- At a glance overview of donor giving history for the past 8 years, averages, maximums, and minimums

Word Processing

- Introduction to the new word processing module
- Designating the file used for the letter data
- Creating a form letter

Form Letter Merging

- Assign a Donation Thank You letter to a Specific Donation
- Print out the Donation Thank You Letter

Day 5

Advanced Donation Management

- Printing Donation Receipts (Canadian Clients)
- Developing Pledge Payment Schedules
- Assigning Pledge Payment Reminder Letters
- Sending of Payment Reminders
- To-Do's and Contact Notes
- Allowing multiple Soft Credits per donation
- Easy setting of Relationships between donors
- History tracking of each pledge letter, donation thank you, contact note, and donation tax receipt sent to this patron
- The security options available you can set up for each employee to define what they can and cannot do
- Review of the numerous donation detail, summary, giving trends, giving level, reports geared towards telemarketers, board members, development staff, and management.

Finalize Donation Setup

- Final setup of General Ledger if current, future, or past accounts need to be defined
- Final setup of System Tables

Day 5 – Homework

Box Office

- Box office to complete final changes to venue maps (if no data import tonight)
- Box office to review the standard ticket face to see if any changes are required
- Confirm that all imported patron, mail list, event, performance and ticketing data is complete and accurate

Development

- Development to make any necessary changes to the imported donation campaigns
- Confirm that all imported patron, mail list, relationship, donation data is complete and accurate

Data Importing (Arts Management)

- Any changes to previously imported data