

A detailed, process oriented caging workflow.

While our workflow is customizable to the specific requirements of each client, most clients share common needs and follow a similar process. A typical workflow begins with mail opening, batching, and scanning, followed by data entry, depositing, and follow up donor and contribution actions. Detailed reports and the secure website allow you visibility into the process.

01. Receive the mail



Mail can be picked up from the local post office BRE or forwarding box, or delivered to the office by USPS or other service. We also accept private courier service drop-off.

02. Batch and sort



Once the mail is received it is opened and batched. Non-responses are tallied if desired. Batches of approximately 50 items are created. The batches can be broken down into individual groups per the clients requirements, for example based on the BRE account or package of receipt. These batches are then totaled for their monetary amounts to establish a control, and delivered to the scanning staff. At this point the batch has a batch number which uniquely identifies it, and a controlling count and amount total.

03. Scan the batches



Upon receipt of the batch, the scan operator will key the batch number and control totals into the system and scan the documents associated with the batch, including full front and back images of the check and the remittance documents. If the count of scan items is incorrect, the batch is resubmitted to the mail staff for correction. The user can also rescan poor images and perform other image quality correction.

04. Verify the batches



This is the first data entry step. At this point an operator will key the amount, mail or source code, and an optional finder code to lookup the donor. After concluding this process, the batch is now ready for depositing and preliminary reporting. Reports that would be available at this stage include daily counts as well as detailed breakdowns of receipt performance by source code. **over>>**

05. Deposit the batches

The verified batches are now ready for deposit, either electronically or at the counter. Reports are sent to the client regarding the source codes and counts of the day's receipts.

06. Key the donor and contribution information

In this stage the full donor details including name, address, contact information, employer, and occupation are keyed. Our lookup algorithms automatically match the donor or present the user with likely matches based on the keyed information to make an informed match. The check details are also keyed at this stage as well including check date, check number. If the contribution is a credit card, the card is charged at this point. After attempting the charge, the card details are redacted from the electronic image and are no longer recoverable.

07. Daily closing processes

Now all the data entry is complete and the batches can be reviewed and posted. The posting process commits the batches at which point they are finalized and the information is available on the website for client review. At the end of the day administrators will perform further daily reporting to the client.

08. Donor gift acknowledgement and fulfillment

We can provide customized thank you letters based on individual gifts, aggregates, or source codes. These letters can be sent at the clients request or mail merge data can be provided directly to the client. Excel or csv reports of fulfilled pledges can be provided to telemarketing companies or direct mail firms.