

Union Rescue Mission saves costs, gains accuracy with ClearView CRM

The ability to automate gift processing has been a clear boon to efficiency and accuracy—and to the budget—for Union Rescue Mission. ClearView CRM's lockbox feature allows the mission to import gifts directly from its scanner system, increasing accuracy and reliability while reducing bank fees and labor costs.

Used in combination with a check-image scanner with image technology software, ClearView CRM:

- reduces the amount of bank fees by capturing check images
- saves the organization time by automatically endorsing checks and printing deposit reports
- increases reliability by reducing equipment downtime
- reduces labor costs associated with staff re-entering data
- guarantees accuracy by eliminating data entry errors
- increases the volume of mail that the organization can handle

With the lockbox feature, Union Rescue Mission staff scans checks and response coupons to create electronic images. ClearView CRM saves the images for future reference, eliminating the need to microfilm or copy checks. Image files from the scanner are loaded onto ClearView CRM's FTP site, where a custom-designed procedure automatically pulls and preprocesses files from the site every 30 minutes. Preprocessed files are immediately processed through the lockbox feature to create batches. The system checks gifts for validity before posting them to the ClearView CRM database.

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“The net result is saving thousands of dollars.”

*David Lopez
Manager, gift processing*

Technologies combine to improve procedures

The marriage of ClearView CRM with image technology allows Union Rescue Mission to improve its processing procedures, accuracy, and overall reliability while reducing operating costs. That means it can devote more money to its mission of helping people and families break the cycle of poverty and achieve self-sufficiency.

The Lockbox feature includes options to update donor name and address information; import donations, pledges, and pledge payments; load multiple batches in one step; automatically add new donors generated from acquisition mailings; automatically enter imported transactions into batches for review and approval; and check for duplicates.



Contact SofTrek

Learn how your nonprofit can increase productivity and save money with ClearView CRM.

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