












Windshield 2020 Quick Start Guide

The purpose of this guide is to offer a brief description of use for those already familiar with Windshield 2020. A first approach should be to have reviewed the videos through Taking Donors Seriously or to be trained by phone with a FOCUS Group consultant.

Quick start

HOW TO:	Step 1	Step 2
1. Create your campaign.	 Campaign List	
2. Create attributes and strategies	 Settings	
3. Enter your prospects	 Prospects	
4. Enter your callers	 Callers	
5. Pull your prospects into your campaign a. Click Home, Add Prospects b. Select the campaign on dropdown c. Click add prospects d. Find prospect in dropdown and then fill information for prospect	 Home	
6. Copy a campaign a. Click Campaign List, Add Campaign b. Enter a campaign name c. Enter a goal amount d. Click Select an option e. Choose "Import from Campaign" f. Select campaign you would like to copy (All prospects in that campaign will be pulled in.) g. Select Start and Target Date	 Campaign List	
7. Get help with WS2020		

Definitions:

Target Low: The amount you are 90% sure the donor will give

Target High: The highest amount you are willing to ask for

Formulas:








Worst case: Committed + Asked + Target Low

Best case: Committed + Asked + Target High

Note: Once committed the target high and low are generally zeroed out.

Note: The “Fulfilled” field does NOT factor into the calculation.

Side Bar Icons and Definitions

ICON	
	HOME: This is the home screen to your account where access is available to all campaigns in your account.
	PROSPECTS: All prospects in your organization’s data to pull into all campaigns.
	CALLERS: People who will be in contact with donors
	REPORTS: Produce reports for tracking progress in campaigns
	CAMPAIGN LIST: All campaigns that your organization has created in WS2020 are listed on this page. They can be sorted by name, goal, committed amount, start date and target date. Campaign information can also be edited on this page. Campaigns may be deleted from this page.
	SETTINGS: Attributes: Distinct constituencies within your organization that will help manage prospects. Strategy for Donor: Way of engaging donor
	HELP & SUPPORT: You will be directed to the Windshield2020 Help and Support page on the TFG website.