

Bonterra™

**Managing Your Data in
Network for Good**

Agenda

Easy Filters

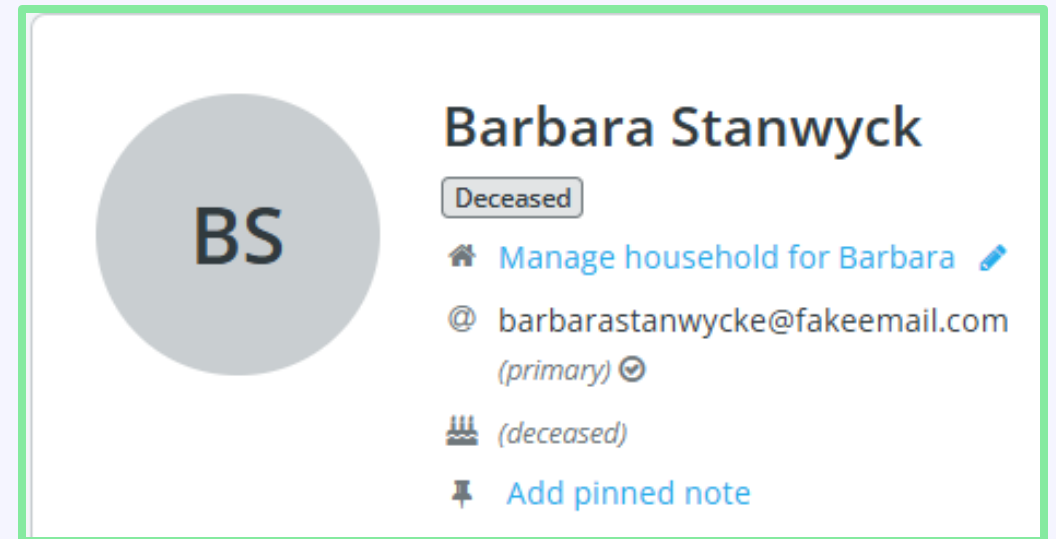
Resolving Duplicates

Deceased Functionality

Groups and Custom Fields

Using the Deceased Functionality

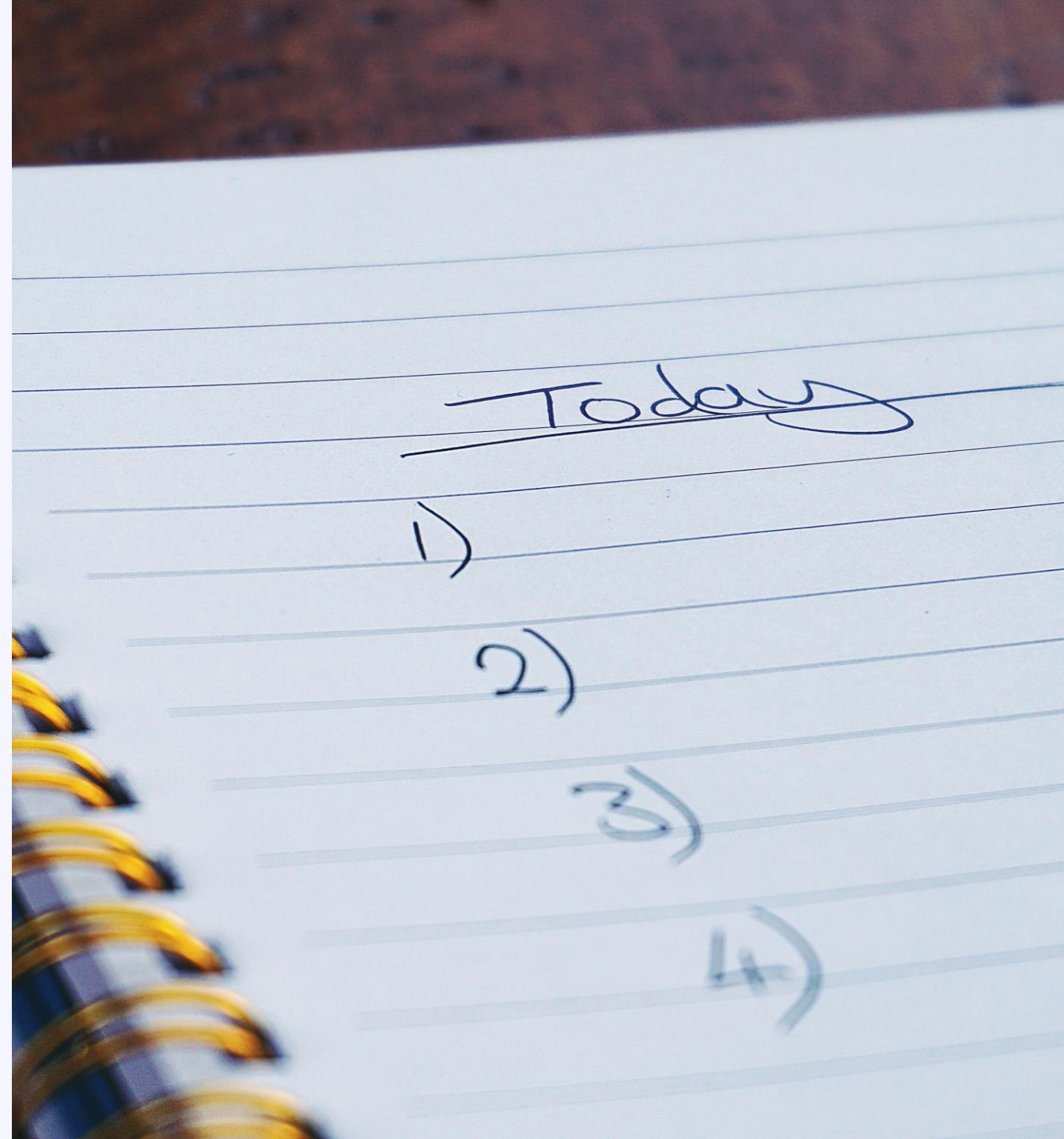
- When enabled, a new donor status of 'Deceased' will be applied to the contact
 - Visible on Contact card and profile
 - Other donor statuses removed (active/lapsed)
- Suppressed from all communications
- Deceased is available as a Filter condition in Contacts and exportable as a column field
- Contacts can be imported as deceased
- If you've been using Custom Fields to track deceased supporters, you can do a bulk update in Bulk Actions



Put it all together

Use these best practices to ensure your donor management system is setup for long-term success:

1. Use filters to identify “missing” contacts and remove if necessary
2. Be sure to resolve any lingering duplicates
3. Update all deceased contacts
4. Keep your Groups simple and valuable
5. Don't use Groups that are better suited for Filters
6. Define your Custom Fields to prevent differences in recording information



Additional Resources

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.

Q & A

We value your feedback!

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!



Thank you for attending!

**We hope to see you
in future trainings.**

