

Combined Federal Campaign 2012 MANAGE Training

Agenda



- >What is MANAGE
- > Access Control
- > Campaign Structure
- > Reporting Units
- > Supplies
- >Outreach
- **Deposit**
- > Reports
- > Awards
- > System
- >Help

What is MANAGE?



MANAGE is a web application used by campaign staff and volunteers to:

Order campaign supplies
Schedule charity outreach events
Make deposits
Track fundraising progress with reports
Order campaign awards

MANAGE Access Control



You are only given as much access is required by your role

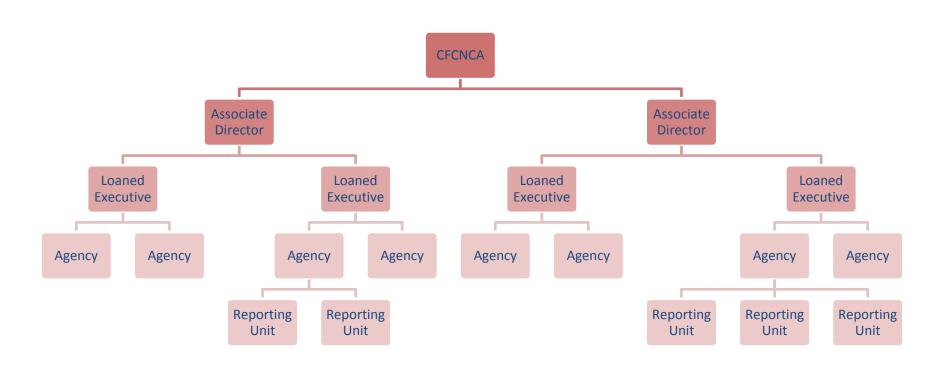
Access is given in two ways:

Campaign Structure — limits access to a specific account based on agency and role

User & Group Permissions - limits access to specific set of pages and actions

Campaign Structure

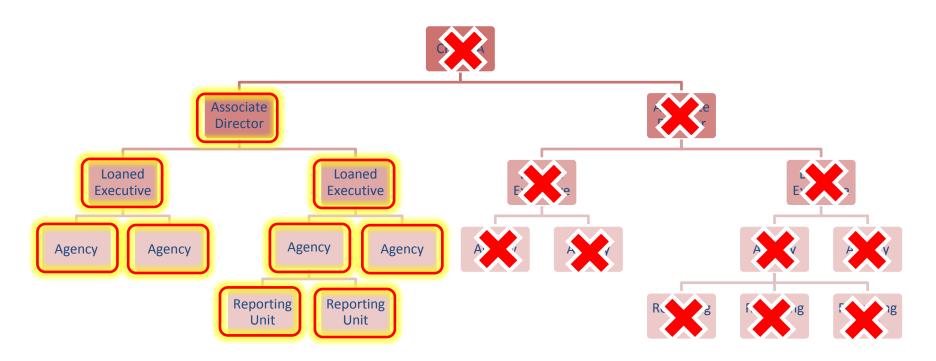




Each MANAGE user is attached to a specific campaign structure component (or tree branch)

Campaign Structure

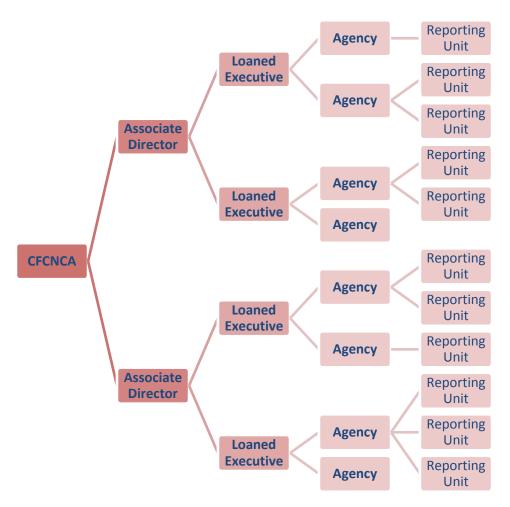




A user attached here... (on the left side) will have access to data for all of these components...and none of these (on the right side).

Reporting Units



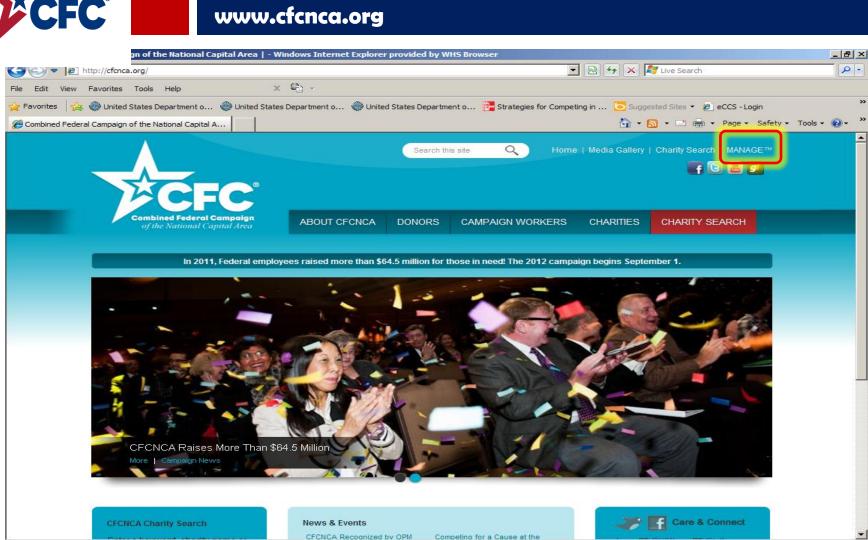


At the end of every campaign structure branch is at least one reporting unit, a government office that gathers and reports CFCNCA pledges.



1 Done

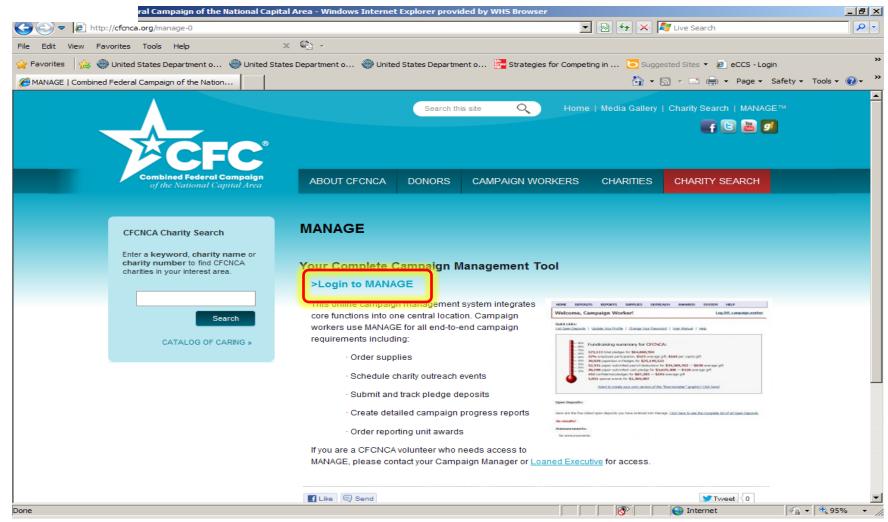
Logging In



▼ 95%

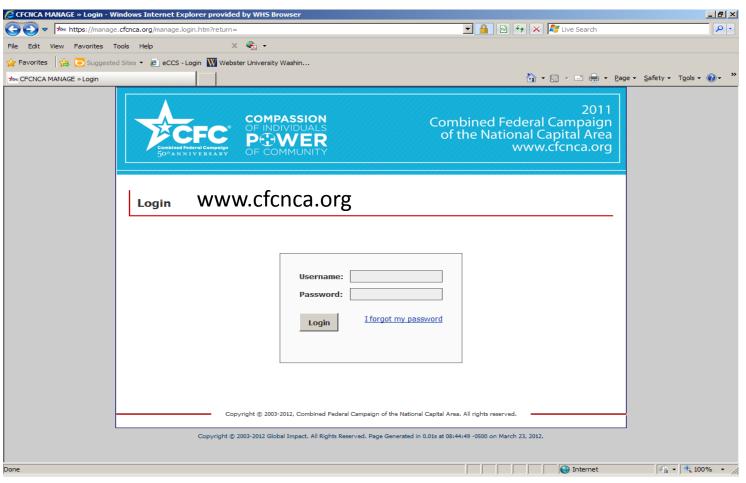


Logging In

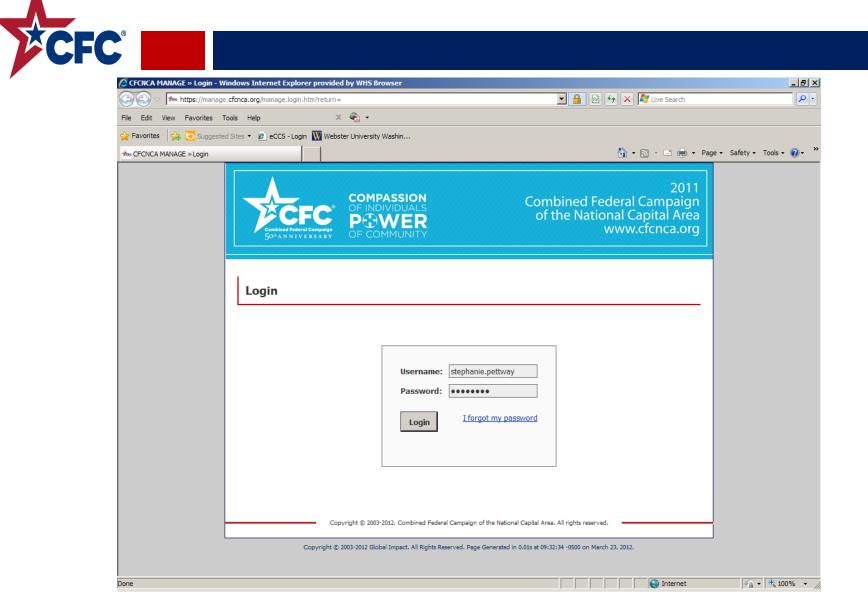


Logging In

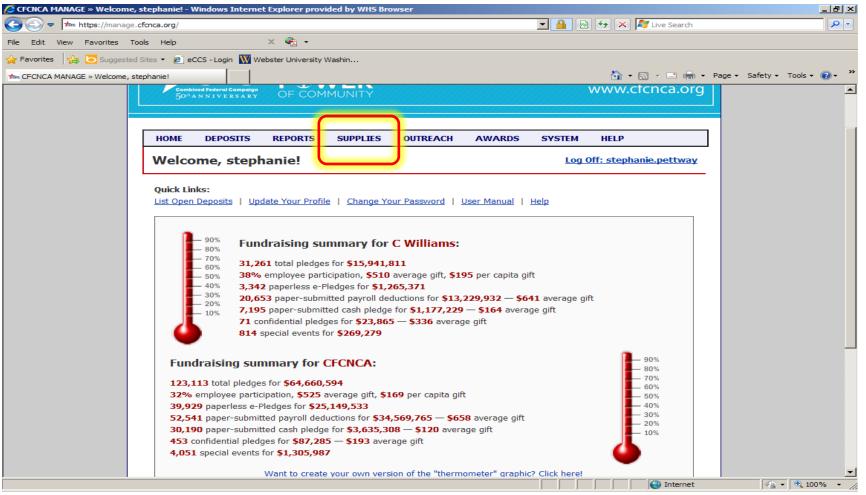




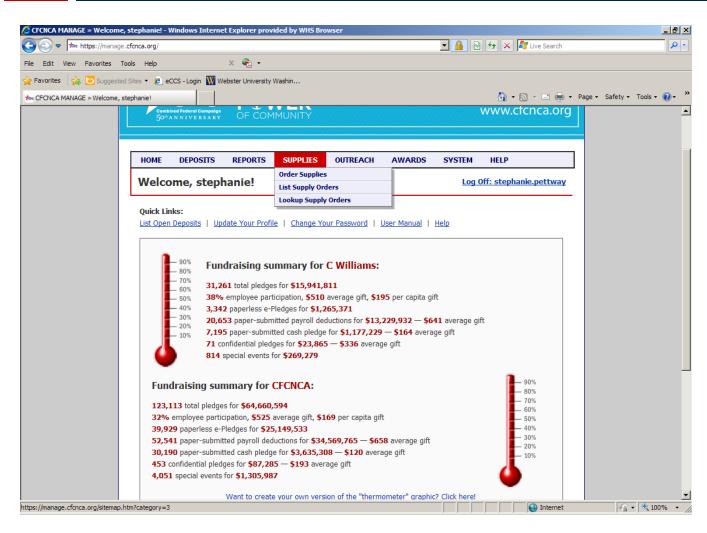
Logging In



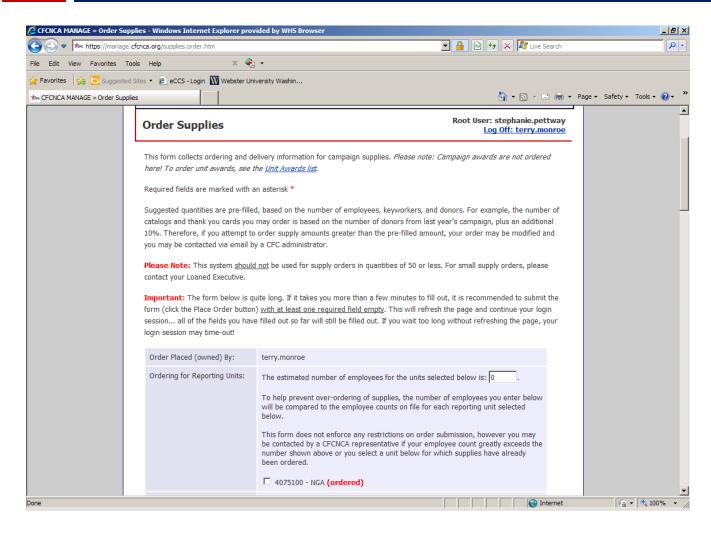




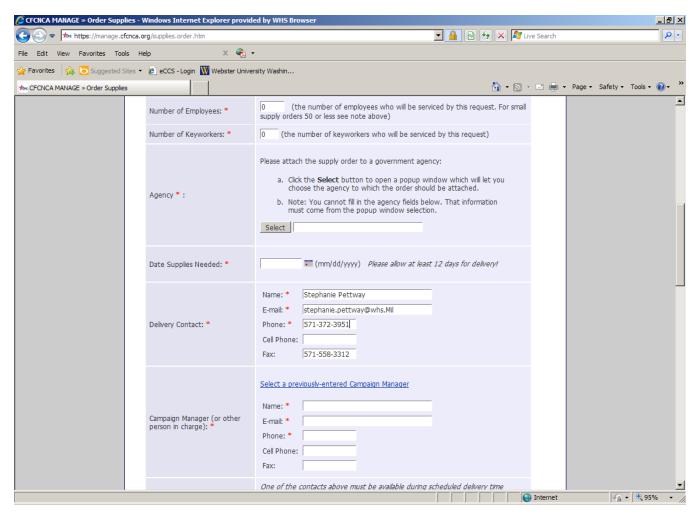




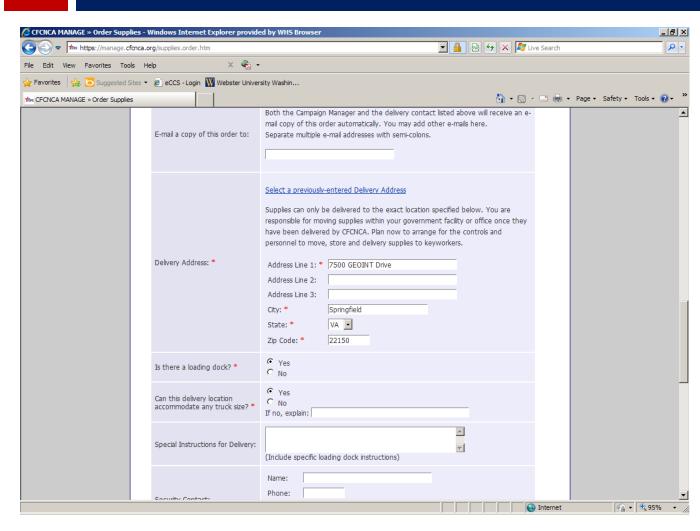




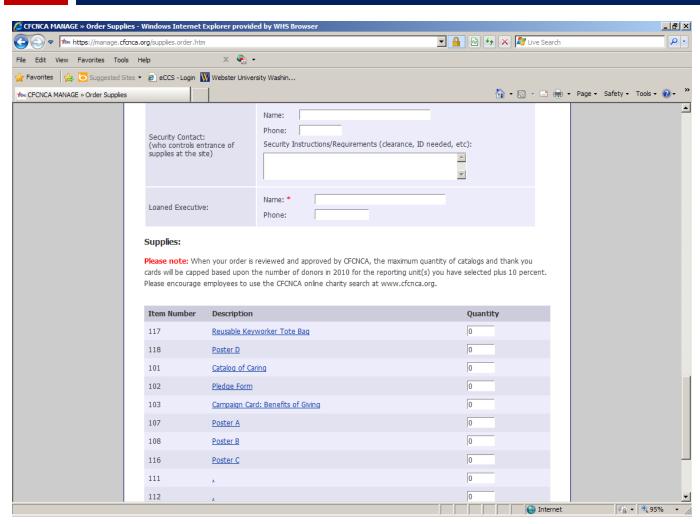




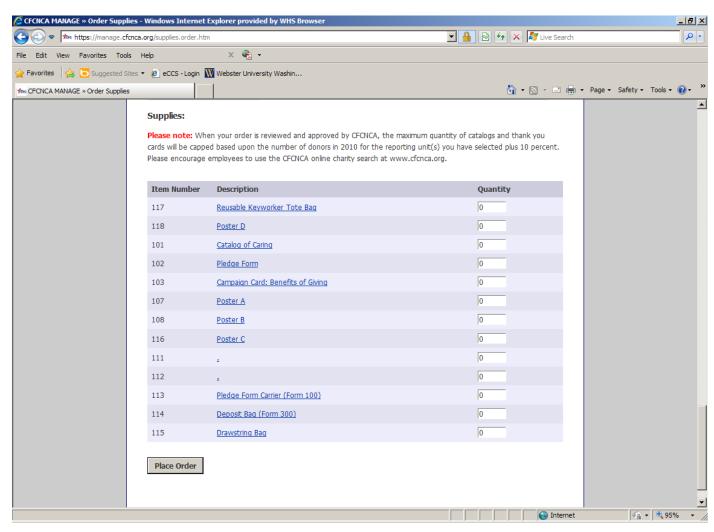




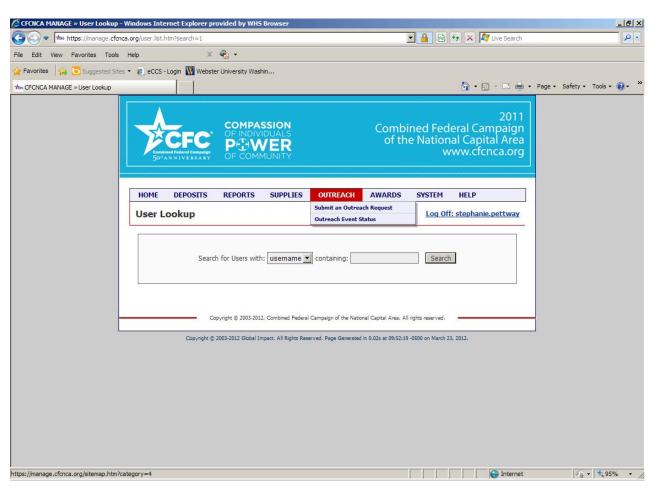






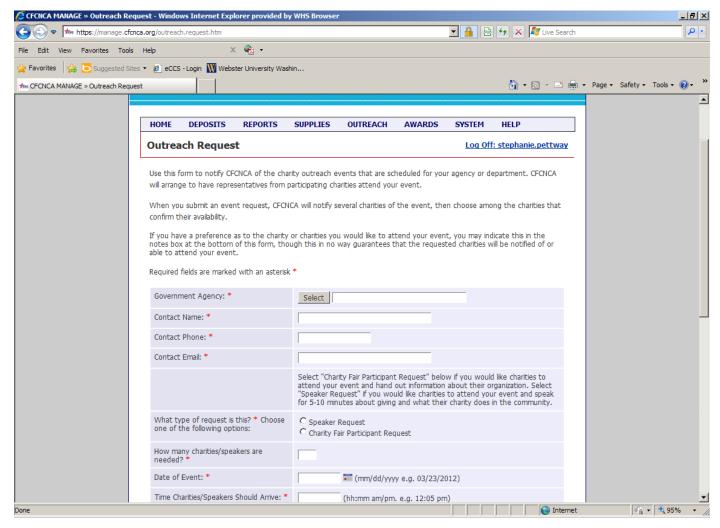




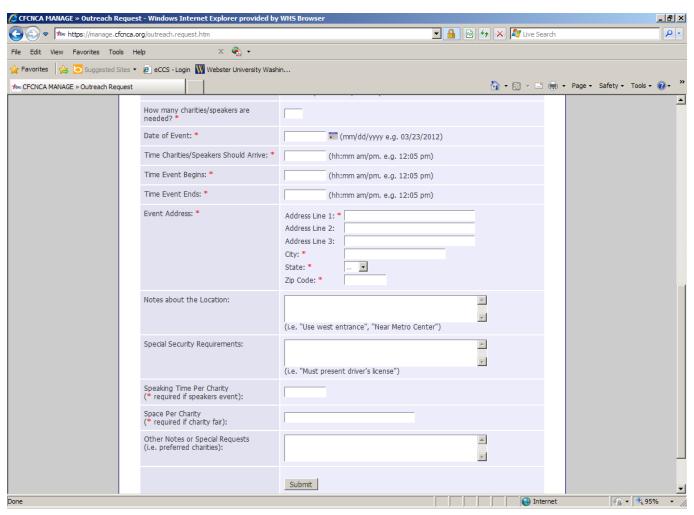




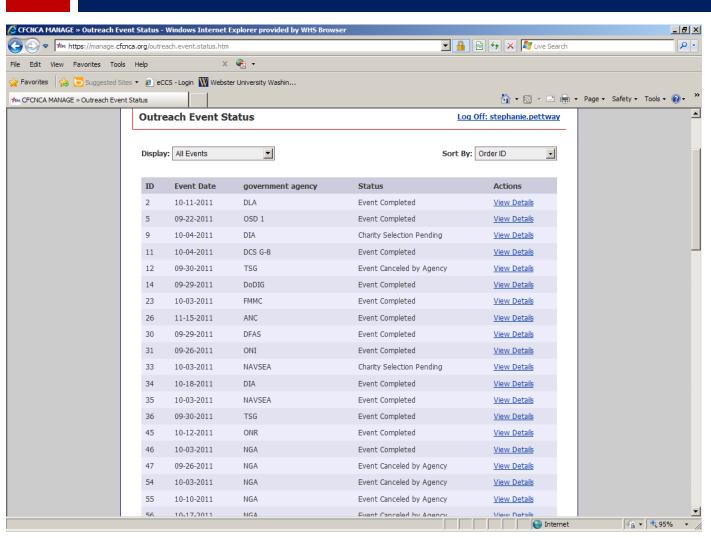




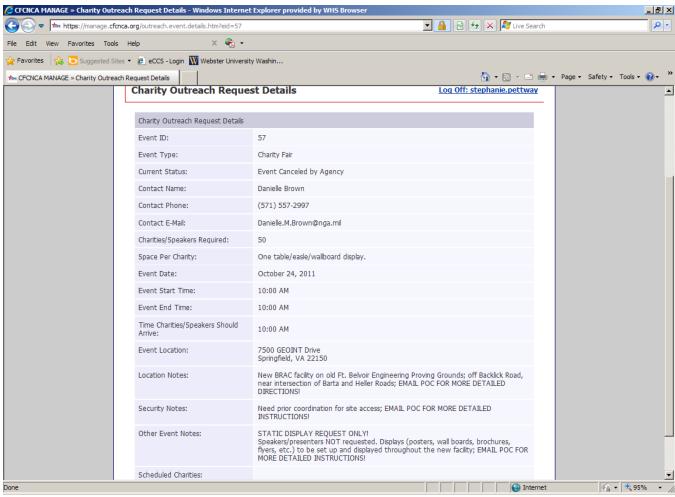








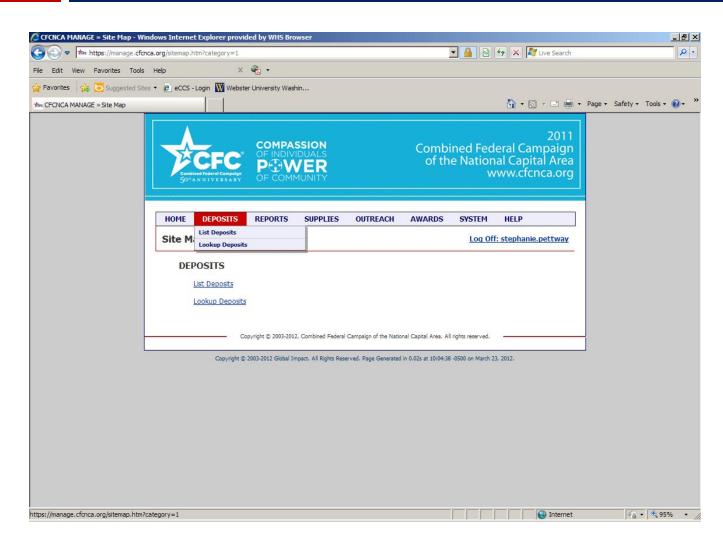






- Agencies use MANAGE to report/make deposits of donor pledge forms
- Details for each deposit are entered into MANAGE to create a Form 200 – an official CFCNCA deposit form
- The Form 200 is a <u>required</u> piece of paperwork... you can't submit pledge forms to CFCNCA without one!









Agencies use MANAGE to generate forms for submitting deposits of donor pledges...



Continue

Cancel



Before you begin filling out the form below, please make sure it has enough rows for each Form 100 you will be placing inside this Deposit Bag (which you specified on the last page). If you begin filling out the form below and click back to the previous page using your brower's back button, the information you have entered on this form will be lost!

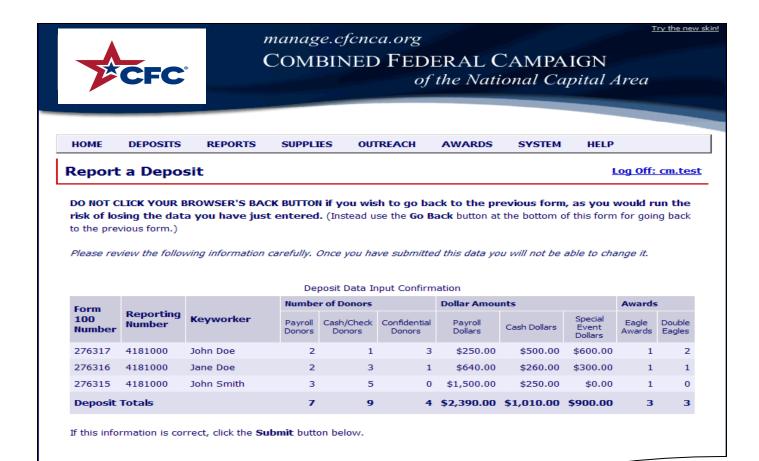
Note: In order to prevent session timeouts, this page will automatically refresh every 5 minutes.

- Using one line per Form 100, complete the form below. Only include information for the Form 100s that will be enclosed in this Deposit Bag! (The Form 100 number is displayed in the upper left corner, below the bar code. Please enter the number only, excluding any preceding letters.)
- 2. When you have completely filled out the form, click the Continue button at the bottom of the page. On the next page, you will be given a chance to review all of the information you have entered and make any necessary modifications.



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Agencies
use
MANAGE
to
generate
forms for
submitting
deposits of
donor
pledges...



Go Back

Submit

Form200 Instructions



CFCNCA Deposit Form (Form 200): 1032230

- This CFCNCA Deposit Form (Form 200) is associated with CFC Deposit Bag #1032230.
- Print this form in its entirety. Note that there are two copies of deposit detail included on this form: an Audit Copy and a Receipt Copy.
- Remember: Only the White portion of the CFCNCA Pledge Form Carrier(s) and any attached Confidential Gift Envelope(s)
 associated with this CFC Deposit Form 200 are to be placed in Deposit Bag #1032230.
 - (a) Attach any confidential gift envelopes to the associated Form 100.
 - (b) DO NOT place yellow Form 100 halves inside the Deposit Bag!
 - (c) DO NOT place Form 100s for other deposits inside the Deposit Bag!
- Place the Audit Copy of this Form 200 inside the slip-pocket on the outside of the Deposit Bag.
- (a) The form detail must be visible through the clear pocket!
- (b) Remove the covering from the slip-pocket's adhesive strip, and seal the Audit Copy inside the pocket.
- (c) DO NOT place the Audit Copy inside the Deposit Bag itself! Use the slip-pocket.
- Assigned Campaign volunteers should take the Receipt Copy of this Form 200 and the (sealed) Deposit Bag to an official CFCNCA collection site or credit union. Write the name of the Bank Drop Location and print/sign your name(s) in the allotted space on the Receipt Copy.
- 6. At the official Bank Drop Location, have the accepting Bank Drop representative print and sign name and date stamp the CFC Deposit Form 200 where indicated. Leave the Deposit Bag at the Bank Drop location, and retain the date-stamped CFC Deposit Form 200 and retain with the agency's Campaign records.
- 7. Leave the Deposit Bag at the Bank Drop Location, and retain the Receipt Copy for your agency's Campaign records.

 $\frac{\hbox{All Completed Employee-Donor CFC Pledge Forms are to be Kept in a}}{\hbox{Secure Location Prior to Delivery to an Official Bank Drop Location}}$

Form200 Audit Copy



CFCNCA Deposit Form (Form 200): 1032230

Audit Copy

Date: June 21, 2010

Department or Agency: Department of the Treasury

Deposit Bag Number: 1032230												
			Donors						Dollars			
Reporting	Form 100	Payroll	Cash	Conf	Total	Eagle	Double	Payroll	Cash and	Special	Total	
Number and	Number		and				Eagle		Check	Event		
Keyworker			Check							Proceeds		
4181000	276317	2	1	3	6	1	2	\$250.00	\$500.00	\$600.00	\$1,350.00	
John Doe												
4181000	276316	2	3	1	6	1	1	\$640.00	\$260.00	\$300.00	\$1,200.00	
Jane Doe												
4181000	276315	3	5	0	8	1	0	\$1,500.00	\$250.00	\$0.00	\$1,750.00	
John Smith												
Deposit Bag Totals:		7	9	4	20	3	3	\$2,390.00	\$1,010.00	\$900.00	\$4,300.00	
End of Deposit												

Form200 Receipt Copy



CFCNCA Deposit Form (Form 200): 1032230

Receipt Copy

Date: June 21, 2010

Department or Agency: Department of the Treasury

Deposit Bag Number: 1032230												
			Donors						Dollars			
Reporting	Form 100	Payroll	Cash	Conf	Total	Eagle	Double	Payroll	Cash and	Special	Total	
Number and	Number		and				Eagle		Check	Event		
Keyworker			Check							Proceeds		
4181000	276317	2	1	3	6	1	2	\$250.00	\$500.00	\$600.00	\$1,350.00	
John Doe												
4181000	276316	2	3	1	6	1	1	\$640.00	\$260.00	\$300.00	\$1,200.00	
Jane Doe												
4181000	276315	3	5	0	8	1	0	\$1,500.00	\$250.00	\$0.00	\$1,750.00	
John Smith												
Deposit Bag Total	ls:	7	9	4	20	3	3	\$2,390.00	\$1,010.00	\$900.00	\$4,300.00	
End of Deposit												

For Campaign Volunteers Completing Deposit Bag Bank Drop:	For Receiving Representative at Official Bank Drop Location:
Official Bank Drop Location Name:	Date/Time of Receipt:
Campaign Volunteer Name (printed):	Receiving Representative Name (printed):
Campaign Volunteer Signatures:	Receiving Representative Signature:



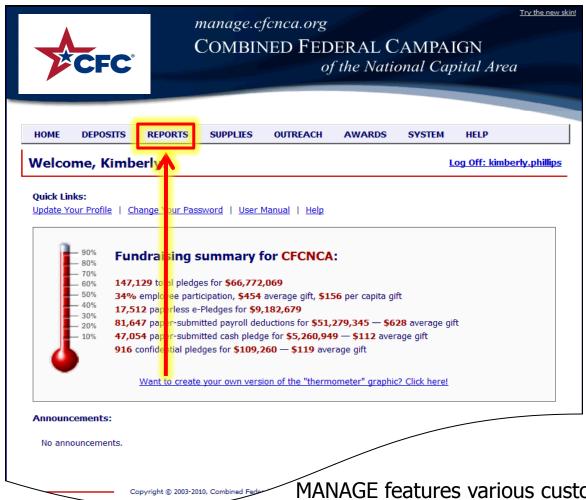
 Since details for every deposit of pledge forms are entered into MANAGE, fundraising progress for all Reporting Units, CMs, LEs, Directors, and CFCNCA as a whole can be tracked in "real time"

 MANAGE offers a variety of custom reports that can be used to track the progress of your campaign



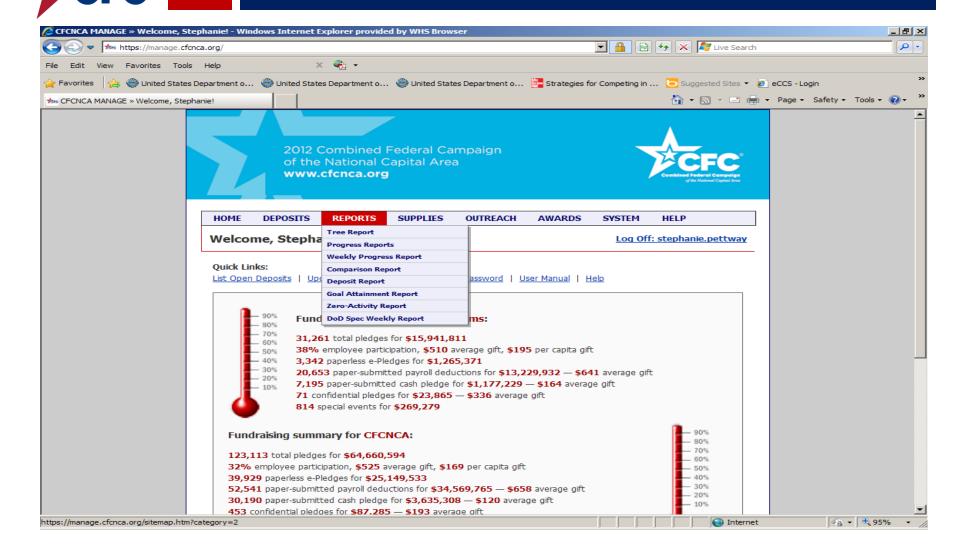






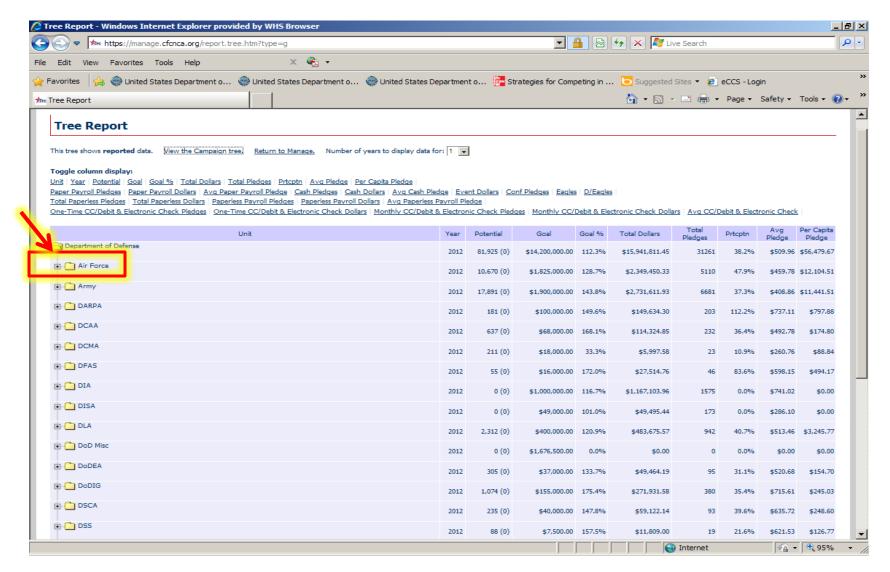
MANAGE features various customizable reports, all found under REPORTS in the menu bar...





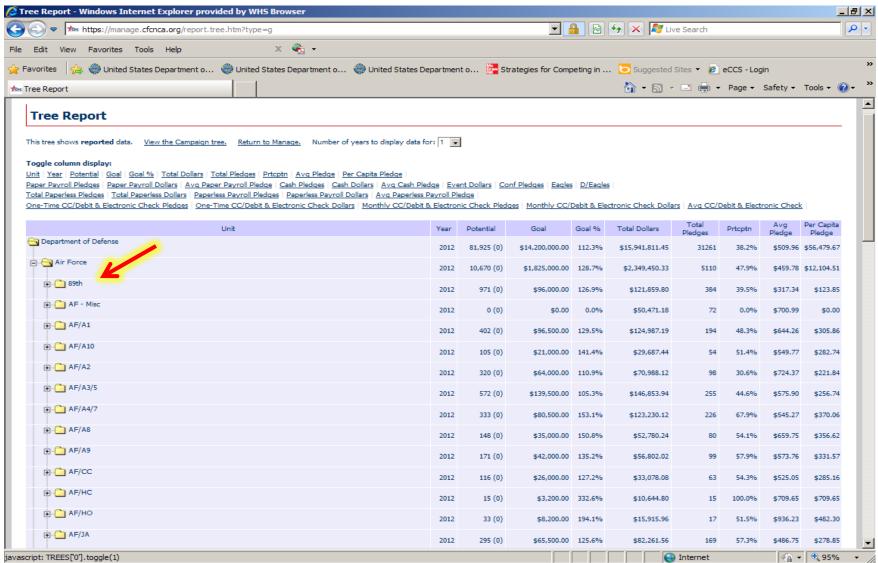


Tree Reports



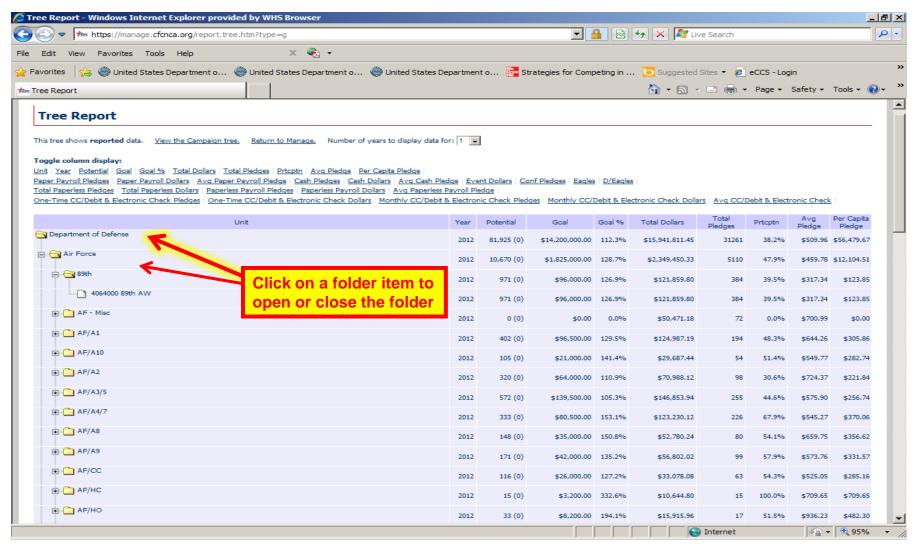
Tree Reports





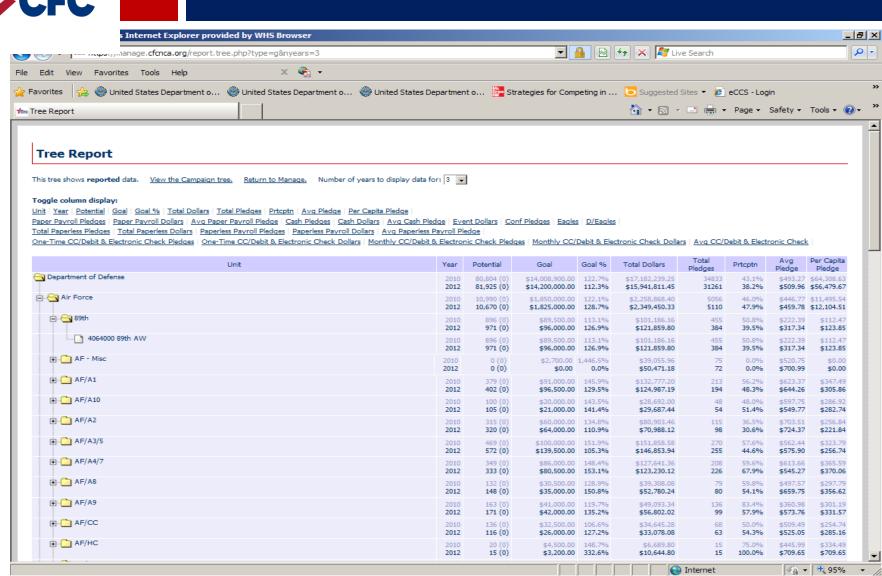


Tree Reports



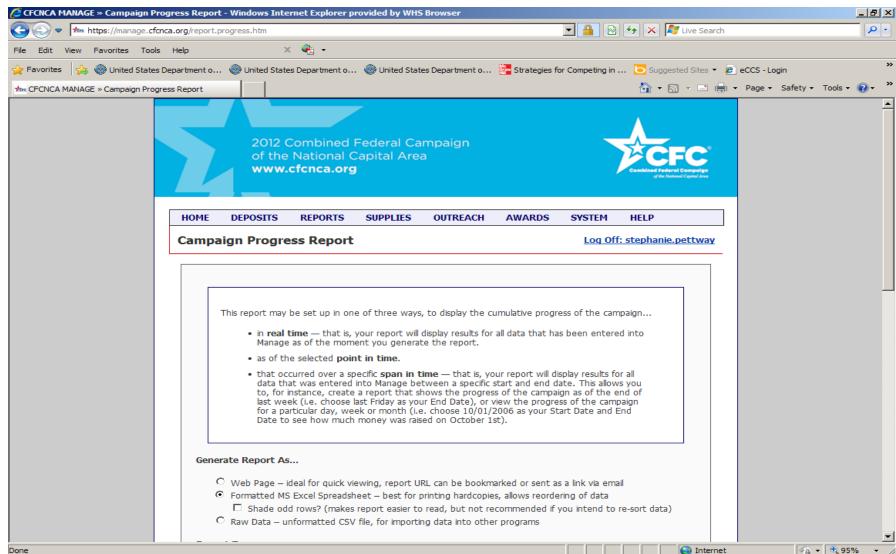


Tree Reports

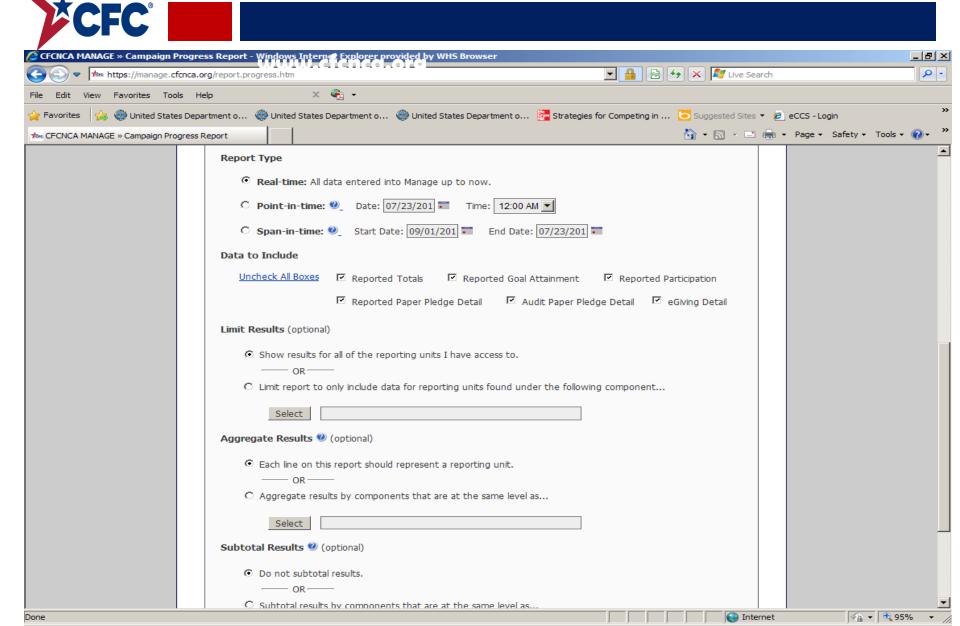


Progress Reports



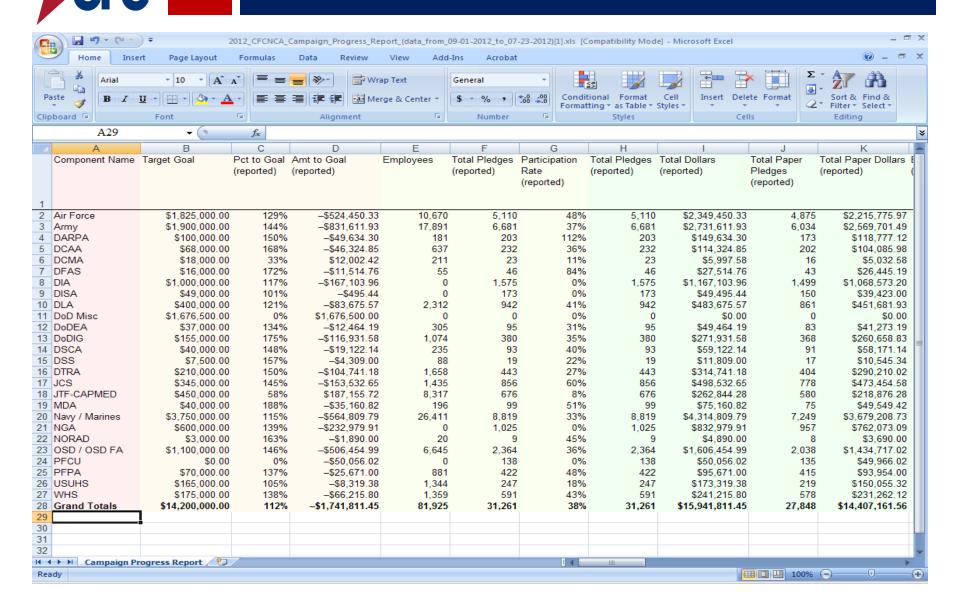


Progress Reports

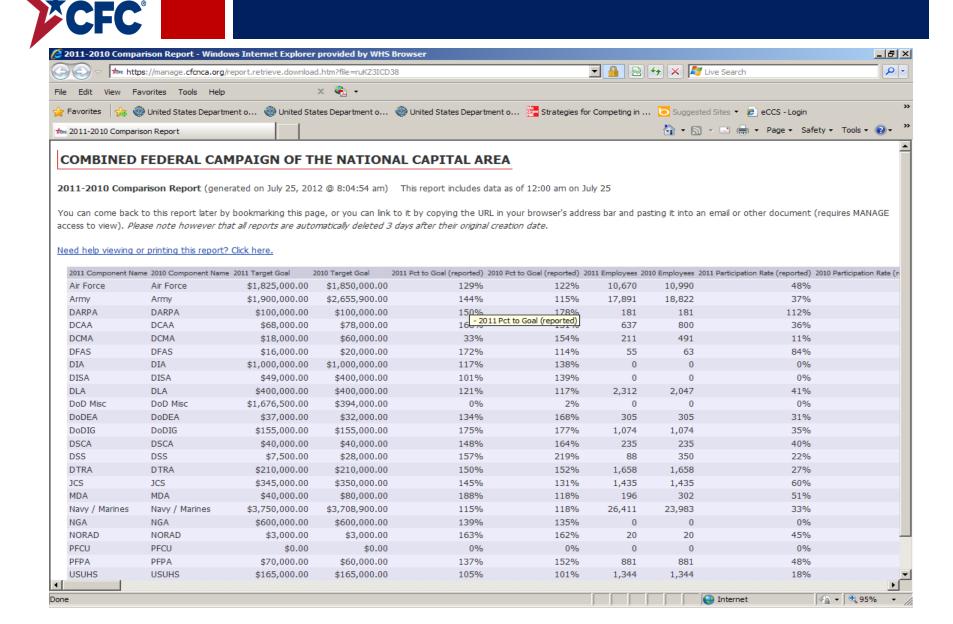


Progress Reports

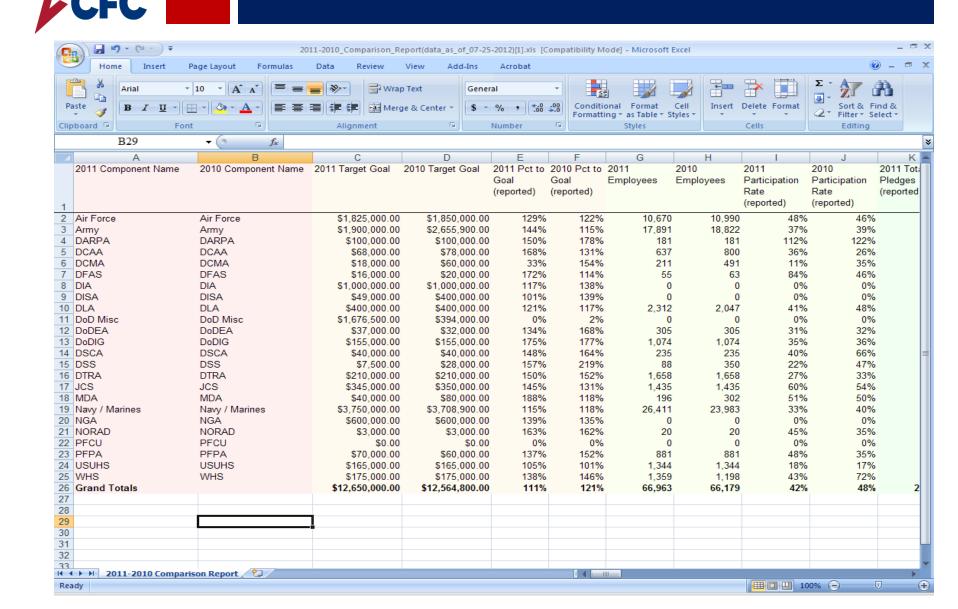




Comparison Reports

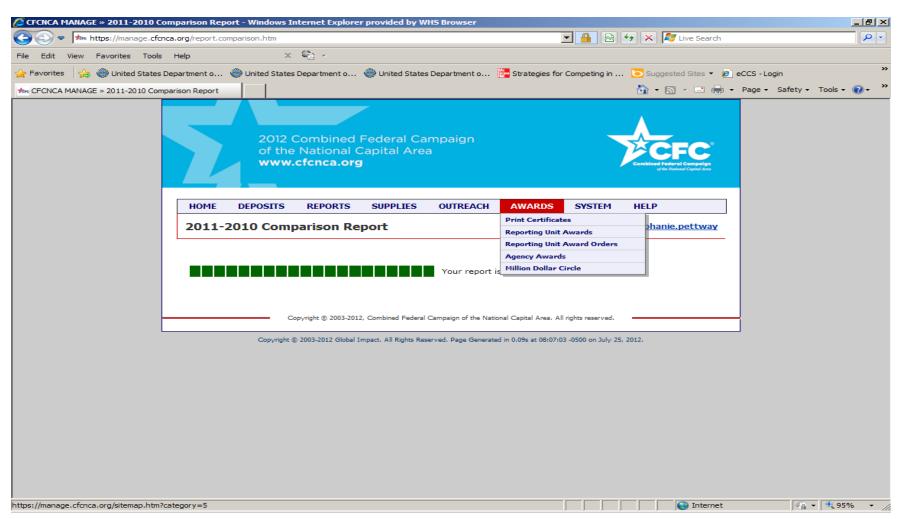


Comparison Reports



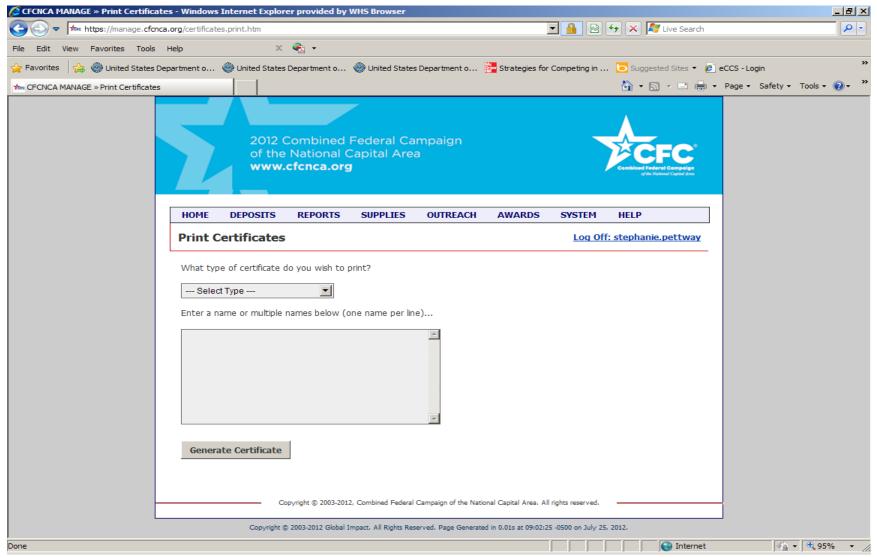
Awards



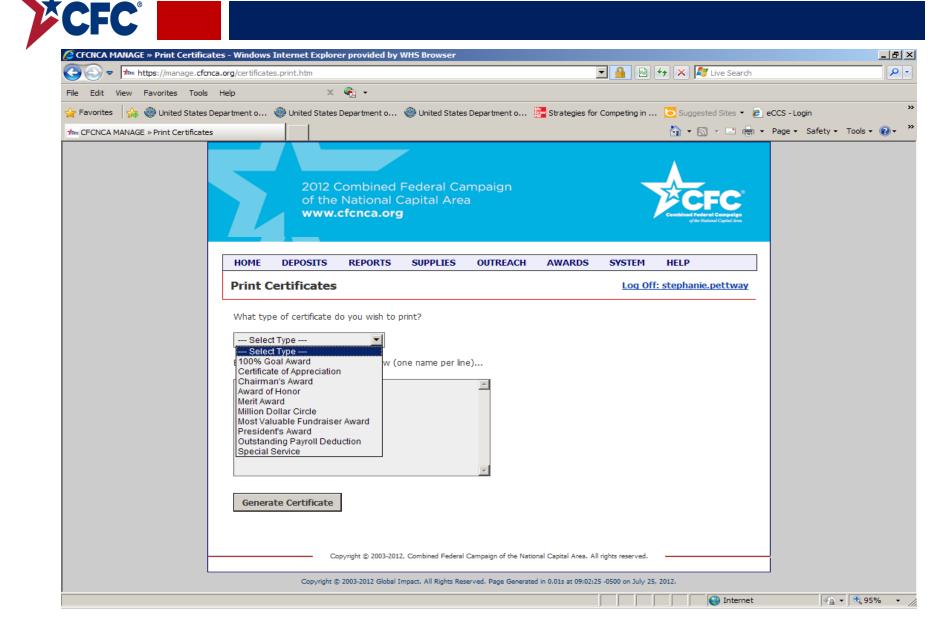


Awards

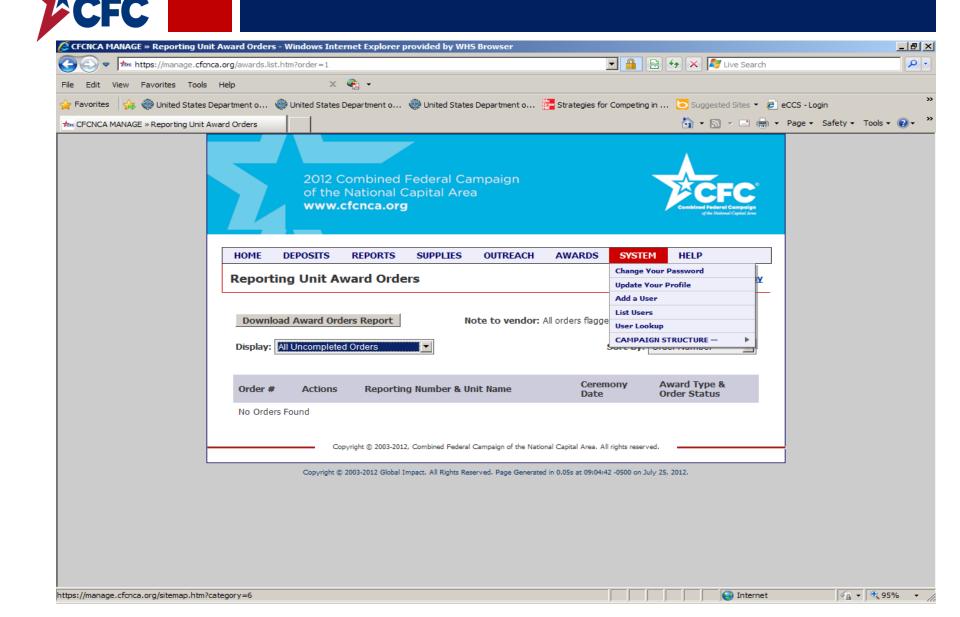




Awards

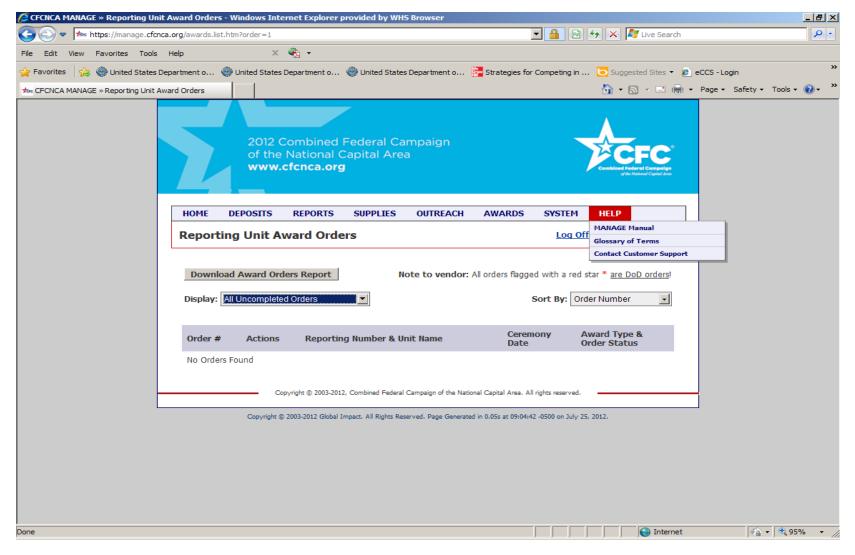


Systems



Help





Contact Information



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