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Use Rapid Entry

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Aegis Premier Solutions is committed to maintaining thehighest 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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Rapid Entry

Rapid Entry is used to quickly enter data in a batch that is then processed in Aegis CRM. A batch is a way to divide up the data entry of information into smaller more manageable pieces and then distribute them to a team of data entry personnel.

With Aegis CRM, your organization can scale to any size or number of batches necessary to accommodate all sized organizations. You enter the data in batches using Rapid Entry so you can query and report on that information in Aegis CRM.

Install Rapid Entry

To install Rapid Entry, follow these steps:

1. Click https://app.aegispremier.com/rapidentry/ to access the installation page for Rapid Entry:
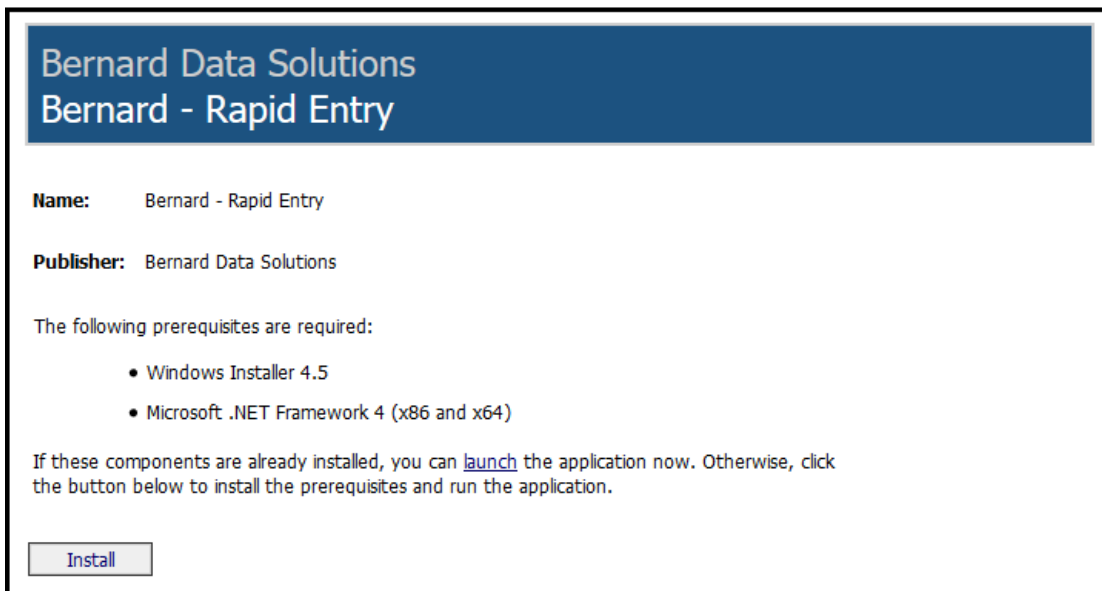

2. Click Install to begin the installation. If the .NET Framework version 4 is not installed on your computer, you will be prompted to do so before continuing the installation of Rapid Entry. Follow the prompts to continue the installation.
3. After installing the .NET framework (and rebooting if prompted to do so), return to https://app.aegispremier.com/rapidentry/ and click the install button again. Follow the instructions to complete the install of Rapid Entry.

AEGIS *crm* Once the installation is complete, the Rapid Entry icon is available on your desktop. When you double click the Rapid Entry icon and a new version is available, it is automatically downloaded and installed on your computer.

Get Started with Rapid Entry

Rapid Entry is used to enter multiple items into a batch that is then processed and uploaded to Aegis CRM.
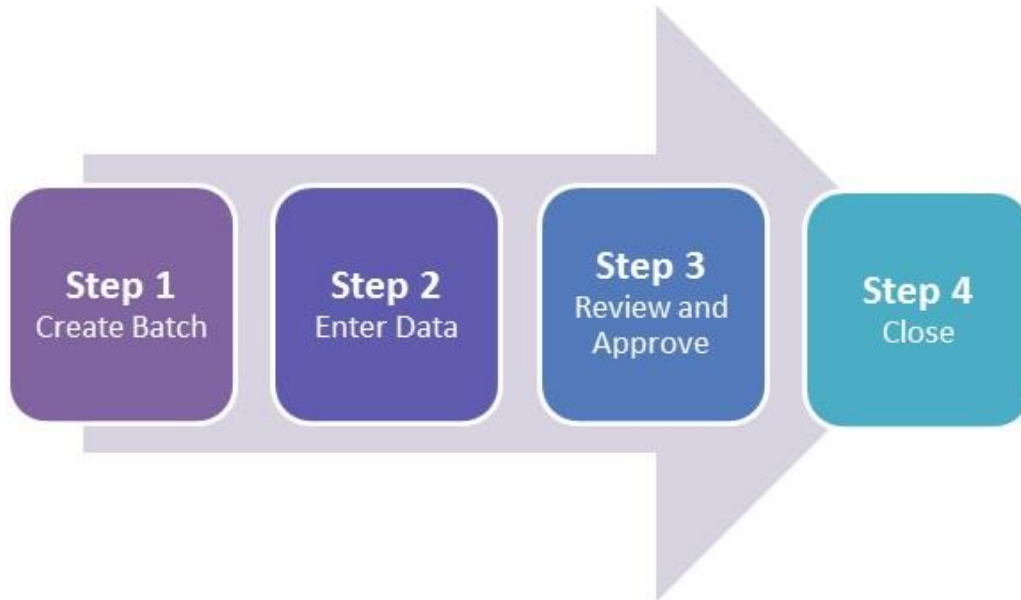
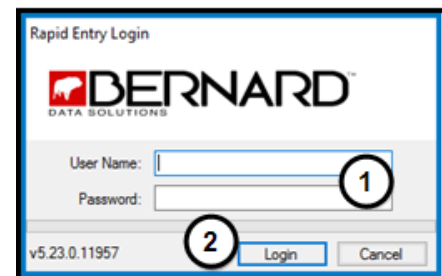Before you can use Rapid Entry, you must install it on your computer.
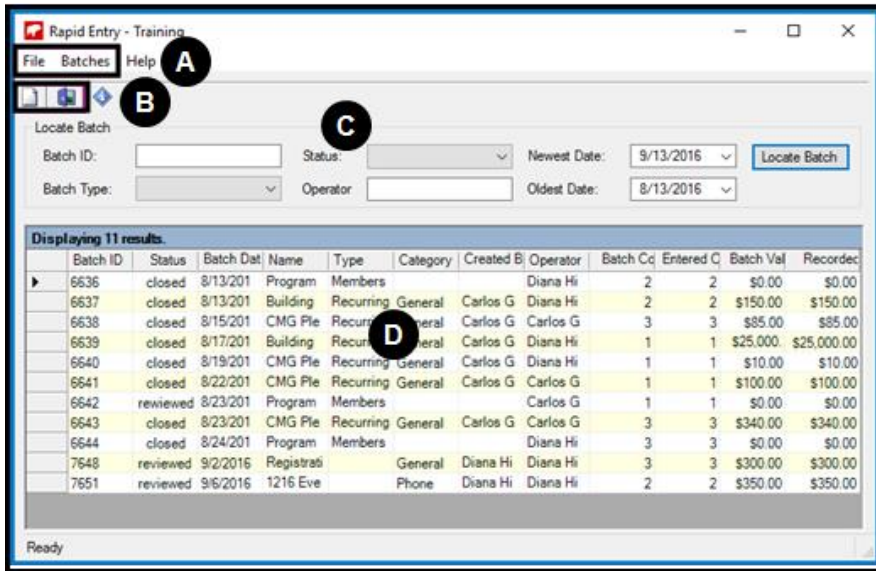
Log in to Rapid Entry

Double click the Rapid Entry icon on your desktop and then follow these steps:

1. Enter your User Name and Password.

2. Click Login.

Navigate the Rapid Entry Home Screen

There are four main sections on the home screen.

A. The Menu section includes these options:

    1. On the File menu, click Exit to close Rapid Entry.

        a. You can also click the X in the top right corner to exit Rapid Entry.

B. On the Batches menu, you can create a new batch or edit the selected batch.

    1. Navigate your mouse to the Quick Links section for quick access to::

        a. Create a New Batch.

        b. Exit Rapid Entry.

C. In the Locate Batch section, you can enter criteria to search for a specific batch.

D. All of the batches that meet the criteria you entered in the Locate Batch section display in the list.

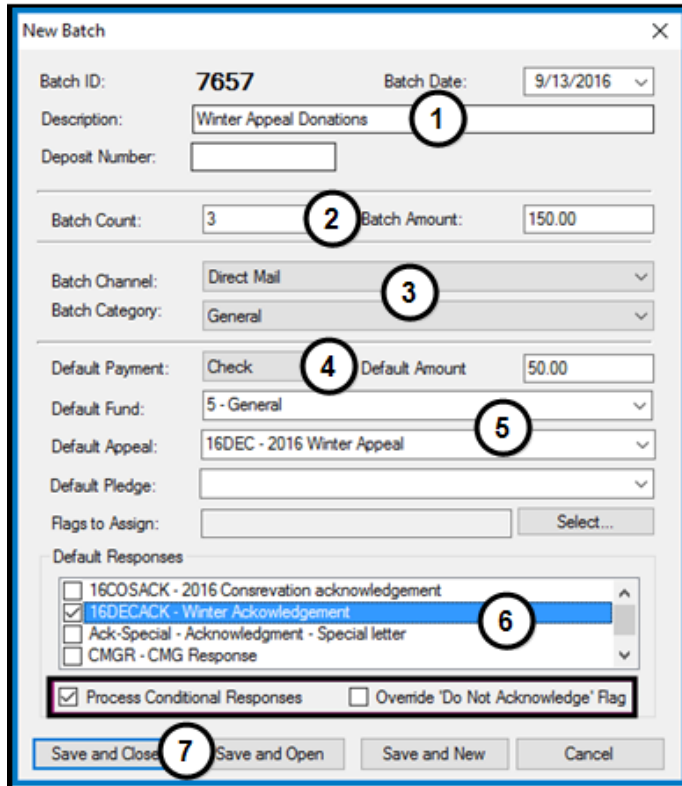   1. Double-click on a row to open the Batch Entry screen.

Batch Status

In the batch results list, the status of the batch displays in the Status column. The following table identifies the different batch states and includes a description of each.

Batch Status	Description
Open	Data is being entered in the batch or it is being reviewed.

Pending	Data has been entered but does not reconcile or needs to be reviewed.
Reviewed	The batch is ready to be reconciled against the daily deposit.
Closed	The batch is reconciled and transactions do not require review.
Processing	Data is being imported to Aegis CRM. If the batch remains in the processing state for more than an hour, send an email to support@aegispremier.com.
Locked	The batch has been reconciled with the daily deposit and the day has been closed.

Create a New Batch

To create a new batch, click the New Batch icon and then follow these steps:

Rapid Entry automatically assigns the Batch ID using the next unused sequential number.

1. Enter the current date and a description for the batch.

2. Enter the number of unique items to be added and the total amount of the transactions included in the batch.

   EXAMPLE: If you have 36 checks to enter and two are from the same donor, the batch count would be 35.

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EXAMPLE: If there have 36 checks to enter and the combined dollar total is $2,700, the total amount is 2700.

Note: You do not need to use a dollar sign, comma, or decimal point when entering an amount. Twenty-seven dollars is 27, while two thousand seven hundred dollars is 2700.

Note: You can change the batch count and amount after you start entering batch information, provided you have the user rights to edit the Batch Header.

3. Select the Batch Channel; such as Mail, Internet or Phone and Batch Category such as checks or cash.

    Note: The selected channel and category applies to every item entered in the batch.

4. Select the Default Payment and enter the Default Amount for each payment. These are automatically added to all entries unless you manually override them on a line-by-line basis.

5. Select the Default Fund and Default Appeal.

    TIP: Because an appeal is required when creating a batch in Rapid Entry, if you receive donations that were not motivated by an appeal we suggest you create a White Mail appeal for these donations.
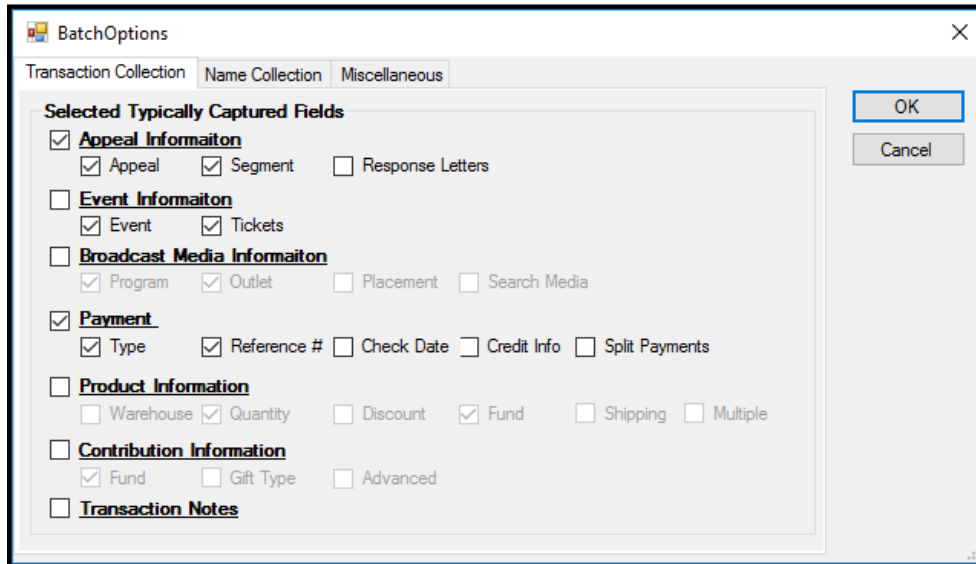
6. Mark the checkbox for the default acknowledgement to be sent to the donor.

    a. Mark the Process Conditional Responses checkbox to apply the response rules on the record.

    b. Mark the Override "Do Not Acknowledge" Flag to send the acknowledgement even if this flag is set on the partner record.

7. Click Save and Open. You can click Save and New to create another batch.

Options in Rapid Entry

Batch options allow you to set up the different data entry panels available in Rapid Entry.

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Transaction Collection

The Transaction Collection tab allows you to select the panels and data entry areas for those panels that should display on the Batch Entry window.
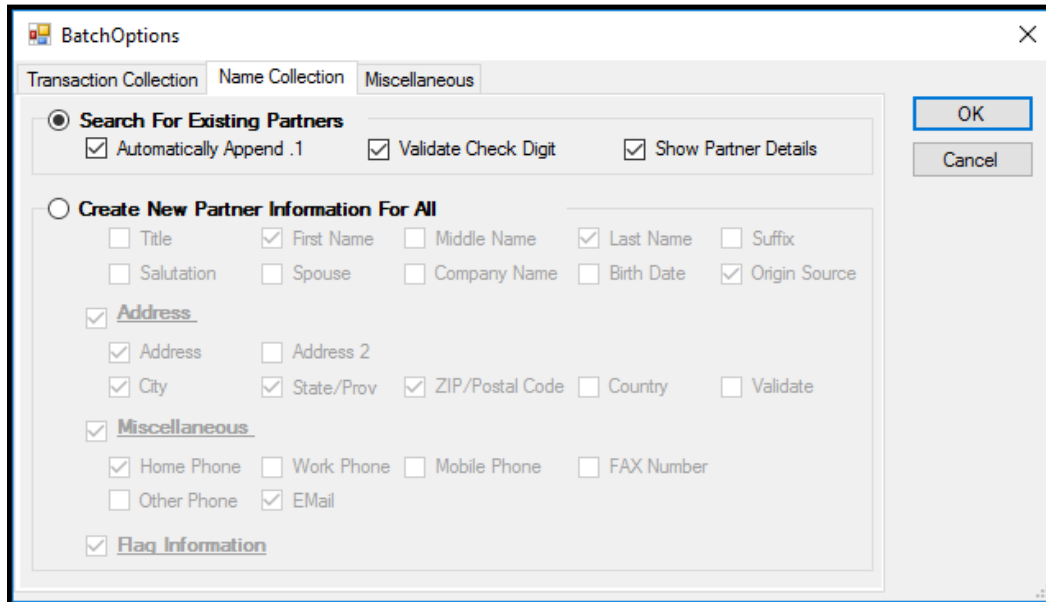

Name Collection

The Name Collection tab sets the preferred method for identifying duplicate partner records and what to do if duplicate records are found.

Select Search for Existing Partners to add a Partner panel where you enter a partner ID and search for existing partner records. If a partner record is not found, click New to enter data for the new partner.

Select Create New Partner Information for all Transactions to add a new Partner panel where you can enter information about the partner so it can be added to Aegis CRM.

Miscellaneous

On the Miscellaneous tab, you define the options for qcing transactions, how to display the selected data entry row, and display payment details.
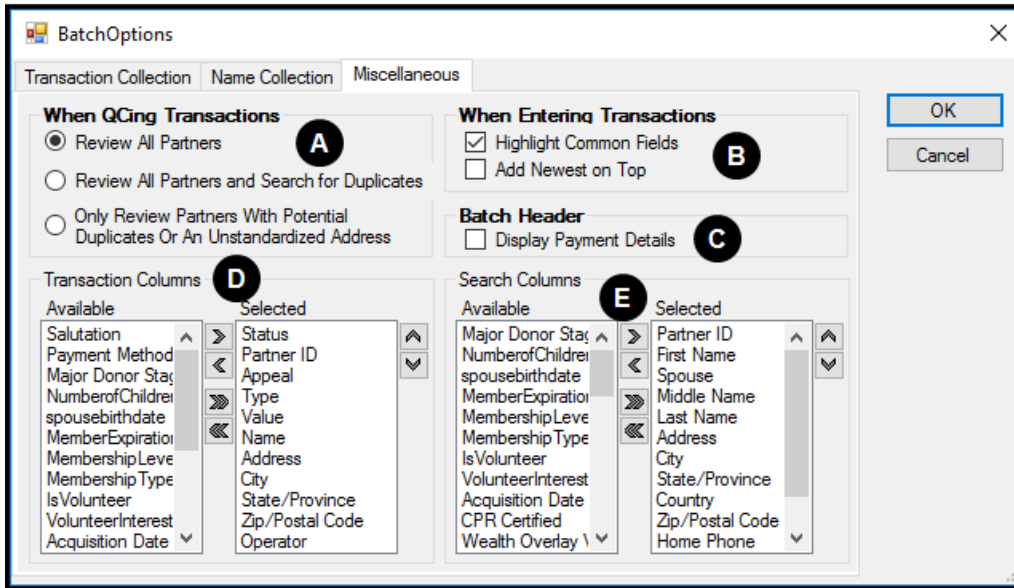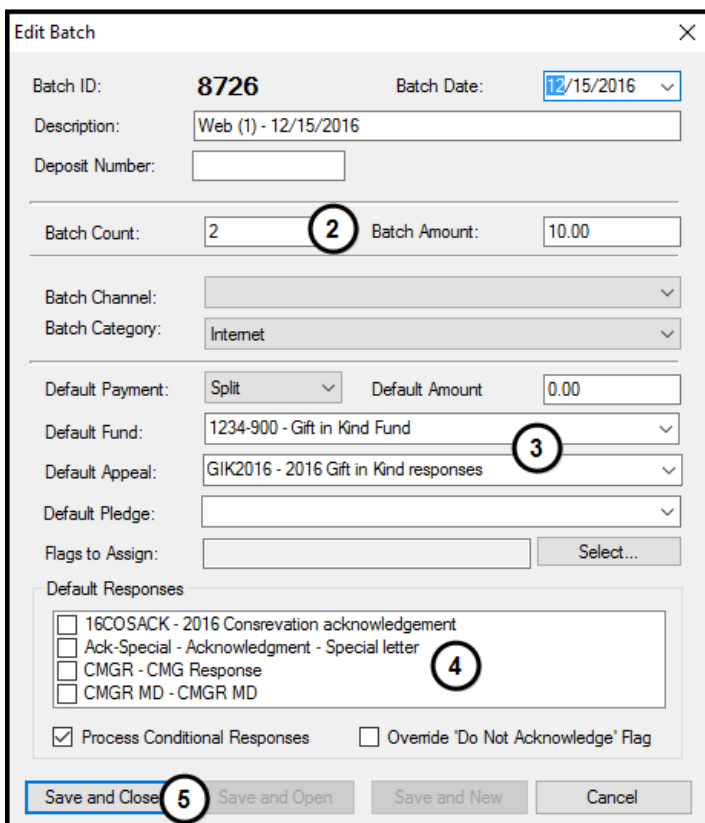
A. In the When QCing Transactions frame, there are quality control options that determine which transactions should be reviewed after they have been entered. You can choose Review All Partners, Review All Partners and Search for Duplicates, or Only Review Partners with Potential Duplicates Or An Unstandardized Address.

B. Mark the checkboxes in the When Entering Transactions frame toHighlight Common Fields and add a colored background to the selected data entry areas or Add Newest on Top so that the newest transaction displays first.

C. Mark the Display Payment Details checkbox to list the details in the Batch Header.

D. Select columns in the Available pane and then click the right arrow to add it to the Selected pane so the column displays in the batch results.

E. Select columns in the Available pane and then cllick the right arrow to add it to the Selected pane so it displays in the search results.

Edit a Batch Header

Note: You can change the batch count and amount after you start entering batch information, provided you have the user rights to edit the Batch Header.

To edit a batch header log in to Rapid Entry, select the row for the batch header you want to edit, and then follow these steps:

1. On the Menu bar, select Batches and then select Edit Batch.

2. Modify the Batch Count or Batch Amount.

3. Change the default options.

4. Edit the default responses.

5. Click Save and Close.

Appeal Panel

The Appeal panel displays options for identifying the motivating appeal for the transactions you enter in a batch.

Note: Press F2 to toggle between displaying and hiding the Appeal panel.

Terms You Should Know

- An Appeal is any form of communication that solicits a donation.

- A Motivating Appeal is the appeal that solicited the contribution, such as "Monthly Newsletter." • A Segment is a specific group within the appeal, such as, "All constituents who contributed within the last 12 months."

- A Response is an acknowledgement sent to a contributor for a specific contribution.

- A Document Template is used to create an automatic response (acknowledgement) for an appeal, typically set up with merge fields for address information.

The name of the appeal and the segment (category) within the appeal display in the panel. If multiple appeals and segments are available, you will be able to select one from the options in the drop-down box. The information displayed in the Motivating Appeal and the Segment fields is determined by the choices made when the batch was created.

Choose Another Response

To choose a response document other than that shown on the Appeal panel, click Response and then follow these steps:

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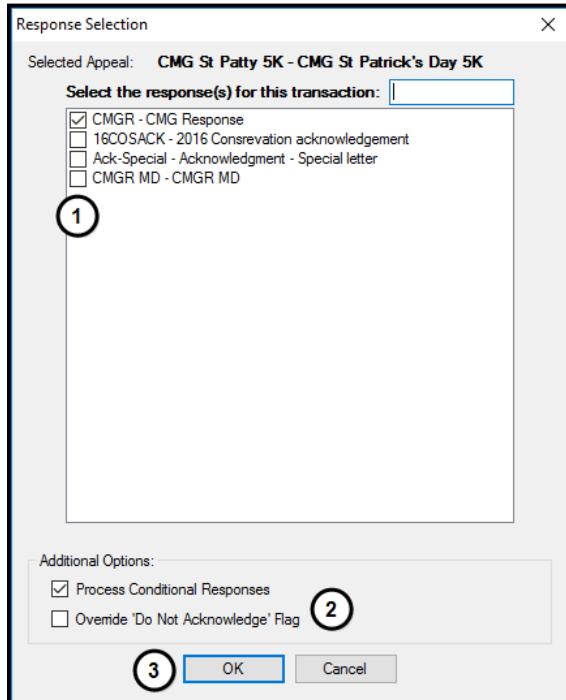
1. Mark the checkboxes for the reponses to use in the batch.

2. Mark the checkboxes to process conditional responses or override the "Do Not Acknowledge Flag" for the partner records included in the batch.

   Note: Marking or unmarking a checkbox allows the user to decide whether or not the appeal's business rules will be considered along with any that are manually selected by the operator.

   Note: If a response is selected when a new batch is created and it is different than that set by the business rule(s) in the appeal, both the business rule response AND the checked response will be sent for all transactions that meet the criteria set for the responses.

   Note: If, during or after a transaction is entered, the response is manually unchecked, NO RESPONSE WILL BE SENT, even if the transaction meets criteria in the motivating appeal. Any change at this level supersedes response templates previously set whether in the business rules of the motivating appeal or in the batch set-up.

Payment Panel

Note: Press F3 to toggle between displaying and hiding the Payment panel.

Terms you Should Know:

- The Payment Amount is the total sum of dollars received from a single appeal contribution.

- A Payment Method is the way in which the contribution was received (cash, check, etc.).

- A Split Payment is a single transaction split between different payment methods.

- A Tax Deductible Contribution is the amount donors can deduct on their taxes.

Note: Please be sure you understand the differences between a payment, a split payment, or a Tax Deductible Contribution to ensure accurate and efficient transaction data entry.

The Payment Panel provides options for choosing the payment method for the transaction.

Payment Methods

The Payment Method can be set as the default during new batch setup or on each transaction. The following tables identifies the different payment methods and includes a description of each method.

Payment Method	Description
Cash	Enter the entire dollar amount and select Cash as the payment method.
Check	Enter the entire dollar amount, select Check as the payment method, and then enter the check number.
Credit Card	Enter the entire dollar amount, select Credit Cardas the payment method, and then enter
Payment Method	Description
	the card number. Click CC Details to add more information about the card including CVV number and expiration date

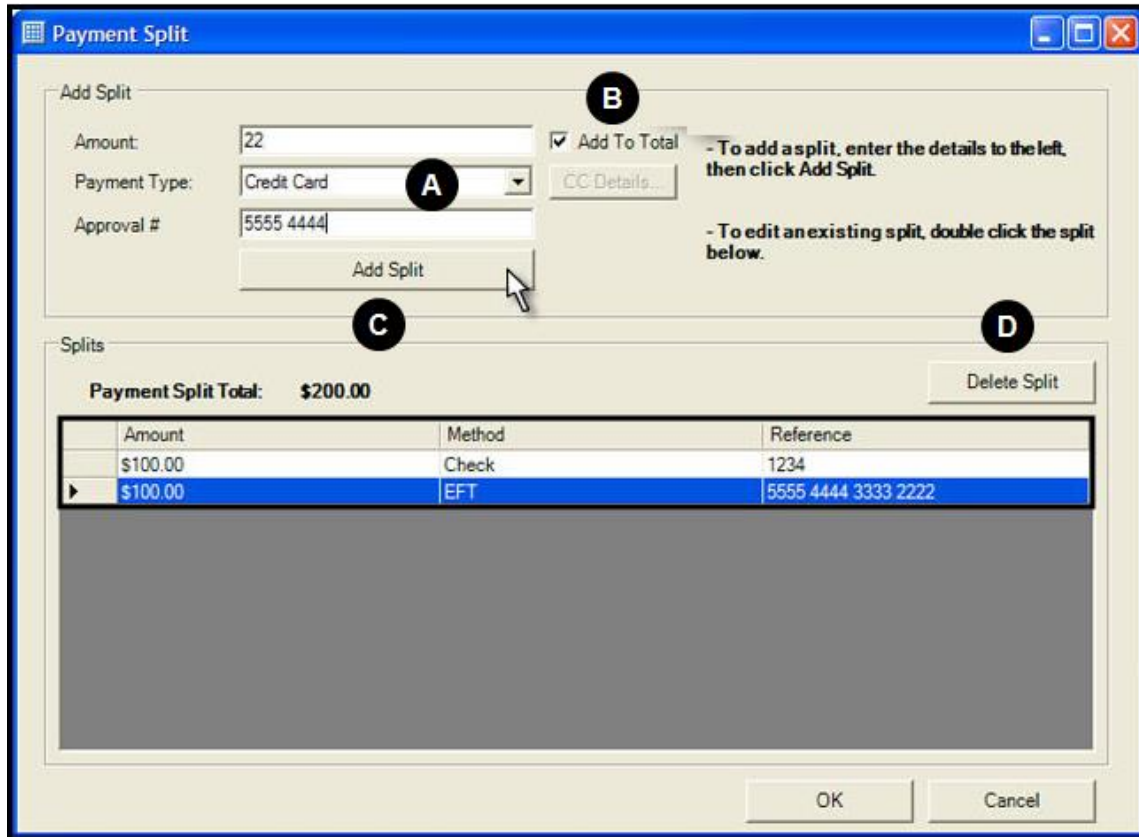|	
Electronic Funds Transfer (EFT)	Enter the entire dollar amount, select EFT as the payment method, and enter the card number. Click CC Details to add more information about the card including CVV number and expiration date.

Payment Amounts

Enter the payment amount as a whole dollar amount (five dollars is "5") or as a decimal amount (five dollars and thirty-two cents is "5.32").

Note: The payment amount does not require the dollar sign or the comma.

Split Payments

The Split button gives you the ability to split a single payment using different payment methods.

Example: if a single payment is received using a check and credit card, you can split them and enter both payment methods for the payment. When the Split button is clicked, the "Payment Split" box is displayed. The box provides guidelines for adding and editing a split.

A. Enter the payment amount, type, and other information for the split. The fields that display in the Add Split panel will change depending on the payment type you select.

B. Mark the Add to Total checkbox to include the split amount in the total for the payment.

C. Click Add Split to add the payment to the Splits panel and automatically update the Payment Split Total field.

D. Click Delete Split to remove the selected payment from the total.

In the example above, two splits for $100.00 each have been added, and a third for $22.00 is about to be completed, for a total of $222.00 dollars.

Review Entries in Rapid Entry

As you enter information in Rapid Entry, it is searched for potential duplicate records and non-standardized addresses. If there is a problem with an entry, the status flag changes in the Status column. All entries that do not display the green check mark must be reviewed before a batch can be properly closed in Aegis CRM.

Status Flags

Status flags are applied to each transaction entered in Rapid Entry and are displayed in the Status column of the Batch Entry screen. The table below identifies the stats flags and includes a description of each flag.

Status Flag	Description
Green Check Mark	No issues with the Partner record have been found.
Yellow Check Mark	There is an issue with the Partner record and it needs to be reviewed..
Green Check Mark with People Icon	A similar record has been found with a potential for duplicate records. If they the records are duplicates, you can merge the records in Rapid Entry.
Letter with a Red Circle and Bar	The Partner record does not have a standardized address.

Review an Entry

To review an entry select the record with an issue, click Review in the Batch Header panel.

After duplicate records have been merged or other issues have corrected, click Review Next to display the next record for review.

Note: Depending on the choices made on the Miscellaneous tab of the batch Options screen, either the next entry in the list or one with a potential issue displays for you to review.

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