Salesforce & *ascend* 101

Agenda

1. Salesforce 101
2. *ascend* 101
   a. Bio Demo
   b. Prospect Management
   c. Gift Processing

Bio Demo

Topics
1. Home page
2. Create Constituent
3. Constituent overview
4. Related records (Constituent Details Tab)
5. Householding
6. Roll ups to overview page
7. Other features: Global Search, Householding spouses, Knowtify(Alerts)

References in Basecamp:
ascend Bio Demo Complete User Manual v1.2

Prospect Management

Topics
1. Assignments
2. Create Contact Report
3. Create Proposal
4. Research
5. Wealth rating
6. Other Features: Create simple report, List View by PRM

References in Basecamp:

ascend Prospect Management Complete User Manual

Gift Processing

Topics
1. Create a session
2. Expedited Gift Processing v2
3. Session defaults
4. Create pledge and Process a pledge payment,
5. Adjustments and mass adjustments
6. Automatic soft crediting.
7. Other Features: Auto-generate Matching Gifts, Third Party Matching, integration with Double the donation

References in Basecamp:
Expedited Gift Processing (v2) (xGPv2) User Manual

Questions?