Frequently Asked Questions (FAQ)

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General

Q: What is a donor CRM and why is it important?

> A: Donor CRM (or Donor Management System) is a relationship database that helps a user manage their donors, prospective donors, volunteers, and other supporters by keeping track of donations, interactions, thank you letters, trend analysis, reporting, segmenting, and more. Any nonprofit looking to identify, research, cultivate, solicit, and steward their donors needs a way to manage all of the data they collect through the information gathering process. Anyone looking to establish a long-term recurring donation plan can benefit from a donor CRM that automates as much of the recurring donation process as possible, including regularly sent acknowledgements.

Q: What is Moves Management?

> A: Moves Management is a predefined set of actions established for a specific campaign.
>
> *For example, a major donor campaign might look like: initial gift, one day later personal telephone thank you, 5 days later handwritten thank you, 3 weeks later ask for a recurring gift, 1 week later send newsletter, 3 months later ask for event sponsorship.*

Q: What is a custom field? What fields are automatically included?

> A: Automatically Included Fields:
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> - Contact ID, Name, Address(es), Primary Address, Title, Salutation, Type, Birthday, Social Media, Notes, Contact Information- phone number(s) and email
> - Most recent Gift Date and Total Gift Amount

Q: What are some features I should be taking advantage of with GiveSmart Donor CRM?

> - Search capability with intuitive and elastic search technology
> - Built-in filtering AND Inverse filter capabilities
> - Simple thank you letter / acknowledgement merge tool
> - Gift entry wizard
> - Querying – no need to know complicated language – delivers query in plain English
> - Smart Donor Score – measure ‘heart’ and ‘wallet’ combination

Q: Does GiveSmart Donor CRM have the ability to run an email campaign for, let's say, LYBUNT (gave Last Year But Unfortunately Not This)?

> A: Filtering includes 30+ fundraising filters, including SYBUNTS and LYBUNTS

Q: Does GiveSmart Donor CRM track our constituent biographical and demographic data? Such as:

- preferred name formats for recognition purposes
- current and past address information
- communication preferences (some prefer no email, others no phone calls, etc.).

> A: Bio and Dem details can be tracked in GiveSmart Donor CRM easily including all these examples.

Q: How can Donor CRM track every interaction our fundraisers have with each donor and prospect? *Every time we bump into someone at the local store, we note the conversation for future reference. Every time we call and leave a message, we note the date and time. Every mail appeal, newsletter and holiday card we send is noted on every record to which it was mailed, along with a description of the content of that mailing. If a donor sends us a handwritten note or photo, we scan that document and attach it to their record in our database.*

> A: We track those details under the Activities section of a record, and many interactions are automatically logged (thank you letters, email sent through the system). We do not allow for attaching documents, but the user can easily upload to Google Drive or something similar and paste the document path into a specific field.

Q: Does Donor CRM record all the important details needed by our auditors for the special types of gifts we receive less frequently?

For example, multi-year pledges with installment schedules, tribute gifts (in honor or memory of a loved one), in-kind gifts (a physical asset, instead of cash), stock gifts with the number of shares and value per share, planned gift commitments, etc.

> A: Yes, we can store all those details.

Q: Does GiveSmart Donor CRM have tools needed by our grants manager?

> A: Yes! We can track grant proposals, all correspondence, reporting requirements, manage deadlines, document budgets, funding restrictions, properly recognize funders. Across the entire lifecycle of each grant.

Q: What levels of admin access are available ?

> - **Admin User**: ability to add new fields, codes, and other admin users
> - **User**: No ability to add new fields, codes, or admin users.
>
> Both have full access to data entry.

Q: Can you schedule thank you letters to automatically go out?

> A: No. For your own information for future conversations, it's generally not best practice to have thank you letters go out automatically. A user should always spot check them in the event a nick-name should be used/replaced, additional comment needs to be added, or other personalization. While online forms within Donor CRM do send automatic confirmation receipts, they are no replacement for a genuine thank you letter.

Q: Can a donor make a recurring donation from a donation form ?

> A: Yes. When creating a Donation Form, if you opt to include a monthly or annual option, then your supporters will have the ability to place a single, monthly or annual donation.

Application How To

Q: Can you send an email directly from Donor CRM without a thank you email?

> A: Yes, under Collect Donations.

Q: Is there a way to edit a Pledge?

> - Click on **Pledges** on the side bar,
> - Choose **Send Pledge Thank Yous**
> - **Filter by Status** should be **All**
> - Click **Clear All**
> - Check the pledge you want to edit
> - Click **Preview (1) Thank You Letters**
> - Click the little pencil and paper icon to edit

Integrations / Importing Data

Q: Can I import multiple addresses for a contact?

> A: Yes. Simply follow the steps outlines in the import document

Q: Will my monthly/annual donors carry over?

> A: We can mark these individuals as recurring donors via a Custom Field but if you had their payment plan set-up in your former CRM or a system you are no longer using, you will need to contact the donor and let them know your new method of collection.

Q: What about my pledges?

> A: We can mark these individuals as pledges via a Custom Field, but you will need to re-create their pledge in Donor CRM.

Q: Will all donations captured through the GiveSmart Fundraise and Event platforms need to be manually added as a 'New Gift'?

> A: Currently reports can be exported from Fundraise & Events and uploaded into Donor CRM. The roadmap includes the development of a formatted report for easy exporting/importing.

Q: What if I have multiple files with contact or gift information?

> A: We can match your contacts or gifts during Data Conversion if we have a unique donor ID within each of your files. You will also be able to merge duplicate contact records after your import is completed with our merging tool.

Q: I need to store more information on my donors or gifts than what you have listed in your template, how do I handle this?

> A: We will be able to create additional custom fields for your data during our import process. By providing us the necessary field names and information, we will work with you to configure these new fields correctly in the system .

Q: Will you remove duplicate contacts from my data?

> A: We recommend that you remove all duplicated contact information prior to importing your data. You will be able to merge your contact information post import via our merging tool.