



INTRODUCTION TO THE AEGIS CRM

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Introduction to the Aegis CRM

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Overview

Aegis CRM is a cloud-based portal you can access anytime from anywhere when you have an electronic device such as a computer, mobile phone, or tablet connected to the internet. When you are logged in to your **Aegis CRM** database, you are using a tool designed to move your mission forward. The integrity and security of your data, as well as the stability of the software, guarantees you a high performing solution customized to meet the needs of your organization.

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.

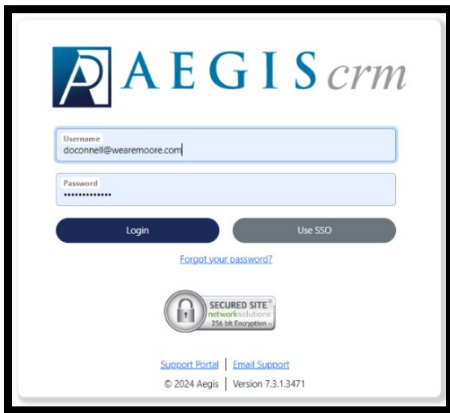
Security is at the forefront of our business mission. Your organization and your donors can rest easily knowing information is secure in state-of-the art data centers, monitored 24/7/365. Our experts ensure your system is always up-to-date, correctly configured, and is PCI DSS compliant.

Logging In and Out

Before accessing *the Aegis CRM*, you must log in to the database.

Open your web browser and enter **aegispremier.com** in the address line. Follow these steps to log in to **Aegis CRM**:

Logging In STEPS



1. Enter your **Username** and **Password** in the appropriate fields.
2. If you do not know this information, contact your Administrator.
3. Click **Login**.

If you have forgotten the password, click the *Forgot your password?* link and follow the prompts to reset it.

Once successfully logged in, the Home page displays all of the modules available based on the rights and permissions assigned by the Administrator.

After *finishing work*, users should log out of the database.

Logging Out STEPS



1. Navigate to upper right corner of the **Home** page.
2. Click on the **Logout** button – right facing arrow.

Home Page

Once successfully logged in to the Aegis CRM, the **Home** page displays. The Home page consists of four distinct areas:

- **Welcome Bar (1)**
- **Actions Menu (2)**
- **Home Dashboard (3)**
- **Navigation Menu (4)**

The screenshot shows the AEGIS CRM Home Page interface. The top navigation bar (1) includes the AEGIS CRM logo, user information 'Welcome Dave O'Connell • Training - Sales', and system settings. The left navigation menu (4) lists various CRM functions. The main dashboard (3) features several data-rich sections: 'Recent Donors' with a list of names and IDs, 'Yearly Donor & Revenue Counts' table, and 'Inventory Remaining' table. The right sidebar (2) contains 'Favorite Queries' and two data tables: 'Donations Last 30 Days' and 'Major Gift Officer Report'.

Partner ID	Full Name
40676735	Martin & Ellen Brody
40676274	Janice Smith
40629293	Darnell Jennifer
40673573	Alanna Dasia
40010742	Jackson Aliya
40678726	Stephen & Barbara Veto
40676075	Michael Brody
40005648	Essence Kaelyn
40676058	Amity Island Recovery Trust
40676067	Amity Police Department

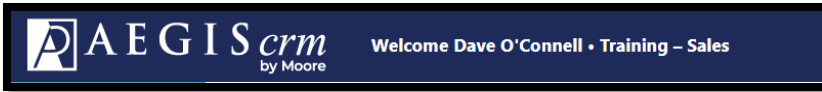
Year Received	Activity Count	Sum of Activity Value
2020	8,172	\$243,603.80
2021	10,270	\$302,652.55
2022	10,474	\$308,814.99
2023	10,987	\$411,816.35
2024	265	\$31,313.02

Item SKU	Item Description	Warehouse	Price	In Stock
123122	Blue Envelopes	Main	0	3,680
123216	Silent Auction	Events	25	600

Partner ID	Full Name	Last Gift Date	Last Gift Amount	Appeal ID	Appeal Segment Description
40676735	Martin Brody	01/23/2024	\$25.00	24_1WT	Gold Major Donors: LTR 1000-
40000298	Jamie Jordan	01/23/2024	\$10.00	24_1WT	Gift Value 50-99.99
40000182	Anita Alexia	01/23/2024	\$70.00	24_1WT	Gift Value 50-99.99
40676069	Mr. Dave Bowman	01/16/2024	\$51.50	24_1WT	White Mail
40676070	Cmdr. Will Riker	01/16/2024	\$123.60	24_1WT	White Mail
40676071	Rocky Balboa	01/16/2024	\$103.00	24_1WT	White Mail
40676072	Dr. Fraiser Crane	01/16/2024	\$20.00	24_1WT	White Mail
40676073	Maj. Margaret Houlihan Ret.	01/16/2024	\$20.00	24_1WT	White Mail
40679334	Rose Codacovi	01/16/2024	\$51.50	24_9MT	Gold Major Donors: LTR 1000-
40004723	Oscar Briana	01/16/2024	\$25.75	24_9MT	Gift Value 25-49.99

RDD Full Name	Partner ID	Full Name	Last Gift Amount	Last Activity Date	Lifetime Revenue	A
Carlos Guerrero	40676735	Martin Brody	\$100.00	01/23/2024	3807.00	3
Carlos Guerrero	40000136	Kayden Tamyra Sr.	\$20.00		0.00	0
Carlos Guerrero	40001719	Abril Zechariah	\$150.00	12/08/2020	100.00	1
Carlos Guerrero	40679913	Mrs. Barbara Veto	\$15.00	11/05/2023	145.00	4

Welcome Bar



Contains the **Aegis Greeting**, **Aegis CRM logo**, and logged in **User's Name**, and **Database Name**.

Actions Menu

The Aegis Actions Menu contains quick actions and locations for users.



The following options are available:



Switch Database – ONLY available to Administrators of clients that have more than one active database.



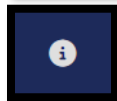
Configure Dashboard Layout – Enables users to configure their own personal Home Dashboard



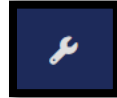
FTP – Link to the client's FTP storage site for Internal Exports and External Import files. Documents are held in a secure, accessible location.



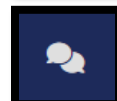
Login to CARE – For qualifying clients, a direct link to the Aegis Care center.



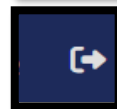
Help – Accesses Aegis online help site containing user manuals, videos, and helpful support materials.



Support – Link to online Aegis Support for the submission of tickets.



Live Chat – Enables live chat box to display linked with Support for the resolution of immediate needs.

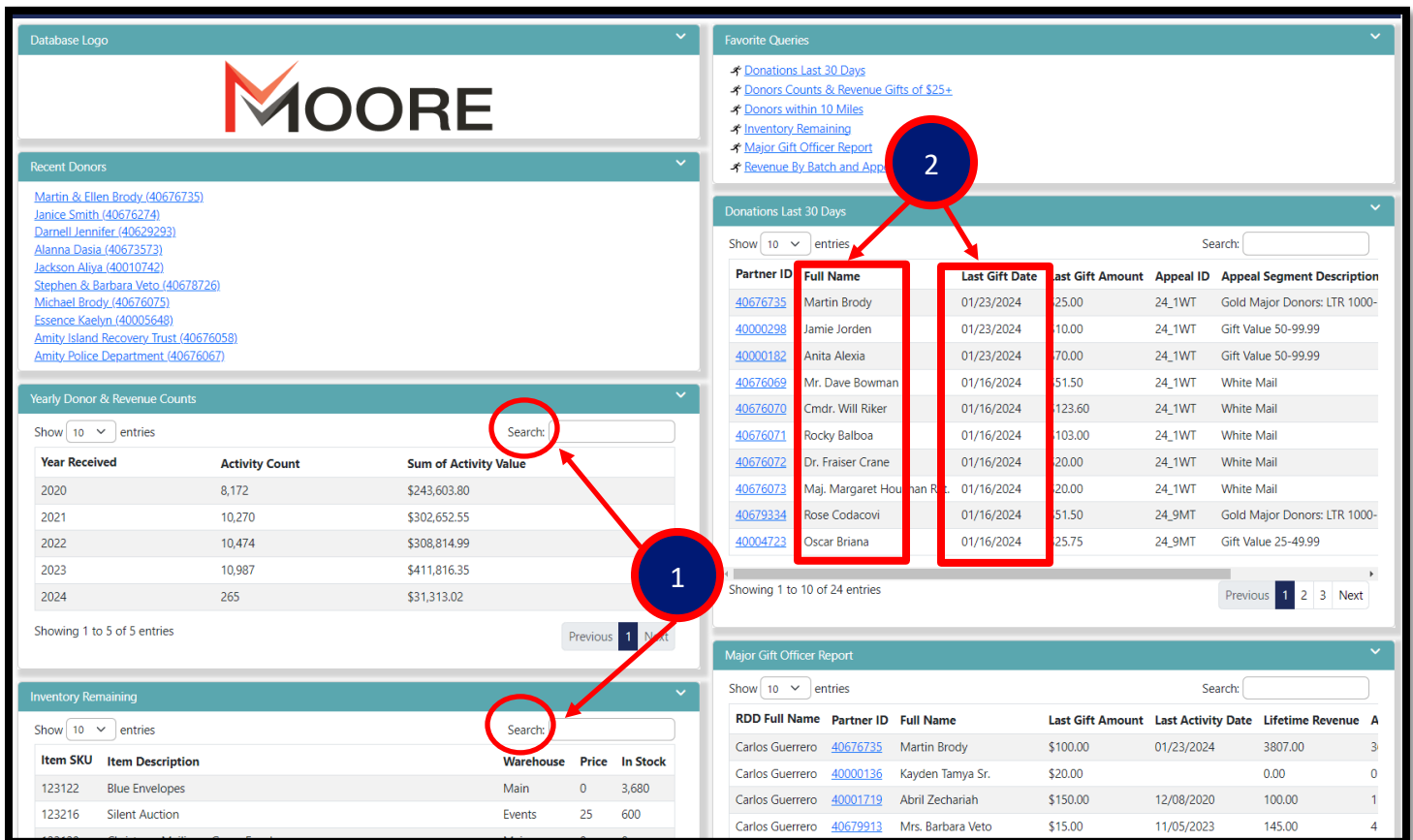


Log Out – Enables user to Log out of system.

NOTE: If users have never requested access to either FTP site, they will have to contact Support to access.

Home Dashboard

Home dashboard displays various **Components, Queries, and/or Charts**. When a user enters the Aegis CRM for the first time, the Home page may be blank. Users can then personally configure the Home dashboard to their own desires choosing from available components, queries, and charts. The users personal configuration will remain in place unless edited by that user.



Users have access to any publicly shared Queries and Charts, as well as to some native components such as Recent Donors, Favorite Queries, and the ability to add a Database logo for their Organization.

Within each of the Query type components are two interactive functions that expand their value:

1. Ability to Search – located in the upper right-hand corner of those components.
2. Ability to Sort – Available by clicking on any of the column headers in the Query.

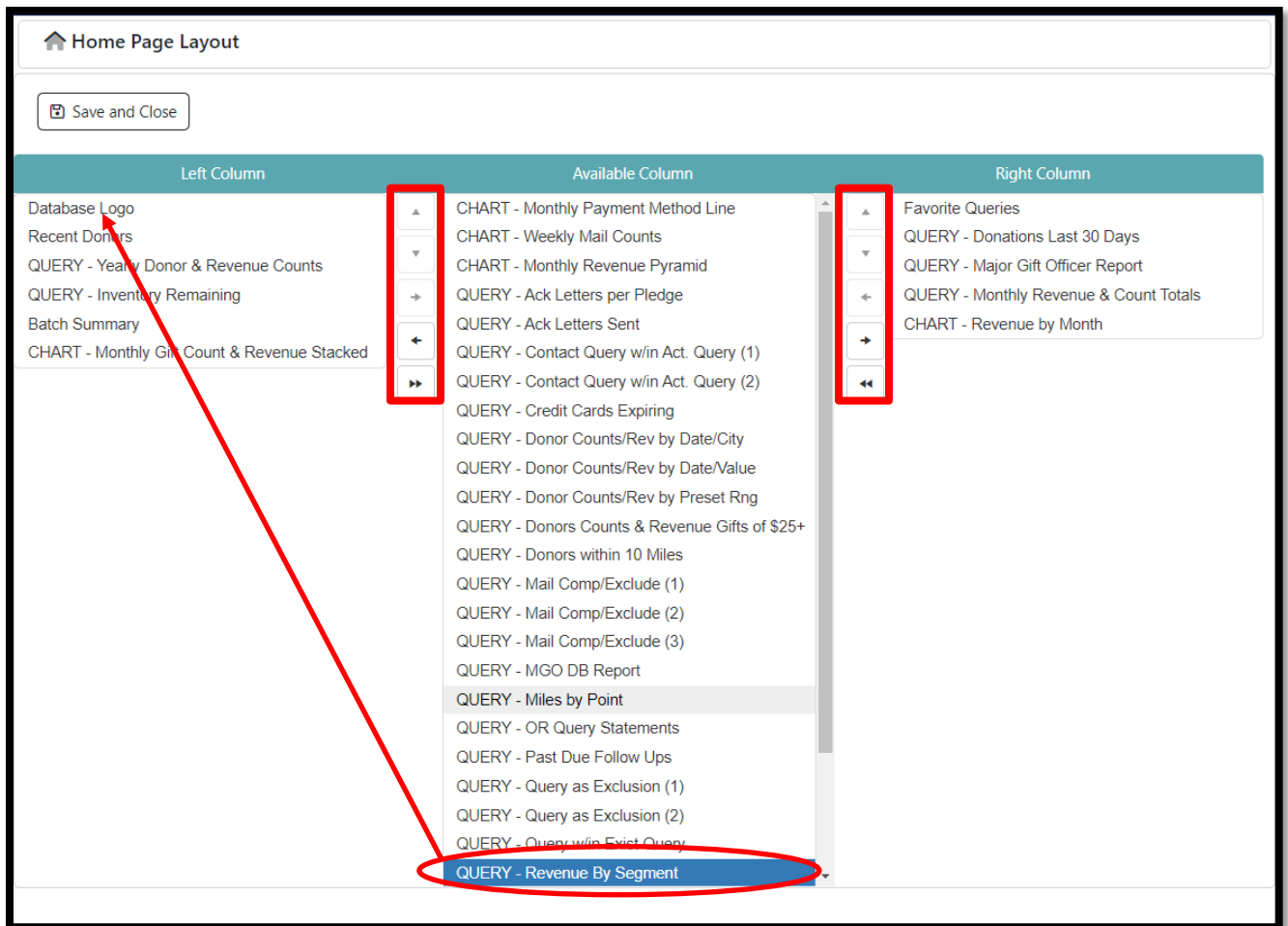
Configuring the Home Dashboard STEPS

1. From the **Actions** menu, click on the **Configure Home Dashboard** button.



2. Select an item from the **Available Column** section in the center and drag and drop to either the **Left Column** OR **Right Column** sections.

- In the screen cap example, the **Query – Revenue by Segment** is being dragged to the second position of the left column.
- Users can also click the **Arrow Command menu** to the left or right of the **Available Column** to add and/or reposition their components.



3. Select as many components as desired and reposition as needed.

4. Click **Save and Close**.

5. The newly configured **Home dashboard** will display.

Navigation Menu

The Navigation menu contains all available modules in the **Aegis CRM**. The following table lists the modules and provides a description of each module.

- **Note:** The modules that are displayed on the Navigation menu depend upon the rights and permissions given provided by the local Administrator.

Module	Description
Home	Customize to display dashboards when you log in to the database.
Donors	Access donor information including giving activity.
Membership	Create and manage all aspects of your membership programs.
Queries	Build quick and accurate ad hoc reports in the database.
Funds	Establish designations when donations made for specific purposes.
Appeals	Create and design fundraising campaigns and Acknowledgements.
Events	Manage all tasks and other details for your events.
Segments	Build to categorize donors based on specific criteria.
Email Engine	Use MailChimp® to design email blasts for your campaigns.
Media Types	Track details about your media outlets and programs.
Inventory	Maintain the goods and materials used to further your mission.
Reports	Determine the effectiveness of your organization.
Major Donors	Maintain all aspects of building relationships with major donors.
Volunteers	Manage all information related to individuals who donate time.
Charts	Design graphical images of data available in the database.
Batching	Enter multiple transactions into the database at one time.
Fulfillment	Manage acknowledgements and orders.
Data Center	Import data from other applications.
Administration	Set user rights and system options.

Navigation Sub-Menus

Some modules on the Navigation menu have sub-module menus that contain different types of the module record type or some type of interactive function. The table displays the modules that contain sub-module menus and the names of the options available via their menus.

Module	Available Sub Types
Donor	New Donor, Locate Donor, Locate Transaction, & Merge Donors
Membership	New Program, Annual Membership, BMP, & POCOMM
Query	New Query, Locate Query, & File Uploads
Funds	New Fund, Locate Funds, & Groupings
Appeal	New Solicitation, New Ack, Locate Appeal, Groupings, Subscriptions, & Global Acks
Event	New Event & Locate Event
Planned Giving	RDD Assignments & Manage Major Donors
Chart	New Chart & Saved Charts
Batching	Batch Load, Batches for Review, Locate Batch, & Day Closing
Fulfillment	Pending Acks, Prepared Acks, Pending Orders, & Prepared Orders
Data Center	Convio Export, Data Quality, Scheduled Imports, File Mapping, & Payments

Records

Records in **Aegis CRM** store information about a module and dictate how it interacts with the database. In addition to tracking donors users can maintain information about appeals, transactions, donations, funds, vendors and volunteers to further your mission.

Record Types

There are multiple record types that display specific information and the following table identifies some of the record types available in **Aegis CRM**.

Record Type	Description
Donor	Track the personal and demographic information about donors.
Transaction	Manage the donations and appeal responses made by donors.
Query	Use to identify information in the database quickly and accurately.
Fund	Track designations when donations are made for specific purposes.
Appeal	Monitor all forms of communication with donors.
Event	Manage all aspects of events hosted by your organization.
Vendor	Track information about the vendors that provide goods and services.
Inventory	Maintain the goods and materials used to further your mission.
Major Donors	Use for establishing and cultivating relationships with major donors.
Volunteer	Identify individuals who give their time to your organization.
Batch	Review and approve data entered into Aegis CRM using Rapid Entry .
Fulfillment	View the pending and prepared acknowledgements or orders.

Locate Function

Finding and accessing individual records quickly is one of the main functions of a CRM. In the Aegis CRM this is done through the **Locate** _____ function. The Locate function is found throughout the system for all major modules and is named as such: Locate Donor, Locate Appeal, Locate Query, Locate Batch, etc.

The Locate interface also helps users to control **Duplication** of records in the database. If a user searches for a specific record and multiple return for a specific search, user can, with permissions, merge those records to avoid duplication. Using the Merge function to reconcile those records will be covered later in the Donors section.

The **Locate Donor** function will be used to demonstrate how Aegis record searches can be conducted below.

Locate a Donor Record

From the **Navigation** menu, click on **Donors>Locate Donor**.

Locating Donor record(s) STEPS

1. Enter as much information about the **Donor** in the fields as possible. The more accurate the criteria, the better chances of locating the correct record.
 - In this example only the **Last Name** equal to **Guerrero** has been entered.
2. Mark the **Exact Match** checkbox to locate only records that specifically match the criteria you enter in the fields.
3. Mark the **Head of Household** to only include this option in your search.
 - If more than one person lives at an address, this checkbox will only return the primary.
4. Click **Locate**.

5. Observe the results of the search for **Last Name** equals **Guerrero**.

The screenshot shows the 'Locate Donor' search interface. The search criteria include: Last Name: guerrero. The results table below shows four records:

Merge	Donor ID	First Name	Spouse	Middle	Last Name	Address	City	State	Country	Zip	Home Phone	Start Date	Company
<input type="checkbox"/>	40676088	Jaime			Guerrero	3667 E 63rd St	Cleveland	OH	US	44105-1211	(555) 555-1212	2024-02-20	
<input type="checkbox"/>	40676090	Carla			Guerrero	509 Smith Brothers Road	Bodega Bay	CA	US	94923	(555) 555-1212	2024-02-20	
<input type="checkbox"/>	40677025	Jose			Guerrero	7355 Cardwell St	Westland	MI	US	48185-2670	(734) 674-3088	2016-05-17	
<input type="checkbox"/>	F18922196	Carlos		E.	Guerrero	955 Peterson Rd	Pierson	FL	US	32180-2913		2023-04-17	

6. Observe the **Color Coding** of the four records:

- **No color** indicates a standard Donor record.
- **Red** indicates Donor record is part of a Pending Batch requiring QC.
- **Green** delineates a Prospect record.

7. To locate another Donor record, click **Clear** to remove the criteria you entered in the fields.

8. OR to open the record, click under the **blue hyperlinked ID** in the far left-hand column.

Wildcard Search

Users can use the **% character** to locate records when only part of the name or ID is known.

The following table identifies different ways to use the % character and includes a description of the results you will receive from your search.

% Character	Results
Search%	Displays records that begin with Search.
%Search	Displays records that end with Search.
%Search%	Displays records that contain Search in the name.
Sea%rch	Displays records that begin with Sea and ends in “rch”.

The wildcard search is useful if unsure of how to spell a donor’s name. For instance, users can enter Sm% in the **Last Name** field to include “Smith” and “Smyth” records in your results.

Note: In order to avoid duplication, it is important that you search for a Donor record before adding a new Donor.

ID Search

Since IDs in the Aegis CRM Database are unique, the most accurate method of finding a record is to search by the **ID** of the record.

