**[Organization Name]**

Prepared by NeonCRM, Professional Services

NeonCRM Policies and Procedures

[DATE]

# Database Usage

NeonCRM is a database built for Non-Profits in order to manage supporters of your organization. The database has donation, membership, event registration, social (or peer-to-peer) fundraising, volunteer tracking, and online store management tools including customizable online forms, automated email and letter communications, and powerful reporting built right in. 

## Purpose of this Guide

The goal is to define and specify [Organization Name]’s usage of different parts of NeonCRM. This guide is part training and part reference material.

### Learning NeonCRM

Individual and organizational accounts are the basics of NeonCRM. Additional pieces of information are layered on top of the account such as transactional information (donations, memberships, event registrations, store purchases), volunteer information, communication history, notes, prospect and activity management, and custom attributes that your organization creates and manages. Each of these features has their own set of reports. Understanding how all the pieces work together will help you be an excellent user of your system.

# Table of Contents

[Database Usage](#h.rrar1dgps27e)

[Purpose of this Guide](#h.qzl25hpt1jm7)

[Learning NeonCRM](#h.z1px4u3jzsns)

[Table of Contents](#h.rpwu0frgo3r9)

[Data Entry Procedures](#h.tj0874p6b4h3)

[Account Creation](#h.hwkqgewz30e9)

[Address Entry Rules](#h.m6f6jeojgu9k)

[Relationships between Accounts](#h.adlk23rvh35a)

[Household Relationships](#h.z0zaps5v6nak)

[Household Contacts](#h.v08z6fpbb8ug)

[Employment History/Contacts Relationships](#h.l35ih2cennn0)

[Additional Organization Contacts](#h.kgalfh9yui1z)

[Account Relations](#h.tow1c55hyufb)

[Additional Account Information](#h.ez7xjbrlo1ov)

[Customizing Account View Screens per User](#h.h5kojalt6n81)

[Custom Fields](#h.hthc07263jvy)

[Prospects, Grants, and Activities](#h.uwr8cmpp5xkp)

[Donations](#h.75fktpcetdvx)

[Campaigns, Funds, and Purposes](#h.2vuqdbfiaf7b)

[Donation Custom Fields](#h.ev0wsd1v8xjw)

[Donation Entry](#h.3xpwwfljdsa5)

[Pledges, Soft Credits](#h.dbb37yo1sw50)

[Events](#h.7alak4q3ila7)

[Event Custom Fields](#h.19knxbgbgzbq)

[Event Categories and Topics](#h.yeevbjmqkhrl)

[Memberships](#h.smlk6tjnbw2w)

[Membership Settings](#h.uvqibu5dbkt0)

[Membership Levels](#h.u7hz6suqgh2m)

[Types of Memberships](#h.qehnlchmis1w)

[Membership Entry](#h.u5rkjjbj8nwd)

[Membership Custom Fields](#h.206zujw2x7do)

[Online Forms](#h.7i25eorfdyh)

[Reporting](#h.kojur34upa70)

[Types of Reports](#h.obkluwe02klb)

[Saved Reports](#h.f7jupjl0lczi)

[Data Maintenance](#h.9ddyobp22uaz)

[Duplicate Manager](#h.iirtk6gejdqa)

[Bulk Operations](#h.odn9mse2oety)

[Batch Update](#h.s5uch961f4m9)

[Excel Tricks and Tips](#h.pqizi45o41da)

[System User Accounts](#h.ln8rtuzglr9c)

[System Administrators](#h.5ynlmiusxfx2)

[System Users](#h.ons7dfc9uv7n)

# Data Entry Procedures

### Account Creation

There are two types of accounts, individual and organization accounts.

An **individual account** is created when they meet any of the following criteria:

* They have made a donation, membership, event registration, or store purchase
* The person has applied or participated in a volunteer project
* We have the person’s mailing address (Note: If we only have a name and an email address for the person we do not create an account. Instead they are adding to our email audienced called [insert distribution list name]

The fields that must be populated on individual accounts are listed below as well as an fields that if we have the information should be populated.

|  |  |
| --- | --- |
| **Required** | **If Available/Applicable** |
| * **First Name** * **Last Name** * **Primary Address** * **Preferred Name** (will autofill w/ First Name unless they have a nickname) * **Salutation** (how the individual would like to be addressed in communication, this may be the same as their First Name or may combine their Prefix and their Last Name together in one field) * **Account Source** (select from the list the source that best suites where the accounts came from) | * **Individual Type of Volunteer, Major Prospect, Board Member** * **Prefix** * **Middle Name** * **Address Type** (work, business, or school) * **Email 1, 2 and 3** * **Phone 1, 2 and 3** * **Phone 1, 2 and 3 Type** (home, work, mobile) * **Household Name** * **Household Salutation** |

An **organization account** is created when it meets any of the following criteria:

* The organization has made a donation, membership, event registration, or store purchase
* An individual account holder in our database has given us the contact and mailing information for their place of employment
* We have the mailing address and a primary contact at the organization
* A person at the organization has expressed an interest in corporate volunteer opportunities.

The fields that must be populated on organization accounts are listed below as well as an fields that if we have the information should be populated.

|  |  |
| --- | --- |
| **Required** | **If Available/Applicable** |
| * **Organization Type** (Foundation, Business, Non-Profit, Educational Institution, Church) * **Company Name** * **Salutation** (who mailings should be addressed to, if no name is available copy the company name) * **Business Address** * **Preferred Name** (will autofill w/ First Name unless they have a nickname) * **Salutation** (how the individual would like to be addressed in communication, this may be the same as their First Name or may combine their Prefix and their Last Name together in one field) | * **First Name** (of primary contact) * **Email** * **Phone** * **Additional Company Contacts** (see additional information about Employment History/Contacts Relationships |

###### 

###### **Address Entry Rules**

* Cardinal and ordinal directions should always be abbreviated with a period – i.e. North becomes N., Southwest becomes S.W.
* Street types should always be written out in their entirety, i.e. Boulevard, Street, Avenue, Road
* Apartment, room, or suite numbers should always be abbreviated on a second line, i.e. Apt., Ste., Rm.

Example:

|  |  |
| --- | --- |
| **Address** | **How to Enter** |
| * 2507 North Greenview Avenue, Apartment 2 * 15 North Wacker Drive, Suite 10B * 1401 Jones Road | * 2507 N. Greenview Avenue   Apt. 2   * 15 N. Wacker Drive   Ste. 10B   * 1401 Jones Road |

###### 

### Relationships between Accounts

There are three ways to relate accounts to each other in NeonCRM: Households, Employment History/Contacts, and Account Relations

##### **Household Relationships**

A household relationship is created between accounts when the accounts live at the same home address in order to both track the relationship, and to make sure that when we do print mailings we do not send multiple pieces of mail to the same household.

A household can have more than one person in it, but one account must be the **Head of Household.** This term is only meant to signify the account that you can edit the household from. If all the people in a household are full accounts, and not household contacts (see additional information on household contacts), you can make a different member of the household the head of household at any time.

A household is created is created when any of the following criteria are meant:

* We have two or more accounts that live at the same address in your database
* We want to be able to reference the name(s) of the other people in the household

To create a household you must first create a **Household Name** and **Household Salutation** from the account that you want to be the head of household.

A **Household Name** ensures that you can properly address the outside of the envelope for a mail merge. It should follow one of the following formats:

Shared Last Name

* If there are two people in the household who share the same last name use alphabetical listing for names [First Name] and [First Name] [Last Name] ex. Alexa and James Smith
* If there are more than two people who all share the same last name then use the format The [Last Name] Family ex. The Smith Family

Different Last Name

* If there are two people who have different last names then list the names alphabetically by last name [First Name] [Last Name] and [First Name] [Last Name] ex. Alexa Jones and James Smith
* If there are more than two people who have different last names list the last names in alphabetical order in the format of The [Last Name], [Last Name] and [Last Name] Family or Household depending on whether they are the family members or roommates ex. The Davidson, Jones and Smith Household

Note: If we have the Prefixes for the individual account listed then include the Prefixes in the household name appropriately, removing the word family or household.

A **Household Salutation** ensures that you can properly address all members of the Household when you send them emails or mailings. Unless we have the Prefix on the account we default to using the first names listed in alphabetical order ex. Alexa and James

###### **Household Contacts**

**Household Contacts** are not full accounts. They are searchable in the database but we are not able to track separate activity for the contact. They are also not able to be pulled into email audiences. We create a household contact instead of a full account when they meet the following criteria:

* We do not have any information about the person that needs to be tracked separately from the head of household account
* We do not have a separate email for the contact

A Household Contact is created in the Household section on an account after a Household Name and Salutation has been created.

Note: When adding an additional person to the household you are able to search the database for any existing accounts to link the records. One of the options will be to create a new person in the household and if they do not meet the criteria for a full account make sure to change the default option of creating a full account to No

##### **Employment History/Contacts Relationships**

When we have an individual account and an organization account in the database and the person is employed at the organization we link the accounts through **Employment History or Contacts** section on the record.

If linking from the individual account you can simply edit the account and either type in the company name and potential matches will come up. Select the organization account that the person should be linked to. That establishes the relationship and on the individual account that information lives in the **Employment History** section.

If linking from the organization account and the organization has no primary contact edit the basic information and type in the person’s name selecting the appropriate one from the options.

If the person is not the primary contact go to the **Contacts section** on the account and search for an existing account.

###### **Additional Organization Contacts**

Just like in households we can create a contact record for a person who works at an organization without creating a full account. We create an organization contact when they meet the following criteria:

* We do not have any information about the person that needs to be tracked separately from the organization account
* We do not have the email address for or need to be able to email an employee

##### **Account Relations**

There are three types of account relations between accounts that are reciprocal: individual to individual, individual to organization, and organization to organization.

When the criteria for Households or Employment History/Contacts is not met, but we want to track relationships between accounts we use the following reciprocal account relations:

|  |  |  |
| --- | --- | --- |
| **Individual to**  **Individual** | **Individual to Organization** | **Organization to Organization** |
| * **Friend to Friend** * **Family Relation to Family Relation** (ex. Aunt to Niece) | * **Congregant to Congregation** * **Volunteer to Volunteer Program** * **Consultant to Pro Bono Consulting Program** | * **Branch to Headquarters** * **Grantee to Grantor** * **Foundation to Corporation** |

### 

### 

### Additional Account Information

##### **Customizing Account View Screens per User**

##### **Custom Fields**

There are 3 types of account based custom fields in NeonCRM. The are created and maintained in System Settings > Home/Dashboards under the Custom Fields header. The 3 types are listed below:

* **Account custom fields** are the most useful type of custom fields because, unlike individual and organization custom fields, account custom fields:
  + Appear on both individual and organization accounts
  + Are available as search criteria and columns in most reports
  + Can be added to your standard and custom Neon forms
  + Are supported for self import and account batch update
* **Individual custom fields** are only available on individual accounts
* **Organization custom fields** are only available on organization accounts

###### **Additional Organization Contacts**

We use the following account based custom fields:

* Account Custom Fields:
  + [List the names of the account custom fields used]
* Individual Custom Fields:
  + [List the names of the individual custom fields used]
* Organization Custom Fields:
  + [List the names of the organization custom fields used]

##### **Prospects, Grants, and Activities**

### Donations

##### **Campaigns, Funds, and Purposes**

##### **Donation Custom Fields**

##### **Donation Entry**

##### **Pledges, Soft Credits**

### Events

##### **Event Custom Fields**

##### **Event Categories and Topics**

### Memberships

##### **Membership Settings**

##### **Membership Levels**

###### **Types of Memberships**

##### **Membership Entry**

##### **Membership Custom Fields**

### Online Forms

### Reporting

##### **Types of Reports**

##### **Saved Reports**

##### **Data Maintenance**

We have established a weekly, monthly, quarterly and annual review policy for maintaining our data.

* **Weekly:** Run the duplicate scans for:
  + Name + Email
  + Name + Address
* **Monthly**: Run the duplicate scans for
  + Name only
  + Email only
  + Address only
* **Quarterly**: Review the following items in NeonCRM to see if they are being populated correctly and consistently:
  + NeonCRM Standard field options: Individual Type, Organization Type, Prefix, Salutation, Household Name, Household Salutation
  + Custom fields: [List custom fields]
* **Annually:** Review numbers for the following information
  + Email unsubscribes
  + Do Not Contact Updates
  + Invalid Addresses

In order to accomplish these tasks NeonCRM offers many tools to monitor, run reports, remove, and merge duplicate accounts or unnecessary information being stored in the database. Below are descriptions of each of the tools.

###### **Duplicate Manager**

The Duplicate Manager allows you to scan your database for duplicate accounts, merge duplicate accounts in bulk, and view your merged account history.

This tool can be found here at Reports > Duplicate Manager.

**Note:** Merging duplicate accounts will NEVER drop transactional information like donations or event registrations. They will be combined onto the combined account.

###### **Bulk Operations**

Bulk Edit or Delete Accounts is a powerful function in NeonCRM, which can be used to edit account information for many accounts at once. You can do the following actions with bulk operations:

* Edit a field or fields in multiple accounts
* Clear data from a field or fields in multiple accounts
* Delete multiple accounts at once

This tool can be found here at System Settings > Home/Dashboard >Bulk Operations: Bulk Edit or Delete Accounts

###### **Batch Update**

You can use NeonCRM's Import Manager function to update certain types of account data on existing NeonCRM accounts. You can perform a batch update to overwrite or delete existing data from the specified accounts.

This tool can be found here at Accounts > Import Manager

For fields available for batch update please refer to online documentation at the following link:

<https://z2.zendesk.com/hc/en-us/articles/218529907-Account-Batch-Update>  
Note that this feature is only available for updating accounts, NOT transactions (donations, memberships, and/or event registrations).

###### **Excel Tricks and Tips**

There are several excel functions that can be useful in cleaning up and managing data. A few of those are outlined below:

* **PROPER**: Standardize the capitalization of a name, address etc.
  + Ex: JAMES RUNDBERG will become James Rundberg
  + Ex: n. KliBOrn ave. will become N. Kliborn Ave.
* **Text to Column**: to break apart things that need to be in separate columns by a delimiter such as a space or a comma
* **VLOOKUP**: We have multiple spreadsheets and we need to pull one piece of information over onto the other by something that they both have in common such as an ID # or an email address.

### System User Accounts

##### **System Administrators**

##### **System Users**