VICTORY OUTREACH INTERNATIONAL

Data Entry Processes

Given by:

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VOI Staff

2017

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 by 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
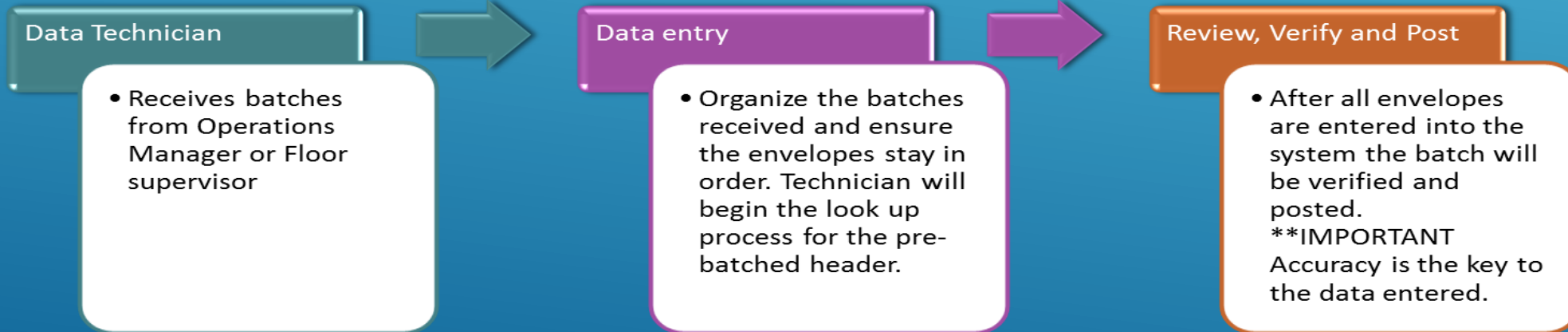- Our labor is not in vain

LET'S BEGIN!

ADMINISTRATION

DATA ENTRY

Begin Point:
Trustee
Processing

End Point:
Data Point
Processing
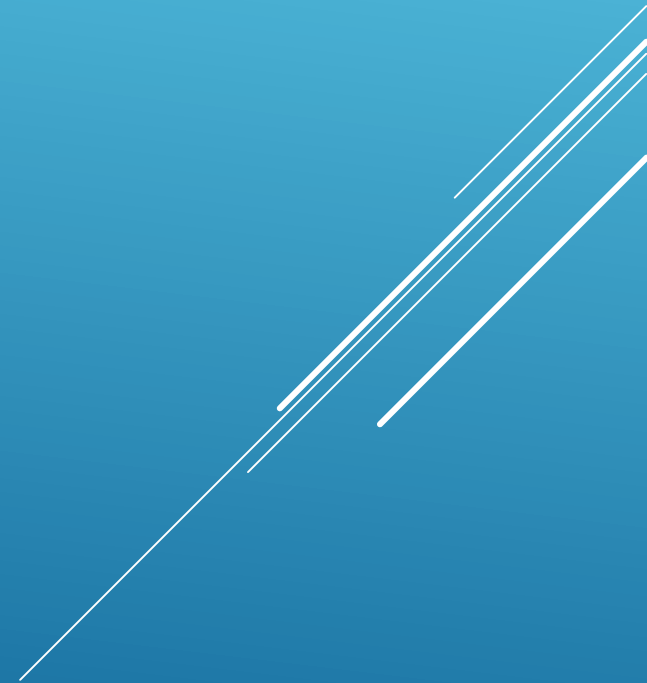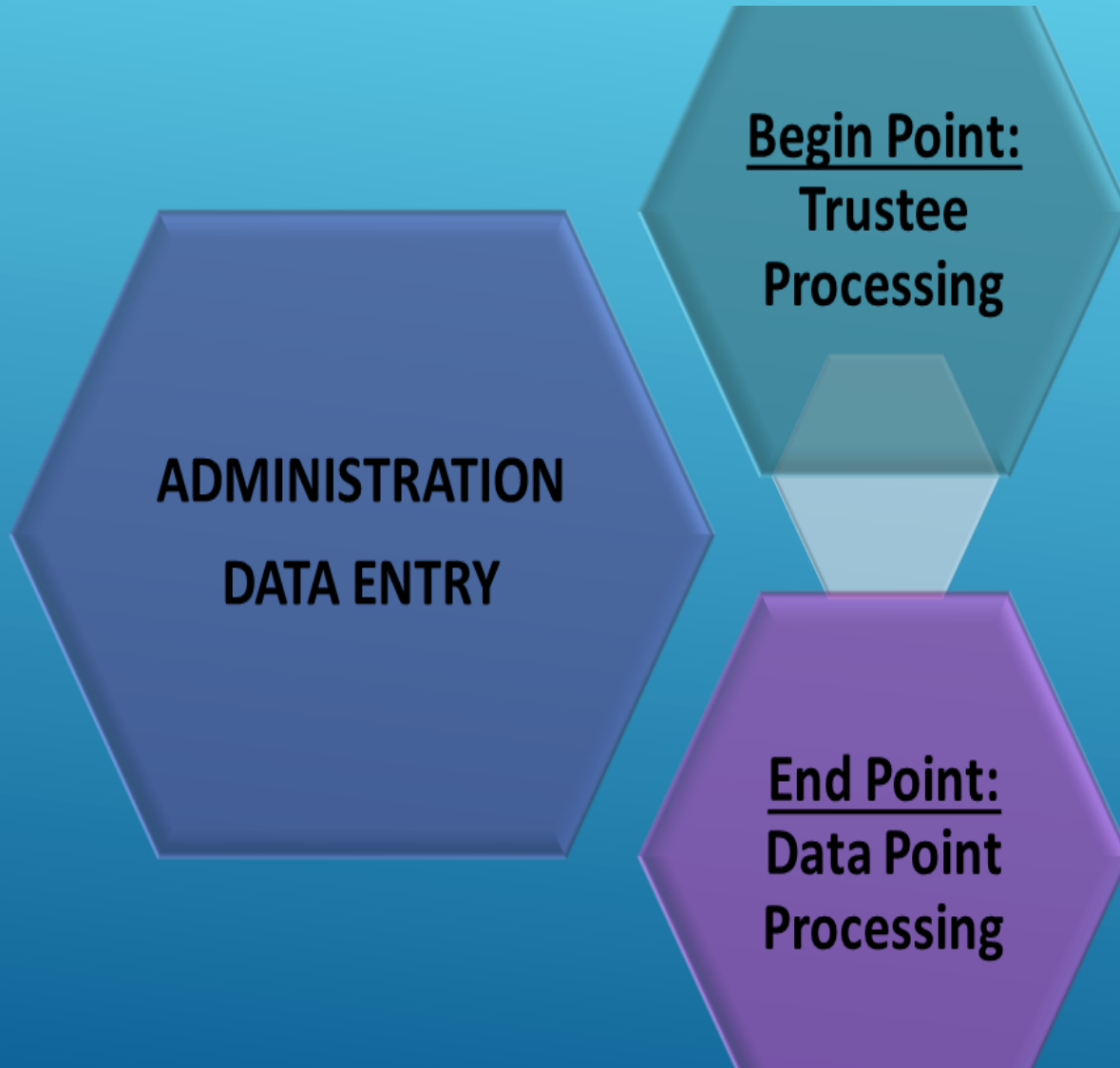
DATA POINT CENTER FLOW CHART

DATA POINT CENTER

PROCESSING CENTER TEAM MEMBERS:
Operations Manager
Floor Supervisor
Data Entry Technician

Data Technician

- Receives batches from Operations Manager or Floor supervisor

Data entry

- Organize the batches received and ensure the envelopes stay in order. Technician will begin the look up process for the pre-batched header.

Review, Verify and Post

- After all envelopes are entered into the system the batch will be verified and posted.
**IMPORTANT Accuracy is the key to the data entered.

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.

LOGGING IN

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

Management and choose Gift batches

Look up batch number
    Example: 071017100WCPM
Click up Update

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** -

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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)
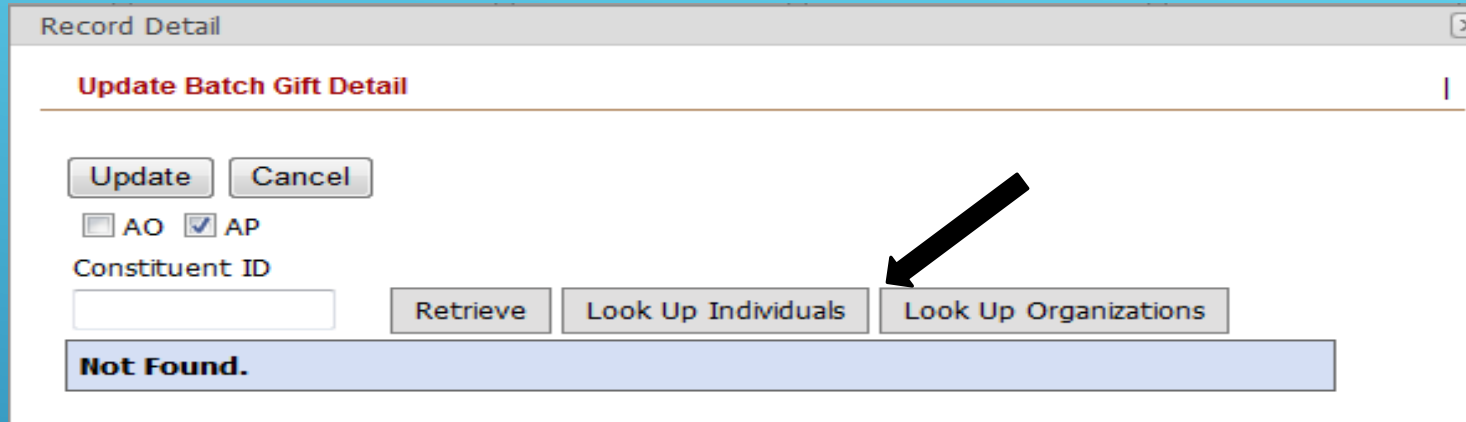
Click on Retrieve
 To see information should then match the envelope

If there is no ID number written on the envelope, click on Look up Individuals.
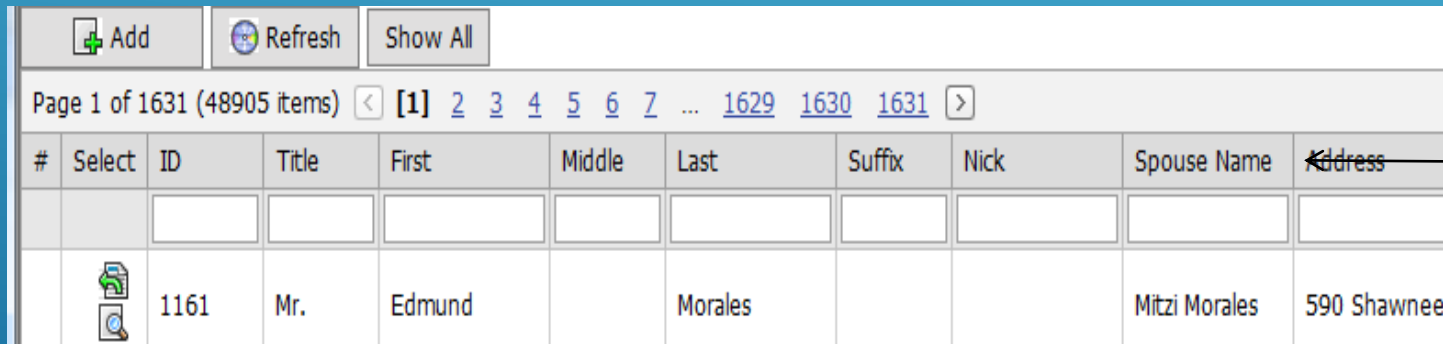
Note: Some times when the envelopes are from women, you might need to enter her first name on the Spouse Name space, since she might be married and could be in her husband's account.

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

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.

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.

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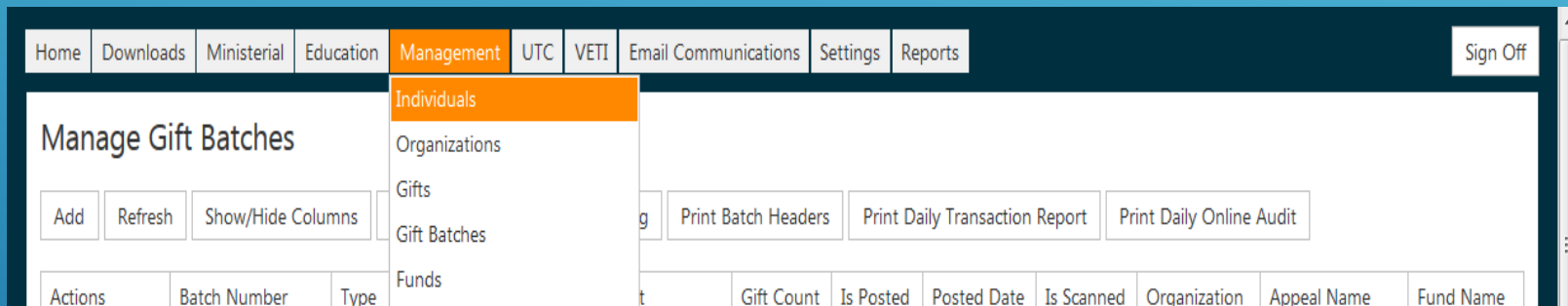
NOTE: in order to create new accounts the gift must be **no less than $7.00** if the data is from an Event. **See Section 2** for adding new account.

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

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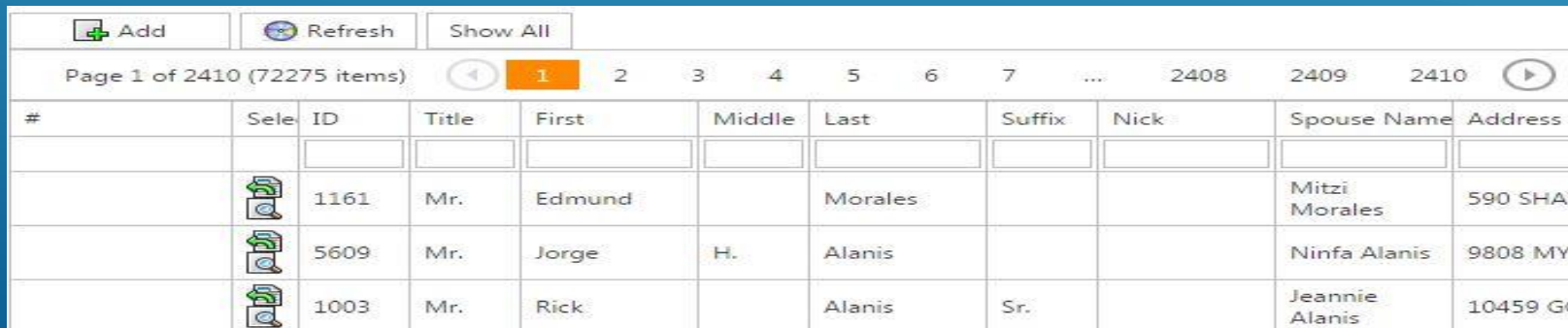
If a person was not found in TRACKER and he/she gave $7.00/$20.00 (Event) or more you will need to add a new account.

Click Management and choose Individuals

Click Add

Enter envelop information as written

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

If legible enter email and phone

Click Is User
Create Username
Generate Password

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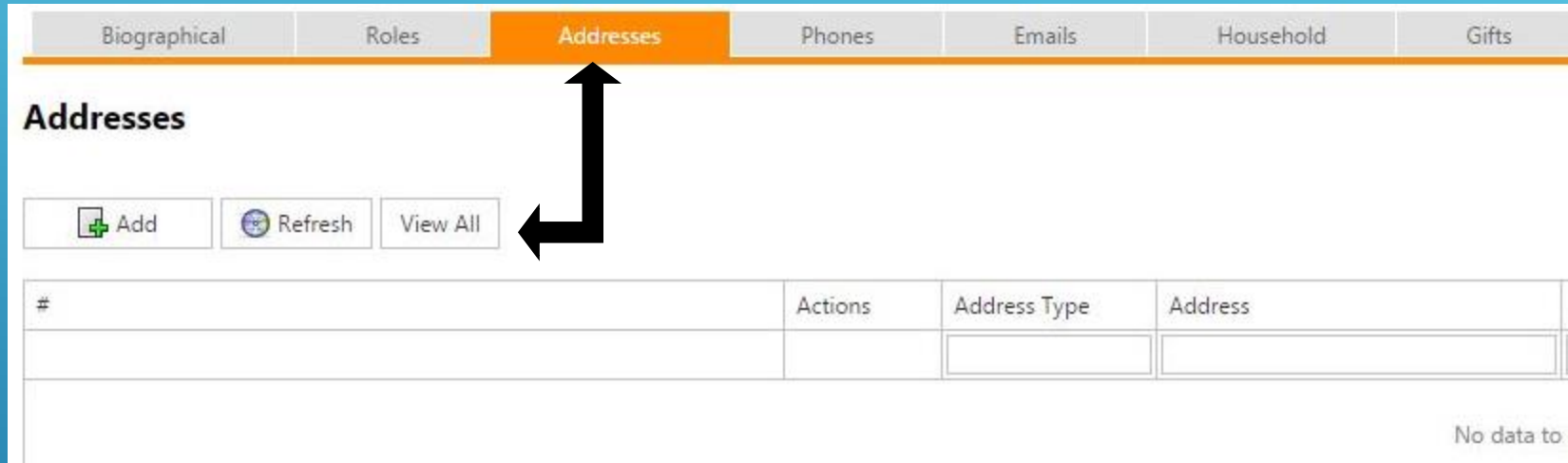
*If he is married, select married on Marital Status, click on New Spouse Record, enter wife's name and last name and click on Head of Household.

Click Add

SET UP ADDRESS

To Enter the **Address** Click on the Address Tab and Add

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

Enter Address

Click Add

Copy the Member's ID number
Close the window

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

Complete and Verify

Click Update

Click Refresh
Confirm Information that appears

	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 <u>In Header & In Data</u> balance you have completed
    If it doesn't not balance you will need to back track to find the error

Then click <u>Return to </u>Batch as of now we will not be posting batches
Initials batch header once batch has been completed

Reminder: We are here to help!

THANK YOU!

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