



Work with Major Donors in Aegis CRM



Aegis Premier Solutions is committed to maintaining the highest standards and providing exceptional service to our nonprofit clients. We are a leading provider of nonprofit services such as caging, donor management, merchant services, and acquisition funding.

Our suite of products offers an end-to-end solution from acquisition funding to donation processing and the management of donor and campaign data. We help you work smarter and make it simple. Let Aegis Premier Solutions help you focus your time on fulfilling your non-profit's mission!

The Aegis brand includes three unique companies – Aegis Premier Solutions, Aegis Processing Solutions and Aegis Premier Technologies – that have joined forces to provide our clients with an A to Z suite of services to help navigate through the various aspects of fundraising.

Security is at the forefront of our business mission. Your organization and your donors can rest easily knowing information is secure in state-of-the-art data centers, monitored 24/7/365. Our experts ensure your system is always up-to-date, correctly configured, and is PCI DSS compliant.

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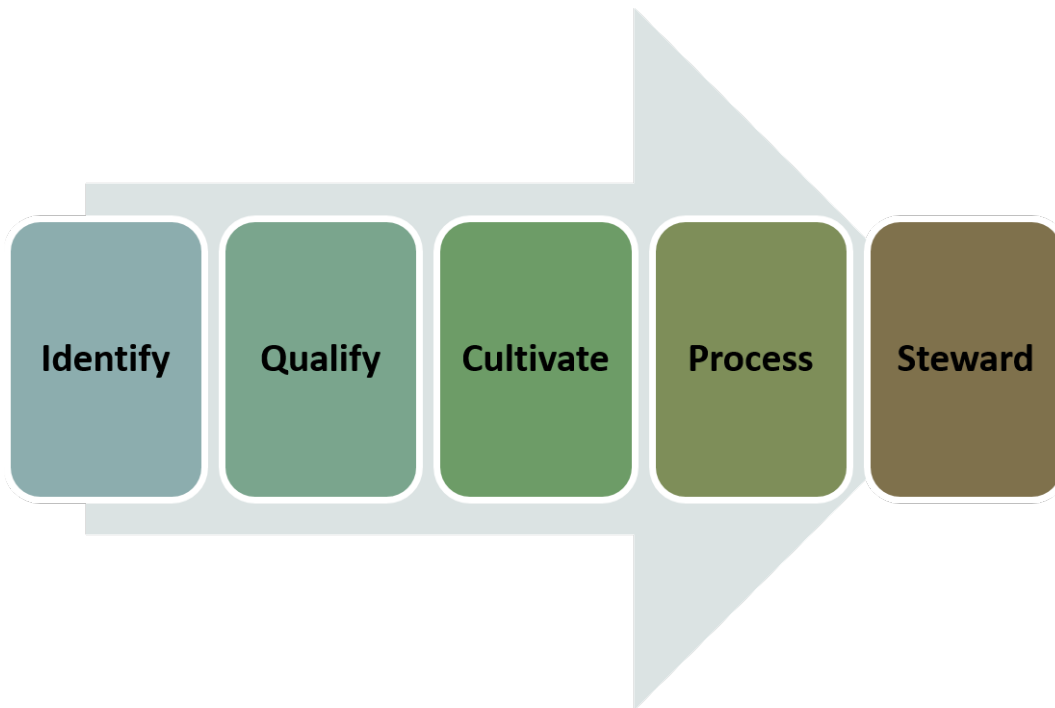
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Moves Management

Moves management identifies the policies and procedures used to build relationships with major giving or planned giving donors to secure a major gift from these donors.

The following graphic shows the stages of moves management:



The following table identifies the moves management stages and includes a description of each stage.

Moves Management Stage	Description
Identify	Use queries and reports in Aegis CRM to look for your largest and most loyal donors.
Qualify	Once you identify potential major donors, you should qualify them to determine if they have the capacity and inclination to make a gift to your organization.

Moves Management Stage	Description
	<p>The Aegis CRM integration with WealthEngine™ gives you a prospects P2G score as well as information related to total assets, gift capacity, and total income on the Major Donor record.</p>
Cultivate	<p>A plan or process that builds a relationship with the prospect, identifies the ideal gift to receive from the prospect, and includes the interactions you estimate it will take to make an ask.</p> <p>When you have identified your major donors and have a plan for cultivating them, you can add notes and follow-ups for the interactions you have with prospects or donors on their Major Donor record in Aegis CRM.</p>
Process	<p>Work through the plan of interactions for building a relationship with the prospect and securing a gift from the donor. Track and manage the different interactions as well as the gifts you receive from the donor on the Major Donor record in Aegis CRM.</p>
Steward	<p>Focus on strengthening your relationship with the donor at all giving levels. Establish a partnership with them that demonstrates appreciation for their gifts and shows how they made a difference to your organization.</p> <p>Analyze the success of your efforts using reports and queries in Aegis CRM and make adjustments as needed to build a relationship with your major donors.</p>

A successful Moves Management program requires analysis, planning, and efficient execution to be successful.

Major Giving Officer Assignments

Major Giving Officers, also known as Regional Development Directors, are the individuals responsible for communicating and working closely with some partners or prospects. Their focus is to build a close relationship with these donors to determine what type of moves management program can generate a major gift to your organization.

View Major Giving Officer Assignments

To view Major Giving Officer assignments click **Major Donors** on the Navigation menu and then select **MGO Assignments**.

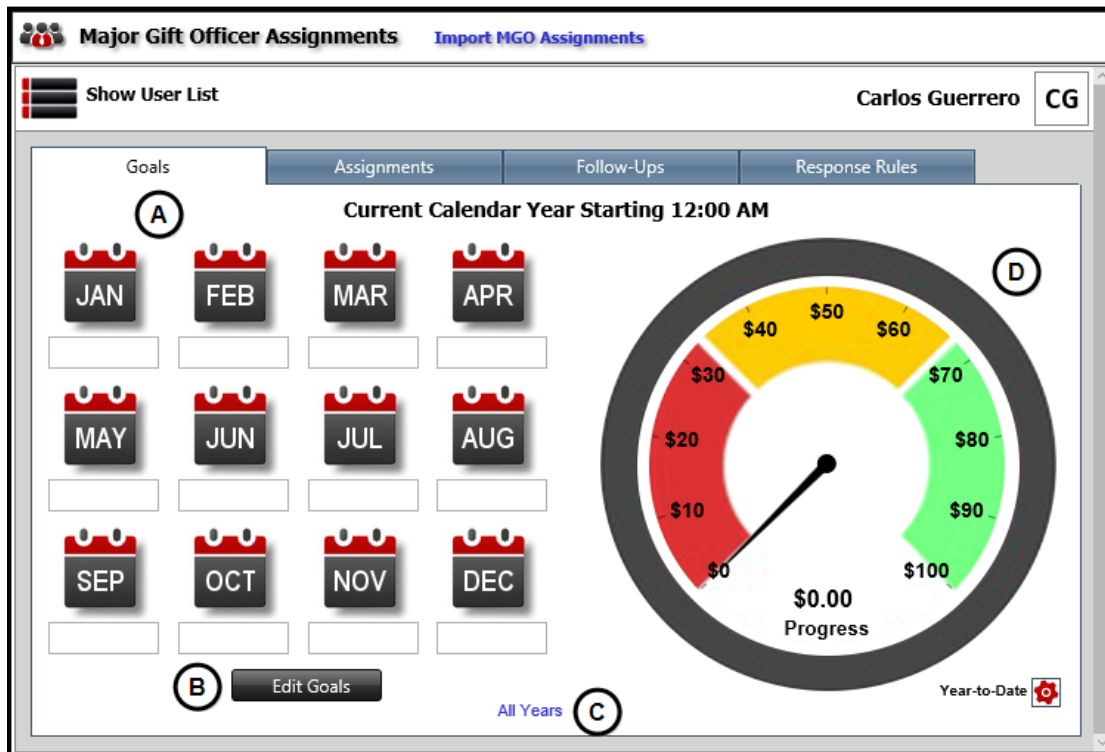
Major Gift Officer Assignments		Import MGO Assignments		
Select a user to view more detailed information				
CG	Carlos Guerrero oguerrero@bernardsolutions.com no goals defined	22 Assignments	9⁹ Follow-Ups	2 Rules
DL	Debby Lee dlee@bernardsolutions.com no goals defined	26 Assignments	0 Follow-Ups	0 Rules
DH	Diana Himes dhimes@bernardsolutions.com no goals defined	2 Assignments	0 Follow-Ups	0 Rules
JM	Jennifer Mitchell jmitchell@bernardsolutions.com no goals defined	28 Assignments	10⁹ Follow-Ups	1 Rules
JA	John Anthony janthony@bernardsolutions.com no goals defined	26 Assignments	0 Follow-Ups	0 Rules
SV	Steve Veto sveto@bernardsolutions.com no goals defined	1 Assignments	6⁶ Follow-Ups	0 Rules

You can quickly view the Major Giving Officer's names and email addresses and any defined goals assigned to them. You can also see the number of assignments, follow-ups and rules associated with the officer. The red number to the right of the number of follow-ups indicates how many follow-ups are past due.

To view specific information for a Major Giving Officer, click the officer's name.

The Goals Tab

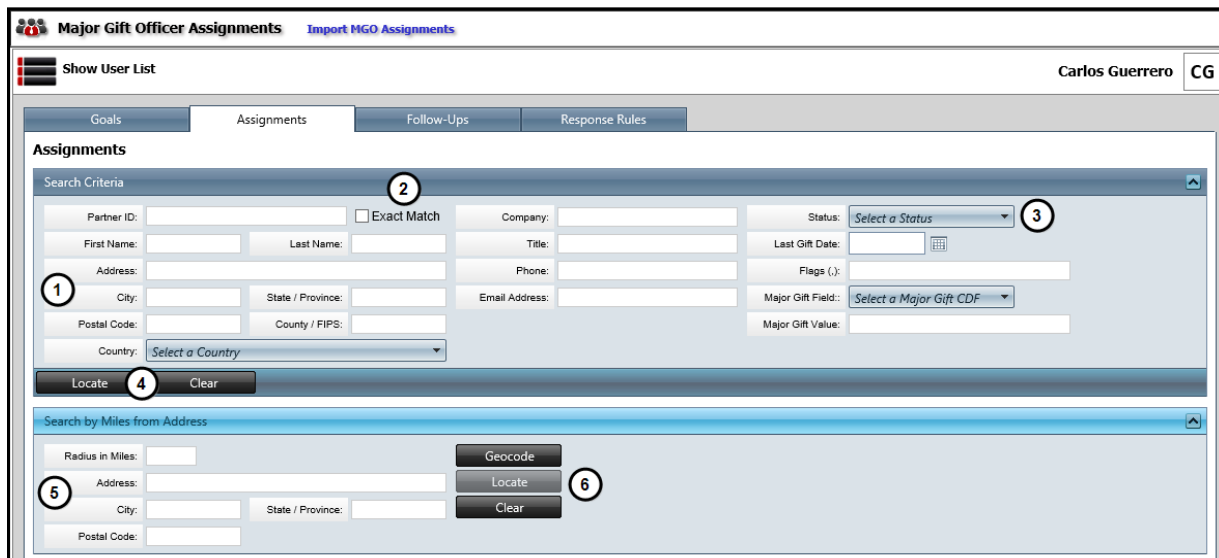
On the Goals tab, you can view and edit goals established for the officer and view the progress made toward those goals.



- A. The goals that have been established for the current calendar year display below the calendar icons for each month.
- B. Click **Edit Goals** to add or modify goals for each month of the calendar year.
 1. Enter or edit goal amounts in the field for each month.
 2. Click **Save** when you are done making changes to the goals.
- C. Click **All Years** to display the goals for previous years.
- D. This graphic shows the progress made toward the established goals.

The Assignments Tab

On the Assignments tab, you can search for and locate major donors assigned to the Major Giving Officer.



1. Enter as much information about the major donors to locate in **Aegis CRM**.
2. Mark the **Exact Match** checkbox to locate a specific donor based on the criteria .
3. Select the **Status** for the major donors assigned to the Major Giving Officer.
 - a. The options available depend on the settings in your database.
4. Click **Locate**.
5. Enter specific address information if you want to search for assigned donors located in a certain area.
 - a. Example: assigned donors in a 25 mile radius from Denver Colorado.
6. Click **Geocode** to get the latitude and longitude for the location and then click **Locate**.

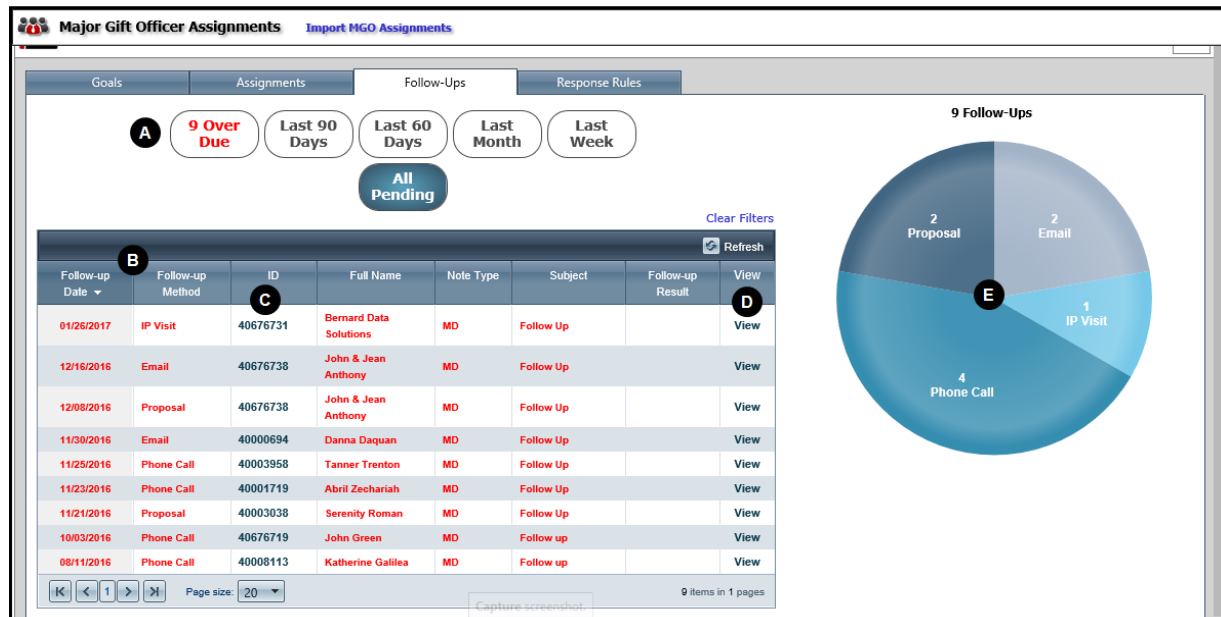
All major giving donors assigned to the officer display in the results of your search.

Major Gift Officer Assignments Import MGO Assignments								
New Assignment		Map Results						
ID	Major Donor	Status	MGO(s)	Follow-Up Dates	Flag(s)	Lifetime Giving	Last Gift	
107901	Daven smith 620 Lake Mike Conner Rd Collins, MS 39428-4012		Carlos Guerrero	Next: 10-26-2016 Last: 10-26-2016		\$83.00 as Revenue \$83.00 in Total	\$83.00 Date: 03-17-2015 Appeal: CMG15	Remove
40000009	Ann Mathew 74114 Peaceful Valley Rd Camdenton, MO 65020-8319	Supporter	Carlos Guerrero Jennifer Mitchell	Next: 05-19-2016 Last: 10-17-2016	EmailUndeliverable, NoEmailSolicitation, VIP, COMM_ASST	\$1,805.00 as Revenue \$1,805.00 in Total	\$1,000.00 Date: 05-02-2016 Appeal: CMG16	Remove
40000175	Sydney Savannah PO Box 1234 Belleville, IL 62266-8234	Supporter	Carlos Guerrero Jennifer Mitchell	Next: 07-31-2016 Last: 07-31-2016		\$2,400.70 as Revenue \$2,400.70 in Total	\$100.00 Date: 07-24-2016 Appeal: 18MAJORDNR	Remove
40000365	Christian Cristofer 25318 Center Grove Rd Randolph, NJ 07869-4411	Supporter	Carlos Guerrero Jennifer Mitchell	Next: 05-06-2016 Last: 10-03-2016		\$2,400.00 as Revenue \$2,400.00 in Total	\$100.00 Date: 08-03-2016 Appeal: 12THGV	Remove
40000676	Zachery Allen 8244 Palmer Ter Riverside, CT 08878-2103	Supporter	Carlos Guerrero Jennifer Mitchell	Next: 10-13-2016 Last: 10-13-2016		\$800.00 as Revenue \$800.00 in Total	\$200.00 Date: 05-04-2016 Appeal: CMG16	Remove
40000694	Danna Daquan 5909 E Church St Jefferson, WI 53549-1500	Supporter	Carlos Guerrero Jennifer Mitchell	Next: 11-30-2016 Last: 11-30-2016		\$2,090.00 as Revenue \$2,090.00 in Total	\$10.00 Date: 06-29-2016 Appeal: 16092	Remove
40001507	Shayna Samantha 38290 S Clayton Way Centennial, CO 80122-3302		Carlos Guerrero Gapfurn@strelenshot.	Next: 07-31-2016 Last: 07-31-2016	Sponsor	\$1,050.00 as Revenue \$1,050.00 in Total	\$100.00 Date: 07-28-2016 Appeal: 18MAJORDNR	Remove

- A. Click **New Assignment** to assign a major donor to a Major Giving Officer.
- B. Click **Map Results** to view the major donors on a map based on the address information for the donor.
- C. Information in the results include the name, status, assigned major giving officers, follow-up dates, flags, lifetime giving amount, and last gift amount for the donor display in the columns.
- D. Click the link in the **ID** column to open the Major Donor record.
- E. Click **Remove** for the major donor to remove the Major Giving Officer assignment.

The Follow-Ups Tab

On the Follow-Ups tab, you can view information about the tasks the Major Giving Officer has or needs to complete for their assigned donors.



Major Gift Officer Assignments [Import MGO Assignments](#)

Goals Assignments **Follow-Ups** Response Rules

A 9 Over Due Last 90 Days Last 60 Days Last Month Last Week

All Pending

B Clear Filters Refresh

Follow-up Date	Follow-up Method	ID	Full Name	Note Type	Subject	Follow-up Result	View
01/26/2017	IP Visit	40676731	Bernard Data Solutions	MD	Follow Up		D View
12/16/2016	Email	40676738	John & Jean Anthony	MD	Follow Up		View
12/08/2016	Proposal	40676738	John & Jean Anthony	MD	Follow Up		View
11/30/2016	Email	40000694	Danna Daquan	MD	Follow Up		View
11/25/2016	Phone Call	40003958	Tanner Trenton	MD	Follow Up		View
11/23/2016	Phone Call	40001719	Abril Zechariah	MD	Follow Up		View
11/21/2016	Proposal	40003038	Serenity Roman	MD	Follow Up		View
10/03/2016	Phone Call	40676719	John Green	MD	Follow up		View
08/11/2016	Phone Call	40008113	Katherine Galilea	MD	Follow up		View

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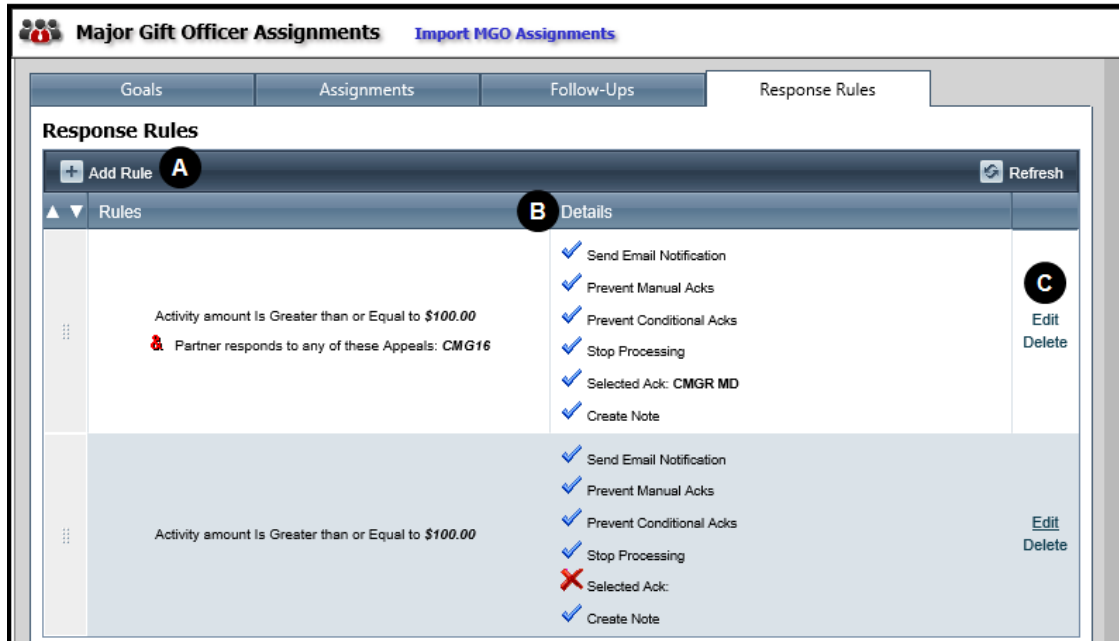
E 9 Follow-Ups

- 2 Proposal
- 2 Email
- 1 IP Visit
- 4 Phone Call

- A. Click any of these options to filter the follow-up results by the criteria you select.
- B. Information including follow-up date and method, major donor ID and full name, as well as note type, subject, and follow-up result display in the columns.
 1. The items displayed in red are follow-up tasks that are past their due date.
- C. Click the link in the **ID** column to open the Major Donor record.
- D. Click **View** to open more details about the follow-up.
- E. View a graphical breakdown of the number of follow-up tasks by method. You can click any part of the graph to filter the results by a specific follow-up method.

The Response Rules Tab

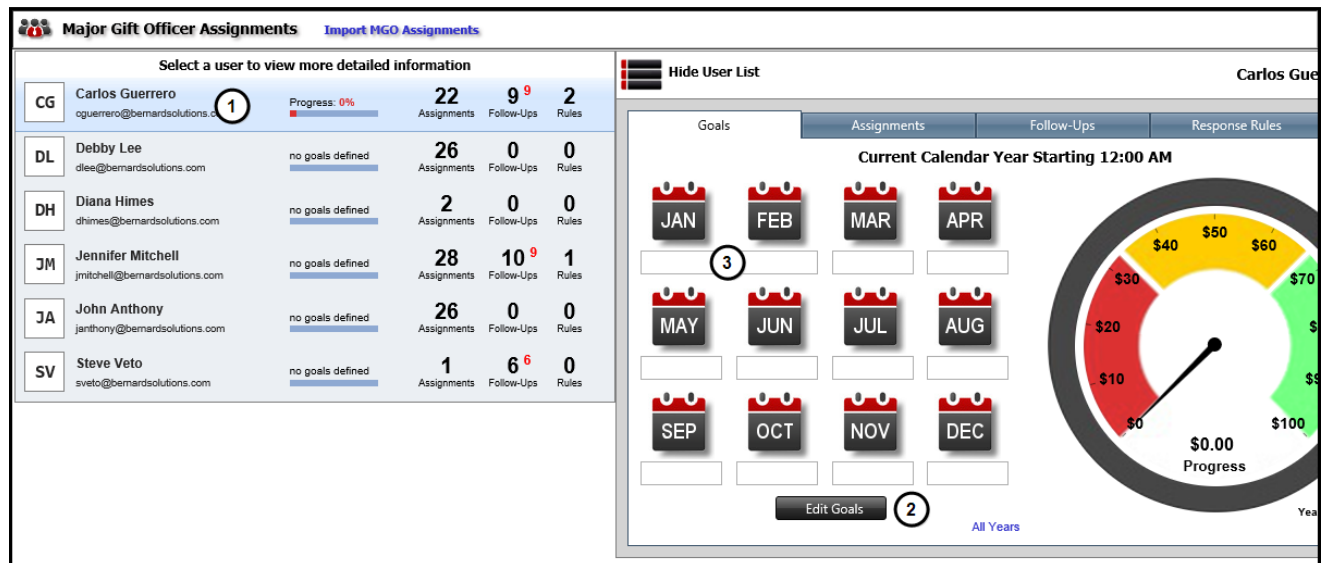
On the Response Rules tab, you can view the acknowledgement rules for gifts received from assigned major giving donors.



- A. Click **Add Rule** to create new response rules.
- B. View the criteria selected options for each rule.
- C. Click **Edit** to make changes to the rule or click **Delete** to remove the rule.

Assign Goals for Major Giving Officers

To assign a monthly goal to a Major Giving Officer, click **MGO Assignments** on the Navigation menu and then follow these steps:



Major Gift Officer Assignments [Import MGO Assignments](#)

Select a user to view more detailed information

CG	Carlos Guerrero	Progress: 0%	22	9 ⁹	2
	oguerrero@bernardsolutions.com		Assignments	Follow-Ups	Rules
DL	Debby Lee	no goals defined	26	0	0
	dlee@bernardsolutions.com		Assignments	Follow-Ups	Rules
DH	Diana Himes	no goals defined	2	0	0
	dhimes@bernardsolutions.com		Assignments	Follow-Ups	Rules
JM	Jennifer Mitchell	no goals defined	28	10 ⁹	1
	jmitchell@bernardsolutions.com		Assignments	Follow-Ups	Rules
JA	John Anthony	no goals defined	26	0	0
	janthony@bernardsolutions.com		Assignments	Follow-Ups	Rules
SV	Steve Veto	no goals defined	1	6 ⁶	0
	sveto@bernardsolutions.com		Assignments	Follow-Ups	Rules

Hide User List Carlos Guerrero

Goals Assignments Follow-Ups Response Rules

Current Calendar Year Starting 12:00 AM

JAN FEB MAR APR

MAY JUN JUL AUG

SEP OCT NOV DEC

Progress Gauge: \$0, \$10, \$20, \$30, \$40, \$50, \$60, \$70, \$80, \$90, \$100

\$0.00 Progress

Edit Goals

1. Select a major giving officer.
2. Click **Edit Goals**.
 - a. The **Edit Goals** button changes to **Save** while you are making changes to the goal amounts.
3. Enter the goal amount under the calendar icon for that month.
 - a. When you are finished enter the goal amounts, click **Save**.

You can use these same steps to make changes to goals that have been created for Major Giving Officers.

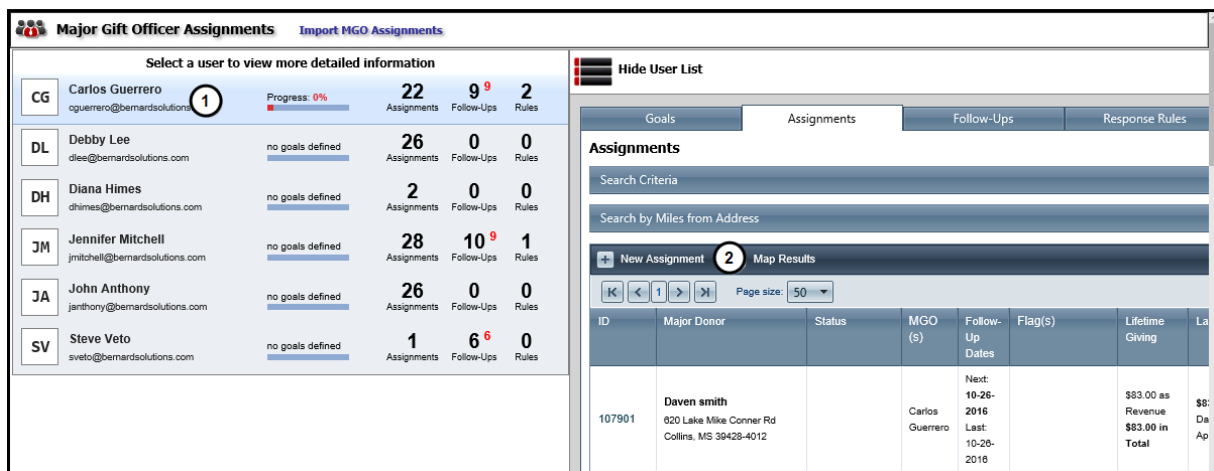
Add Major Giving Officer Assignments

You can add Major Giving Officer assignments one at a time from the MGO Assignments page or partner record.

Note: You must have the rights and permissions for making Major Gift Officer assignments to add new assignments.

Make Assignments on the MGO Assignments Page

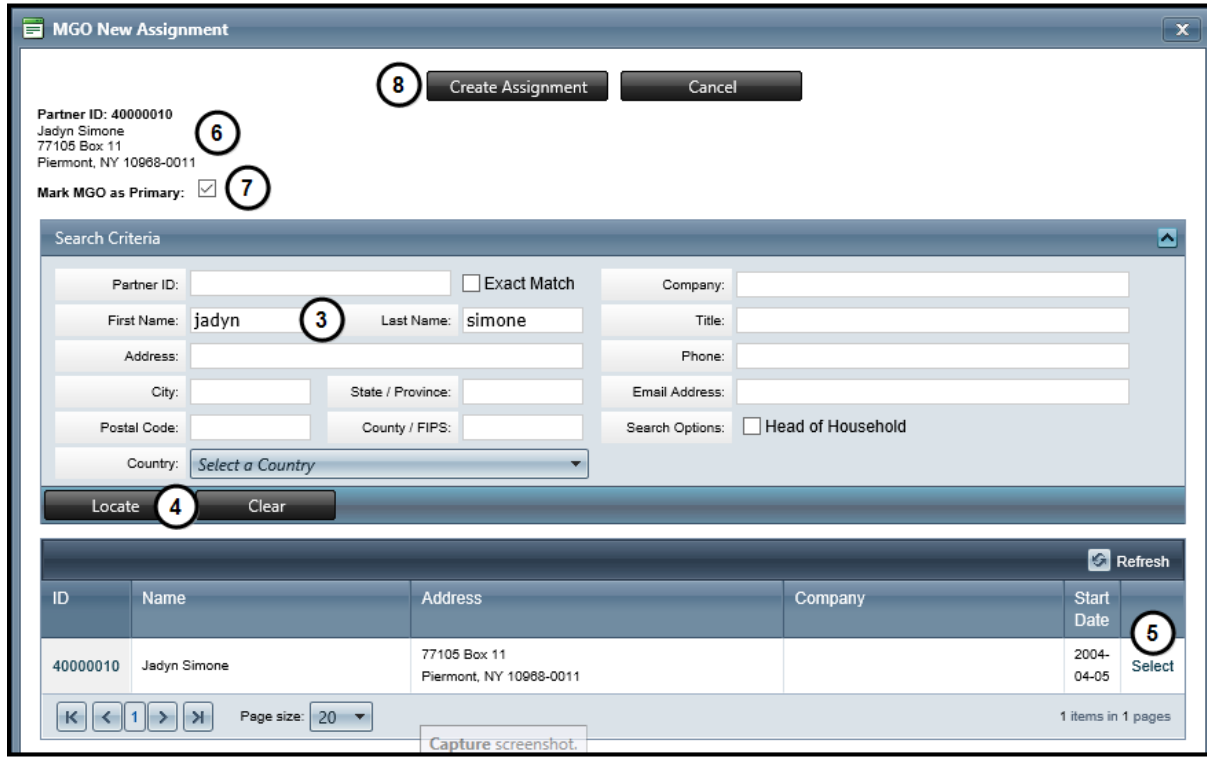
To assign a Major Giving Officer to a major giving donor, click **MGO Assignments** on the Navigation menu and then follow these steps:



The screenshot displays the 'Major Gift Officer Assignments' interface. On the left, a list of users is shown with their initials and names. The user 'Carlos Guerrero' (CG) is selected, and a red circle '1' highlights the dropdown menu for selecting a user to view more detailed information. On the right, the 'Assignments' tab is active, showing a table of assignments. A red circle '2' highlights the 'New Assignment' button. The table below shows a single assignment for 'Daven smith' (ID 107901) assigned to Carlos Guerrero.

ID	Major Donor	Status	MGO (s)	Follow-Up Dates	Flag(s)	Lifetime Giving	La
107901	Daven smith 820 Lake Mike Conner Rd Collins, MS 39428-4012		Carlos Guerrero	Next: 10-26-2016 Last: 10-26-2016		\$83.00 as Revenue \$83.00 in Total	\$83.00 in Ap

1. Select the Major Giving Officer who is receiving the new major donor assignment.
2. Click **New Assignment**.



The screenshot shows the 'MGO New Assignment' window. At the top, there are 'Create Assignment' and 'Cancel' buttons, with a circled '8' next to 'Create Assignment'. Below this, the partner information is displayed: Partner ID: 40000010, Jady Simone, 77105 Box 11, Piermont, NY 10988-0011. A circled '6' is next to the partner name. Below the partner info is a 'Mark MGO as Primary' checkbox, which is checked, with a circled '7' next to it. The 'Search Criteria' section contains several input fields: Partner ID, First Name (jady), Last Name (simone), Address, City, State / Province, Postal Code, County / FIPS, Company, Title, Phone, Email Address, and Country (a dropdown menu). There is an 'Exact Match' checkbox and a 'Head of Household' checkbox. Below the search criteria are 'Locate' and 'Clear' buttons, with a circled '4' next to 'Locate'. At the bottom of the search criteria is a 'Refresh' button. Below the search criteria is a table with the following data:

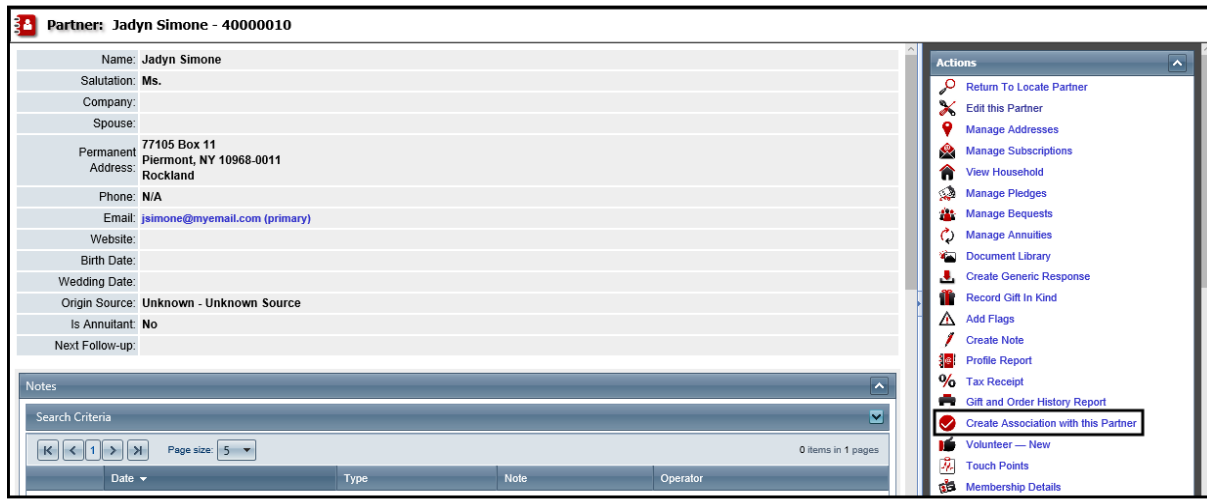
ID	Name	Address	Company	Start Date	
40000010	Jady Simone	77105 Box 11 Piermont, NY 10988-0011		2004-04-05	Select

A circled '5' is next to the 'Select' button in the table. At the bottom of the window, there are navigation buttons (K, <, 1, >, X), a 'Page size' dropdown set to 20, and a 'Capture screenshot.' button. The status bar at the bottom right indicates '1 items in 1 pages'.

3. Enter as much information about the major donor in the search criteria fields.
4. Click **Locate**.
5. Click **Select** for the major donor you are assigning to the Major Giving Officer.
6. View the information for the major donor to ensure they are the correct donor.
7. Mark the **Mark the MGO as Primary** checkbox to establish the Major Giving Officer as the primary officer.
8. Click **Create Assignment**.

Make Assignments from the Partner Record

To assign a Major Giving Officer from the partner record, locate and open the partner record.



Partner: Jady Simione - 40000010

Name: Jady Simione
Salutation: Ms.
Company:
Spouse:
Permanent Address: 77105 Box 11
Piermont, NY 10968-0011
Rockland
Phone: N/A
Email: jsimone@myemail.com (primary)
Website:
Birth Date:
Wedding Date:
Origin Source: Unknown - Unknown Source
Is Annuitant: No
Next Follow-up:

Actions

- Return To Locate Partner
- Edit this Partner
- Manage Addresses
- Manage Subscriptions
- View Household
- Manage Pledges
- Manage Bequests
- Manage Annuities
- Document Library
- Create Generic Response
- Record Gift In Kind
- Add Flags
- Create Note
- Profile Report
- Tax Receipt
- Gift and Order History Report
- Create Association with this Partner**
- Volunteer — New
- Touch Points
- Membership Details

Notes

Search Criteria

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Date	Type	Note	Operator
------	------	------	----------

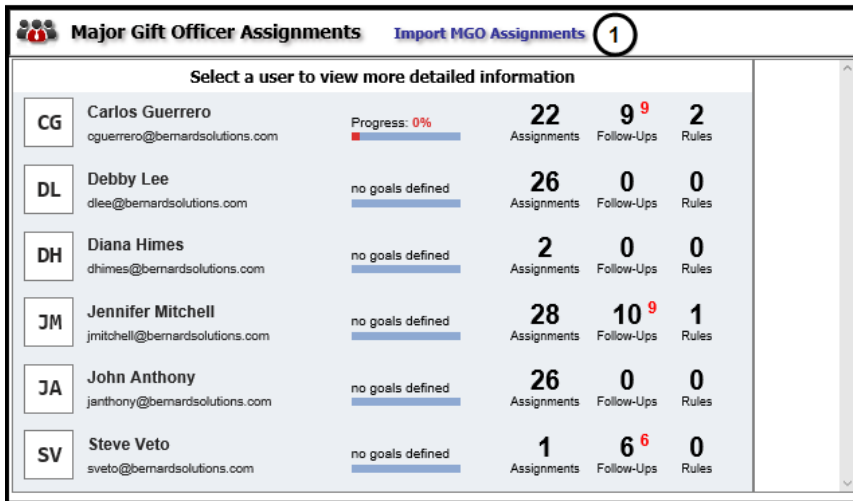
In the **Actions** pane, click **Create Association with the Partner** and then click **Save** when prompted to assign yourself as the Major Giving Officer.

Note: You must have the correct rights and permissions to assign yourself as a Major Giving Officer on a Partner record.

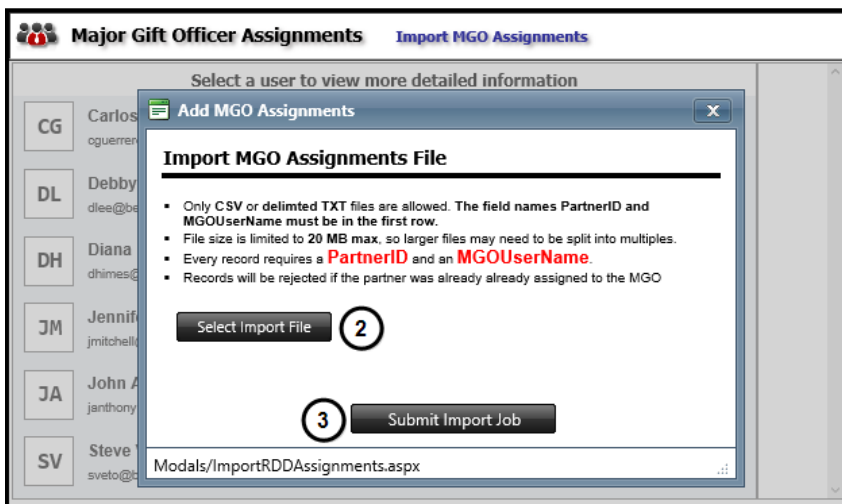
Import Major Giving Officer Assignments

In **Aegis CRM** you can import Major Giving Officer assignments using a .csv or .txt file that includes the partner ID and officer's user name.

To import Major Giving Officer assignments, click **Major Donors** on the Navigation menu, select **MGO Assignments**, and then follow these steps:



1. Click Import MGO Assignments.



2. Click **Select Import File**, navigate to the file you are importing, and then click **Open**.
 - a. The first row of your file must have the **Partner ID** and **MGOUserName** fields as column headings in your file.
 - b. Make sure your import file includes the **Partner ID** for each major donor and a **MGOUserName** for each Major Giving Officer.
3. Click **Submit Import Job**.
 - a. Click **OK** when prompted that you will receive an email when the job is complete.

Locate Major Donor Record

The major donor record contains information you can use to build relationships as you work to achieve your organization’s planned giving goals. To view these records, you can locate and open a major giving record in **Aegis CRM**.

Search for a Major Donor Record

Click **Major Donors** on the Navigation menu and then select **Manage Major Donors**. On the Manage Major Donors page, follow these steps:



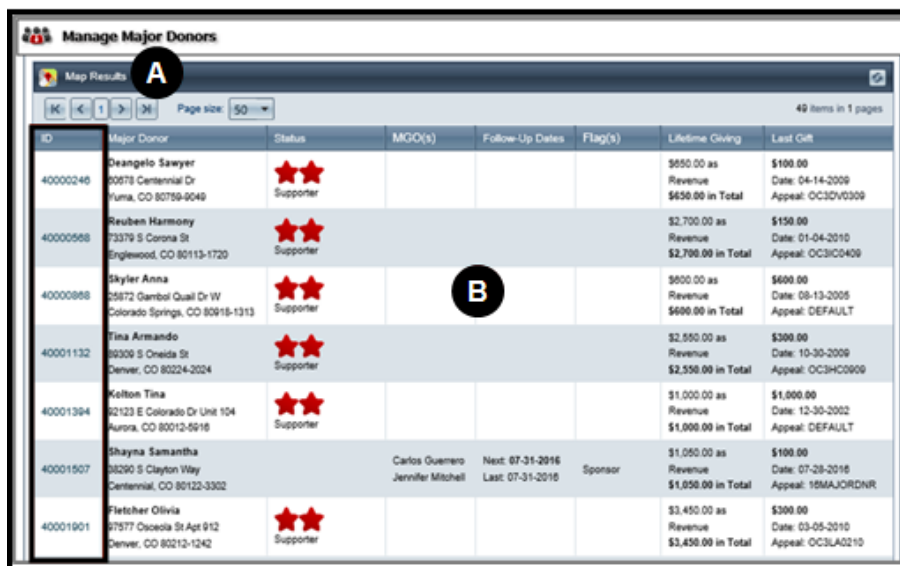
1. Select the query to use as the criteria for your search in the left pane. The criteria of the query selected displays in the right pane.
2. Enter as much information about the major donor in these fields as you can to ensure accurate results.
3. Click **Locate**. To search for other major donor records, click **Clear** and repeat these steps.

To search for major donors included in the query who are located within a certain mile radius from a specific address, follow these steps:



1. Enter the radius and address information.
2. Click **Locate**.

When multiple records are found, you can sort the results by clicking on the column headings or click the link in the ID column to open the event record.



ID	Major Donor	Status	MOO(s)	Follow Up Dates	Flag(s)	Lifetime Giving	Last Gift
40000248	Deangelo Sawyer 80878 Centennial Dr Yuma, CO 80759-6049	Supporter				\$650.00 as Revenue \$650.00 in Total	\$100.00 Date: 04-14-2009 Appeal: OC3DV0309
40000588	Reuben Harmony 73379 S Corona St Englewood, CO 80113-1720	Supporter				\$2,700.00 as Revenue \$2,700.00 in Total	\$150.00 Date: 01-04-2010 Appeal: OC3IC0409
40000888	Skyler Anna 35872 Gambol Quail Dr W Colorado Springs, CO 80916-1313	Supporter				\$600.00 as Revenue \$600.00 in Total	\$600.00 Date: 08-13-2005 Appeal: DEFAULT
40001132	Tina Armando 80306 S Oneida St Denver, CO 80224-2024	Supporter				\$2,550.00 as Revenue \$2,550.00 in Total	\$300.00 Date: 10-30-2009 Appeal: OC3HC0909
40001394	Kelton Tina 82123 E Colorado Dr Unit 104 Aurora, CO 80012-5916	Supporter				\$1,000.00 as Revenue \$1,000.00 in Total	\$1,000.00 Date: 12-30-2002 Appeal: DEFAULT
40001507	Shayna Samantha 83290 S Clayton Way Centennial, CO 80122-3302		Carlos Guerrero Jennifer Mitchell	Next: 07-31-2016 Last: 07-31-2016	Sponsor	\$1,050.00 as Revenue \$1,050.00 in Total	\$100.00 Date: 07-28-2016 Appeal: 15MAJORDNR
40001901	Fletcher Olivia 97577 Osceola St Apt 912 Denver, CO 80212-1242	Supporter				\$3,450.00 as Revenue \$3,450.00 in Total	\$300.00 Date: 03-05-2010 Appeal: OC3LA0210

- A. Click **Map Results** to view the major donors' location in Google Maps.
- B. View specific information about the major donors included in your search results including status, assigned major giving officers, lifetime giving, and last gift.

Navigate a Major Donor Record

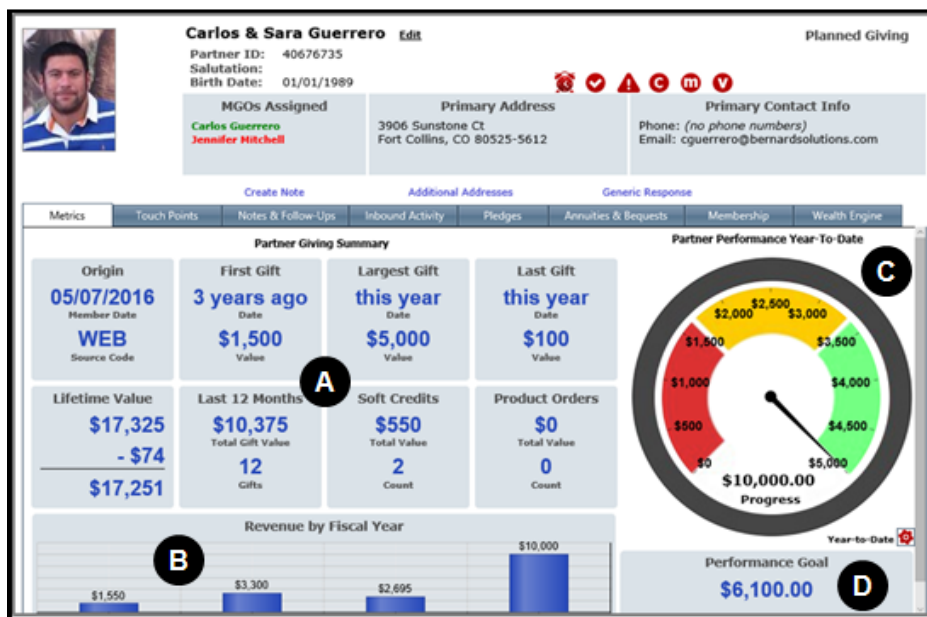
The major donor record allows you to view specific information about that donor.



- A. View the primary address and contact information for the major donor. You can also identify the major giving officers assigned to the donor along with the Partner ID.
- B. Access additional information about the major donor including giving metrics, touch points, membership details, pledges, annuities, and bequests. Follow up details as well as inbound activity are available on the record. If your organization uses Wealth Engine, you can also view that information.

The Metrics Tab

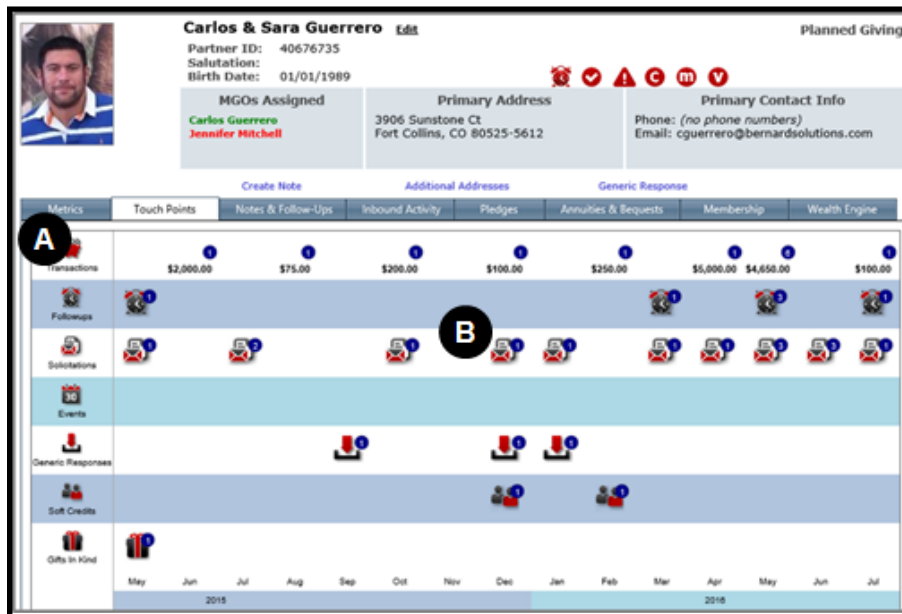
On the Metrics tab you can view a summary of the donor's giving history along with revenue by fiscal year and performance to date.



- A. View a giving summary that includes details about the first, largest, and last gift made by the donor. You can also view the total lifetime value of the gifts, how many gifts were made and total gift value in the last 12 months along with any soft credits given to the donor.
- B. View the donor's revenue by fiscal year to see a graph of giving starting from the first year a gift was made.
- C. View how much revenue has been received to date toward the performance goal established for the donor.
- D. View the performance goal established for the donor.

The Touch Points Tab

On the Touch Points tab, you can view all of the different ways a donor has interacted with your organization.

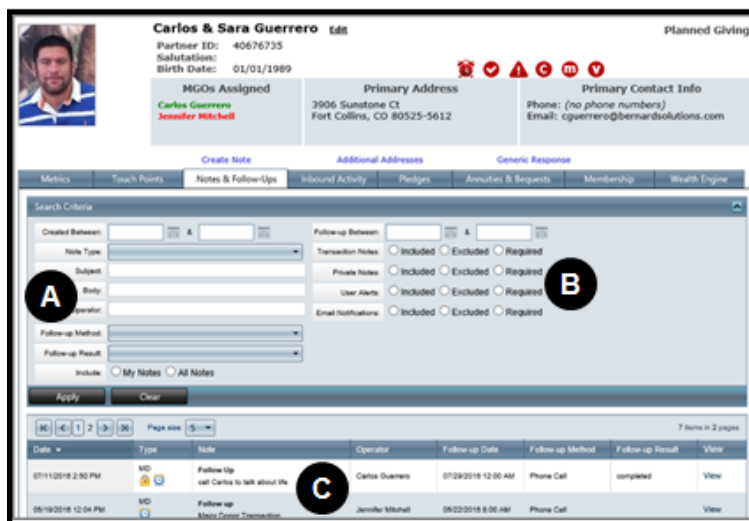


- A. View the different activities including transactions, solicitations, and events used for interacting with a donor. You can also view any soft credits given to a major donor as well as the gifts in kind and generic responses received from the donor.

- B. View and access a specific activity to see additional information about that activity.

The Notes & Follow-Ups Tab

On the Notes & Follow-Ups tab, you can search for and view these activities for the major donor.



Carlos & Sara Guerrero Edit Planned Giving

Partner ID: 40676735
 Salesperson: Birth Date: 01/01/1989

MGOs Assigned
 Carlos Guerrero
 Jennifer Mitchell

Primary Address
 3906 Sunstone Ct
 Fort Collins, CO 80525-5612

Primary Contact Info
 Phone: (no phone numbers)
 Email: cguerrero@bernardsolutions.com

Search Criteria

Created Between: [] & []
 Note Type: []
 Subject: []
 Body: []
 Operator: []
 Follow-up Method: []
 Follow-up Result: []

Follow-up Between: [] & []

Transaction Notes: Included Excluded Required
 Private Notes: Included Excluded Required
 User Alerts: Included Excluded Required
 Email Notifications: Included Excluded Required

Include: My Notes All Notes

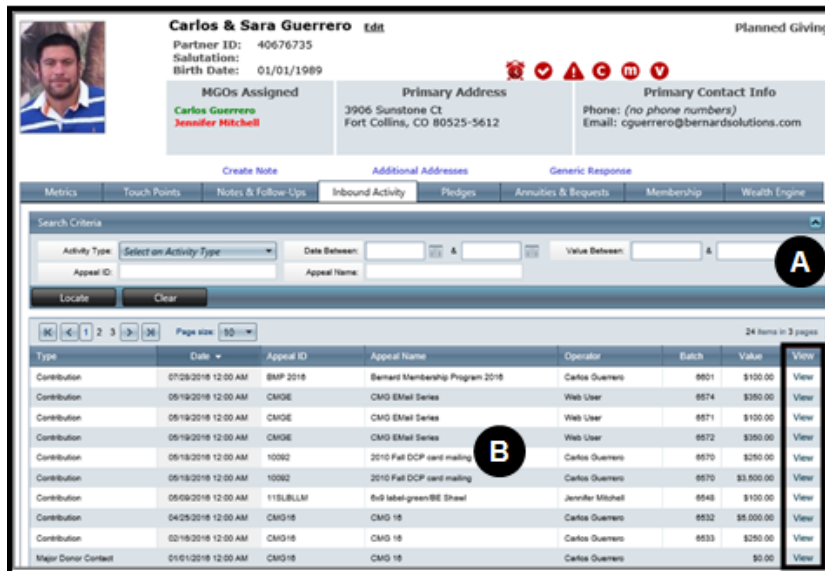
Apply Clear

Date	Type	Note	Operator	Follow-up Date	Follow-up Method	Follow-up Result	View
07/11/2018 2:50 PM	MD	Follow Up call Carlos to talk about the	Carlos Guerrero	07/29/2018 12:00 AM	Phone Call	completed	View
08/18/2018 12:04 PM	MD	Follow up Missed Power Transmission	Jennifer Mitchell	08/22/2018 8:00 AM	Phone Call		View

- A. Enter criteria to search for specific notes or follow-ups.
- B. Select whether to include, exclude, or require these note or follow-up types.
- C. View the search results and click View to open the note or follow-up.

The Inbound Activity Tab

On the Inbound Activity tab, you can view the activities made by a major donor.



Carlos & Sara Guerrero Edit Planned Giving

Partner ID: 40676735
Salutation:
Birth Date: 01/01/1989

MGOs Assigned
Carlos Guerrero
Jennifer Mitchell

Primary Address
3906 Sunstone Ct
Fort Collins, CO 80525-5612

Primary Contact Info
Phone: (no phone numbers)
Email: cguerrero@bernardsolutions.com

Create Note Additional Addresses Generic Response

Metrics Touch Points Notes & Follow-Ups **Inbound Activity** Pledges Annuities & Requests Membership Wealth Engine

Search Criteria

Activity Type: Select an Activity Type Date Between: & Value Between: & **A**

Appeal ID: Appeal Name:

Locate Clear

Page size: 50 24 items in 3 pages

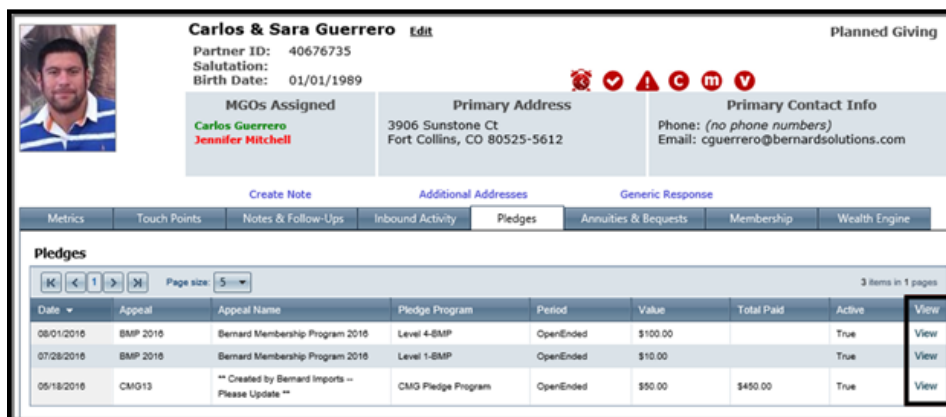
Type	Date	Appeal ID	Appeal Name	Operator	Batch	Value	View
Contribution	07/29/2018 12:00 AM	BMP 2018	Bernard Membership Program 2018	Carlos Guerrero	8801	\$100.00	View
Contribution	05/19/2018 12:00 AM	CMGE	CMG Email Series	Web User	8574	\$350.00	View
Contribution	05/19/2018 12:00 AM	CMGE	CMG Email Series	Web User	8571	\$100.00	View
Contribution	05/19/2018 12:00 AM	CMGE	CMG Email Series	Web User	8572	\$350.00	View
Contribution	05/18/2018 12:00 AM	10092	2010 Fall DCP card mailing	Carlos Guerrero	8570	\$250.00	View
Contribution	05/18/2018 12:00 AM	10092	2010 Fall DCP card mailing	Carlos Guerrero	8570	\$3,500.00	View
Contribution	05/09/2018 12:00 AM	115LBJLM	6x1 label-green/BE Sheet	Jennifer Mitchell	8548	\$100.00	View
Contribution	04/25/2018 12:00 AM	CMG 18	CMG 18	Carlos Guerrero	8532	\$5,000.00	View
Contribution	02/19/2018 12:00 AM	CMG 18	CMG 18	Carlos Guerrero	8533	\$250.00	View
Major Donor Contact	01/01/2018 12:00 AM	CMG 18	CMG 18	Carlos Guerrero		\$0.00	View

B

- A. Enter search criteria to filter the inbound activities that display in the results.
- B. View details including Appeal ID, Appeal Name, and Value of the inbound activity. Click View to display information about a specific activity.

The Pledges Tab

On the Pledges tab, you can view details about the pledges made by the major donor.



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Create Note Additional Addresses Generic Response

Metrics Touch Points Notes & Follow-Ups Inbound Activity **Pledges** Annuities & Requests Membership Wealth Engine

Pledges

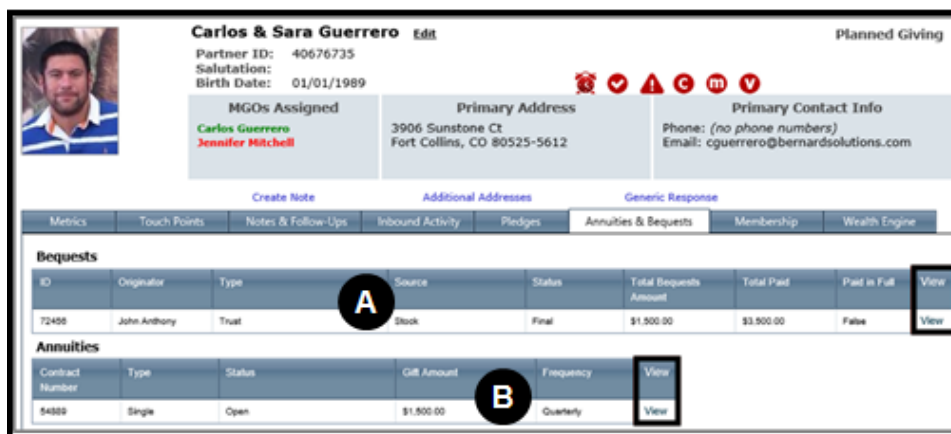
Page size: 5 3 items in 1 pages

Date	Appeal	Appeal Name	Pledge Program	Period	Value	Total Paid	Active	View
06/01/2016	BMP 2016	Bernard Membership Program 2016	Level 4-BMP	Open/Ended	\$100.00		True	View
07/28/2016	BMP 2016	Bernard Membership Program 2016	Level 1-BMP	Open/Ended	\$10.00		True	View
05/18/2016	CMG13	** Created by Bernard Imports -- Please Update **	CMG Pledge Program	Open/Ended	\$50.00	\$450.00	True	View

View details including Appeal and Appeal Name as well as the Pledge Program and Value of the pledge. Click View to access additional information about a specific pledge.

The Annuities & Bequests Tab

On the Annuities & Bequests tab, you can view information about these major giving activities.



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Create Note Additional Addresses Generic Response

Metrics Touch Points Notes & Follow-Ups Inbound Activity Pledges **Annuities & Bequests** Membership Wealth Engine

Bequests

ID	Originator	Type	Source	Status	Total Bequests Amount	Total Paid	Paid in Full	View
72408	John Anthony	Trust	Stock	Final	\$1,500.00	\$3,500.00	False	View

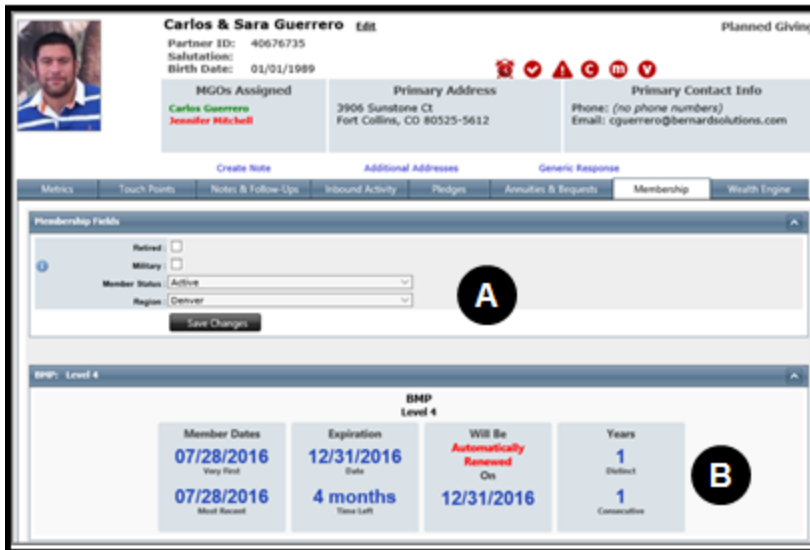
Annuities

Contract Number	Type	Status	Gift Amount	Frequency	View
84889	Single	Open	\$1,500.00	Quarterly	View

- A. View information including the Type, Source, and Total Bequests Amount for any bequests made by the donor. Click View to access additional information about a specific bequest.
- B. View the Type, Status, Gift Amount, and Frequency for any annuities given by the donor.

The Membership Tab

On the Membership tab, you can view details about the major donor's participation in a membership program.



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MGOs Assigned
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Primary Address
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Fort Collins, CO 80525-5612

Primary Contact Info
Phone: (no phone numbers)
Email: cguerrero@bernardsolutions.com

Membership Fields

Retired:
Military:
Member Status: (Active)
Region: (Denver)

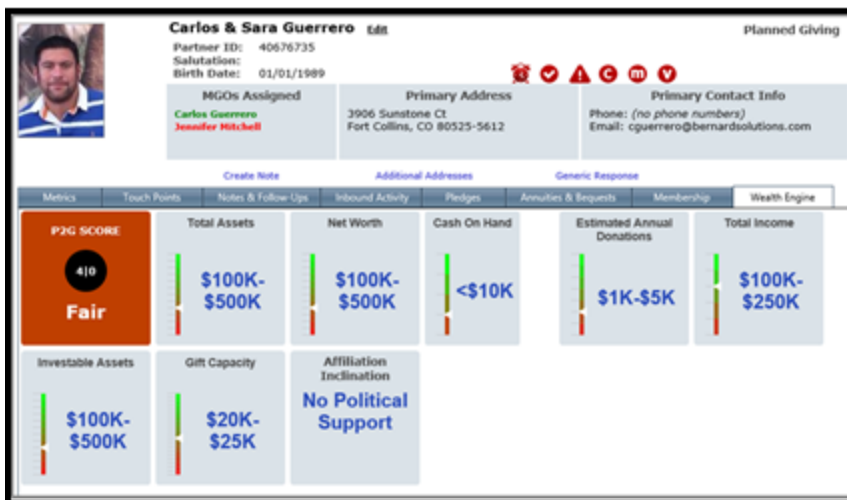
BMP: Level 4

Member Dates	Expiration	Will Be Automatically Renewed	Years
07/28/2016 <small>Very First</small>	12/31/2016 <small>Date</small>	On	1 <small>Default</small>
07/28/2016 <small>Most Recent</small>	4 months <small>Time Left</small>	12/31/2016	1 <small>Consentive</small>

- A. View the membership fields associated with the major donor.
- B. View the dates, expiration, and renewal details as well as number of years the donor has been part of the membership program.

The Wealth Engine Tab

On the Wealth Engine tab, you can view details about the major donor’s ability to give major gifts to your organization. You must subscribe to Wealth Engine in order to use this functionality.



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Wealth Engine

P2G SCORE
410
Fair

Total Assets \$100K-\$500K	Net Worth \$100K-\$500K	Cash On Hand <\$10K	Estimated Annual Donations \$1K-\$5K	Total Income \$100K-\$250K
Investable Assets \$100K-\$500K	Gift Capacity \$20K-\$25K	Affiliation Inclination No Political Support		

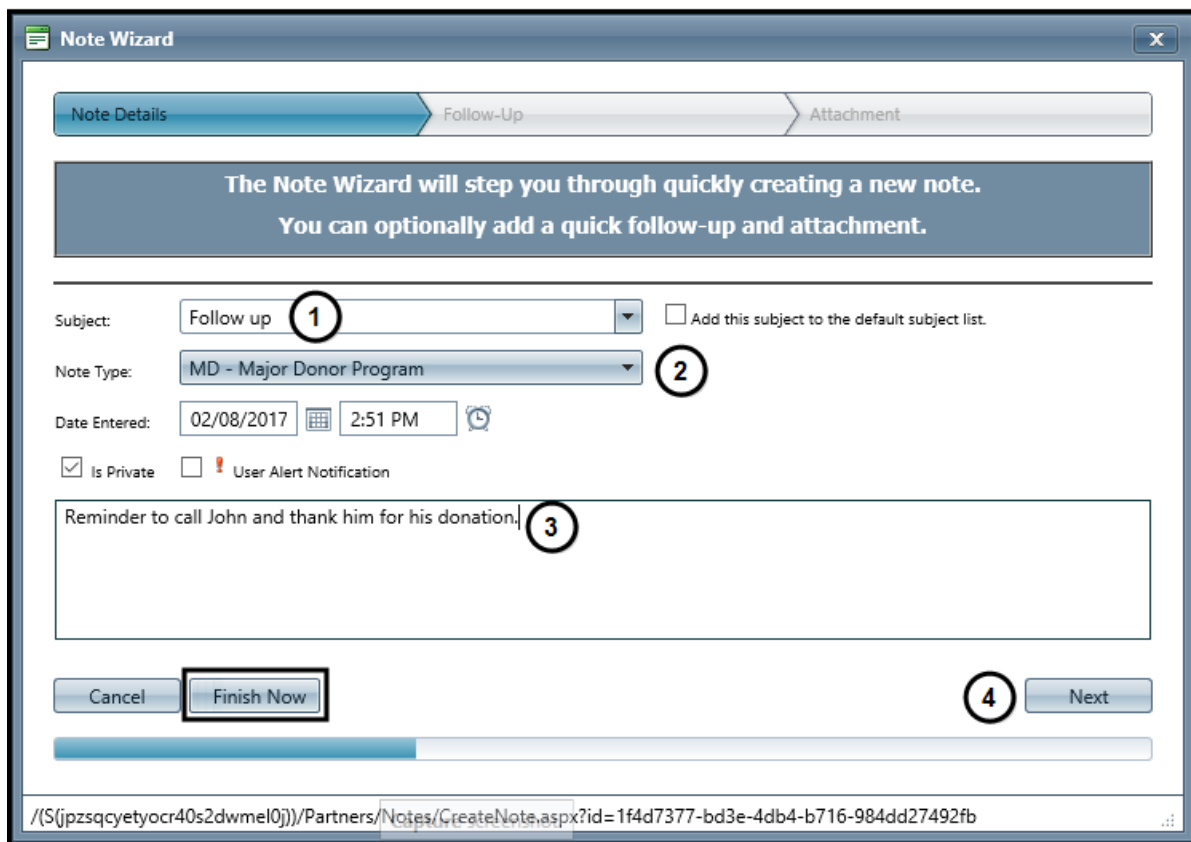
View information about the net worth, total assets, total income, and amount of giving capacity.

Follow Up with a Major Donor

When working with Major Donors, it is important to contact them on a regular basis to strengthen the relationship you have with them. Creating notes on the Major Donor record sets up a reminder to follow up with the donor.

Add a Follow Up on a Major Donor Record

To add a follow up locate and open the major donor record, click **Create Note**, and then follow these steps:



The Note Wizard will step you through quickly creating a new note. You can optionally add a quick follow-up and attachment.

Subject: Follow up Add this subject to the default subject list.

Note Type: MD - Major Donor Program

Date Entered: 02/08/2017 2:51 PM

Is Private User Alert Notification

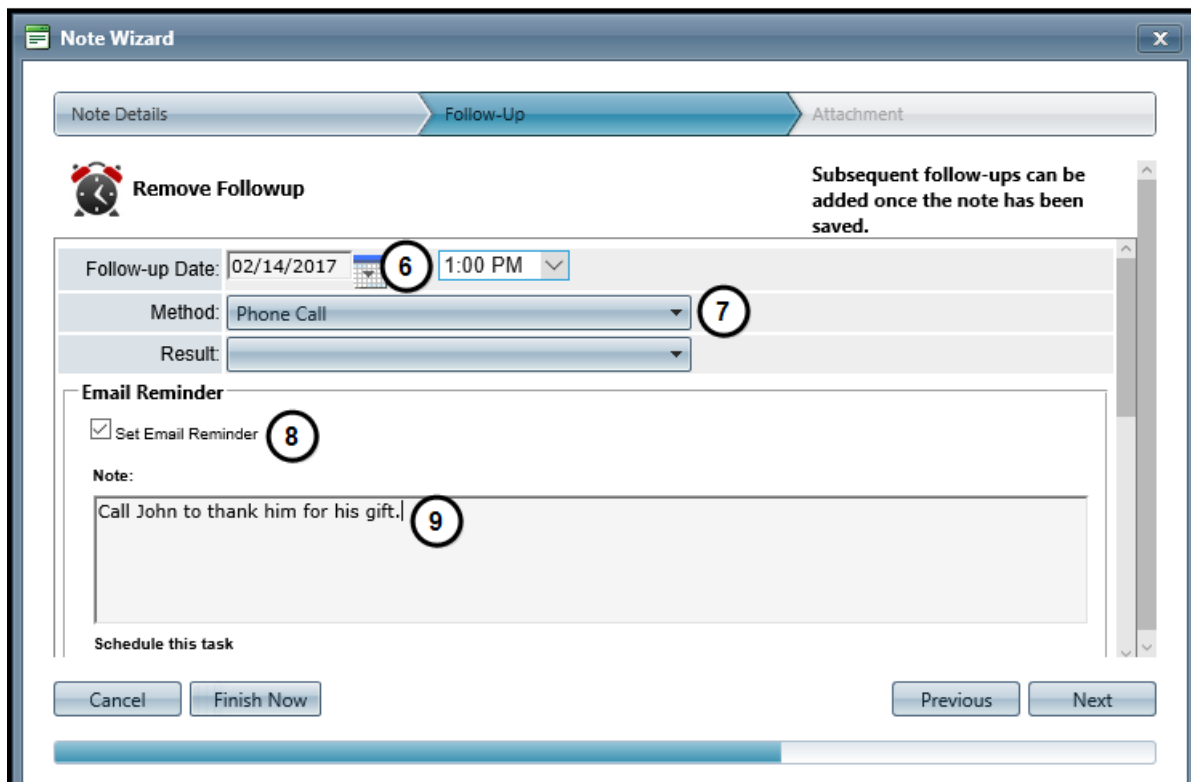
Reminder to call John and thank him for his donation.

Cancel Finish Now Next

/(S(jpzsqcyyocr40s2dwmel0j))/Partners/Notes/CreateNote.aspx?id=1f4d7377-bd3e-4db4-b716-984dd27492fb

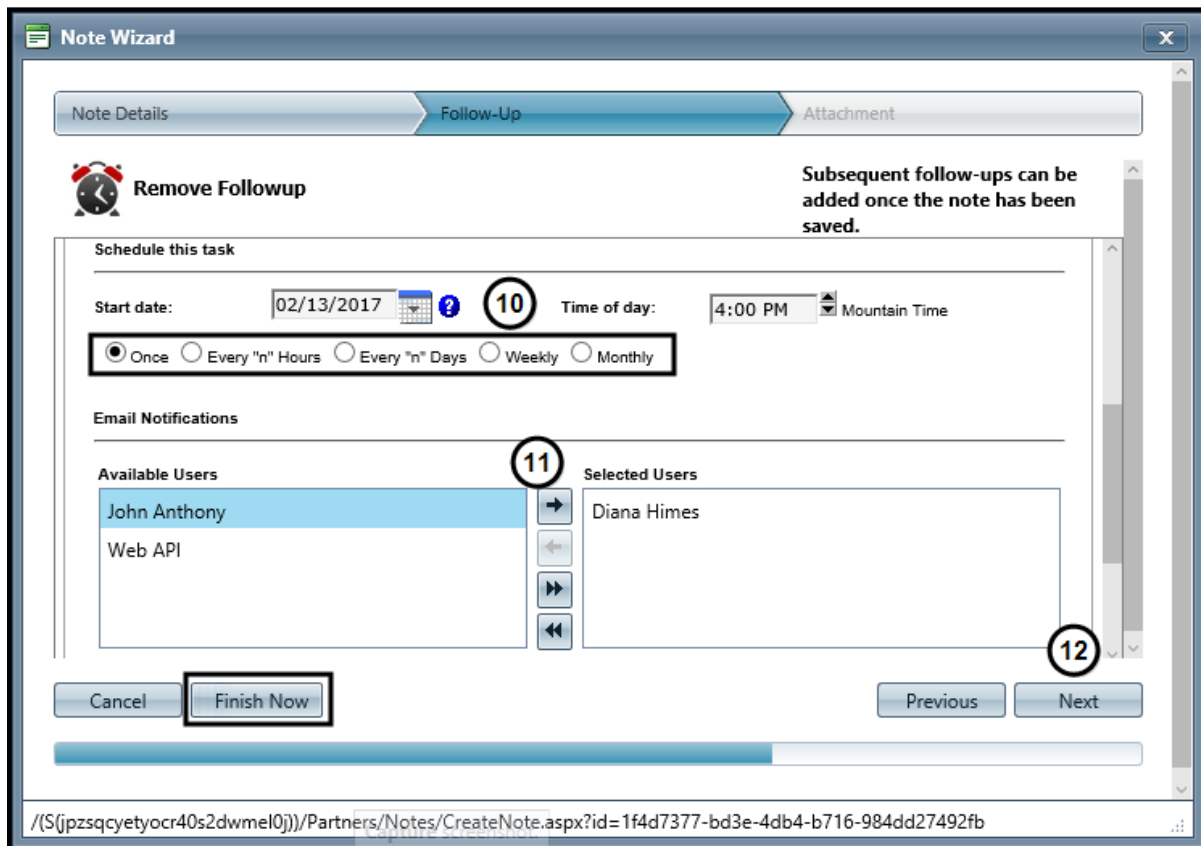
1. Select the **Subject** for the note.
 - a. **Follow up** is the default and you can choose a different subject from the options in the list.

2. Select the **Note Type**.
 - a. **MD - Major Donor Program** is the default and you can choose a different note type from the options in the list.
3. Enter information about the follow up.
4. Click **Next**.
 - a. If you do not want to set up a follow up reminder or attach any documents, you can click **Finish Now** to save the note.
5. Click **Add Followup** on the Follow-Up screen.

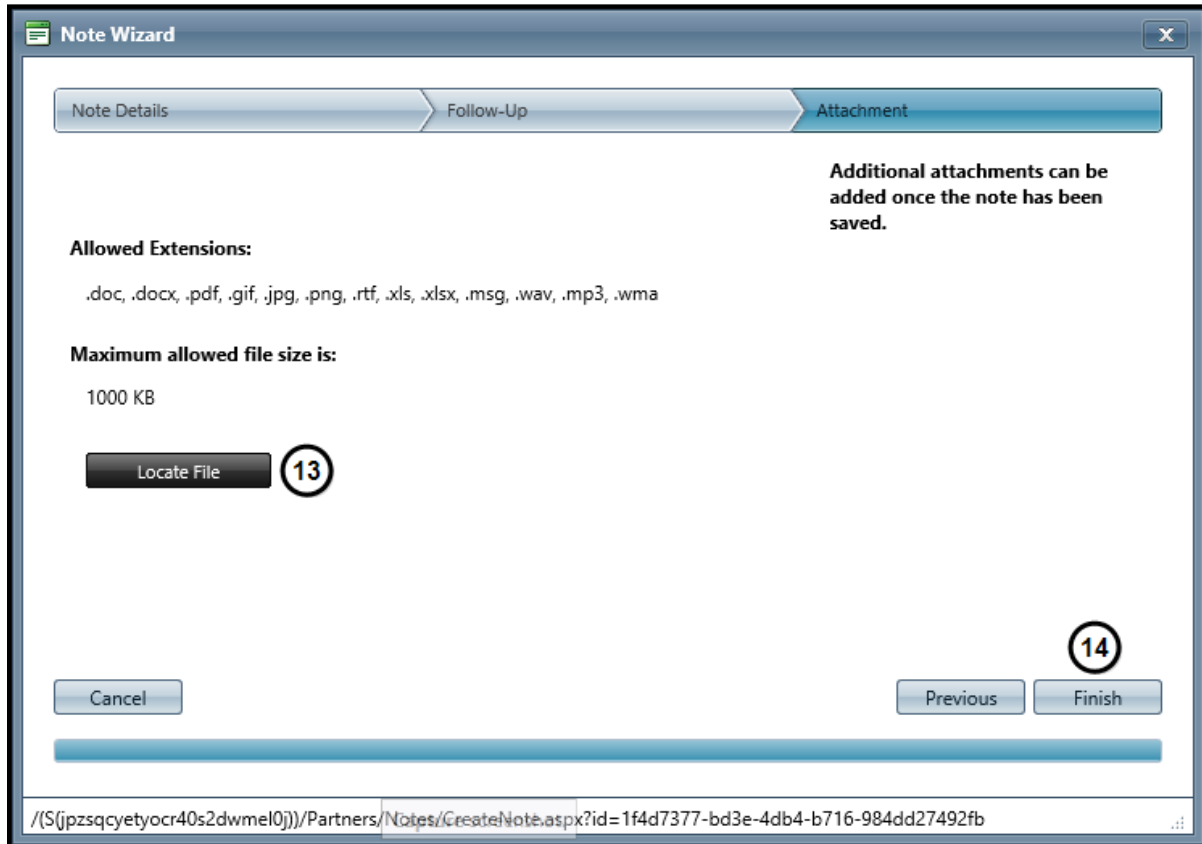


6. Select a **Follow-up Date** and time for the followup.
7. Select a **Method** for the followup.
8. Mark the **Set Email Reminder** checkbox to generate an email reminder for the followup.

9. Enter details in the **Note** frame to include in the email.
 - a. Scroll down to access the email reminder settings.



10. Select the **Start date** and **Time of day** to send the email.
 - a. Select how often to send the email.
11. Select a user in the **Available Users** frame and click the right arrow button to add them to the **Selected Users** frame so they receive a copy of the email.
 - a. The user who creates the note is automatically added to the **Selected Users** frame.
12. Click **Next**.
 - a. If you are not attaching any documents, you can click **Finish Now** to save the note.



13. Click **Locate File** to search for an upload an attachment to the note.
14. Click **Finish**.



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