



VICTORY OUTREACH INTERNATIONAL

Data Entry Processes

Given by:
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VOI Staff



— WORLD CONFERENCE —

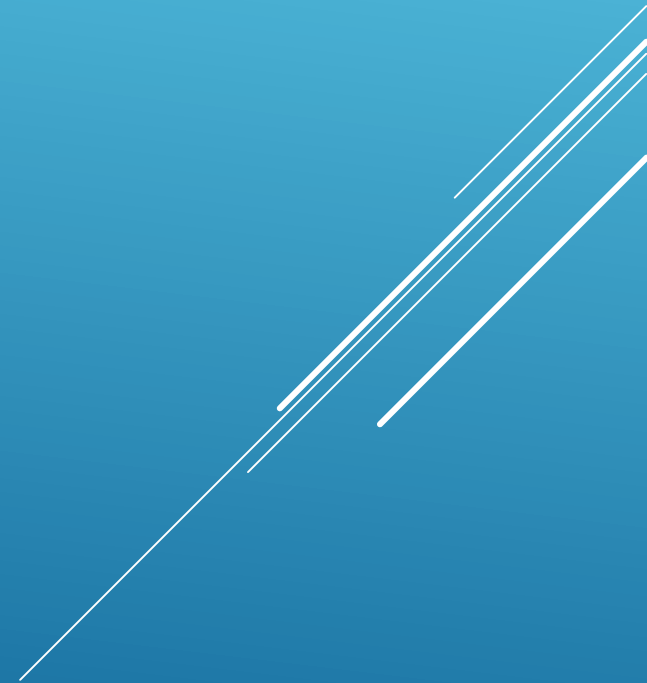
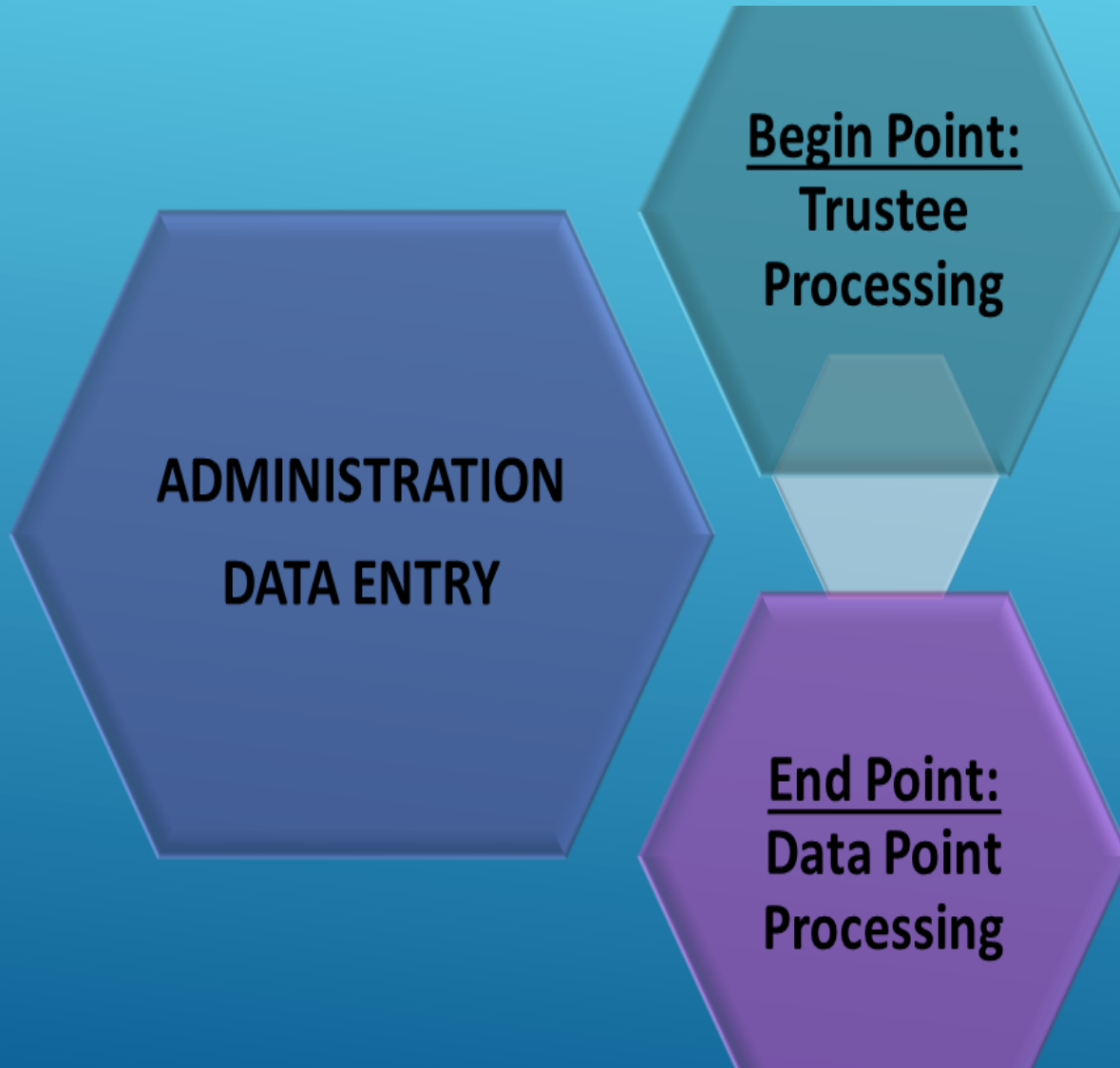
INTRODUCTION

- ▶ World Conference 2017 we are celebrating our 50th
 - ▶ We have family all around the world coming together
 - ▶ Date: July 10th through 14th
 - ▶ Location: Los Angeles Convention Center
 - ▶ Reminder: **Register to volunteer at VictoryOutreach.org**
 - ▶ Introduce WC Finance Team
 - ▶ Trustee: Rosanna Carrillo & Susan Kelly
 - ▶ Data: Tammie Lauterio & Jessica Sanchez
- 

IMPORTANT

- ▶ Day of volunteering:
 - ▶ We represent our Multi-Region
 - ▶ We are on time
 - ▶ No phones
 - ▶ No visits
 - ▶ Be sure to check in badge
 - ▶ Check in will be at the main information/register booth
 - ▶ Will not have access to Data Room without badge
 - ▶ No visits during the time we are processing data
 - ▶ As we serve all we do is confidential
 - ▶ Our labor is not in vain
- 

LET'S BEGIN!

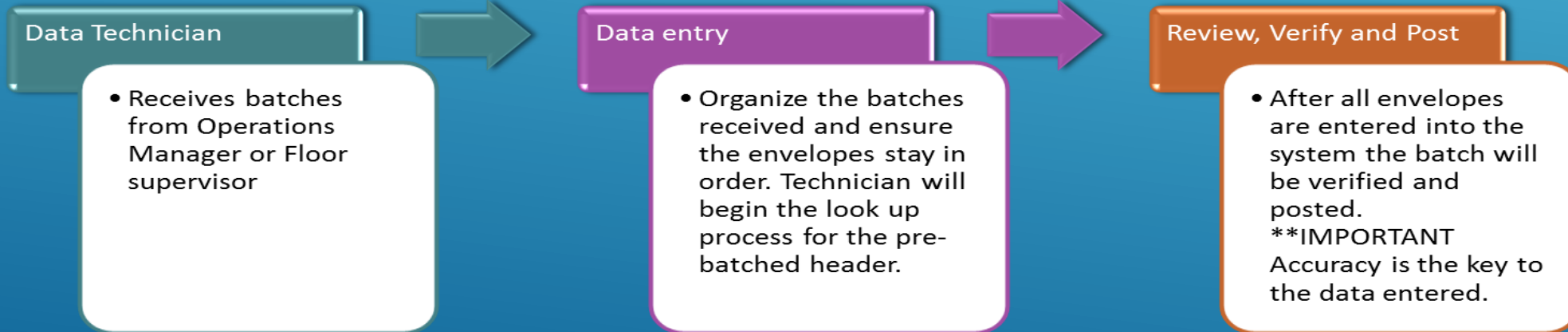


DATA POINT CENTER FLOW CHART


DATA POINT CENTER

PROCESSING CENTER TEAM MEMBERS:

Operations Manager
Floor Supervisor
Data Entry Technician




GETTING STARTED

- ▶ Trustee lead will bring all processed batches to the Data entry area.
 - ▶ Operation Manager(Key Lead) will receive batches and enter batches by searching for the batch number pre-printed on log.
 - ▶ All batch number will be Pre-batched in Tracker system -New.
 - ▶ Batches with account numbers will be distribute to be enter batch data online.
 - ▶ Important batches are entered correctly by
 - ▶ Batch number
 - ▶ Member
 - ▶ Amount
- 

DESIGNATED TEAM

- ▶ 3 to 5 helpers
 - ▶ Will assist to look up member's account numbers
 - ▶ Will create new members accounts if not found
 - ▶ This will help to speed up the process for those entering data

 - ▶ Side note: On Appeal night will have batches separated by UWC level but data process will remain the same.
- 
- A decorative graphic consisting of several parallel white lines of varying lengths and orientations, located in the bottom right corner of the slide.

LOGGING IN

Give here now
You don't need an account to give

Sign up
Receive benefits like Video streaming

Victory Outreach Member Leadership Cloud System

Apply for
Urban Training Center or Minister Exam

Sign In

To access your account please sign in

User:

Password:

Remember Me

[Can't access your account?](#)
[New member? Create an account here](#)

Username and Password will be posted in on laptops
Along with Cheat Sheets

Home Downloads Ministerial Education Management UTC VETI Email Communications Settings Reports

Welcome Data Training

Profile

Image Not Available

ID: 128397
 Name: Data Training
 Home Address: -
 Email: Email not verified [Verify Email]
 Cell Phone: -
 Home Phone: -
 UWC Level: -
 [Update Profile]

Role(s)

Organization	Role
Victory Outreach International Organization	Staff Login Administrator
Victory Outreach International Organization	Administrator

Actions

- Update Profile
- Give a Gift
- Change Password
- Update Address
- View Coaching Network
- View Membership Level
- View My Reports

Management Options

- View my Reports
- Manage Constituents
- Manage Organizations
- UTC Applications
- Go to Gift Batch
- Find a Gift

Management and choose Gift batches

Home Downloads Ministerial Education Management UTC VETI Email Communications

Manage Gift Batches

Add Refresh Show/Hide Columns

Actions	Batch Number	Type	Amount
[Update] [Delete]	080509100CV	Cash and Checks	\$82.00
[Update] [Delete]	080509101CV	Cash and Checks	\$371.00

Individuals
 Organizations
 Gifts
Gift Batches
 Funds
 Appeals
 Fee Adjustment Requests
 Notifications of Change
 Regional Report Submissions
 Process New Member
 Process Free Gift

Look up batch number
 Example: 071017100WCPM
 Click up Update

Add Batch Detail

Batch Number
032517300WCSATAM1

Create Multiple

Date
3/25/2017

Select Organization
203221-V. O. International Events

Fund
United We Can

Default Appeal
WCONF 2017 - UWC

Gift Count
5

Batch Amount

Currency
USD

Sub Type
Soft Credit

Batch Type
Cash and Checks

Is Active
 Is Posted

Notes

[Scanned Batch](#)

Document
 No file chosen
 Check to remove document

Fund/Suffix/Qty (limit 10) /Start

Print Appeal Name (Event Name)

Batch Reference Number

1. Confirm batch number on batch header

2. Confirm Gift count

3. Enter Batch Amount

Will be shown in hands training.

4. Click Batch Detail

Click on the first entry row

Verify Print Post Report Add New Gift Return To Batch Return To List Post Batch

	Count	Amount
In Header	5	\$160.00
In Data	5	\$0.00

ID: DT: - AM: \$0.00 GT: - CNUM: CTYP: - FUND: U-UWC APPL: CS-CHURCH -
ID: DT: - AM: \$0.00 GT: - CNUM: CTYP: - FUND: U-UWC APPL: CS-CHURCH -
ID: DT: - AM: \$0.00 GT: - CNUM: CTYP: - FUND: U-UWC APPL: CS-CHURCH -
ID: DT: - AM: \$0.00 GT: - CNUM: CTYP: - FUND: U-UWC APPL: CS-CHURCH -
ID: DT: - AM: \$0.00 GT: - CNUM: CTYP: - FUND: U-UWC APPL: CS-CHURCH -

Click in Edit

ID: DT: - AM: \$0.00 GT: - CNUM: CTYP: - FUND: U-UWC APPL: CS-CHURCH -
No Constituent Specified.

Edit Delete Refresh AO AP REF:

Enter Constituent ID (Account Number)

Record Detail

Update Batch Gift Detail

AO AP

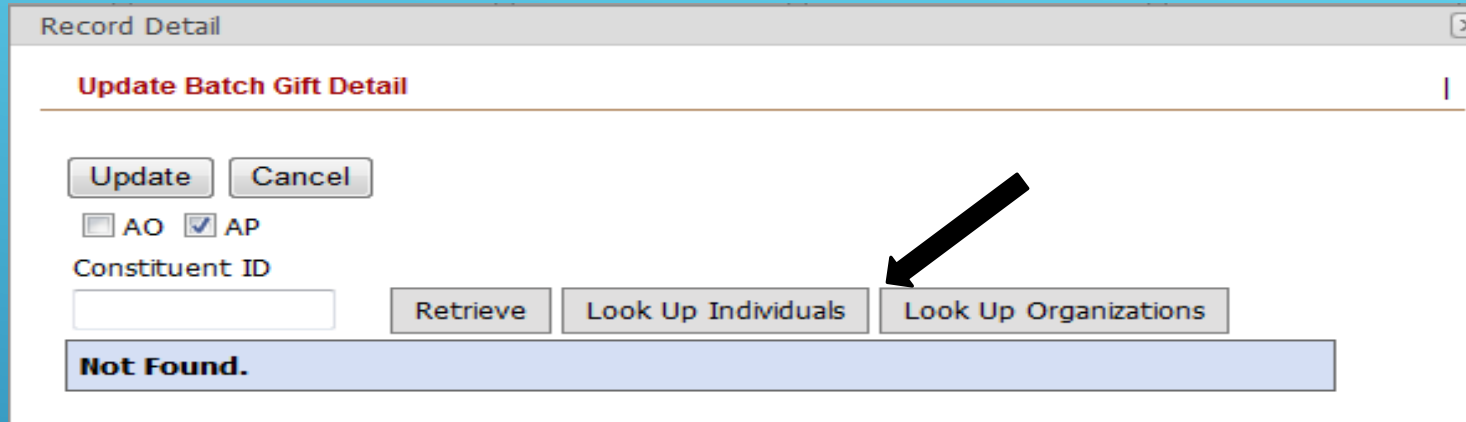
Constituent ID

Not Found.

Click on Retrieve

To see information should then match the envelope

If there is no ID number written on the envelope, click on Look up Individuals.



Record Detail

Update Batch Gift Detail

Update Cancel

AO AP

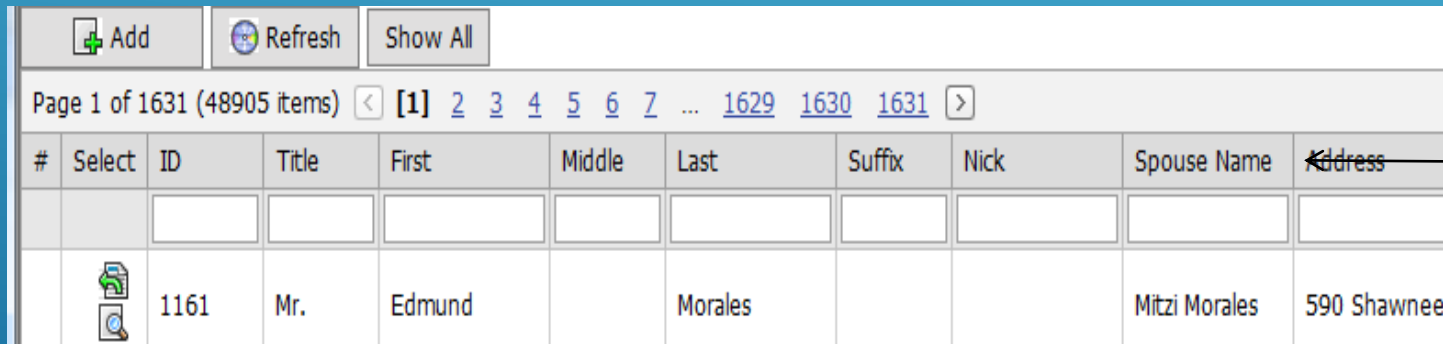
Constituent ID


Retrieve Look Up Individuals Look Up Organizations

Not Found.

Note: Some times when the envelopes are from women, you might need to enter her first name on the Spouse Name space, since she might be married and could be in her husband's account.

Search for name: Best to search by last name and first 3 letters of first name.



#	Select	ID	Title	First	Middle	Last	Suffix	Nick	Spouse Name	Address
		1161	Mr.	Edmund		Morales			Mitzi Morales	590 Shawnee L

Spouse Name

In Look up Mode when you find the individual Click on the green arrow

You will see the details of your selected person, please view the envelope and make sure it is the same person you are applying the gift to.

Update Batch Gift Detail

AO AP

Constituent ID

| 123771 | Mrs. [REDACTED] : | [REDACTED] , Newark, New Jersey, 07104, United States | p: ☎ 973-289-2323 | e: vonewarknjgang7@gmail.com | Member - Victory Outreach Newark
[Open Account](#)

Date Amount Gift Type

Reference

Fund Appeal

Check Number Check Type

Create Pledge Pledge Amount Due Date

Transfer from the envelope:

Date

Amount

Gift type

Check # - if applicable

Check type – if applicable

NOTE: See page 14 for sample type of checks that will be entered.

Click update when data has been entered

If you are unable to find the person and he/she gave less than \$7.00 (events) then click on **AO** (Apply to Organization) and enter his/her name in Reference field.

Update Batch Gift Detail

AO AP ←

Constituent ID

Not Found.

Click update

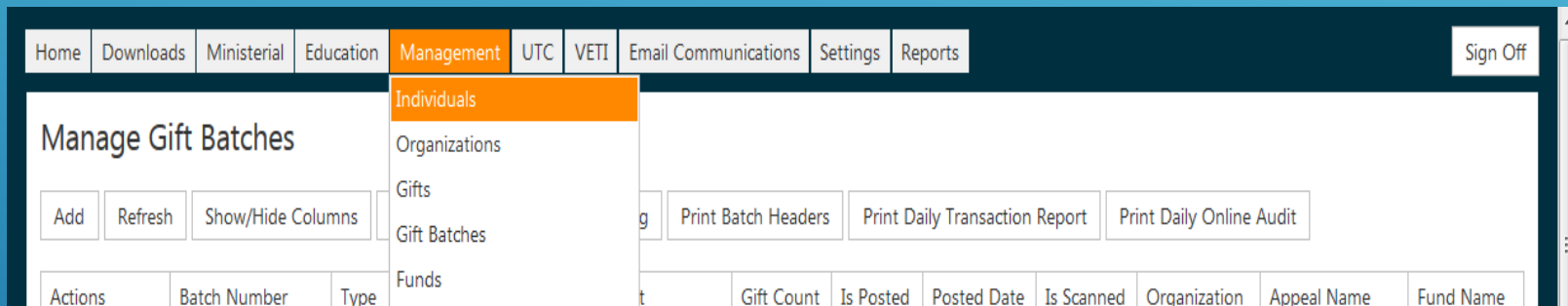
NOTE: in order to create new accounts the gift must be **no less than \$7.00** if the data is from an Event. **See Section 2** for adding new account.

Designated team will be selected to create new account and looking up account numbers.

CREATING NEW ACCOUNTS

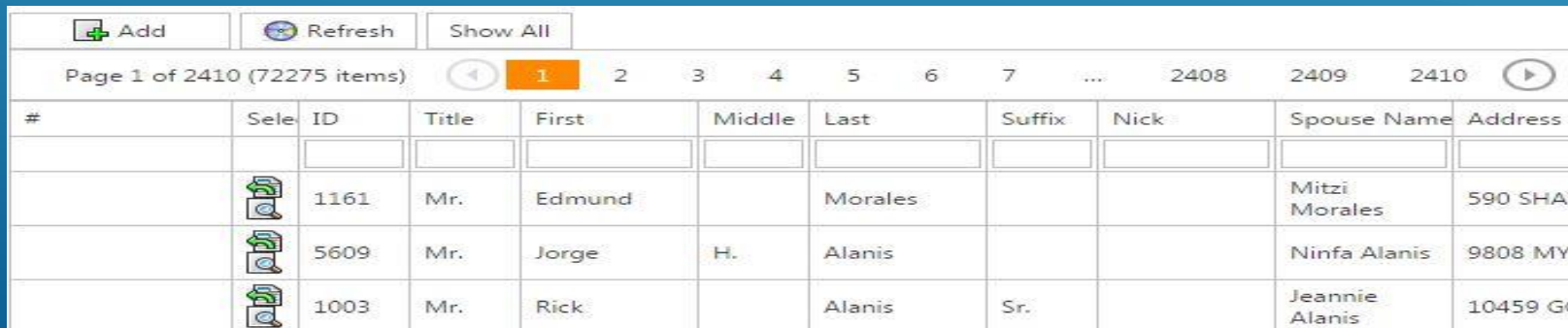
If a person was not found in TRACKER and he/she gave \$7.00/\$20.00 (Event) or more you will need to add a new account.

Click Management and choose Individuals



The screenshot shows the TRACKER application interface. At the top, there is a navigation bar with tabs: Home, Downloads, Ministerial, Education, Management (highlighted), UTC, VETI, Email Communications, Settings, and Reports. A 'Sign Off' button is located in the top right corner. Below the navigation bar, the 'Manage Gift Batches' section is visible. On the left, there are buttons for 'Add', 'Refresh', and 'Show/Hide Columns'. In the center, a dropdown menu is open under 'Management', showing options: Individuals (highlighted), Organizations, Gifts, Gift Batches, and Funds. To the right of the dropdown, there are buttons for 'Print Batch Headers', 'Print Daily Transaction Report', and 'Print Daily Online Audit'. Below these buttons, a table header is visible with columns: Actions, Batch Number, Type, Gift Count, Is Posted, Posted Date, Is Scanned, Organization, Appeal Name, and Fund Name.

Click Add



The screenshot shows the TRACKER application interface. At the top, there are buttons for 'Add', 'Refresh', and 'Show All'. Below these buttons, the text 'Page 1 of 2410 (72275 items)' is displayed. A navigation bar shows page numbers from 1 to 7, with '1' highlighted. Below the navigation bar, a table is visible with columns: #, Sele, ID, Title, First, Middle, Last, Suffix, Nick, Spouse Name, and Address. The table contains three rows of data:

#	Sele	ID	Title	First	Middle	Last	Suffix	Nick	Spouse Name	Address
		1161	Mr.	Edmund		Morales			Mitzi Morales	590 SHAW
		5609	Mr.	Jorge	H.	Alanis			Ninfa Alanis	9808 MYR
		1003	Mr.	Rick		Alanis	Sr.		Jeannie Alanis	10459 GO

Add Cancel

Biographical Information

Constituent Code

New

First Name

Last Name

Household Name

Is Business

Business Name

Middle Initial

Nickname

Suffix

[Select One] ▼

Title

[Select One] ▼

Gender

[Select One] ▼

SSN

Birthdate

Language

[Select One] ▼

Date Licensed

Enter envelop information as written

Source: [Select One] Church: [Select One]

Deceased

DeceasedDate: []

Preferred Email: [] Preferred Phone: [] Preferred Phone Type: [Select One] Preserve Current Phone

Marital Status: [Select One]

Is Active
 Head of Household
 Person in Recovery Home

Notes: []

Photo: [Image Not Available] [Choose File] No file chosen
 Check to remove photo
 Check to approve photos

Spouse Photo: [Image Not Available] [Choose File] No file chosen
 Check to remove photo

Couple Photo: [Image Not Available] [Choose File] No file chosen
 Check to remove photo

User Information

Is User

Username: []

Click on the ... button to check availability.

Password: []

Enter/Select:
 Source: Victory Outreach Church
 Church: Select Church

If legible enter email and phone

Click Is User
 Create Username
 Generate Password

Click Add

Marital Status

Married New Spouse Record

Spouse

[Select One] ...

Is Active

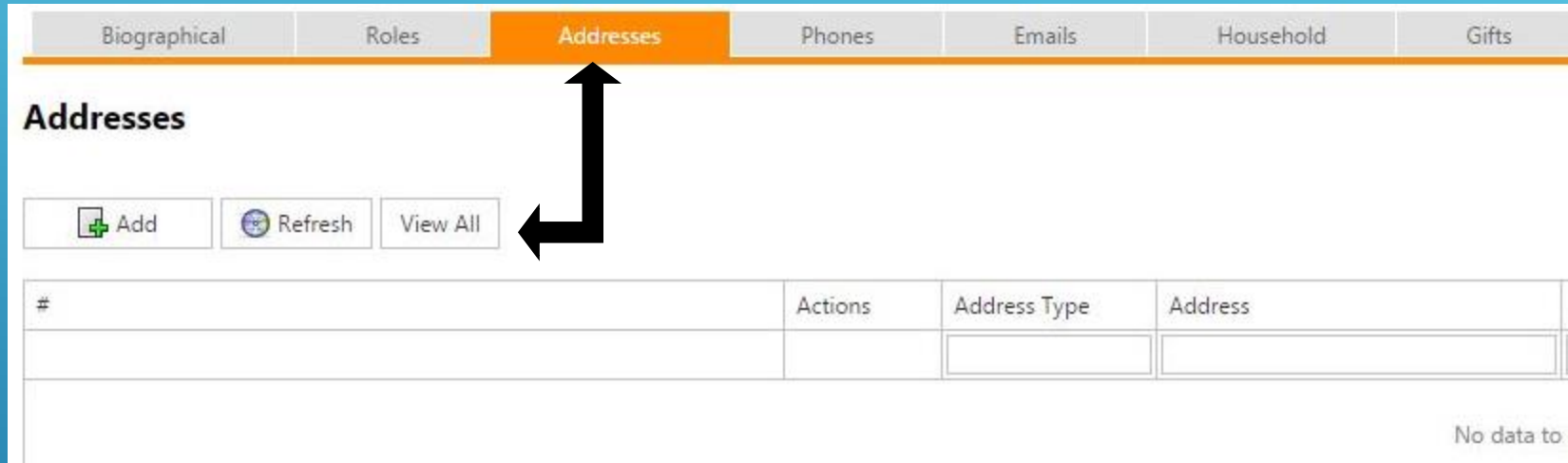
Head of Household

Person in Recovery Home

*If he is married, select married on Marital Status, click on New Spouse Record, enter wife's name and last name and click on Head of Household.

Click Add

SET UP ADDRESS



The screenshot shows a software interface with a top navigation bar containing tabs: Biographical, Roles, Addresses, Phones, Emails, Household, and Gifts. The 'Addresses' tab is currently selected and highlighted in orange. Below the tabs, the word 'Addresses' is displayed in bold. Underneath, there are three buttons: 'Add' (with a green plus icon), 'Refresh' (with a globe icon), and 'View All'. A black arrow points from the 'Addresses' tab down to the 'Add' button. Below the buttons is a table with the following columns: '#', 'Actions', 'Address Type', and 'Address'. The table is currently empty, and the text 'No data to d' is visible at the bottom right of the table area.

#	Actions	Address Type	Address

No data to d

To Enter the Address Click on the Address Tab and Add

Add Cancel

Address Detail

Address From

3/23/2017

Address To

Is Active

Don't send Mail

Is Preferred

Invalid Address

DPC

LOT

CART

Address Type

[Select One]

Address Information

Country

United States

Address Line 1

Address Line 2 / Suburb

City

State

[Select One]

Zip

Notes Quick note: Return UF Return NN Return NA

Add

Cancel

Verify Address

Click on is Active

Click on Is Preferred and select
Mailing Address on the Address Type

Enter Address

Click Add

253919

Biographical

Roles

Addresses

Phones

Emails

Household

Gifts

Pledges

Documents

N

Addresses



Add



Refresh

View All

#	Actions	Address Type	Address	City	Country	From
		Mailing Address	3409 Lime st	Chino	United States	3/23/2017

Copy the Member's ID number
Close the window

Update Batch Gift Detail

AO AP

Constituent ID

Individual Not Found.

Date: Amount: Gift Type:

Reference:

Fund: Appeal:

Check Number: Check Type:

Create Pledge Pledge Amount: Due Date:

Paste the number on the Constituent ID box and click on RETRIEVE.

Update Batch Gift Detail

AO AP

Constituent ID

253919

| 253919 | ██████████ 3409 Lime st , Chino, California, 91710,
United States | p: | e: | Member - Victory Outreach Chino
[Open Account](#)

Date

3/25/2017

Amount

20.00

Gift Type

Cash

Reference

Fund

Event Offering

Appeal

WCONF 2017 - Event Offering (WCOI

Check Number

Check Type

[Select One]

Pledge Amount

Due Date

Create Pledge

Complete and Verify

Click Update

Verify	Print Post Report	Add New Gift	Return To Batch	Return To List	Post Batch			
Count Amount								
In Header	5	\$160.00						
In Data	5	\$0.00						
ID:	DT: -	AM: \$0.00	GT: -	CNUM:	CTYP: -	FUND: U-UWC	APPL: CS-CHURCH	-
ID:	DT: -	AM: \$0.00	GT: -	CNUM:	CTYP: -	FUND: U-UWC	APPL: CS-CHURCH	-
ID:	DT: -	AM: \$0.00	GT: -	CNUM:	CTYP: -	FUND: U-UWC	APPL: CS-CHURCH	-
ID:	DT: -	AM: \$0.00	GT: -	CNUM:	CTYP: -	FUND: U-UWC	APPL: CS-CHURCH	-
ID:	DT: -	AM: \$0.00	GT: -	CNUM:	CTYP: -	FUND: U-UWC	APPL: CS-CHURCH	-

No Constituent Specified.

AO

Click Refresh
 Confirm Information that appears

Verify Print Post Report Add New Gift Return To Batch Return To List Post Batch

	Count	Amount
In Header	4	\$130.00
In Data	4	\$130.00

ID: **2012** DT: **7/10/2017** AM: **\$100.00** GT: **Cash** CNUM: CTYP: - FUND: **EO-EVENT OFFERING** APPL: **EO-Event Offering** -

ID: **62697** DT: **7/10/2017** AM: **\$10.00** GT: **Cash** CNUM: CTYP: - FUND: **EO-EVENT OFFERING** APPL: **EO-Event Offering** -

ID: **95902** DT: **7/10/2017** AM: **\$10.00** GT: **Check** CNUM: **123** CTYP: **Personal Check** FUND: **EO-EVENT OFFERING** APPL: **EO-Event Offering** -

ID: **1440** DT: **7/10/2017** AM: **\$10.00** GT: **Cash** CNUM: CTYP: - FUND: **EO-EVENT OFFERING** APPL: **EO-Event Offering** -

Click Verify

If In Header & In Data balance you have completed

If it doesn't not balance you will need to back track to find the error

Then click Return to Batch as of now we will not be posting batches

Initials batch header once batch has been completed

Reminder: We are here to help!

VICTORY OUTREACH INTERNATIONAL®
 "United We Can ..." MEMBER #: _____

Name: _____ Date: _____
 Address: _____
 City: _____ State: _____ Zip Code: _____
 Phone: _____
 Email: _____
 Church: _____ Pastor: _____

New Member New Address

I want to become a Direct Pay Partner!
 (Please see reverse for information and Authorization Form or visit the Member Center at www.victoryoutreach.org)

"Give and it shall be given unto you ..." Luke 6:38

Gold Partner \$200 Per Month
 Silver Partner \$100 Per Month
 500 Plus Partner \$75 Per Month
 500 Partner \$50 Per Month
 \$1-A-Day Partner \$30 Per Month
 G.A.N.G. Partner \$30 Per Month
 Other _____

TOTAL \$ **MO-3956 \$15-**

FOR OFFICE USE ONLY

VICTORY OUTREACH INTERNATIONAL®
 "United We Can ..." MEMBER #: _____

Name: _____ Date: _____
 Address: _____
 City: _____ State: _____ Zip Code: _____
 Phone: _____
 Email: _____
 Church: _____ Pastor: _____

New Member New Address

I want to become a Direct Pay Partner!
 (Please see reverse for information and Authorization Form or visit the Member Center at www.victoryoutreach.org)

"Give and it shall be given unto you ..." Luke 6:38

Gold Partner \$200 Per Month
 Silver Partner \$100 Per Month
 500 Plus Partner \$75 Per Month
 500 Partner \$50 Per Month
 \$1-A-Day Partner \$30 Per Month
 G.A.N.G. Partner \$30 Per Month
 Other _____

TOTAL \$ **10.00**

FOR OFFICE USE ONLY

VICTORY OUTREACH INTERNATIONAL®
 "United We Can ..." MEMBER #: _____

Name: _____ Date: _____
 Address: _____
 City: _____ State: _____ Zip Code: _____
 Phone: _____
 Email: _____
 Church: _____ Pastor: _____

New Member New Address

I want to become a Direct Pay Partner!
 (Please see reverse for information and Authorization Form or visit the Member Center at www.victoryoutreach.org)

"Give and it shall be given unto you ..." Luke 6:38

Gold Partner \$200 Per Month
 Silver Partner \$100 Per Month
 500 Plus Partner \$75 Per Month
 500 Partner \$50 Per Month
 \$1-A-Day Partner \$30 Per Month
 G.A.N.G. Partner \$30 Per Month
 Other _____

TOTAL \$ **PV-1122 \$5-**

FOR OFFICE USE ONLY

VICTORY OUTREACH INTERNATIONAL®
 "United We Can ..." MEMBER #: _____

Name: _____ Date: _____
 Address: _____
 City: _____ State: _____ Zip Code: _____
 Phone: _____
 Email: _____
 Church: _____ Pastor: _____

New Member New Address

I want to become a Direct Pay Partner!
 (Please see reverse for information and Authorization Form or visit the Member Center at www.victoryoutreach.org)

"Give and it shall be given unto you ..." Luke 6:38

Gold Partner \$200 Per Month
 Silver Partner \$100 Per Month
 500 Plus Partner \$75 Per Month
 500 Partner \$50 Per Month
 \$1-A-Day Partner \$30 Per Month
 G.A.N.G. Partner \$30 Per Month
 Other _____

TOTAL \$ **PV-1385 \$50-**

FOR OFFICE USE ONLY

VICTORY OUTREACH INTERNATIONAL®
 "United We Can ..." MEMBER #: _____

Name: _____ Date: _____
 Address: _____
 City: _____ State: _____ Zip Code: _____
 Phone: _____
 Email: _____
 Church: _____ Pastor: _____

New Member New Address

I want to become a Direct Pay Partner!
 (Please see reverse for information and Authorization Form or visit the Member Center at www.victoryoutreach.org)

"Give and it shall be given unto you ..." Luke 6:38

Gold Partner \$200 Per Month
 Silver Partner \$100 Per Month
 500 Plus Partner \$75 Per Month
 500 Partner \$50 Per Month
 \$1-A-Day Partner \$30 Per Month
 G.A.N.G. Partner \$30 Per Month
 Other _____

TOTAL \$ **PV-2041 \$10-**

FOR OFFICE USE ONLY

THANK YOU!

- ▶ We appreciate you!
- ▶ See you at World Conference 2017!
- ▶ More Information or Questions
 - ▶ Email: Jessicas@victoryoutreach.org
- ▶ Register as a volunteer
 - ▶ www.VictoryOutreach.org