<u>**How to Use Request tracker**</u>

Request tracker is our system to assure that all member requests that are not filled immediately are carried out in a timely manner. It is also a tool to let others working on various administrative tasks, know what has been done and when it has been done, so that they can coordinate their own efforts, with those of others.

It is imperative that the mailing dates and member status for each mailing are logged into Request tracker, so that we know what members have or have not been mailed to.

To input an item or review what is to be done:

1. Sign on to Admin

2. A screen will pop up with an "*add*" button & a "*go*" button
   - If you want to review a log of what has been done or what may need your attention, Put in a start date for the period you'd like to review and press "Go."
   - If you would like to add a task that someone needs to take care of, or would like to add information about a project that you have completed, click "Add"

3. **Add Screen**
   - Put your Name in administrator name if you are inputting info on what you have done. Put the members name in if it is a request that requires a response directed to the member.
   - Input Member # of the member who needs help if a response to that member is required.
   - Fill in request method.
   - If you are logging in actions that you have taken, put the date of completion in the filled date area.
   - If it is a request from a member, Leave filled date <u>blank</u> and it will be inserted by whoever fulfills the request at a later date.
   - Request is a description of the problem to be solved, or of the action (i.e. mailing) that has been completed.
   - If a Specific person should get back to the member, put their name in caps at the beginning of the request description.
   - Click "Go" when you are finished and the screen and this info will be automatically added to the request tracker database.

4. **Go Screen**
   - A log screen will come up showing the actions and requests occurring in the time period you have specified.
   - To edit an item, add comments, or to mark it fulfilled, just hit the edit button and make the appropriate changes.
   - Click "Go" when you are finished editing an entry, and then click "Go" again on the log screen, and it will refresh with the updated entry.

How Get Data from the Database into Excel

1. Go to Admin Section and click on Export
2. Chose the type of report you need (i.e. Donations, New members, Children etc.)
3. Check sort parameters required and put in E-mail address you need the data sent to. Sometimes it is easier to get all the data rather than to sort prior to Export and then sort & eliminate what you don't need later in excel.

4. Open e-mail received from web site and download file to your desktop. The file will download as a text file.

5. Open Excel and under File click open. A box will pop up and you will look to find the file you just downloaded in Desktop. Make file type at the bottom of this box "Text Files". Locate the file & click open.

6. A conversion wizard will pop up.
   - Check delimited & click next.
   - Un-check Tab and check Other and in the box provided, put Pipe (The key above the enter key with shift applied.
   - Scroll over to zip code and highlight the zip code column. Un-check "general" and check "text" right beneath it.
   - Click finish

7. The Data will now go into an Excel spread sheet. You can now sort the data by highlighting the entire sheet by selecting the top left square. You check "my data has Header row prior to sorting. You can also delete any columns or rows that do not apply to what you are doing.

8. From this Spreadsheet, it is easy to make mailing labels in Word using the enclosed Avery 5160 Label template, and using the mail merge/labels function under Tools. With the exception of CIC mailings, always use the member # and Status field on the label.

9. When you finish, don't forget to save as a Microsoft excel workbook, otherwise it will remain as a text file. You may delete the initial text file that you were e-mailed if you like. It is often helpful to name the file with a file name that states its purpose (i.e. spring newsletter mailing) and a date when it was created.

How to Prepare excel spreadsheets of addresses needed for mailing or e-mail for regional coordinators

- IN Admin Go to Export.
- Select Members
- For Other use *exclude*.
- Pick region needed
- Insert e-mail address
- Import into Excel Spread sheet – Delimited format, Pipe delimited/ format Zip codes as text.
- Sort by status.
- Delete the following fields prior to sending the report to the coordinator:
  Do not e-mail
  PayType,
  InsertDate,
  OtherType,
  Lastupdate
  Username
  Password
- You can import the Primary address fields & Status field into Word to a standard Avery 5160 Label format if needed.
- Send by e-mail to the coordinator

<u>How to add a Renewal or new Membership Payment:</u>

- IN Admin - Click Membership box
- Then click add/edit members
- Search for the name or put in membership #. You can also check by city or address fragment or e-mail. IF you can not find this person in the database then you must add a member by clicking - Add a member and filling in the info in the pop up box. If you find the member, add payment as below.

IF YOU CAN NOT FIND THE RECORD USING SEARCH:

<u>To add a member:</u>

- Do not select for comp or other
- Other type will default to none
- First Name: Put in both spouses if they have the same last name, e.g. "Debbie & Mark". (Use & - Don't write out "and".) Upper & lowercase is standard for all entries
- Last Name: as provided
- Spouse Name: Only if the spouses or partners have **different** *<u>last</u> names*
- State is 2 letter Abbreviation only.
- Add phone and work Phone (fax is no longer recorded)
- ***MAKE sure we get e-mail correct.*** If none is provided or if it is unclear, call and try to get one.
- Add alternate e-mail if provided
- Click on **"ADD MEMBER".**
- If Children are added, click the C next to the member's name to access the children screen & add the children data.
- O next to member's name gets to "Do you want to be listed in the FCC Family directory." People are very sensitive about this.
- DON'T FORGET TO CLICK ON ***UPDATE*** EACH TIME YOU ADD OR REVISE SOMETHING.

You can now add the payment

IF YOU FIND THE RECORD USING SEARCH:

- Click on the member's name to access record to verify or update data.
- Check anything that has been changed & revise if necessary.
- ***MAKE sure we get e-mail correct.*** If none is provided or if it is unclear, call and try to get one.
- If Children are added, click the **C** next to the members name to access the children screen & update & check existing data
- **O** next to member's name gets to "Do you want to be listed in the FCC Family directory?" People are very sensitive about this.

You can now add the payment

Adding a Payment

Click on P next to the member's name for Payment screen

Under **Membership** section click **ADD**
A screen will pop up

AMOUNT: just the amount, don't need $ or cents

CHECK DATE: input date on check

DATE RECEIVED: is the current date.

YEAR: Will default to current year until Nov 1 2002, But this allows you to post payment for future years if that year is already paid for**.**

- **METHOD:** Scroll for credit card, check or cash (unlike online renewal, this only posts credit card payments to a members account, and these must be sent to Ron Tralle so he can process the charges so we can get paid.)

How to add a Charitable Donation:

- ❖ Leave all foundation and matching grants in questions pile
- IN Admin - Click Membership box
- Then click add/edit members
- Search for the name. IF the Donor is not in data base then you must add a member by clicking Add a member and filling in the info in the pop up box. If you find the member, add payment as below.

To add a member:

- Select for Other
- Other Type: scroll to "CIC Donor"
- First Name: Put in both spouses if they have the same last name, e.g. "Debbie & Mark". Use & - Don't write out "and".
- Last Name: as provided
- State is 2 letter Abbreviation only.
- Spouse Name: Only if the spouses or partners have **different** *last names*
- And phone or e-mail if provided
- Click on "ADD MEMBER".

Adding a Payment (Donation)

Click on P for Payment screen
AMOUNT: just the amount, don't need $ or cents
CHECK DATE: very important
DATE RECEIVED: leave it on the current date
DONOR DESIGNATION: YES OR default is NO
DESIGNATION: write orphanage name first, (e.g. Tongling) Or Amity. If they just say "grandmas", just enter that.
DONOR HONOR: select YES OR default is NO
HONOREE: If yes - Just first and last is fine. (not needed for general appeal)
IN MEMORY OF: select YES OR default is NO
MEMOREE: if yes- put in name
SEND GIFT CARD: YES OR default is NO
RECIPIENT: if yes- name
MATCHING GRANT: YES OR default is NO
COMPANY: if yes- enter Co. name if matching Grant is selected
BROCHURE REQUEST: scroll to how many to send and add to request tracker if you are not sending them out right away.
CAMPAIGN: Defaults to current (2007-2008) unless you are entering historical data.
UNIFIED APPEAL: Is the contribution from the Unified Appeal?
OTHER CHAPTER: leave it as a NO unless it specifically mentions another FCC chapter
CHAPTER NAME: do nothing unless it specifically mentions another FCC chapter

(Cont. on next page)

Prior to adding donation- double check address on the bottom of the screen to be sure it matches donation card

If not, find right member or if it is the same person, change it in the database.

Then click ADD…*Don't forget to click ADD.*

- After you add the donation. you can see what you added on the Payments screen. ***Please*** check it.
- If you have not just added this donator as a new member, when the member or donor name comes up, please click on the name to check if the address is the same. IF not, please correct. Click on **UPDATE.**

MEMBER NUMBER: write this on the card in upper left-hand corner of donation card
Break donation cards into 3 piles

- ❖ $250.00 or over
- ❖ Under $250
- ❖ Under $250 with more to do like send cards or Brochures

CREDIT CARD Procedures:

Use same procedure as above
For Method select "Credit Card off site"
At the bottom of the screen:

- ❖ Select "Yes" for Charge Credit Card
- ❖ Insert Card # & Expiration Copy Member name
- ❖ Click **ADD** only once, and you are done – if card does not go thru, just leave in the questions pile.

New Member Materials & Procedures

- Run new member report out of export screen in Admin
- Insert date start = last time run (taken from request tracker)
  Insert date end = Yesterday's date or latest date in drop down box
  Import into Excel Spread sheet – Delimited format, Pipe delimited/ format Zip codes as text.
- Before proceeding with new member kits go in & clean up Data for improper case usage and convention errors. Convention errors include not Upper & Lower case, Phone # in format other than xxx-xxx-xxxx, state spelled out, etc.
- It is critical that we get e-mail addresses for all new members. If they are not supplied, make a phone call to obtain them.
- Check for duplicate memberships in this spreadsheet. If you find any, they will usually be right next to each other with successive member #s, change the membership classification of one of them to Delete /Other. Delete the payment on this member # and add it to the other corresponding member # for the next available year.

  - Make labels for each member from resulting excel file
  - Run Mail merge Welcome letter from resulting excel file
  - Put in the member #s in search box in the add/edit member's area, and run an all info form for each new member.
  - Make New Member packets containing the following

1. Welcome letter.
2. Members All Info form printed from data base w/ How to change your data sheet attached
3. CIC Charitable Appeal
4. CIC Charitable Annual Report
5. Instructions to change user profile
6. Latest newsletter or letters

Mail out and note date of report & completion in Request tracker

This should be done at least once a month