



# CATALOG OF SERVICES

Inside:  
Education and services to help you  
customize ClearView CRM, work more  
efficiently, and keep your data pristine



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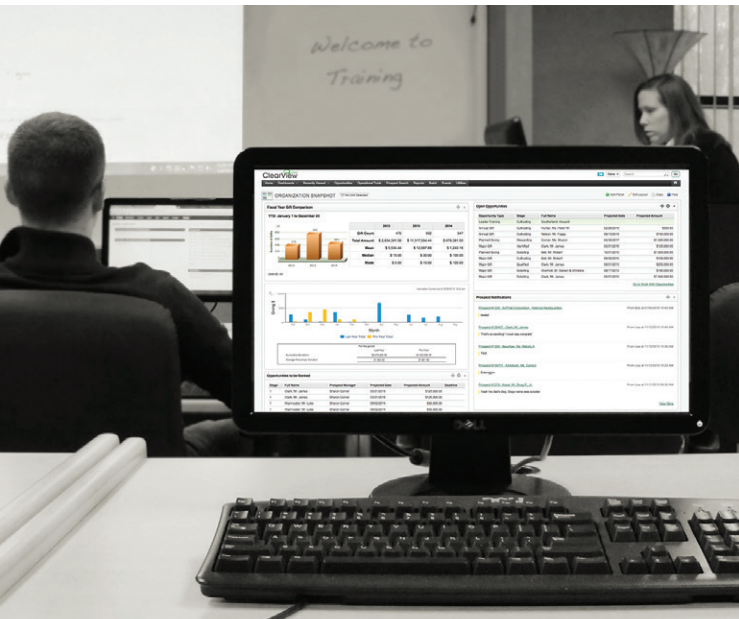
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# TRAINING TOPICS



# ClearView CRM Education



SofTrek offers a full slate of training topics to help you and your staff take advantage of the power and flexibility of ClearView CRM. Training can take place on line via webinar, at your offices, or at the SofTrek Training Facility in Amherst, N.Y.

For more information on any training topic, to discuss date and place, or to get an estimate, contact:

Jill Lemme, Trainer/Instructional Designer,  
at 800.442.9211 or [jlemme@softrek.com](mailto:jlemme@softrek.com)

## Training Options

### Custom Training

Custom training is always available. SofTrek's training professionals can develop sessions that:

- suit your organization's configurations, workflows, and other needs
- use your database and its customizations
- include content, timeframes, and participants that you and your trainer determine are most appropriate.

Contact us for more information and an estimate.

### One-on-one Training

Grab the opportunity for focused, personal training with our professional trainers. One-on-one training can take place via phone, online, or in person. You can ask for a set agenda, or simply let us know your needs and allow the time together to take its own shape. If you or someone on your staff would benefit from one-on-one training from a SofTrek trainer, we'd be happy to discuss what you're looking for and provide an estimate.

# ClearView CRM basics

## General ClearView CRM Navigation

Understanding how to navigate ClearView CRM is critical. In this session, you'll learn about the main Navigation Menu, as well as the most-used options under the User Menu. Finally, a trip through the Site Map will give you quick access to many of the tools you'll need on a regular basis.

## Logging in to ClearView CRM (for clients with live and test environments)

Your organization has two versions of your database: one for testing and one for your real-time, live data. Learn how to log in to each of these environments and bookmark each page so you can save yourself precious time.

## Finding and Creating Prospect Records

Locating a prospect in ClearView CRM has never been easier. We showcase the quick search field, as well as demonstrate how to use wildcard features in both the simple search and advanced search. We will also touch on the recently viewed link in the navigation menu.

## Deciphering Dashboards

Learn how to create dashboards that are relevant to your day-to-day activities, as well as how to edit and copy them. Tour the Panel Library to see why you should be using the standard dashboard panels every day. Find out how many dashboards you can create and how to set which dashboard displays each time you log in.

## Biographical Bonanza

Get ready for a tour of multiple biographical records. You'll not only see how to create a prospect's address, phone, email, foundation and alumni records, but you'll also learn how to edit them. You may experience a sense of déjà vu when you see just how similar the data entry portion of each record is to the others, but you'll leave confident on how to use these features.

## "Extra, Extra!"

Join us for a look at some of the "extras" within ClearView CRM. We'll explore the Additional Demographics record, showing you how to create and edit the fields within. You'll also discover tags, connections and attributes, and the purpose they serve your organization.

## All About Actions

Review the entire actions process in ClearView CRM. We'll start with common types of actions, how to create an action record, and action-specific reports to help guide your solicitation.

## Communication within ClearView CRM

Discover ClearView CRM features that let you communicate with other users in your organization. See how to use notifications, memos and notes. We'll also cover a few features you may not have noticed (e.g., lists and watch on the contact information quick view button, or send email), and why using them can benefit you.

# ClearView CRM basics

**ClearView CRM training can offer step-by-step instruction on time-saving tips, proven techniques, and powerful fundraising features.**



## Rev Up Your Workday:

### ClearView CRM Communications Tools to Streamline Day-to-day Activities

Find out about the tools in ClearView CRM that help your day-to-day tasks run smoother. Turn ClearView into your own personal secretary using features like notifications, actions, lists, watching a prospect and calendar and email integrations. Learn the difference between notes and memos, and understand key places to locate time-saving information.

## Personal Settings Overview

Learn about your personal settings in ClearView, from changing your password and setting up your email and calendar integrations, to managing your favorite lists, navigation menu, dashboards and prospect summary views.

## Help Documentation Overview

Answer the essential question, "Where can I turn for help?" Explore the extensive ClearView CRM Help Documentation site so you know exactly where to find information on specific features and topics and where to go 24/7 when you need step-by-step instructions or a simple topic overview.

## Leveraging the Site Map

Find out about a hidden treasure--the ClearView CRM site map. Located on the navigation menu, this tucked-away gem gives you quick access to a handful of key features. Learn how to start leveraging key links in the site map.



## Opportunity management

## Creating New Opportunities

New to opportunity management? This first session will offer you the basics. We'll discuss what an opportunity is and how you can benefit from using opportunity management tools in ClearView CRM. You'll also learn how to create an opportunity record for existing and new prospects.

## Editing and Advancing Opportunities Through the Pipeline

For your second session on opportunity management, we'll dive into existing Opportunity records to learn how editing the records works. You'll see how to use your opportunity portfolio to advance your prospects through the opportunity pipeline, and even how to close an opportunity record at the end of the process.

## Opportunity Management: Dashboards & Reports

This final session on opportunity management will help you understand how the opportunity process comes full circle by learning about dashboard panels and standard ClearView reports based on opportunity records. Find out how to gain quick access to key pieces of opportunity information to better help you advance those records through the pipeline to completion.



# Business intelligence and reporting

## **“I Need a Report. Now What?”: Using Existing (and Conceptualizing New) Reports to Get the Data You Need**

Explore ClearView's robust collection of standard reports to help you hone in on the appropriate data. If a standard report doesn't fit the bill, learn to scope out your needs including conceptualizing and sketching a unique report that supports your vision and outcomes. If you need SofTrek's help, learn how to submit a report request, including providing input to help turn around your custom reports quickly.

*Note: Does not include ad hoc report building.*

## **BI Reporting—Basic**

Learn about ClearView CRM's built-in library of reports and basic reporting tools, as well as about the reports mini-editor and copying reports from the business intelligence repository.

*Note: Does not include ad hoc report building.*

## **BI Reporting—Intermediate**

Find out how to run and modify reports from ClearView CRM's built-in library for your organization's needs, as well as how to use the ad hoc view builder to create your own basic ad hoc views and reports.

*Prerequisite: BI Reporting—Basic session*

## **BI Reporting—Advanced**

Discover the differences between topics and domains, dig into advanced mini-editor features, and beef up your skills to create many different chart-style reports with guidance from a dedicated SofTrek trainer:

*Prerequisite: BI Reporting—Basic and Intermediate sessions*

## **Power-user Reporting—Basic**

Learn how the features in ClearView's advanced report-writing tool can help report developers build basic power reports while gaining hands-on experience.

*Prerequisite: Jaspersoft Power User license, and competence with SQL syntax and usage*

## **Power-user Reporting—Intermediate**

Find out how to use more complex tools, like sub-reports, maps and input controls, within ClearView's advanced report-writing tool to build custom, complex power reports.

*Prerequisite: Jaspersoft Power User license, Power User Reporting—Basic session, and competence with SQL syntax and usage*



# Events and registrations management

## Creating a New Event

New to events and registrations management? This should be your first session to learn the basics. We'll discuss what events and registrations management is and how to create and set up a new event record in ClearView CRM.

## Adding and Editing Event Registrations

For your second session on events and registrations, we'll dive into existing event records to learn how to add new registrations. From single participants to team registrations, you'll learn how to enter them all. Once registrations are added, you'll learn how to edit existing registration records to update fees or add team members as guests.

## Events Dashboards & Reports

For our final session on events management, you'll understand how the events process comes full circle by learning about dashboard panels and reports based on registration records. Find out how to gain quick access to key pieces of registration information right from a dashboard panel and how to export that data into an excel spreadsheet. Learn about reports related to events and how they can be used to help your event run smoother.

## I've chosen our topic. Now what?

Your next step is figuring out exactly how your ClearView training will proceed. Take a look at the options below, then let us know your thoughts so we can provide an estimate.

### Location

- Online via GoToWebinar
- On site at your offices
- On site at the SoftTrek Training Facility

### Follow-up resources

- Practice activities
- Trainer support
- FAQ reference documents
- Video portfolio
- Custom documentation
- One-on-one training consultation

# Administrative privileges

## Customize the ClearView Database for Efficiency: Using Basic Administrative Tools to Mirror Your Business Rules

Save time and eliminate needless data entry for colleagues by learning about the main administrative privileges that allow you to customize your database. From modifying menus to rearranging fields and defaults on screens, personalizing ClearView CRM to your business rules reduces incorrect data placement and ensures only data important to your organization is being stored.

## Protect Your Database Through Customization: Learn ClearView's Intermediate Administrative Essentials

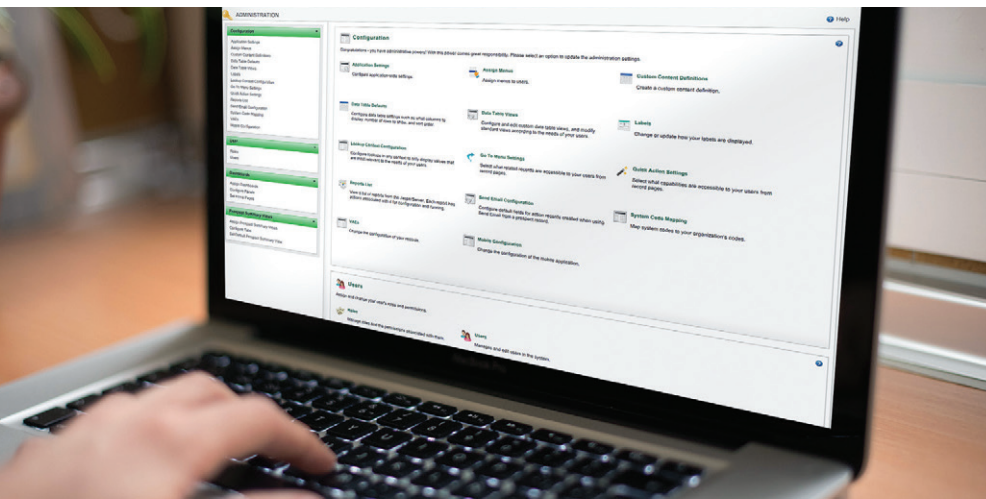
Protect your data by modifying aspects of ClearView CRM. Customize labels or application settings to ensure your organization knows where to capture relevant information. Grant permissions to certain roles, and learn the benefits and consequences of those actions. Additionally, educate administrators on tools like data table views, table maintenance and solicitors to safeguard your database from redundant information.

## Advanced Administrative Privileges

We'll explore configuration tools like lookup context configuration, system code mapping (via table maintenance) and mobile app configuration, and understand what parts of ClearView those affect. Other highlights include learning how to configure your own dashboard panels and prospect summary view tabs using the configure panels and configure tabs options in the administration screen.

## Administrative Extras: Utilities

This session is to help ClearView users who have administrative permissions understand more complex functionality available from the database. Learn about utilities, from understanding what tracks are and how to create them, to using auto update, SQL query tool, scheduled jobs, and more.



# Using other ClearView CRM features

## Welcome to ClearView CRM Mobile

Get an in-depth look at how to navigate and use the range of functions available within the mobile app.

## Understanding and Using ClearView Batch

Receive an overview of everything related to Batch in ClearView CRM, including best practices on the workflow to follow, creating a batch from a template, and entering different transaction and payment types. We'll end with posting batches and understanding some common suspended batch types.

## Committee and Volunteer Management

Learn to create and manage volunteers and committees within Operational Tools, and to assign and manage prospects in committees in ClearView.

## Planned Giving Management

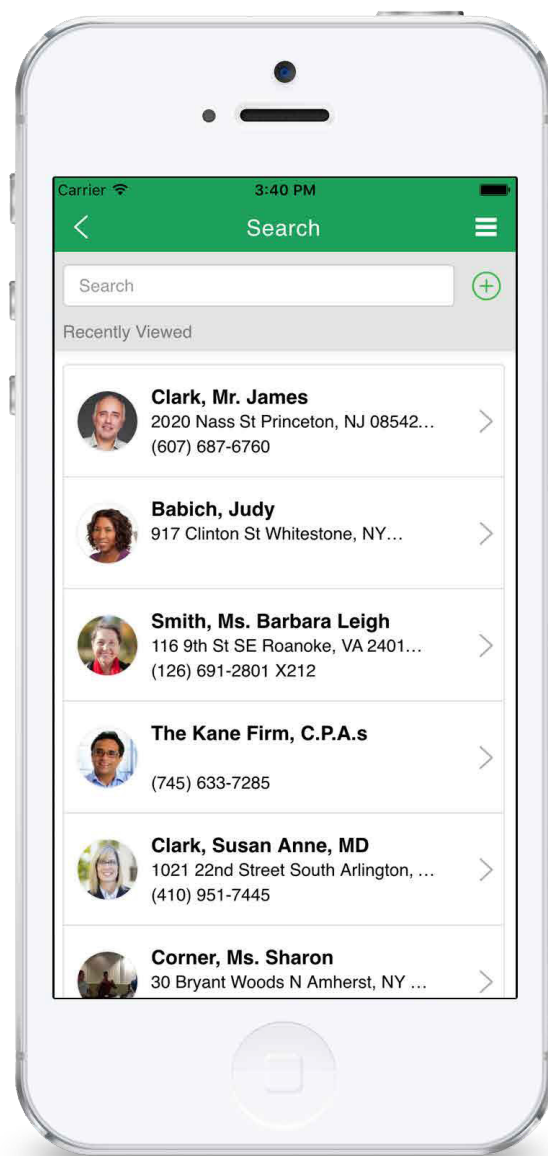
Take an in-depth look at creating and managing planned gifts for organizations that use the ClearView CRM's Planned Giving feature.

## WealthEngine Integration

Receive an overview of how WealthEngine works and where it stores the information it collects.

## Constant Contact Integration

Find out how Constant Contact can integrate with ClearView and the purposes for using this email marketing tool.



# REPORTING, CUSTOMIZATION, AND DATA MANAGEMENT SERVICES

**SoftTrek offers a range of services—**

from custom development and report creation to data import/export and appends—that ensure ClearView CRM performs exactly the way you need it to. Get in touch with us to:

- tailor ClearView CRM to your organization's business rules
- create customized reports, dashboards, and BI tools
- make sure your data is pristine
- streamline the way your staff work



# Direct mail and email support

## Data selects and mailing segmentation

Develop highly targeted direct-mail campaigns that offer increased effectiveness and measurable ROI by creating list selections with complex segments of thousands or even millions of people.

## Acquisition list loading and deleting

SofTrek's lockbox import/export tool will allow you to export files to direct mail agencies or mail houses and receive files from caging or other services. We can also purge lists once mailings are complete.

## Payment/pledge acknowledgments

Generate good will and meet IRS requirements more easily and quickly by automating the process of acknowledging donations and/or pledges with a daily mail file for the previous day's payments.

## Pledge billing

Keep an important, ongoing revenue source on track and accurate. Generate pledge reminders, standard billings, and credit card billings by creating a billing table—the source for export files, reports, and custom billing forms.

## Constant Contact email blasts

Generate effective, appealing fundraising and advocacy email blasts with Constant Contact, the industry standard for email marketing.

## Membership billing segmentation

Manage membership billing based on your selection of members meeting certain criteria. Query or export the data, or run a custom billing program to print bills.

## Receipts processing

Handle ongoing and year-end receipt processing to meet U.S. and Canada taxing authority receipting requirements for gift payments.

## Premium fulfillment processing

Create and export premium fulfillment files to provide your premium vendor with necessary fulfillment lists.

## Magazine subscription processing

Allow people to subscribe to your organization's magazine, complete with payment processing.



# Custom development

## System analysis and design

## Programming and testing

### System integration

Quickly and easily get data into and out of ClearView CRM. Integrations can send data in one or both directions, and you can continue to report from one or both systems. You can also make ClearView CRM your database of record by storing data from all your systems in ClearView's core donor database.

### Application programming interface (API) development

SofTrek provides a complete application programming interface (API) that can connect any application to ClearView and share information bi-directionally. The API also supports integration to online engagement tools.

### Custom development

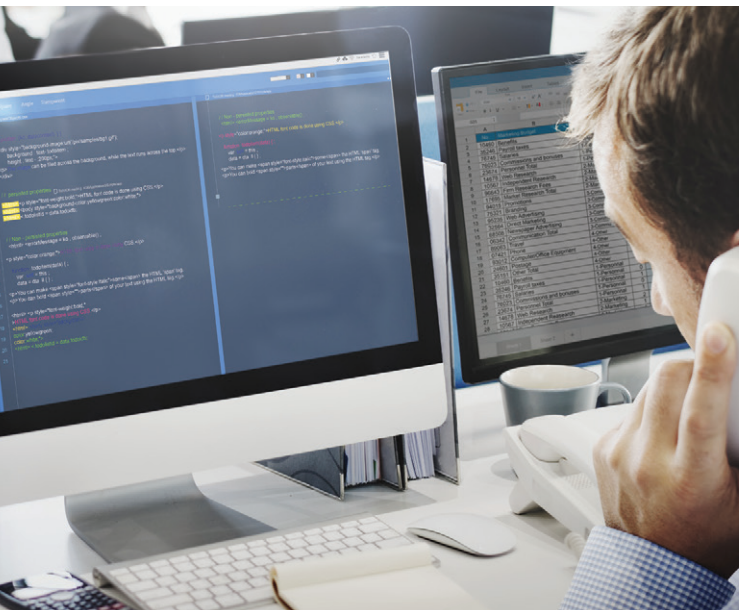
SofTrek can help you integrate systems, develop specialized triggers, embed reports and dashboards, add custom fields to screens and more. Custom screens, forms and web pages can provide utility-type functionality that interacts seamlessly with ClearView CRM's core donor database (a report that acts as a receipting utility, for example). We can also create screens with your custom reports with interactivity specific to your organization or implement custom solutions for auditing important data.

### SQL updates/queries.

Get SQL queries that can meet a range of needs for your organization. Quickly streamline and handle processes like selection filtering, bulk-updating data, creating quick data pulls and more.

### Custom notifications

Get alerts in ClearView CRM when important events occur. Custom notifications can make you aware of a range of occurrences like major gift payments, giving level milestones, solicitor actions, changes in contact information, and more.





# Custom report development

## BI analysis/design

## BI software development

### Business intelligence analysis and design

SofTrek can produce effective business intelligence for your organization by transforming your data into meaningful and useful information. We can help you organize your data from the ground up so it is reportable and provides insights that inform strategy.

### Custom report development

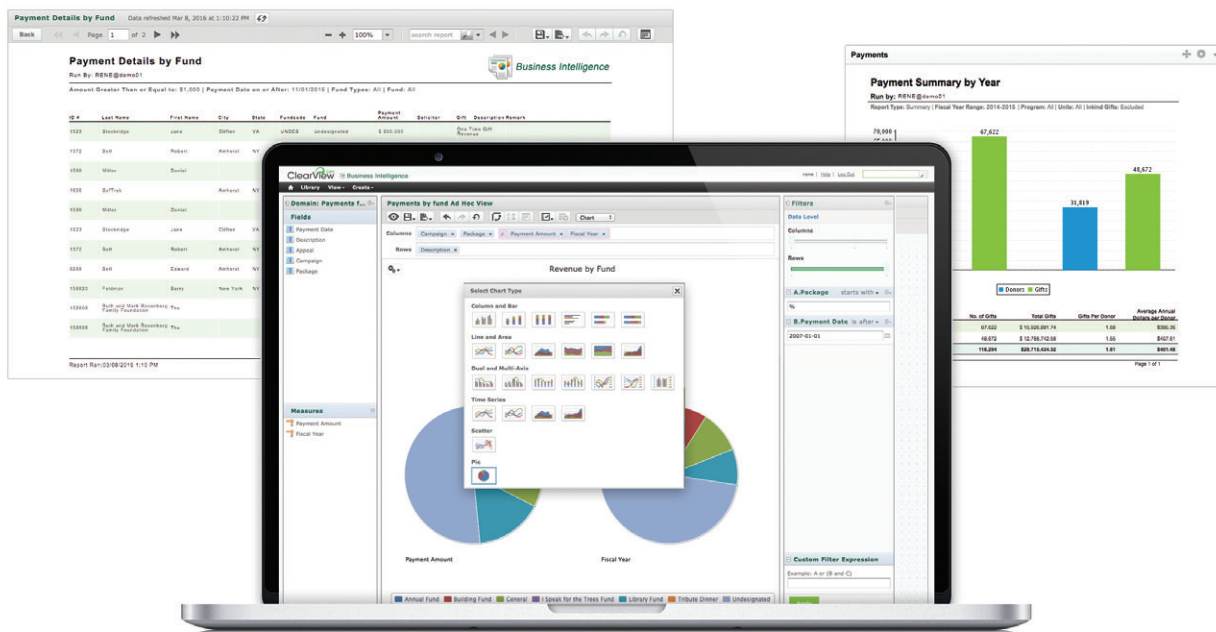
Your data is only as good as the reports you can run on it. Consult with a SofTrek reporting expert to design and create reports that measure and illuminate, including interactive reports and drill-down charts and graphs that are easily understandable and exportable.

### Custom dashboards and panels

Create dashboards and panels that can give your organization at-a-glance insight and data on a range of measures and activities. You can develop dashboards on single topics—solicitor or campaign results, for instance—or combine panels in a dashboard that focuses on your key KPIs.

### Custom data warehousing

Running reports—especially complex reports with voluminous data—is easier and faster with a custom data warehouse based on your business logic. Reports that might take hours to produce can take mere seconds.



# Appendix

## Data governance

### Validations

#### **Addresses**

Critical constituent communication relies on accurate contact data. Address verification services let you verify, correct, transliterate, and format addresses from all over the world before you send out appeals, acknowledgments, letters, and other mail.

#### **Auto-update**

Create, delete and/or update identical information for a large number of records at once. This service is ideal for adding consistent interest codes, actions and more.

#### **Coding accuracy support system (CASS) certification**

Validate, correct and standardize customer address data to qualify for the highest postal discounts. CASS certification verifies the accuracy of data cleansing and address matching and provides valuable postal discounts for qualifying mailers.

#### **Data cleansing, coding and organization**

SofTrek services to de-clutter your system include putting triggers in place to address new business rules or workflow changes, and creating custom scripts to ensure clean, well-organized and consistent data that's more readable and usable. We can also develop strategies for your code structure that will ensure your data is eminently reportable.

#### **Deceased processing**

Verify the death of people in your database to eliminate the possibility of sending inappropriate communications. Deceased processing can easily be scheduled in conjunction with an NCOA process (see National Change of Address updates).

#### **Duplicate resolution**

Reduce the number of redundant records in your database through duplicate identification and resolution by merging or other methods.

#### **Email append and verification**

Improve conversion rates for your email fundraising campaigns, and complete your donor records. Email append and verification services identifies invalid emails, fixes errors and adds as many business or personal email addresses as possible.

#### **Geographic data and U.S. Census demographics**

Add latitude and longitude information to street addresses in your database to visualize constituent relationships, which makes analysis easier and improves the intelligence you gather. The geographic data also includes Core Based Statistical Area (CBSA) information for metropolitan and micropolitan areas. Use tract and block numbers to link addresses to demographic information and valuable U.S. Census marketing data.

*Clean, accurate, and  
consistent data saves  
you time and  
money*



#### **National Change of Address (NCOA) updates**

NCOA updates make your mailing lists more accurate and reducing “undeliverable-as-addressed” mail by identifying and updating the addresses of people and businesses that have moved. NCOA updates help reduce costs and increase effectiveness of your mailings.

#### **Phone number validation**

Maximize your solicitation response rates by verifying phone numbers via a database of 110 million U.S. and Canadian residential households, then attaching missing or different numbers.

#### **Salutations, name spelling, gender identification**

Create personalized messages, and identify the gender makeup of your database. This service parses full names and multiple names so you can correct misspellings like “Jonh” to “John” and use correct salutations. It can also apply a gender code to each record in your database.

#### **Wealth screening**

Make sure your organization asks the right person for the right amount, in the right form, at the right time by mining your database to provide wealth ratings—an effective way to screen people with the greatest potential to become major and planned givers.

# Data import/export

## **Accounting (general ledger) interface**

Ensure fundraising and accounting figures match by exporting transactions from ClearView CRM into your accounting system. These transactions are updated with a date showing that they were sent to accounting and can no longer be edited.

## **Prospect research**

Create a list of prospects from ClearView CRM and submit the list for wealth screening. Then use comprehensive prospect and donor data to create targeted solicitation and donor lists and rate candidates for major or planned gift proposals, track the history of your research on each prospect, segment and run lists from your database and more.

## **Lockbox processing and ETL (extract/transform/load)**

Ensure accurate data and save time by eliminating manual data entry by importing or exporting data. SofTrek will use the most appropriate tool to import/export data from another system or range of other sources with all validations and business rules consistently applied.

# Conversion services

## **Project management**

Ensure your conversion to ClearView CRM or integration of ClearView CRM and another system is on time and well managed with a SofTrek dedicated project manager. A PM can collaborate with your internal PM or act in that role for you and SofTrek.

## **Data extraction and conversion**

SofTrek can move ClearView CRM data into another system (e.g., general ledger/accounting), following specified file formatting to ensure accurate conversion.

## **Conversion analysis, programming**

SofTrek will develop a thoughtful strategy to convert your data from an existing system to ClearView CRM. Analysis is the first and most crucial part of this service, helping ensure that data mapping is accurate. If desired, SofTrek can make ClearView's core donor database the single source of data among several systems or applications.

# *Interested in taking advantage of one or more of the SofTrek services in this catalog?*

We would be happy to discuss your needs, answer your questions and provide an estimate of time and cost. Get in touch in whichever way is easiest for you:

**SofTrek Client Services:** [support@softrek.com](mailto:support@softrek.com)

**SofTrek Client Education:** [training@softrek.com](mailto:training@softrek.com)

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