Contributor Relations Rel 9

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