



Operations, Database Division

Request for Proposal for Lockbox Services Provider

Table of Contents

1. Executive Summary.....	3
General Information	3
2.1 The Enterprise.....	3
2.6 Timeline.....	7
3. Proposal Preparation Instructions	7
3.1 Vendor’s Understanding of the RFP.....	7
3.2 Good Faith Statement.....	7
3.3 Communication.....	7
3.4 Proposal Submissions.....	8
3.5 Proposal Content	8
A. Vendor Qualifications and References	8
B. Explanation of Procedures.....	9
C. Staffing	9
D. Management and Quality Assurance	9
E. Samples of Previous Work	9
G. Signature.....	9
H. Price Proposal, Fees, and Expenses	9
4.0 Method of Award.....	10
4.1 Selection and Notification.....	10

1. Executive Summary

The Conquer Cancer Foundation of the American Society of Clinical Oncology (“Conquer Cancer” or “Conquer Cancer, the ASCO Foundation”) is a 501(c) (3) charitable organization which funds research for every cancer, every patient, everywhere. In 1964, seven oncologists created the American Society of Clinical Oncology, now a global network of nearly 45,000 cancer professionals. As ASCO’s foundation, Conquer Cancer supports groundbreaking research and education so both doctors and patients have the resources they need to create better outcomes for patients.

The Operations and Database Division of Conquer Cancer is responsible for maintaining Conquer Cancer’s Donor Database, StratusLive. This includes the processing (creating a record in StratusLive for pledges and gifts) and receipting of all gifts received by Conquer Cancer, processing of returned mail and record upkeep.

Statement of Work

The Operations, Database Division is soliciting proposals from interested providers to furnish Conquer Cancer with comprehensive donation payment processing services for donations sent to Conquer Cancer via mail, including receipt of payments and credit card information, depositing funds to a designated bank account, submitting credit card information to processing gateway, capturing donor data & image, establishing a process for handling exceptions, providing acknowledgement, and reporting. Conquer Cancer is seeking accurate and timely handling of all donations received by mail with an integration into the StratusLive data base. Please inform of what other business’s you support – multiple lines of businesses within an organization.

The purpose of this Request for Proposal (RFP) is to invite prospective vendors to submit their proposal to supply a Lockbox Services solution including providing a digital interface with StratusLive to Conquer Cancer.

General Information

2.1 The Enterprise

Conquer Cancer is working to create a world free from the fear of cancer through its mission of conquering cancer worldwide by funding breakthrough research and sharing cutting-edge knowledge. Conquer Cancer also supports initiatives to ensure that all people have access to high-quality cancer care. Working in close collaboration with a global network of top scientists and clinicians, as well as leading advocacy and research organizations, Conquer Cancer draws on the passion and expertise of the nearly 45,000 oncology professionals who are members of its partner organization, the American Society of Clinical Oncology, Inc. (ASCO).

Founded in 1964, ASCO is the world's leading professional organization for physicians and oncology professionals caring for people with cancer. ASCO’s mission is conquering cancer through research, education, and promotion of the highest quality patient care. Its global membership is composed of nearly 45,000 oncology professionals in academic and community-based settings, including physicians, researchers, patient advocates, and nurses who are leaders in advancing cancer care in the 21st century.

2.2 Project Purpose and Description

Conquer Cancer solicits donations from existing donors and to prospective donors by mail and through other channels. Each solicitation is considered a campaign with a designated purpose for the funds. The solicitation includes a reply form which is coded with the campaign. In response to solicitations, donors send gifts in the form of a check or credit card information to a bank lock box. The purpose of this project is to process the replies and checks received to solicitations.

2.3 Project Scope

Conquer Cancer is a fundraising organization that does outbound direct mail. Conquer Cancer is seeking a provider of caging service to process inbound donations. Conquer Cancer has two types of solicitations - appeals and acquisition, the former to existing donors who have historically donated to the non-profit. For these existing donors we have the donor's name, address, and contact info, along with a donor ID. Each solicitation letter and remittance statement has that donor's ID printed on the bottom.

The second type of solicitation is acquisition campaign, which is designed to attract new donors. For acquisition these individuals do not already reside in the donor database. Volume of responses vary by the number of campaigns run and the month of the year. The chart below contains both check and credit card payments totals combined each month. Individuals totals by payment type can be seen in the attachment A.

CCF Donation Payments (Mailed)											
Jan-19	Feb - 19	Mar 19	Apr 19	May 19	Jun 19	Jul 19	Aug 19	Sep 19	Oct 19	Nov 19	Dec 19
284	961	807	488	179	1014	684	292	281	208	1037	789
Jan 20	Feb 20	Mar 20	Apr 20	May 20	Jun 20	Jul 20	Aug 20	Sep 20	Oct 20	Nov 20	Dec 20
225	1191	1258	480	490	489	1124	87	1143	822	588	2397
Jan 21	Feb 21	Mar 21	Apr 21	May 21	Jun 21	Jul 21	Aug 21	Sep 21	Oct 21	Nov 21	Dec 21
477	1562	2190	759								

As a minimum, services required include:

Overall Functionality Requirements	
	Receive payments and information in a secure PO Box Ability to process donation payments - via cash, check, and credit card Deposit checks via a remote capture process to Conquer Cancer's bank account Enter credit card information into Conquer Cancer's payment processor gateway
	Ability for Conquer Cancer to determine appropriate batch size and batch numbering system – at least daily
	Ability to process both Business Reply Envelopes/non-BRE returns
	Ability to capture information via key and/or optical recognition (OCR) scanline capability and meet case-sensitive expectations
	Ability to utilize a finder number in order to minimize data entry error
	Ability to process noted exceptions - to include missing Campaign Activity Group code, handwritten returns, rejected payments, tributes & memorials or other invoiced payments for accounts and contacts
	Ability to process additional noted exceptions - communication preference, address change, multiple designations. Vendor can either accommodate in the lockbox file or divert the exception into a separate upload
	Ability to escalate to a data entry team to input the exception manually
	Ability to provide quick turnaround (Same day or next day) SLA on bank deposits, especially cash deposits

	Ability to key directly into client databases where required
	Ability to process donor tax receipts and acknowledgements - customized letters & receipts with special envelopes. Providing print and mail dates in format able to be imported into database
	Ability to provide searchable imaging system and/or easily assessable scanned images of donation slip, envelope, check and/or other supporting payment documentation including returned mail as a separate process
	IRS electronic storage requirements direct to storage facility
	Ability to deposit checks based on payee name preferences and reconciliation of incorrect deposits

2.4 Technical and System Requirements

Technical Specifications	
	Vendor to provide Custom File formats, see example on page 6
	Vendor to provide file transfer location or electronic files
Reliability, Backup & Disaster Recovery	
	Vendor to provide image backup plan & documentation
	Vendor to provide disaster recovery plan including recovery timeline
	Vendor to complete Security Questionnaire, see Attachment B
	Online access to retrieve and complete any necessary forms
Documentation	
	Vendor to provide Conquer Cancer with training documentation
Reporting	
	Accounting Reports - Deposit and balance reporting
	MARCOM Reports - Returned mail rates, address updates
	Operations Reports – Review CC QA reporting, see Attachment A
Security/Data Integrity/Privacy	
	PCI, DSS and CISP Compliant to include full documentation
	Internal Q/A process to ensure 98-99% accuracy data entry rate
	Ongoing training with vendor and Conquer Cancer with response to issues identified by Conquer Cancer and/or vendor
	Bonding Requirements

Example of the Custom Layout:

Column	Header Row	Required	Field Size	Type
1	ContactNumber	Conditional	8	nvarchar
2	Honorific	Optional	100	nvarchar
3	FirstName	Conditional	50	nvarchar
4	MiddleName	Optional	50	nvarchar
5	LastName	Conditional	50	nvarchar
6	Suffix	Optional	20	nvarchar
7	EmailAddress1	Optional	100	nvarchar
8	Line1	Optional	250	nvarchar
9	Line2	Optional	250	nvarchar
10	PostalCode	Optional	10	nvarchar
11	City	Optional	250	nvarchar
12	StateorProvince	Optional	50	nvarchar
13	Country	Optional	250	nvarchar
14	HomePhone	Optional	50	nvarchar
15	AddressType	Conditional	50	nvarchar
16	PaymentAmount	Required	18,2	Decimal
17	PaymentSpecialInstructions	Optional	100	
18	PaymentRequiresReview	Optional	10	
19	ReceivedOn	Optional	50	nvarchar
20	AccountingDate	Required	50	nvarchar
21	PaymentMethod	Required	50	nvarchar
22	PaymentCheckDate	Conditional	50	nvarchar
23	PaymentCheckNumber	Conditional	15	nvarchar
24	CampaignActivityGroupExternalAppealCode	Required	13	nvarchar
25	DesignationAmount1	Conditional	18,2	decimal
26	DesignationCode1	Conditional	100	nvarchar
27	TributeAmount	Optional	18,2	decimal
28	TributeSpecialMessage	Optional	2000	nvarchar
29	TributeType	Optional	50	nvarchar
30	TributeeTitle	Optional	50	nvarchar
31	TributeeFirstName	Optional	50	nvarchar
32	TributeeLastName	Optional	50	nvarchar
33	TributeeBiographicalInformation	Optional	4000	nvarchar

2.5 Additional Expectations

The successful responder must demonstrate a high level of accuracy in capturing data and the ability to handle the variation in volume, especially the year end increase in responses.

2.6 Timeline

The following is a tentative schedule that will apply to this RFP but may change in accordance with the organization's needs or unforeseen circumstances. Changes will be communicated by e-mail to all invited proposers.

Date of Issue	June 3, 2021
Technical Questions/Inquiries Due	June 30, 2021
Responses to questions no later than	July 7, 2021
Proposal Submission to Conquer Cancer	July 16, 2021
Vendor Notification of selection for presentation of proposal	July 31, 2021
Presentation of Selected Proposals to Conquer Cancer	August 16, 2021
Estimated Project Start Date	September 1, 2021

3. Proposal Preparation Instructions

3.1 Vendor's Understanding of the RFP

In responding to this RFP, the vendor accepts the responsibility to fully understand the RFP in its entirety, and in detail, including making any inquiries to Conquer Cancer as necessary to gain such understanding. Conquer Cancer reserves the right to disqualify any vendor who demonstrates less than such understanding. Further, Conquer Cancer reserves the right to determine, at its sole discretion, whether the vendor has demonstrated such understanding. That right extends to cancellation of award prior to contract signing if an award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to Conquer Cancer.

3.2 Good Faith Statement

All information provided by Conquer Cancer in this RFP is offered in good faith. Individual items are subject to change at any time. Conquer Cancer makes no certification that any item is without error. Conquer Cancer is not responsible or liable for any use of the information or for any claims asserted there from.

3.3 Communication

Verbal communication shall not be effective unless formally confirmed in writing by Conquer Cancer. In no case shall verbal communication govern over written communication.

3.3.1 Vendors' Inquiries

Applicable terms and conditions herein shall govern communications and inquiries between Conquer Cancer and vendors as they relate to this RFP. Inquiries, questions, and requests for clarification related to this RFP are to be directed in writing to:

Attention: Ms. Reese Teasley, Associate Director, Contracts & Compliance

Telephone: +1 (571) 483-1433

Email: reese.teasley@conquer.org

Conquer Cancer Foundation

2318 Mill Road; Suite 800

Alexandria, VA 22314

3.3.2 Informal Communications Shall include, but are not limited to:

Requests from/to vendors or vendors' representatives in any capacity, to/from any Conquer Cancer employee or representative of any kind or capacity with the exception of Reese Teasley for information, comments, speculation, etc. Inquiries for clarifications and information that will not require addenda may be submitted verbally to the above named at any time.

3.3.3 Formal Communications shall include, but are not limited to:

Questions concerning this RFP must be submitted in writing and be received **prior to June 30, 2021 at 6PM Eastern Daylight Time (EDT)**.

- Errors and omissions in this RFP and enhancements. Vendors shall bring to Conquer Cancer any discrepancies, errors, or omissions that may exist within this RFP. With respect to this RFP, vendors shall recommend to Conquer Cancer any enhancements which might be in Conquer Cancer's best interests. These must be submitted in writing and be received **prior to June 30, 2021 at 6PM EDT**.
- Inquiries about technical interpretations must be submitted in writing and be received prior to **June 30, 2021 at 6PM EDT**. Inquiries for clarifications/information that will not require addenda may be submitted verbally to the buyer named above at any time during this process.
- Verbal and/or written presentations and pre-award negotiations under this RFP.

3.3.4 Addenda

Conquer Cancer will make a good-faith effort to provide a written response to each question or request for clarification that requires addenda within 3 business days. Conquer Cancer's response will be sent to all vendors.

3.4 Proposal Submissions

Email proposals are preferred. Conquer Cancer will not accept proposals received by fax.

Proposals must be delivered, **on or prior to July 16, 2021 at 6PM EDT**, to:

Ms. Reese Teasley

Associate Director, Contracts & Compliance

571-483-1433

reese.teasley@conquer.org

Conquer Cancer Foundation

2318 Mill Road; Suite 800

Alexandria, VA 22314

3.5 Proposal Content

A. Vendor Qualifications and References

The proposal must include:

- A brief history of the vendor's organization
- Descriptive information of current services offerings
- A list of the vendors five largest (by work volume) current clients
- Names, addresses, phone numbers, and email addresses of at least four current and one previous client, whom we may contact for references
- Number of clients engaged in programs closely similar to those of Conquer Cancer
- Turnover of clients engaged in programs closely similar to those of Conquer Cancer

B. Explanation of Procedures

The vendor must provide a complete explanation of the policies, processes, tools, procedures, schedules, reports, etc., that will be used to deliver the desired services as described in, in Section 2. of this RFP. This should include an implementation and transition schedule.

C. Staffing

The vendor must identify the staff person who will act in the capacity of Account Executive for Conquer Cancer. For the identified individual, the proposal must include:

- A detailed biography or resume
- A chart showing the person's place in the vendor's organization
- Identification and functional description of this person's manager or supervisor
- Office location
- Estimated percent of this person's time that will be dedicated to this account
- Number of clients assigned to Account Executives and the size of said accounts.

Describe customer service organization and follow up to issues, method of tracking issues, as well as average response time and resolution time. The proposal must identify, at least by job function, other staff that will assist the Account Executive in successfully performing the work on this account.

If vendor will be making use of subcontractors, the key person for each subcontractor should be identified and a bio or resume should be provided.

D. Management and Quality Assurance

Your proposal must explain the management processes you use regularly to ensure that the services you provide are timely, correct, consistent, complete, and high in quality. Please explain any policies you have related to warranties of your work, and how those policies are implemented and enforced. Explain the avenues of recourse Conquer Cancer will have in the event it is not pleased with the services it receives from you.

E. Samples of Previous Work

As an attachment to the proposal, please submit at least two examples of successful lockbox implementation schedules for current or recent clients as well as monthly files provided for upload to a customer relationship management or ERP system. These materials will be kept confidential, and they will not be returned.

F. Sample Contract

Please include a copy of your standard contract or terms and conditions including any service level warranties.

G. Signature

Your proposal must be signed by an owner, principal, officer of the corporation, or another person who is legally authorized to enter into agreements on behalf of the company.

H. Price Proposal, Fees, and Expenses

The proposed pricing of for the services offered must encompass all anticipated charges for the requested on-going services and any one-time set up fees. Please provide detail of charges and an estimate of the annual cost based on the volume noted in Section 2. If assumptions are used to calculate the fees, please explain.

If you wish to propose fees based upon itemized expenses, summarize all the items that will be included therein and provide your estimates of what a "typical" billing would be.

If there are any pass-through costs from suppliers or subcontractors, your proposal must show what those are, along with estimates of a "typical" billing period, and complete disclosure of your company's related markups if any.

4.0 Method of Award

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, format, and enterprise. The purpose of this RFP is to identify those vendors that have the interest, capability, and financial strength to supply Conquer Cancer with a Lockbox Services Solution, as identified in the Scope of Work.

Evaluation Criteria:

1. Best value based on requirements met and features
2. Innovative and efficient use of technology
3. Customer support and ability to resolve issues quickly by knowledgeable and experienced account team
4. Ability to meet timeline for implementation

4.1 Selection and Notification

Vendors determined by Conquer Cancer to possess the capacity to compete for this contract will be selected to move into the proposal presentation and negotiation phase of this process. Written notification will be sent to these vendors via mail or email after the proposals have been reviewed.

Selected vendors will be invited to present their proposals to Conquer Cancer management and staff, as well as ASCO information technology and finance staff.

Based on the written proposal and presentations, Conquer Cancer will select the vendor for negotiations and contracting. If negotiations are not successful or a contract is not executed, Conquer Cancer may negotiate with other vendors or issue another RFP, at its discretion.

Attachment A
CC QA reporting

CC QA reporting

File Field Names	Format	Case	Fields Contents	Notes
ContactNumber	Text	A000000 or C0000000	As listed on remittance	A = Account & C= Contact
Honorific	Text	Proper/Title	As listed on remittance "Mr, Mrs, Dr,	No ALL CAPS (.) or (-)
FirstName	Text	Proper/Title	As listed on remittance "Jane"	No ALL CAPS or No(.) or (-) replace dash with space
MiddleName	Text	Proper/Title	As listed on remittance ("L" or "Le Ann")	No ALL CAPS or No(.) or (-) replace dash with space
LastName	Text	Proper/Title	As listed on remittance "Doe"	No ALL CAPS or No(.) or (-) replace dash with space
Suffix	Text	Proper/Title	As listed on remittance "Jr" or "Sr" or "IV"	No ALL CAPS or No(.) or (-) replace dash with space
EmailAddress1	Text	Proper/Title	As listed on remittance	Must contain "@" & .
Line1	Text	Proper/Title	As listed on remittance	No ALL CAPS or No(.) or (-) replace dash with space
Line2	Text	Proper/Title -	As listed on remittance	No ALL CAPS or No(.) or (-) replace dash with space
PostalCode	Text	Zip(-)plus 4	As listed on remittance "06001-4542"	Please include dash (-) before the +4
City	Text	Proper	As listed on remittance	No ALL CAPS or No(.) or (-) replace dash with space
StateofProvince	Text	ALL CAPS Standard Abbreviations	Standard Abbreviations	ALL CAPS
Country	Text	Proper	Standard Country Full Name	
HomePhone	Number	2027779311	As listed on remittance	No (-) - Numbers ONLY
AddressType	Text	Proper/Title	Always "Primary"	
PaymentAmount	Number	100	As listed on check	No (.) or (\$)
PaymentSpecialInstructions	Text	ALL CAPS	Always "OTHER"	
PaymentRequiresReview	Text	ALL CAPS	Always "TRUE"	
ReceivedOn	Date	00/00/0000	Date Received	
AccountingDate	Date	00/00/0000	Date Received	
PaymentMethod	Text	Proper/Title	Check	
PaymentCheckDate	Date	00/00/0000	Date listed on check	
PaymentCheckNumber	Text	B-1475 or 632	As listed on check	Use check or money number listed

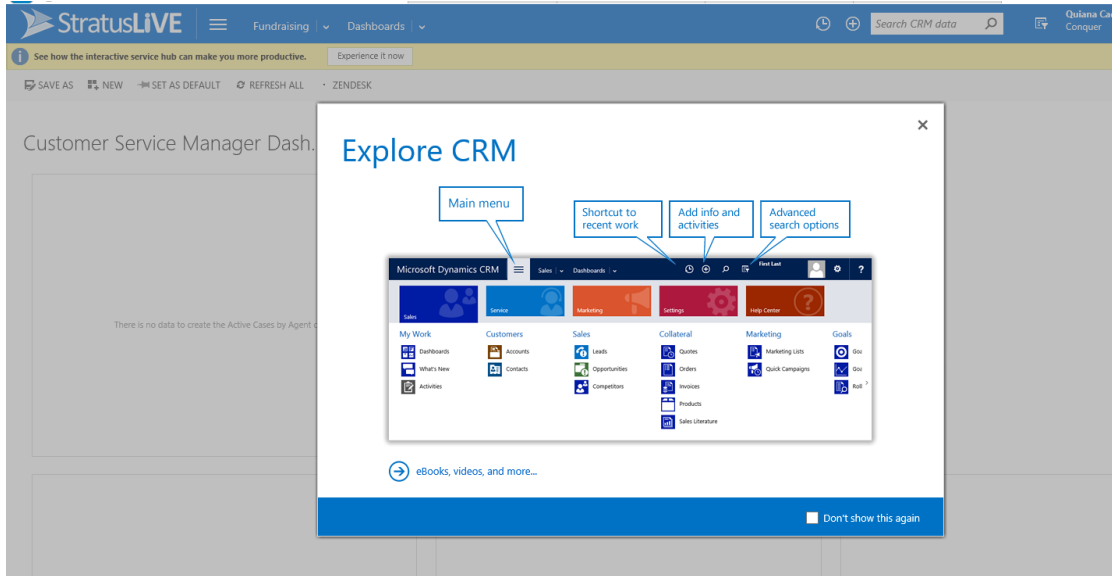
CampaignActivityGroupExternalApp ealCode	Text	A00B0000000000	As listed on remittance or Generic if not listed	We use generic CAG when one isn't listed "C20C200000001" or "C20C200000002"
DesignationAmount1	Number	100		No (.) or (\$)
DesignationCode1	Text	Proper/Title	As listed	
TributeAmount	Number	100	As listed	No (.) or (\$)
TributeSpecialMessage	Text	Sentence	As listed	
TributeType	Text	Proper/Title	As listed	
TributeeTitle	Text	Proper/Title	As listed	
TributeeFirstName	Text	Proper/Title	As listed	No ALL CAPS or No(.) or (-) replace dash with space
TributeeLastName	Text	Proper/Title	As listed	No ALL CAPS or No(.) or (-) replace dash with space
TributeeBiographicalInformation	Text	Proper/Title	As listed	

Attachment B
Security Questionnaire Link

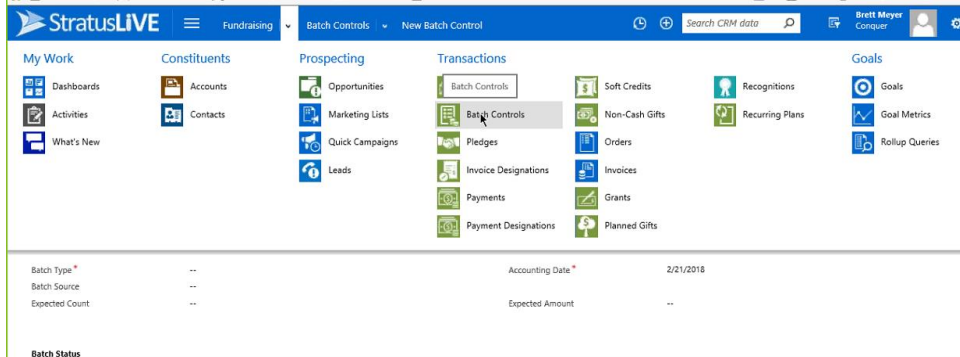
Attachment C
SOP for Cash Receipting

Cash Receipting Process

Short cut tools for reference



Go to "Fundraising" and Click "Batch Controls"



Locate the batch and double click to open

The image shows a screenshot of the StratusLIVE CRM interface displaying a table titled "Q's Unposted Batch Control View". The table has the following columns: Batch Control Number, Created On, Accounting Date, Batch Type, Batch Source, Expected Count, Expected Amount, Created By, and Status Reason. The table contains several rows of data, with the row for Batch Control Number 0019763 highlighted. The interface also shows a search bar for records and various action buttons like NEW, DELETE, EMAIL A LINK, RUN REPORT, EXCEL TEMPLATES, EXPORT TO EXCEL, IMPORT DATA, CHART PANE, and NEW SYSTEM VIEW.

Batch Control Number	Created On	Accounting Date	Batch Type	Batch Source	Expected Count	Expected Amount	Created By	Status Reason
0019745	12/10/2020 11:03...	12/10/2020	Payment	CCF Lockbox Credit Card	16	\$240.00	Autumn Jenni...	Active
0019751	12/11/2020 8:42 P...	12/11/2020	Payment	CCF Lockbox Credit Card	34	\$969.00	Autumn Jenni...	Active
0019754	12/11/2020 8:45 P...	12/11/2020	Payment	CCF Lockbox	50	\$1,295.00	Autumn Jenni...	Active
0019762	12/14/2020 7:14 P...	12/12/2020	Payment	CC Engaging Networks	42	\$7,359.69	SLCRM Admin	Active
0019763	12/15/2020 10:19...	12/14/2020	Payment	CCF Lockbox	28	\$511.00	Autumn Jenni...	Active
0019765	12/15/2020 10:20...	12/14/2020	Payment	CCF Lockbox	49	\$2,718.00	Autumn Jenni...	Active
0019766	12/15/2020 10:21...	12/14/2020	Payment	CCF Lockbox	28	\$593.00	Autumn Jenni...	Active

Click the dropdown (blue bar) for Batch Control Number

The screenshot shows the StratusLIVE interface. At the top, there is a blue navigation bar with 'StratusLIVE' and 'Fundraising' dropdowns. Below this is a yellow alert bar with 'New Alerts (6)'. The main content area has a blue header with 'BATCH CONTROL : CCF INFORMATION' and 'Batch Control 0019763'. Below this is a table with 'Batch Information'.

Batch Information			
Expected Count:	28	Expected Amount:	\$511.00
Actual Count:	1	Actual Amount:	\$2.00

Below the table is a 'General' tab.

Click "Payments"

The screenshot shows the StratusLIVE interface with the 'Payments' menu option highlighted. The navigation bar is the same as in the previous screenshot. Below the navigation bar, there are two sections: 'Common' and 'Process Sessions'. Under 'Common', 'Payments' is highlighted. Under 'Process Sessions', there are options for 'Background Processes' and 'Real-time Processes'.

Click "Add New Payment"

The screenshot shows the StratusLIVE interface with the 'Add New Payment' button highlighted. The navigation bar and alert bar are the same. Below the header, there is a section for 'Add New Payment' with a text input field and a dropdown menu. Below this is a toolbar with various action buttons like 'ADD NEW PAYMENT', 'ADD EXISTING PAYMENT', etc. Below the toolbar is a table header with columns like 'Payment Number', 'Created On', 'Accounting Date', etc.

Enter the "Campaign Activity Group": formally the Appeal Marketing Source Code in Raiser's Edge. The 13 digit code starting with an A or D on the reply device. See highlighted below. Then hit the Tab button.

The screenshot shows a donation form for 'CONQUER CANCER! THE ASCO FOUNDATION'. The form is titled 'Payment - New' and 'Constituent & Campaign Information'. It has several input fields for 'Contact', 'Account', 'Solicitor', 'Campaign', 'Campaign Activity', and 'Campaign Activity Group'. The 'Campaign Activity Group' field is highlighted with a blue border and contains the value 'a20102000005'. Below this is the 'Payment Information' section with fields for 'Amount', 'Payment Method', 'Check Number', and 'Check Date'.

The CAG will auto populate the Campaign and Campaign Activity

StratusLIVE

Save Save & Close Save & New Credit Card

Payment - New

Constituent & Campaign Information

Contact Account Solicitor
Campaign * Campaign Activity Campaign Activity Group
2020 Annual Fund Direct Mail November 2020 Acquisition Control vs. Test A20L102000005

Payment Information

Amount * Payment Method Check Number Check Date
Accounting Date * Received On Credit Date
12/14/2020 12/23/2020 12/23/2020

Designations

Enter "Amount": This is the Gift Amount. See check or Cash deposit Slip

StratusLIVE

Save Save & Close Save & New Credit Card

Payment - New

Constituent & Campaign Information

Contact Account Solicitor
Campaign * Campaign Activity Campaign Activity Group
2020 Annual Fund Direct Mail November 2020 Acquisition Control vs. Test A20L102000005

Payment Information

Amount * Payment Method Check Number Check Date
5.00 Check
Accounting Date * Received On Credit Date
12/14/2020 12/23/2020 12/23/2020

Designations

+ Add - Remove

Amount *	Payment Designation Type *	Invoice	Opportunity	Designation *	Debit Account	Credit Account
----------	----------------------------	---------	-------------	---------------	---------------	----------------

Enter "Check Number" and "Check Date"

StratusLIVE

Save Save & Close Save & New Credit Card

Campaign * Campaign Activity Campaign Activity Group
2020 Annual Fund Direct Mail November 2020 Acquisition Control vs. Test A20L102000005

Payment Information

Amount * Payment Method Check Number Check Date
5.00 Check 32124722 12/14/2020
Accounting Date * Received On Credit Date
12/14/2020 12/23/2020 12/23/2020

Designations

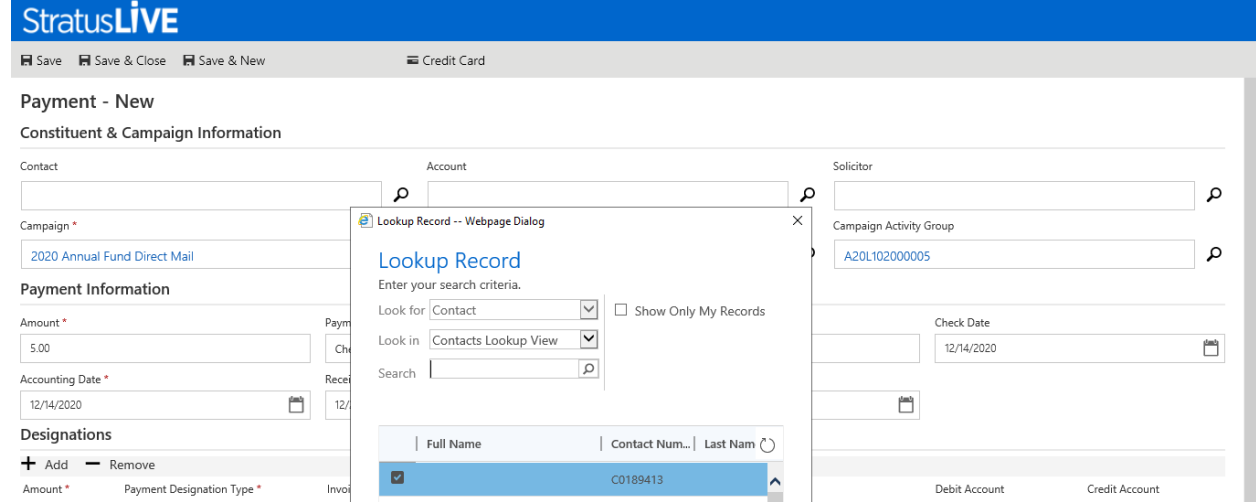
+ Add - Remove

Amount *	Payment Designation Type *	Invoice	Opportunity	Designation *	Debit Account	Credit Account
5.00	Gift			Area of Greatest Ne		

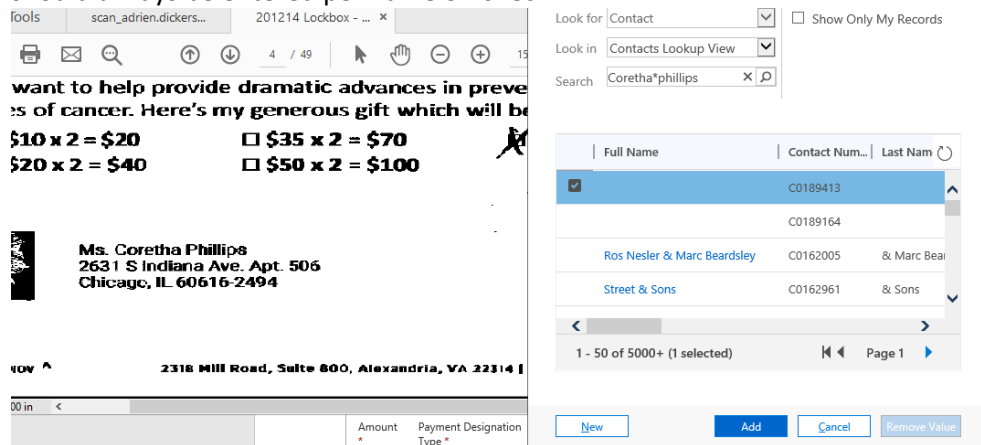
Other Details

Receipt Allow Receipt Template Payment Tribute

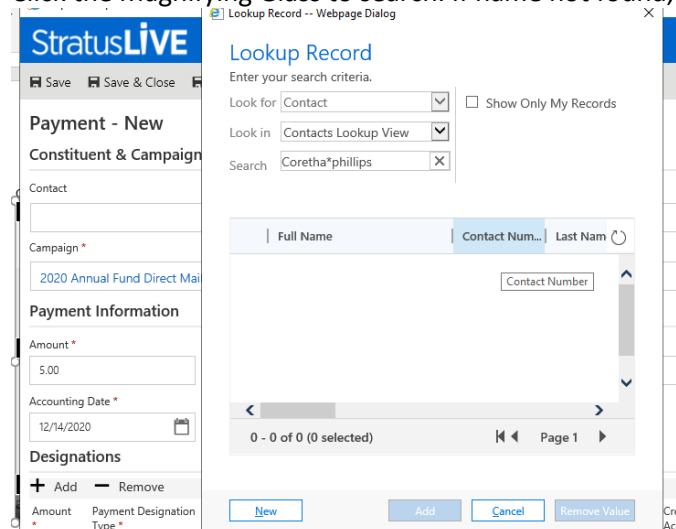
Enter the “**Contact**” (Individual Donor Name) or the “**Account**” (Company Donor Name). Click the Magnifying glass for Contact or Account to search



Enter Name from Reply Device or Check. If the name on the reply device is different from check, the gift should always be entered per name on check.



Click the Magnifying Glass to search. If name not found, click “**New**” to add a new contact or account



Mandatory Information needed for record: **Honorific, First Name, Middle Initial (if applicable), Last Name, List as Name, Check box for Home is Primary, Street 1, Street 2, City, State, Zip, Email (if applicable, Home Phone (if applicable))**

Pavment - New
 ibox - Foundation A.pdf - Adobe Acrobat Reader DC
 View Sign Window Help
 Tools scan_adrien.dickers... 201214 Lockbox -

YES! I want to help provide dramatic advances all types of cancer. Here's my generous gift which will help:

\$10 x 2 = \$20 \$35 x 2 = \$70
 \$20 x 2 = \$40 \$50 x 2 = \$100

Ms. Coretha Phillips
 2631 S Indiana Ave, Apt. 506
 Chicago, IL 60616-2494

2316 Mill Road, Suite 800, Alexandria

Conquer Cancer 89607, 896076 12/14/20 Bat:727

Receipt

CONTACT: CCF - SL CONTACT
 New Contact

Honorific Ms.
 First Name * Coretha
 Middle Name --
 Last Name * Phillips
 Suffix --
 List As Coretha Phillips
 List As Verified?
 Employer Account --
 Home Is Primary
 Street 1 2631 S Indiana Ave Apt 50
 Street 2 --
 City Chicago
 State/Province
 ZIP/Postal Code 60616

Last Transaction Amount --
 Last Transaction Date --
 Date of First Gift --

RECENT OPPORTUNITIES
 Topic | Goal Total Am... | Est. Close D...
 To enable this content, create the record.

CONNECTIONS
 Connected To | Role (To) | Co...
 To enable this content, create the record.

EDUCATION
 Institution | Institution Account | Degree Nam...
 To enable this content, create the record.

Scroll down the form and add Constituent Record Source – **“Gift Entry”**

CONTACT: CCF - SL CONTACT
 New Contact

Twitter --
 Is Staff
 Past President
 Constituent Record Source **Gift Entry**
 Is Constituent
 Nancy's Contact

Map showing Washington, D.C. area with labels for Fair Oaks, Providence, Fairfax, Mason, and Alexandria.

Scroll down form and enter **“Gender”**, and **“Spouse/Partner Name”** (if applicable from check) then click the save button on bottom right of the form

StratusLIVE Fundraising > Contacts > Coretha Phillips >

New Alerts (6) Latest: You've got an alert for the mailbox 'Quiana Cadlett'. Today 1:35 PM View Alerts

CONTACT: CCF - SL CONTACT
 Coretha Phillips

Details

PERSONAL
 Gender Female
 Spouse/Partner Name --
 Marital Status --
 Birthdate --
 Age --
 Anniversary --

MARKETING
 Originating Lead --
 Last Campaign Date --
 Marketing Materials Allow

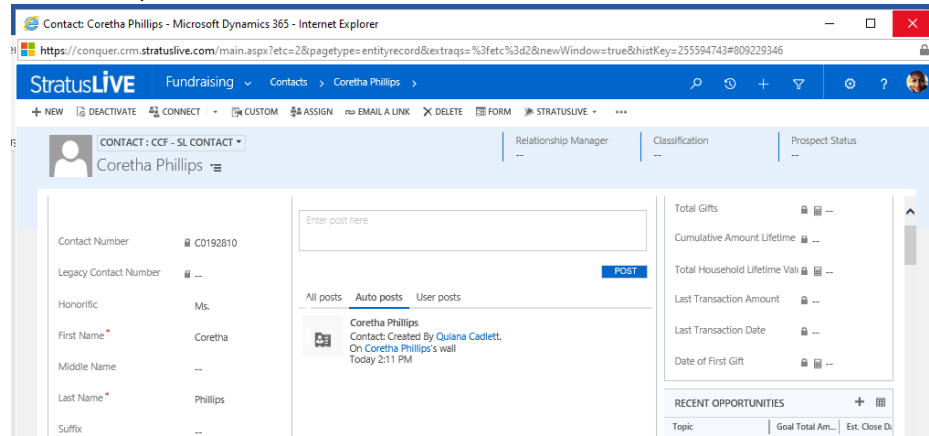
OWNERS
 Owner * Quiana Cadlett
 Currency US Dollar

CONTACT PREFERENCES
 Contact Method Any
 Email Allow

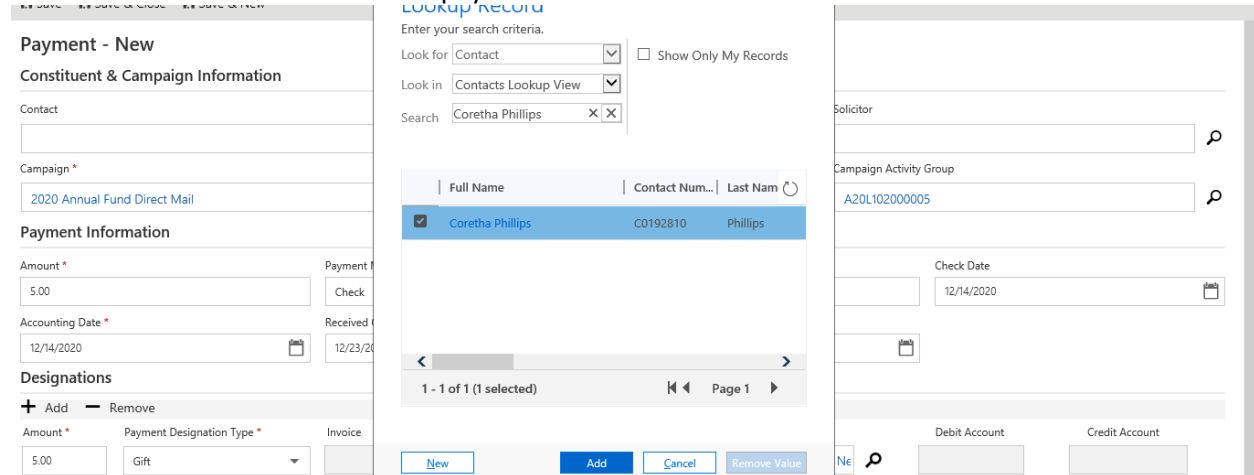
SALUTATIONS
 Informal Household Salutation Coretha
 Formal Household Salutation Ms. Coretha Philli...
 Nancy's Addressees --

Active

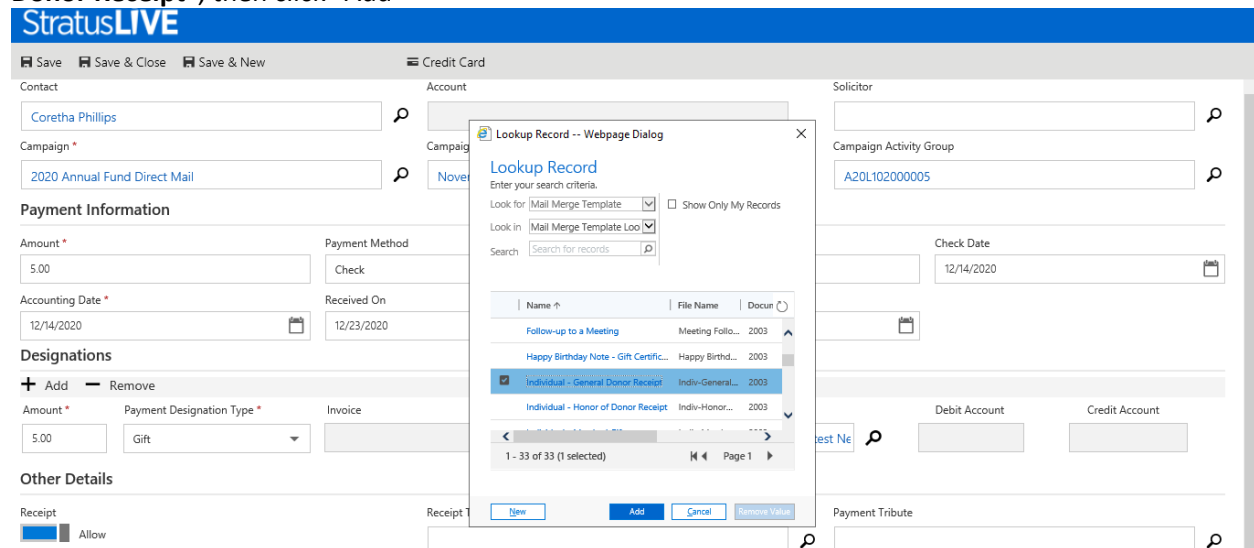
Once done, click the **red X** to close out of the record



Click **“Add”** to add the donor to the payment



If the donation is \$10 or more, click the magnifying glass for **“Receipt Template”** and choose the appropriate receipt per donation. If gift isn't a tribute (honor or memorial) use the **“Individual – General Donor Receipt”**, then click **“Add”**



Enter "Tribute" if applicable

Save Save & Close Save & New Credit Card

Payment - New

Constituent & Campaign Information

Contact Account Solicitor
 Campaign * Campaign Activity Campaign Activity Group

Payment Information

Amount * Payment Method Check Number Check Date
 \$ Credit-Debit Card
 Accounting Date * Received On Credit Date
 12/01/2020 12/10/2020 12/10/2020

Designations

+ Add - Remove
 Amount * Payment Designation Type * Invoice Opportunity Designation * Debit Account Credit Account
 \$ Gift Area of Greatest Need

Other Details

Receipt Allow
 Receipt Template Payment Tribute
 Salutation Employer Matching Program Government Matching Program

To add a tribute click the "Magnifying Glass" and click "New"

Contact Quiana Cadlett
 Campaign * 2017 Unrestricted

Payment Information

Amount * Payment Method
 100.00 Cash
 Accounting Date * Received On
 02/01/2018 02/01/2018

Designations

+ Add - Remove
 Amount * Payment Designation Type * Invoice
 100.00 Gift

Other Details

Receipt Allow
 Salutation

Look Up Record

Enter your search criteria.

Look for Tribute Show Only My Records
 Look in Tribute Lookup View
 Search

Name Created On

No Tribute records are available in this view.

0 - 0 of 0 (0 selected) Page 1

New Add Cancel Remove Value

Solicitor Doris Nichols
 Campaign Activity Group
 Check Date
 Debit Account Credit Account
 Payment Tribute
 Government Matching Program

Add tribute info "Contact" or "Account" record. Choose tribute type "In honor" or "In Memory"

SAVE SAVE & CLOSE + NEW FORM EDITOR ZENDESK

TRIBUTE : INFORMATION

New Tribute

General

Constituent Information

Contact Quiana Cadlett Account

Details

Tribute Amount	--	Tribute Type	In Honor of
Tributee1 Contact	Quiana Cadlett	Tributee2 Contact	In Memory of
Tributee1 Full Name	Doris Nichols	Tributee2 Full Name	--
Tributee1 Special Biographical Information	--	Tributee2 Special Biographical Information	--
Special Message	--	Publish To Web	True
Is Amount Private	False	Tribute Award Or Recognition	--

Add message in **“Special Message”** box if applicable

TRIBUTE : INFORMATION
New Tribute

General

Constituent Information

Contact: Quiana Cadlett Account

Details

Tribute Amount	--	Tribute Type	In Honor of
Tributee1 Contact	Doris Nichols	Tributee2 Contact	--
Tributee1 Full Name	Doris Nichols	Tributee2 Full Name	--
Tributee1 Special Biographical Information	--	Tributee2 Special Biographical Information	--

Special Message: thinking of you Publish To Web: True
Tribute Award Or Recognition: --

Once done entering all tribute info, click **“Save”** at the bottom right of form

StratusLIVE Tribute for Quiana...

TRIBUTE : INFORMATION
Tribute for Quiana...

General

Constituent Information

Contact: Quiana Cadlett Account

Details

Tribute Amount	--	Tribute Type	In Honor of
Tributee1 Contact	Doris Nichols	Tributee2 Contact	--
Tributee1 Full Name	--	Tributee2 Full Name	--
Tributee1 Special Biographical Information	--	Tributee2 Special Biographical Information	--

Special Message: Thinking of you Publish To Web: True
Tribute Award Or Recognition: --

Is Amount Private: Yes
Status Reason: Active

Status: Active

To add a tribute notification, Click the drop down and choose **“Tribute Notification”**

StratusLIVE Tribute for Quiana...

Common

- Activities
- Closed Activities
- Connections
- Documents
- Audit History
- Contacts
- Payments
- Pledges
- Recurring Plans
- Tribute Notifications

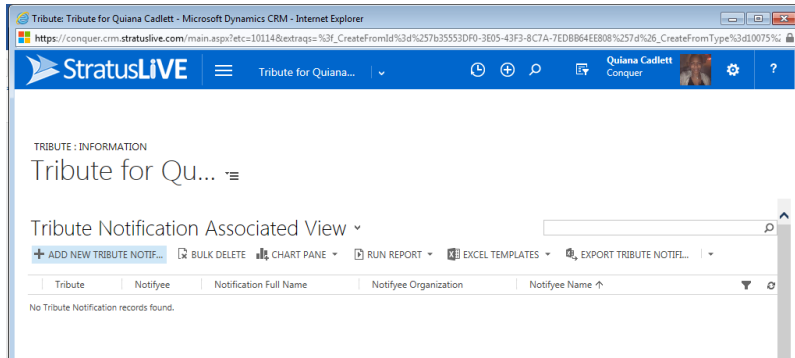
Process Sessions

- Background Processes
- Real-time Processes

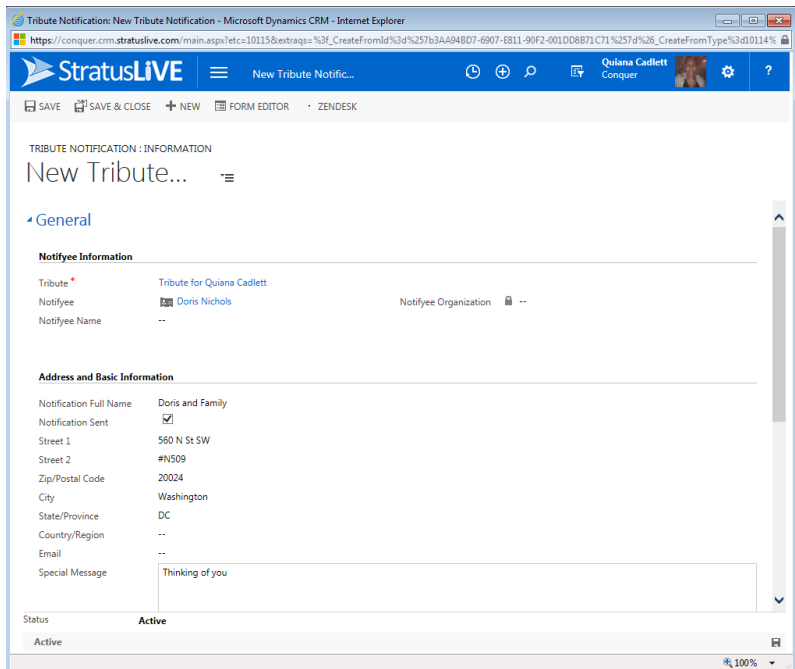
Details

Tribute Amount	--	Tribute Type	In Honor of
Tributee1 Contact	Doris Nichols	Tributee2 Contact	--
Tributee1 Full Name	--	Tributee2 Full Name	--

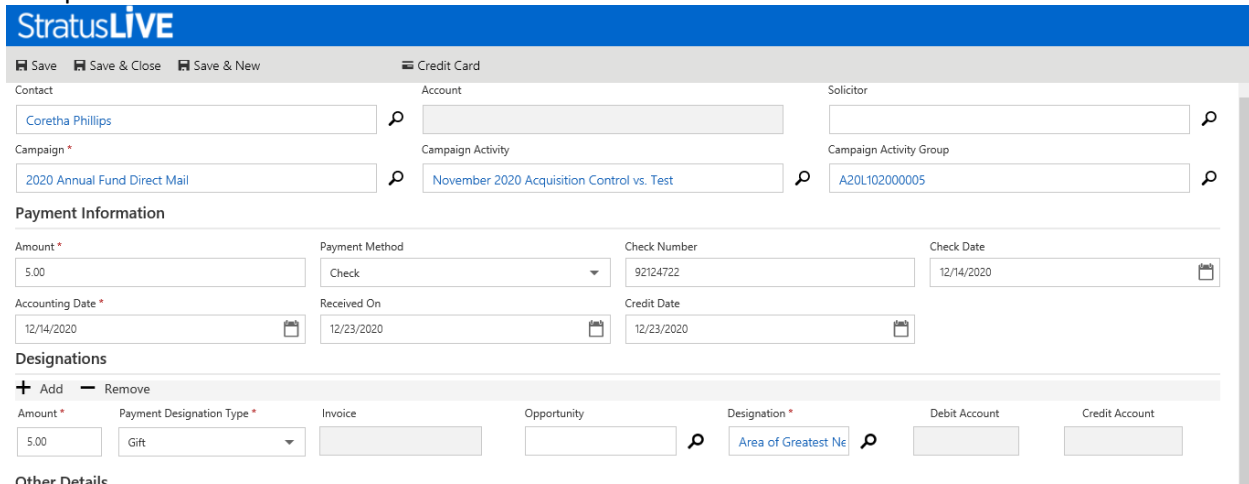
Click "Add New Notification"



Enter all associated tribute info then click "Save & Close"



"Payment Designation Type" and "Designation" will already be noted from the defaults during batch set up



Once done, click **“Save & New”**. This will generate a new payment form for additional gift entry

StratusLIVE

Save Save & Close Save & New Credit Card

Payment - New

Constituent & Campaign Information

Contact: Coretha Phillips Account: Solicitor:

Campaign: 2020 Annual Fund Direct Mail Campaign Activity: November 2020 Acquisition Control vs. Test Campaign Activity Group: A20L102000005

Payment Information

Amount: 5.00 Payment Method: Check Check Number: 92124722 Check Date: 12/14/2020

Accounting Date: 12/14/2020 Received On: 12/23/2020 Credit Date: 12/23/2020

Designations

+ Add - Remove

Amount *	Payment Designation Type *	Invoice	Opportunity	Designation *	Debit Account	Credit Account
5.00	Gift			Area of Greatest Ne		

Other Details

Receipt: Allow Receipt Template: Payment Tribute:

Once done entering all gifts in the batch, Click **“Save & Close”**

StratusLIVE

Save Save & Close Save & New Credit Card

Payment - New

Constituent & Campaign Information

Contact: Account: Solicitor:

Notify DB Manager once batch is completed