Setting up Your Organization for Success with Network for Good

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Agenda

Onboarding Process

How to Get Help

Fundraising Software Overview

Next Steps and Login

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Onboarding Process for New Customers

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Your Goal for Onboarding

Master the basics of your new fundraising software in your first 90 days so you are set up for success and can become a more confident fundraiser

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Onboarding Team

- Assigned an onboarding specialist during your first 90 days

- Will meet with you or your team 2-3 times over Zoom

- Here to provide:
  - Training on key features in your software to help you raise more money and engage with donors better
  - Assistance with the data import process

- In back-to-back meetings, so please use Customer Support for software questions outside of your meetings

You should have a 1:1 scheduled with the Onboarding Team now!

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Foundational Webinars

- Live, group webinars hosted by the Training Team in Bonterra Academy
- Will help you accomplish major tasks in your software.
- Self-paced learning.
- Hosted at least once a week and can be taken in any order!
- Recordings are also available if the webinars don't fit your schedule

Please sign up for a data import webinar and the Creating Highly Effective Fundraising Pages webinar!

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Foundational Webinar	Objective
Creating Highly Effective Fundraising Pages	Build your first donation page
Preparing Your Org's Data for the Data Import Team	For organizations with the paid data import service to help you gather and prepare your data for import
Self-Importing Your Data Successfully	For organizations doing a self-import to help you gather and prepare your data for import
Sending an Email Blast	Send a test email blast
Saying Thanks with Acknowledgments	Review acknowledgment process and learn how to create templates
Leveraging Your Data via Filters	Learn how to build simple and complex filters in the Contacts and Giving tab

Onboarding for New Customers Timeline

WEEK 1
- Attend **Setting up for Success** webinar
- Add all admins
- Attend the **data import webinar** that fits your org's needs
- Set up Bonterra Payments

WEEK 2-3
- Export data into .CSV or .XLS
- Attend **Creating Highly Effective Fundraising Pages** webinar and build your first donation page

WEEK 4
- Self-import your final file or send in your spreadsheets to the Data Import team
- Resolve import errors
- Share your fundraising page online

BY WEEK 6
- Attend **Sending an Email Blast** Webinar
- Attend **Saying Thanks with Acknowledgments** Webinar

BY WEEK 8
- Ensure existing fundraising processes are functioning in your new software
- Attend **Leveraging Your Data with Filters** Webinar

BY WEEK 10
- Attend advanced webinars for continued learning

Customers always get ongoing support from the Customer Support team!

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How to Get Help from the Customer Support Team

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Contacting the Customer Support Team | 8am – 7pm ET

Chat

- In-app messenger support for quick, technical questions
- Blue dot in bottom right corner of system
- Expect a reply in 2-3 hours

Email

- success@networkforgood.com
- Dedicated team to resolve product problems and questions
- Expect a reply in 2-3 business days

But first!

You can access **View Guides and Help Articles** in the Help tab in your software to find a comprehensive library of articles, guides, walkthroughs, and videos.

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Fundraising Software Overview

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How Funds are Disbursed

- **All** credit card donations are processed through Network for Good's Fundraising Pages

- Donations immediately populate in your Donor Management system on the Giving tab

- Transaction fees can be covered by the donor during the checkout process

- If you have questions about your payment processor, please contact our Customer Support team at success@networkforgood.com

Bonterra Payments (Powered by Stripe)
Disbursed in five business days
Need to complete sign up before you can receive donations
Apple Pay and Google Pay as checkout options

PayPal
Funds available in your PayPal account
Must complete signup to use
Includes **Venmo** as payment processor

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Next Steps and Login

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Data Import Process

Importing all your contacts and donation history helps you uncover insights about your fundraising and build segmented lists for targeted outreach.

Steps:

1. Gather your data from all legacy sources

2. Put your data into spreadsheets (.csv or .xls files)

3. Clean the spreadsheets as needed

4. Upload into the software for import:
   a. Self-import individual contacts and donations
   b. Send to our Data Import team (2-4 week timeline) if a part of your subscription

Data Import Team

YOU:
Gather data and put in spreadsheets

Self-Importer Tools
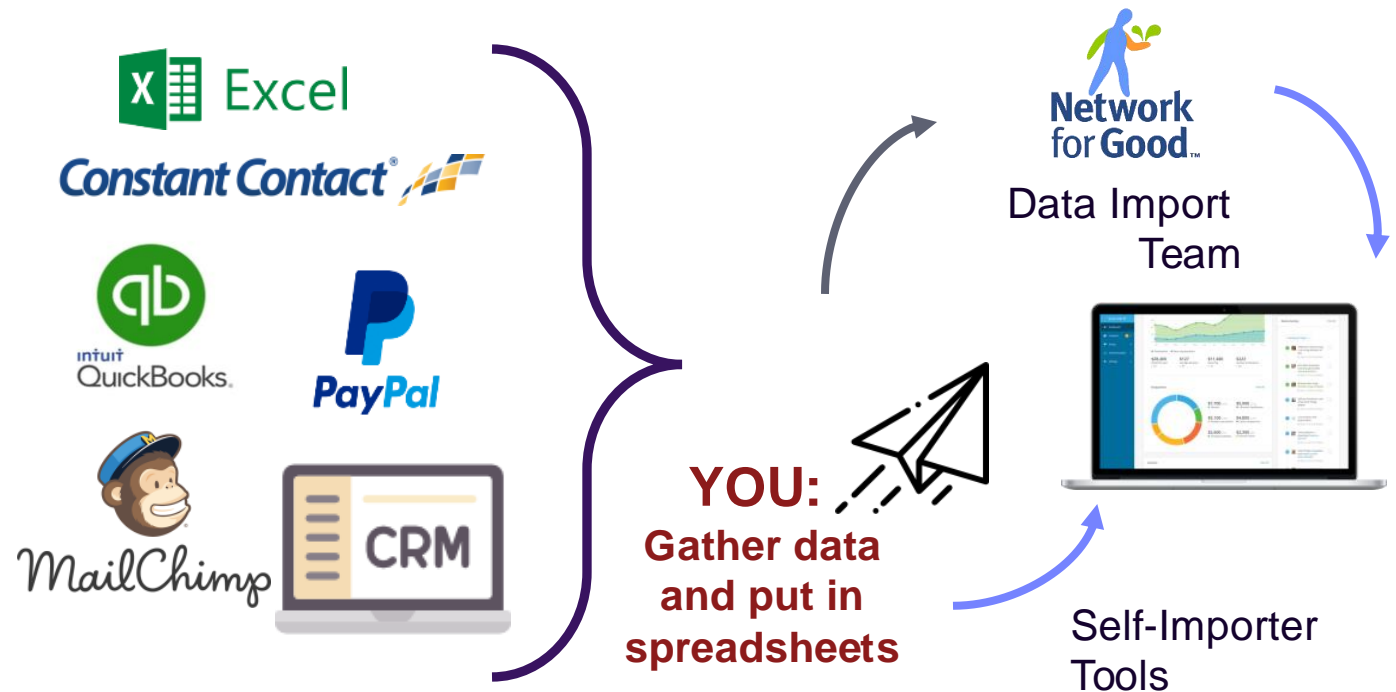
You'll learn everything you need to know about importing your organization's data in the training webinars!

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Personal Fundraising Coach
SUBSCRIPTION ADD-ON

If you have a Personal Fundraising Coach as a part of your Network for Good subscription:

1. Visit the Tasks area in your software

2. Complete the task to select your coach and schedule your first meeting

If you are interested in learning more about this paid service, please reach out to our sales team!

Cindy Harris

Available

i Seasoned, Results-Focused Professional
Valley Village, CA
Video Intro
LinkedIn
View more details >

John Gilchrist

Available

i Fundraiser, Mentor, Teacher, Drill Sarge
Dallas, TX
Video Intro
LinkedIn
View more details >

Janet Cobb

Available

i Accountability Partner, Educator, Coach
Chicago, IL
Video Intro
LinkedIn
View more details >

Lucas Metropulos

Available

i Modern Fundraiser & Social Entrepreneur
Boca Raton, FL
Video Intro
LinkedIn
View more details >

Andrea Holthouser

Available

i I help clients define & achieve success
Brevard, NC
Video Intro
LinkedIn
View more details >

Tracy Vanderneck

Available

i Experienced, versatile coach.
Bradenton, FL
Video Intro
LinkedIn
View more details >

Naheemah McMicheaux-McCallop

Available

i Storytelling Culture Catalyst
Long Beach, CA
Video Intro
LinkedIn
View more details >

Michele Peters

Available

i Servant Leader with Fundraising Passion.
Sebastian, FL
Video Intro
LinkedIn
View more details >

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Homework

1
- Add all admins
- Attend the **data import webinar** that fits your org's needs

2
- Set up Bonterra Payments
- Attend the **Creating Highly Effective Fundraising Pages webinar**

3
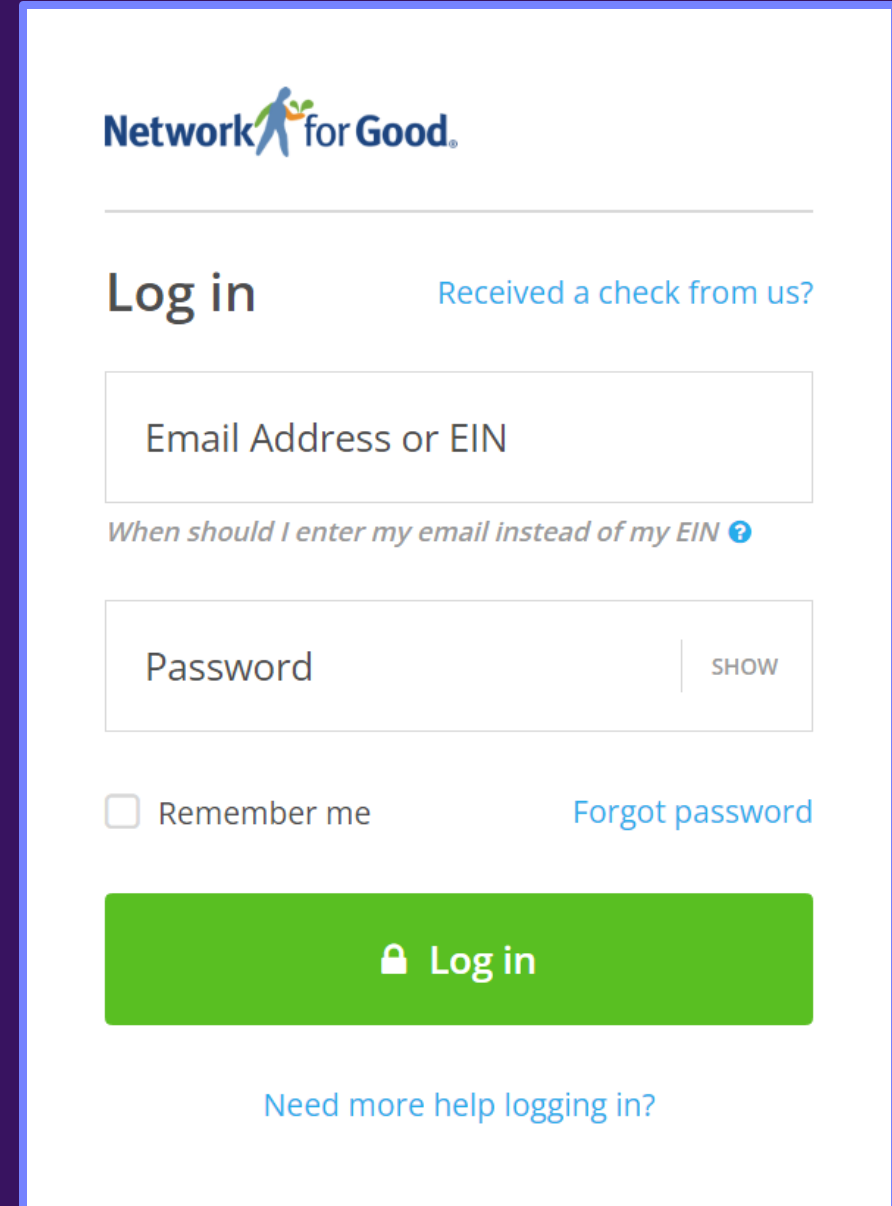- Export your data from legacy software into .CSV or .XLS files

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Let's Log in!

Visit https://networkforgood.com/login directly in your browser

If you haven't set your password yet:

1. Select **Forgot password**

2. Enter your email address

3. You'll receive a link to set your password

4. Log in!

5. Enter the code texted to you

Please be sure to log in with your email address and not your organization's EIN

Network for Good.

Log in   Received a check from us?

Email Address or EIN

When should I enter my email instead of my EIN ❓

Password   SHOW

☐ Remember me   Forgot password

🔒 Log in

Need more help logging in?

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Q & A

- Ask questions about functionality covered in this training

- Ask real-life application questions

- Or sign off and we will see you in the next training!

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Thank you for attending!

We hope to see you
in future trainings.

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