NHC DONOR MANAGEMENT
CIVICRM SYSTEM

url=New Hope Clinic (dmsnhc.org)
Select Click Here for DMS
Enter your Login & password

Here are some basic getting started tips

The app software is CIVICRM, a free nonprofit content management system.
Civicrm.org
CIVICRM is a plug-in for WordPress.
WordPress must be installed first, then CIVICRM must be uploaded to the plugins folder. Creating a separate database for CIVICRM is advisable so it is not inside the WordPress database. Once CIVICRM is loaded into the plugins, it must then be activated. During the activation process, you determine the database folder structure.
The app is designed to maintain a donor contact list, the contributions associated with each donor, and various reporting features.

END USER INSTRUCTIONS
Having as much information as possible is best to make life easier later when entering data. Yes, it takes time. Be sure to fill in as many fields as possible; this is helpful in reporting. In most cases, Sheila will need to explain the check processing options.

After logging in, select CIVICRM from the list on the left side.

ADDING NEW CONTRIBUTIONS:

TIP NOTE: Select Search and enter the name to select because that brings up the donor’s profile to verify the address and any other information to update before entering the contribution. Yes, it takes a little longer, but you don’t see that information in the donor contribution screen, and sometimes it changes.

- Enter the Donor name in Search and select the name
- If multiple same last names, CLICK on the name desired
- Verify information, email, address, communication pref
- Select Contributions
  - All previous contribution data will be displayed
  - CLICK Record Contribution (Black box)
- Select Financial Type—Donation
- Enter the total amount ie 100.00
- Enter Contribution Source. This is extremely important for reporting
  - Sometimes Sheila needs to be consulted
- Select the CAMPAIGN
- Contribution Status—Defaults to Completed—This is OK
- Send Receipt---LEAVE BLANK
- Receipt Date- Defaults to current date--OK
- Payment Method---Select from DROP DOWN LIST
- Skip Transaction ID
- Insert Check Number
- Skip Soft Credits
- If ONLINE contribution, Enter the Receipt date. These are from PAYPAL
- There is an EOM monthly DUKE employee matching list Sheila provides, and use EFT for those transactions

- IF Organization, search by organization name and follow the steps above

- Print the NHC Deposit Ticket after all contributions have been entered.

  - Select Contribution Reports
  - Select NHC Deposit Ticket
  - Print the NHC Deposit Ticket, match the checks with the report, and place it in the file cabinet in the ED office.

- Create Contribution Thank You Letters
  - Select CONTRIBUTIONS from the drop-down list
  - Select Find Contribution
  - Enter the Donor Name and Press ENTER
  - Select the CHECK BOX of the donor

- In the ACTIONS DROP-DOWN BOX, Click
- Click the drop-down arrow in the ACTIONS Box
- Select THANK YOU LETTERS-PRINT OR MAIL
- NOTE the Update Thank you dates Usually defaulted to a check
- Be sure the Print and Mail option is GENERATE PDF for PRINTING(ONLY)
- Select USE TEMPLATE to select the type of letter
  - Most used is the General Thank You (xxxx)LWindow
  - This means the letter folded will be displayed in a window envelop
  - Note other options
- Skip Page Format – that has been pre-configured
- Click MAKE THANK YOU LETTERS
  - This will generate the PDF letter on the screen for viewing
- If all is OK, print the letters and Close the PDF file

NOTE: Sometimes, there is a need to make the letter a Charitable Distribution; in that case, you delete the bottom tax text section of the letter.
Also, text can be added for additional customization.
DO NOT SAVE THE CHANGES!

OTHER LETTER CHOICES: In Honor/Memory of Online Donations LWindow, Online Donations Campaign, again, sometimes the letters need some customization.

ADDING A NEW DONOR:

- ADD NEW HOUSEHOLD, INDIVIDUAL, ORGANIZATION
  - Here is where it gets tricky. (I generally add everyone as a HH)
  - If INDIVIDUAL, no problem, fill in the blanks
  - If HOUSEHOLD, enter HH information
    - Then add each HH member as an Individual
    - Be sure to make the Head of Household PREFIX Mr. and Mrs
    - Add the additional member of the HH with the correct PREFIX
  - If Organization, enter Organization information
    - Then add the contact as an INDIVIDUAL and set the relationship as AFFILIATE OF
- If just and INDIVIDUAL, no problem…

    - Select CONTACTS, NEW INDIVIDUAL
    - Be sure to select the correct PREFX and continue to fill in all the required, blank fields as needed
    - Be sure to select ADDRESS
    - Be sure to select COMMUNICATION PREF –USE APPROPRIATE OPTIONS
    - Select NOTES if anything special
- IF HOUSEHOLD
    - Select CONTACTS, NEW HOUSEHOLD
    - Use the contact's LAST NAME and fill in blank fields as needed
    - Be sure to Select ADDRESS and fill in blank fields as needed
    - Other options as needed
    - Click save
- IF ORGANIZATION
    - Select CONTACTS, NEW ORGANIZATION, SUB TYPE
    - Fill out appropriate blank fields
    - Once completed, the Organization needs to be added as an INDIVIDUAL
    - Double check the RELATIONSHIP and set it as AFFILIATE OF

When all are finished for the session, please be sure to log out.
Click on the CIVICRM Home Page
Find the dmsadmin user option in the upper right corner of the web site screen (not the windows x) choose Log Out……You're done!!

CONTRIBUTION ANNUAL LETTER

Some donors make recurring contributions. These are tagged with an Annual Letter report in the Contacts Report Section.

- Select CONTRIBUTIONS
- Select Find Contributions
- Enter donor name; it is best to use the full name so that the result is what you want
- Check the contributions for the year
- In the ACTIONS box, select Export Contributions

- Select Fields for Export
- Select Annual Donation
- Select Download
- Exports to a CSV file---note browser download, upper right corner
- Open the CSV file
    - Delete the Contribution ID column
    - Add Auto Sum to Amount column
    - Add “Total” in the cell before the Total amount
    - Format the Amount column to $
    - Add a gray background to the header row
    - Highlight the area and select Copy
    - There is an Annual Letter Template in the common\NHC\Donations folder, Year-receipts.docx mail merge for the tagged donors.
    - Open the Letter and Paste a Picture into the letter above the signature. Align the picture to the Right and make any fine-tuning for proper viewing.
    - Adjust the letter text as needed, i.e., update the year, etc.
    - Save letter with the updated year, print to screen to preview, finalize printing
    - Delete the CSV file