



home

classroom

administration

# RenWeb Fundraising Pro Training 1

# Getting Started

- Installing the Fundraising PRO software
  - Go to [www.renweb.com](http://www.renweb.com)
  - Click on Support
  - Click on Downloads
  - Go to the Donor Program download
  - It is important to download and install each step in order listed on the website.
  - It may be necessary to save the program to a location on the computer before running the install.
  
- Logging in for the first time
  - User Admin – adding users
    - User
    - Password



# Overview

- Initial Sync
- Constituent
  - Basic Info
- Relationships
  - Giving
  - Family
- Interests
- Notes
- Renweb Sync



# Using the Constituent List

- It is possible to access the Constituent List by selecting the Constituent List menu button in the left-hand pane of the program.
- In order to bring up a full list of all the constituents listed within the database, including donors, organizations, parents, alumni, etc., select the **Refresh Data** button.
- Constituents can be filtered from the drop down menu.
- By selecting the column heading of any column in the grid the grid will then re-sort the contents by the items in the column. For example, to sort by the constituents name you can simply click on the column heading marked "Filed As".

# Filtering Constituents

## ■ Drop Down Menu

- Active Constituents
- Inactive Constituents
- Deceased Constituents
- Recycle Bin (Doesn't completely delete constituents unless Purged)
- Constituents With Missing Greetings
- Constituents With Blank "Filed As"
- Constituents With Missing Pre-fix
- Records Created from last Sync
- Records Updated from last Sync
- Records Created from last Import
- Records Created from last Import
- All Constituents
- RenWeb Linked Constituents
- No RenWeb Link



# Filtering Constituents Cont.

- Constituent Search Option:
  - **Type** a few letters of the last name
  - Choose constituent from the short list
  - Must use the **Refresh Data** button to pull all constituents, including new constituents added.






# Adding a New Constituent

- Click the **New Constituent** button.
- Enter the constituent's name and add a spouse if desired.
- Press Next
- Enter the constituent's contact information.
- Press Finish

If attempting to add a constituent that is already in the system, the user will receive a message warning that a phonetic match exists.



# Deleting Constituents

- From the Constituent List, click on a constituent record.
- Click the Delete button.
- Confirm the delete.
- The constituent goes to the Recycle Bin and may be retrieved if necessary.
- Be sure that before purging the Recycle Bin, no constituent has any pertinent giving history tied to him or her.

# Purging the Recycle Bin

- From the Constituent Filter drop down menu, select Recycle Bin.
- Press the Refresh Data button.
- Click on a constituent record to purge one record at a time or press the Purge All button to purge all records.
- Confirm the purge all action by pressing yes.

Note: To remove a constituent from the Recycle Bin, double click on the record; change the status from Deleted to Active.


# Merging Constituents

- From the Constituent List, click on both of the constituents.
- Click the Merge button.
- Beside each data element will be a checkbox, which if checked signifies to keep the data in the merge.
- Press the Merge button.

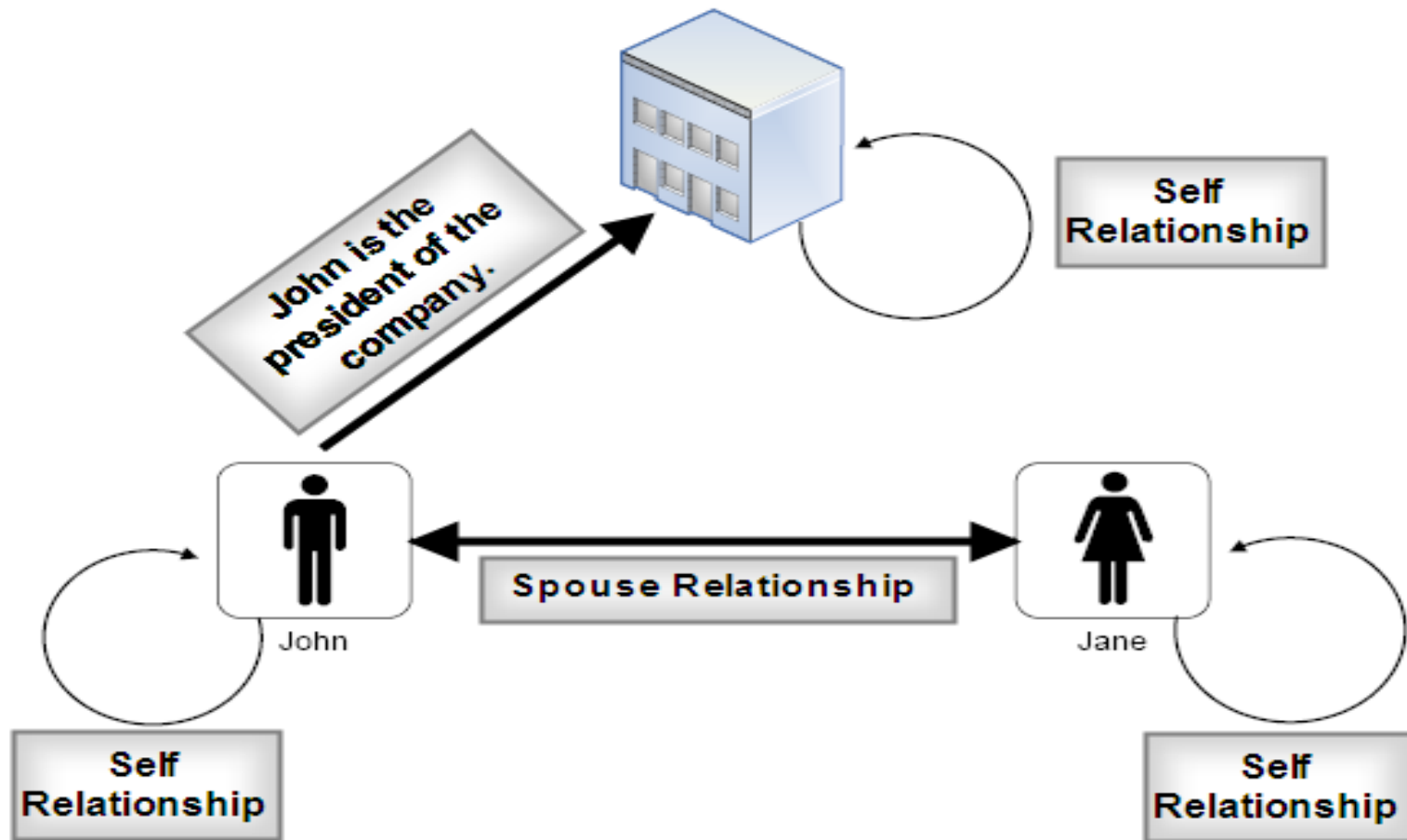




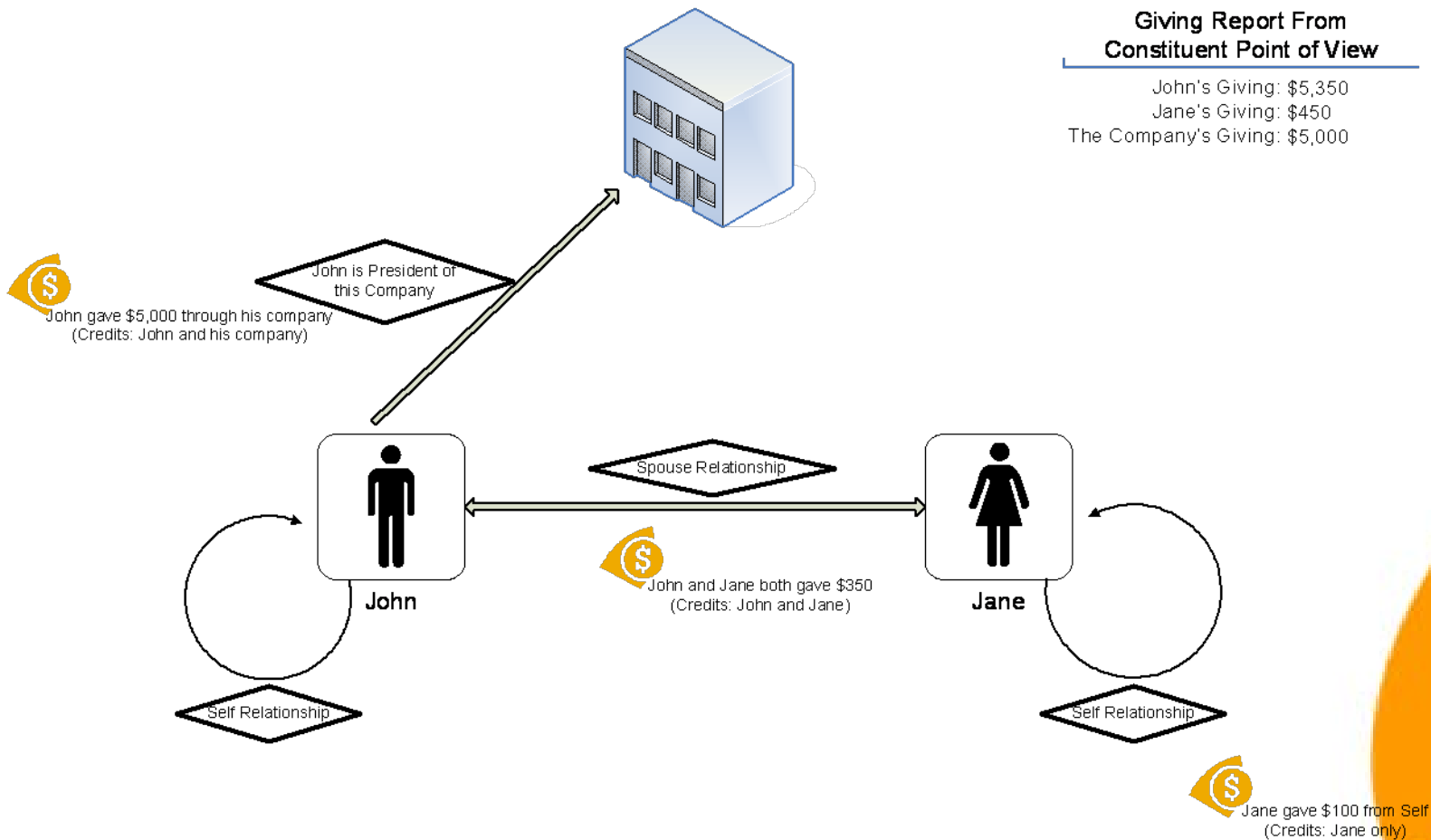
# The Constituent Screen

- Basic Information
    - Contact Information
      - Multiple Phone Numbers
      - Multiple Addresses
      - Email
    - Misc. Information
    - Interests
    - Other Contacts (Relationships)
    - Jumping to Another Constituent
  - Relationships
    - Relationship Types
    - Adding Other Relationships
    - Primary Relationship
    - Relationship Greeting/Salutation
  - Notes
- 

# Relationship Diagram



# Relationship Giving





# Understanding Relationships

- Self Relationship

- Every constituent has a self relationship

- Spousal Relationship

- Spousal relationship can be tracked (in the event of a divorce the spousal relationship can maintain giving history records)

- Business Relationship

- Constituent influence
- Matching Funds

- Primary Relationship



# Constituent Interests

- A constituent can contribute to an organization in many ways: giving donations, volunteering in various ways, etc. The constituent interest is a way to track what kind of relationship they desire to have or have historically had with the school.
- Example: It is possible to create mailings (postal or electronic) to everyone in your database marked as "**alumni.**" Such a query would select only constituent records where an **alumni** interest exists.

# Constituents – Additional Information

- This is a quick reference of constituents having any one of the following types of relationships with the current record:
- Spouse
- Child
- Company
- Example: You are conducting a telethon effort. Your callers use Renweb Fundraiser Pro to provide contact information and a way to insert notes regarding discussions with constituents. While looking up the constituent phone number, the caller can immediately see and refer to the current constituents most important relationships.

# Working Grids

- Most grids in the system allow one or more of the following functions:
- Sorting by clicking on column headers
- Printing via a nearby "Print" button, if available. The user will see a print preview first.
- Refresh data from live Internet database, via "Refresh" button, if available.





# Renweb Sync

## Settings and Tools - Utilities

- RenWeb Sync Tab
  - Start
  - Synchronization Options
  - Pre-Sync Report
  - Approving the Sync

