



charitymaster™

First steps tutorial

Introduction

This tutorial will teach you how to navigate through the various screens and how to enter and edit names in CharityMaster. This tutorial will also introduce you to:

- Searching the database
- Establishing links between names in the database
- Using flags to indicate various groups to which names belong
- Custom filters
- Customizing CharityMaster
- Reports
- Sending letters and e-mails

On every screen, just push the F1 key and the help for that screen will appear.

If you are learning how to use CharityMaster by using a “production” system using live data, your user security level may prevent you from accessing some of the screens referred to in this tutorial. You don’t ever have to see these screens but you can read about them in the CharityMaster help system.

Navigation

At startup, the ‘Maintain names’ screen will appear. At the top of your screen, you will see a “ribbon” that contains all of the buttons that you need to use CharityMaster. The buttons are grouped into tabs. When the **Maintain names** screen is open, the **Maintain names** tab will be activated. *Click on each of the tabs now to have a look at what each of them allow you to do.*

On all screens, you move from field to field using either the “Tab” key or your mouse. On some screens, you can also use the “Enter” key to move from field to field: on others the “Enter” key will close the screen.

You can also go directly to most fields and buttons by using “keyboard shortcuts.” {Alt + the underlined letter or number on the field label or button name.} For example, on the ‘Maintain names’ screen, pressing Alt and "p" together will take you directly to the "Home phone" field. *Try that now.* The more you learn to use the keyboard shortcuts, the faster you can enter data and navigate CharityMaster.

On the ‘Maintain names’ screen, you can scroll through the names in the system by using the navigation buttons (◀ ▶) or the PageDown / PageUp keys. To facilitate scrolling through the database, you can reduce the number of names you have to look at by applying a filter and/or changing the sort order. See ‘Custom Filter’ below and in the help system.

To shut down CharityMaster, click on the ‘Exit’ button (there is one on every tab) or press F10.

Entering names of people and organizations

The ‘Maintain names’ screen is the place where you record most of the information about your constituents. The buttons at the bottom of this screen allow you to add and delete names.

Standard 'entity types'

People, companies, foundations and governments that support your organization by buying tickets to performances or other events or by making donations must be assigned an entity type. The following standard entity types are built in:

- Individuals.
- Companies
- Foundations / Agencies. This entity type can include government funding agencies (e.g. Arts Councils)
- Governments
- Employees

You can modify the standard entity types and add additional entity types.

Add a name

Let's start by adding an individual to the database. Click on the "Add name" button at the bottom of the "Maintain names" screen. (You can also use the keyboard shortcut Ctrl + A.)

When the "Add a new name" screen appears, *enter the following information:*

Entity type: Leave "Individual" selected. Click on the little arrow to the right of the field to see the list of entity types you can select.

Title: The cursor (the flashing vertical bar) should be in this field. Click on the little arrow to the right of the field and select the appropriate title from the drop down list. Press the "Tab" key and the cursor will move to the "First name" field. Note that if the title you need is not in the drop-down list, just type in the title you need.

First name: Enter "Thomas" then press "Tab." Note that you MUST enter something in this field.

Last name: Enter "Birchall" then press "Tab." Note that you MUST enter something in this field.

Name category: Depending on the settings entered by the System Administrator, this field may not be visible. If it is visible, leave the category set to the default. (See the "name categories" section of this tutorial.)

Salutation: Note that CharityMaster automatically entered "Thomas" here. This person prefers to be addressed as "Tom" so change "Thomas" to "Tom" in the "Salutation field. (Note that whenever you make a change to the "First name" field, CharityMaster will automatically change the salutation field.)

Address 1: Enter "489 Airport Blvd."

Address 2: Leave blank.

City / town: CharityMaster automatically filled in this field based on the address of your organization. Let's leave this unchanged.

Prov. / State: CharityMaster automatically filled in this field based on the address of your organization. Let's leave this unchanged but note that you can only enter one of the official two character codes for provinces / states.

Postal / zip: If you are in the US, enter "45601" and if you are in Canada enter "POA 1H0"

Home phone: Enter "7024537201" Note that you must not enter dashes, brackets or spaces. CharityMaster will ensure that phone numbers are in the proper format.

Other phone numbers: Leave these blank. Skip to the e-mail address field by pressing the Alt and E keys together.

e-Mail address: Enter tbirchall@bigisp.com

Solicitation restriction: Leave the default selection in place.

When you have finished entering all of the information, click the **Add name** button (or press Alt + S) to save your work. At this point we recommend that you press the F1 key and read the help for the **Maintain names** screen.

Organizations

When you set up the first record for an *organization* (company, foundation, congregation, government, etc.), that record is set as the "main contact." The "main contact" for an organization has a check mark in the "Main contact" field (to the right of the organization name.) When you set up the second and subsequent contacts for the same organization, CharityMaster searches for existing organizations with similar names. If one or more similar names are found, you will be asked if the new contact is in the same organization. If you click the 'yes' button, the "main contact" checkbox for this additional contact will be unchecked.

When there are multiple contacts for an organization, the 'Maintain names' screen will display the 'Multiple Contacts' button. When you click this button the 'Manage multiple contact organizations' screen will appear. Use this screen to go to any of the contacts within the organization, to change the main contact or to change the name of the organization.

You can add one or more entity types to CharityMaster. These entity types can include any other organizations with which you partner from time to time (e.g. schools), suppliers, mailing lists of various sorts, etc.)

Searching the database

When the 'Maintain names' screen is open, you can search for a name in your database by:

- First or last name (of individuals or organization contacts.)
- Company / organization name
- E-mail address. (Sometimes an e-mail message will bounce back and you can't tell from the e-mail address whose address it is.)
- Phone number. (Sometimes you may not be able to make out a person's name in a phone message but you can understand the phone number.) CharityMaster searches through all types of phone numbers.

Search for first or last name

Start by pressing one of the navigation buttons (◀ ▶) at the bottom of the screen to move CharityMaster off of the name we have just created (Thomas Birchall.) Proceed as follows:

- Press Ctrl + F or click **Search** then '**Find person**' on the **Maintain names** tab of the ribbon.
- On the **Search for person** screen, select the search type (search by first name or by last name). Select "Last name."
- Enter as few as four letters. To try this out, enter "birc". (Capitals are ignored.)
- Click 'Search' (or Alt + S.)

If there is only one name that matches the search field, the name will be displayed immediately. Otherwise, the 'Person Search Results' screen will appear. In this case you can either:

- Select the name that you want by clicking on the name and then click on the 'Go to selected' button, OR
- Simply double click on the name you want.

Links to other names in the database

CharityMaster allows you to record connections or 'links' between names in your database. This feature can be extremely helpful when you lose contact with someone who had previously been a donor. Links can also help when soliciting VIPs or major companies for donations.

You can jump from name to name in the database by double clicking on any of the links you have added. For instructions on adding and deleting links, see "Entering data on the 'Maintain Names' and 'Add a New

Name' screens" in the help system.

Name categories

You can set up CharityMaster to require that each name be assigned a 'name category.' You might use this feature to group selected individuals and / or organizations together. Name category examples might include:

- The Richardson family. (Any and all names in the database related to the Richardson's.)
- Categories to distinguish between supporters and clients (e.g. counseling clients).
- The Buffet group of companies.

'Name categories' are associated with 'entity types.' For example, you can have 'name categories' for individuals but not for organizations or vice versa. You can also set up name categories that can be used with all entity types.

You can make 'Name categories' a requirement for any given entity type. Edit, add to and delete 'name categories' by clicking **Setup tables** on the **Setup** tab of the ribbon. Then click **General** and then **Entity type and name categories**. When the **Maintain entity types** screen appears, press F1 to read the instructions. Then press the **Maintain categories** button to open the **Maintain name categories** screen and press F1 again to read more about 'name categories.'

Flags

Any name can be assigned a variety of prospect / communication flags. These flags are used to identify that a name belongs to a certain "group" or list. Some ideas for using flags are:

- Identifying people who attended a particular fundraiser so that you can invite them to that event next year.
- Identifying various kinds of prospects such as "major donor," "potential board member" or "Corporate table sponsor."
- Flagging people who want to receive your newsletter. You might use two flags: one for those who want to receive an electronic version and another for those who want a paper version.
- Flags for VIPs, previous board members, seniors, etc.
- Restricting certain types of solicitation.

Although CharityMaster ships with a few standard flags which cannot be edited or deleted, you can add an almost unlimited number of flags to the CharityMaster setup. Clicking **Setup tables** on the **Setup** tab of the ribbon. Then click **General** and then **Prospect / communication flags**.

Flags can be any combination of two letters and numbers and you can assign up to 25 flags to a name in the database.

To add a flag to a name, just double click on the 'Flags' field, and then double click on one of the flags to the left of the 'Set flags' screen to add a flag to this name.

Let's add a flag to the "Thomas Birchall" record we set up earlier.

1. Locate the “Thomas Birchall” record in the database. (Use the search function: Ctrl + F)
2. *Double* click on the “Flags” field and the “Set flags” screen will appear.
3. Click on (select) the “DP” flag in the left hand column. Click on the  button and the flag will move over to the right hand column. (Instead of selecting a flag then clicking the  button, you can simply *double* click on a flag to move it from the left column to the right column.)
4. Repeat step 3 for any additional flags you want to add.
5. Click on the “Save” button and all of the flags you have moved to the right hand column will appear in the “Flags” field on the “Maintain names” screen.”

Flags can be used to create a list of every name with that specific flag or to mail letters and/or e-mails to every name with a specific flag or group of flags. You can also create lists that INCLUDE selected flags and, at the same time, EXCLUDE selected flags. Flags can be used in combination with ‘name categories’ to achieve even finer granularity of your data.

Custom filters and custom lists

When you are on the ‘Maintain names’ screen, you can use a custom filter. For example, you can create a filter to see only names with a specific flag set (or which DON’T have a specific flag. Click on ‘Custom filter / sort’ on the **Maintain names** tab of the ribbon or press the F4 function key to set up your ‘custom filter.’

*You can see a list of all of the special CharityMaster function and hot keys by clicking on the ‘Hot keys’ button on the **Home** tab of the ribbon.*

Once you have set a ‘custom filter,’ the ‘Maintain names’ screen will display only those names that meet the filter criteria that you have set. You also use the Custom Filter feature to create a customized listing in the ‘Report Selector’ or to create a custom mailing list for use by the ‘Bulk Mailing Wizard’ and / or the ‘E-Mail Wizard’.

Other name management features

- **Households.** CharityMaster helps you to minimize the costs of your mailings by identifying all members of a household and giving you the option of sending mailings to all members of a household or just the "head" of the household.
- **Phone captains.** A “Phone Captain” is someone who is made responsible for following up mailings of various kinds. You may wish to set up phone captains for all of the names in your database or for just the more important potential donors. To use this functionality, you first set up one or more people as phone captains, and then assign one or more names to each phone captain. You should probably not assign more than eight or ten people to any given phone captain. When you do a solicitation mailing to hundreds of people, CharityMaster can produce a report sorted by phone captain so that you can organize a personal follow-up to each person on your mailing list.
- **Communications history.** Each time you mail a letter or send an e-mail, CharityMaster will record that fact. You can also record telephone interactions. CharityMaster can display a record of all contacts with a person or company. See “Communications history” in the help system.
- **Notes.** Use notes to record such items such as how the person became associated with your organization, reasons why this person does not want to be solicited or how they want to be solicited, results of your solicitation, additional contact information (e.g. seasonal address), etc.
- **Reminders.** CharityMaster can remind you of scheduled donations, invoices and any "to do's" when

they are due. When you start CharityMaster, the system will check for any reminders which are due today or which are overdue.

- **Duplicate detection.** When you add a new name to CharityMaster, the system will check to see if someone with the same or a similar first / last name combination is already in the database. If a match is found, you will be asked if the name you are adding is a duplicate. CharityMaster also has several reports that analyze your database to detect potential duplicates.

Customizing CharityMaster

CharityMaster allows for a great deal of customization. Click on the **Setup** tab then the **Setup tables** menu button. Click on the various menu items to see the 30 or so tables that can be maintained. **Remember: if there is a feature that CharityMaster does not currently include, we may be able to add it for you for free!**

Reports

Use the 'Report Selector' to produce one of the more than 70 reports that are available. Many of these reports are customizable. You can also produce mailing labels from many of these reports and most reports can be exported to Excel so that you can do your own analysis.

Open the **Report Selector** by clicking on the **Outputs** tab then the **Report Selector** button.

Communicating with your constituents

From the 'Maintain names' screen you can produce a single letter and a mailing label for the current name or you can send an e- mail to this name.

You can also do 'bulk' mailings using the 'Bulk Mailing Wizard'. After selecting any one of a number of predefined or customizable lists, you can produce customized letters for everyone on the list. To help you save postage and stationary, for most mailing lists, you can elect to exclude those names that have an e-mail address from the mailing. You can then use the E-mail Wizard to send your message to the rest of the list.

CharityMaster allows you to create letters using Microsoft Word templates. You can create and edit as many templates as you need. Then, when you want to send a new letter that is the same as or similar to a mailing you have already sent out, you can create the mailing using the same Word template.

Using the 'E-Mail Wizard' you can send mass e-mails to everyone on the selected list that has an e-mail address. You can send your message in HTML format and your message can have up to five attachments.

Every time you send a letter or an e-mail, you have the option of adding a record of the communication to each name to whom you sent the letter or e-mail.

We hope you enjoyed this tutorial. All of this information is also available in the CharityMaster help system. Press the F1 key on any screen to get the information you need.