Windshield 2020 CRM User Guide

Overview of Windshield CRM

Windshield now includes basic CRM (Customer Relationship Management) features designed to meet the needs of small organizations that may not have the resources for a more advanced system. This version provides essential tools for managing prospects and donations efficiently.

Features Overview

1. Prospect Import:
Easily import prospect records along with basic contact details.

2. Donation Management:
Add, edit, and delete donations for specific prospects.

3. Reporting:
Export donation data for archival purposes or use it with mail merges to generate giving statements or thank-you notes.

Data Philosophy

To maintain simplicity, donations in the Windshield CRM are treated separately from campaign commitments. If a donation is associated with a campaign, it must be entered in two places:

1. **Campaign Module** – Enter the commitment under the relevant campaign.
2. **CRM Module** – Log the donation under the donor's CRM record to ensure the donor receives giving statements and acknowledgments.

Note: This requires double entry. We apologize for the inconvenience.

How to Get Started with Windshield CRM

If you are new to Windshield and wish to use the CRM features, follow the steps below:

Step-by-Step Instructions:

Step 1: Import Your Prospects

- Navigate to the **Prospects Module**.
- Select **"Import from File"** to download a template.
- Fill out the template and upload it to the system.

Step 2: Create Your Campaign

- Refer to the **Quick Start Guide** for campaign creation instructions.

Step 3: Set Attributes and Strategies

- Follow the **Quick Start Guide** to configure relevant attributes and strategies.

Step 4: Add Callers

- See the **Quick Start Guide** for instructions on adding callers.

Step 5: Assign Prospects to Campaigns

- Use the **Prospects Module** to pull imported prospects into specific campaigns.

Managing Donations

The **Prospects Module** allows you to view, add, edit, delete, and export donation records.

Features and Actions:

1. View Donations:

- Use the **View** button to see all current donations linked to a prospect.
- The slider tool provides quick access to edit or delete donation entries.

2. Add New Donation:

- Select the donor and campaign from the dropdown list.
- Enter the payment type, donation amount, and the donation date.

3. Export Donations:

- Specify a **start and end date** to filter donation records.
- Exported data can be used for reporting and to generate giving statements or thank-you notes through a mail merge.

Conclusion

Windshield CRM offers essential functionality for managing prospects and donations in a streamlined manner. While some processes may involve double entry, the system aims to simplify donor tracking and reporting for small organizations. For more detailed instructions, refer to the **Quick Start Guide** provided with your software package.