World Outreach Ministries Ps.67:1.2

GETTING STARTED WITH YOUR WOM LOGIN ACCOUNT

"Going Into All the World!"

Global Impact:

Evangelism

Discipleship

Church Planting

Bible Schools

Leadership Training

Life Skills Training

Trafficking Rescue

Translation Work

Medical, Dental

Aviation

Agriculture

Water Systems

Drama Teams

Feeding Centers

Orphanages

Helps Ministry

Dear WOM Missionary,

This is Jason Peebles, President of WOM. We are excited to be able to serve you and your ministry. **We are providing you with a powerful Login System. With our system, you can login to your WOM account 24/7!** Just think what this means. It means that no matter where you are, you can Login to see donations, track new pledges, spot new donors, view your Deposit Reports, create Excel files, and much more. **Our Login System was designed to help you manage and increase your support-base, so that you can better fulfill your ministry goals.**

Please take time to go through each section in this **OVERVIEW**. We know that you are busy, but this is a vital tool for your success! **This is "the tool" that will help you track your funds and develop a stronger connection with your supporters.** *I am still amazed when some workers fail to study the very tool that can empower them to better manage and increase their monthly income.*

As with any program there will be a learning curve. However, our system is very user friendly. You can learn most of it by simply "clicking" around. This **OVERVIEW** will help – plus, there's a short **TRAINING VIDEO** that you can watch when you login (you will find it in the drop-down menu on the left-side). Our dedicated office Team will be doing their normal routine every day – processing checks, online gifts, keeping your list updated, sending Tax-receipts, uploading reports, making deposits, etc. **And now, you can stay connected to the information you need from anywhere in the world!**

You may have questions, but we ask that before you call you first review this Overview and watch the Training Video. Then, start "clicking-around" to learn for yourself. It was designed to be an intuitive experience.

We want you to know that we appreciate you and your ministry! Our calling is to serve you and help you succeed.

Blessings Always!

Jason R. Peebles
President, CEO

"Going Into All The World!"

Login Portal Overview

1. **Login** – Login by using the link on our website in the **upper-right corner** -- that says, **"Missionary Login."** Go to our website **www.WorldOutreach.org** / click on the link in the upper right corner / and enter your **username & password** that we assigned you.

2. **First, notice the center of the page** – It has most of the functions that you will need. The sections are **My Contact List, My Donations, My Deposit Reports, My Pledges, Special Reports, and Personal Info** – with **sub-features** in each section.

3. **Second, locate the drop-down-menu** - Simply click (or on a mobile device tap) the drop-down-icon in the **upper left corner** of the screen that has 3-lines. Clicking or tapping this icon allows the drop-down-menu to open and close.

4. **Drop-down menu features** - You will find the same features in the drop-down menu as in the center of the page, plus a few additional features that you can become familiar with.

5. **World Outreach logo takes you "home"** – Clicking the logo takes you to the home screen.

6. **The upper blue part of the page** – Your Name, Fund Code, List Count, Reports Inbox, and Donation Stats icon.

7. **The lower blue part of the page** – Icons for Resource Library & Messages.

Section Titles & Functions

1. **My Contact List** – This section allows you to work with your Contact names in many ways. You can click each name to expand their information, create Sublist teams, and view newly added contacts.

2. **My Donations** – This section allows you to run reports and create files related to your donations - **Gifts This Period, Gifts by Date Range, view Gift Notes, and view First Time Donors.**

3. **My Deposit Reports** – This section has your official **Deposit Reports** that we upload every two weeks. These reports show your donor activity during the two-week period, donation amounts, a breakdown of fees, and the net amount. Remember – we send **ACH direct deposits** to your Bank every two weeks – **transmitted on the 15th and the 31st (or 30th) and showing in your Bank within 1-2 business days.** As stated, a detailed breakdown of "who gave what" will be found in these **Deposit Reports**. These reports will also show any important notes from the Home Office plus your running balance if you have asked us to hold funds until you request them.

4. **My Pledges** – This section allows you to view your **Active Pledges** (pledges that have already cycled at least once) and new **Pending Pledges** that have a future start date (donors can choose when they want their pledge to start, and often they select a future date for it to begin). This feature allows you to see what is coming and go ahead and "thank them" even before their first gift cycles.

5. <u>**Special Reports**</u> – This is a powerful section that gives you many **reporting options**. You can create **Reports & Excel files** to help you develop a stronger support-base. Many of the reports are accessible to you with one click. For example, you can generate an Excel file of all your **Contact Names & Emails.** This feature will help you periodically upload a current copy of your list (and capture any new emails, changed emails, names, etc. that have been entered since last time) – for your e-Newsletters. You can upload the file to groups like MailChimp, Epistle.Today, Constant Contact, etc. to capture new emails and names. Note: The **Reports Filters** give more in-depth reporting options, and any reports that you request from this page will be sent to your portal's "**Reports Inbox**" at the top of the home page.

6. <u>**Personal Info**</u> – This section is where you can upload your **Photo & Ministry Summary** that display on your WOM Donation Page (or you can email them to us and will be glad to do it for you). You can swap it from time to time. **For example, during a project -** you may want to temporarily use a different photo and ministry summary to highlight the project – for example, a photo of the Jeep you need. You can also change your **Password** in this section. If you ever forget your password, then email us and we will be glad to reset it for you.

==Steps For Routine Tasks==

Your WOM Login account gives you many options. There is no way to cover all the different ways to use the system (please watch the Training Video in the drop-down menu). However, here are some common tasks to help you get started. Walking through these exercises will help you learn how to use the information to your advantage. **First, Login to your WOM Portal**.

1. ==<u>**I want to see my "Official Deposit Reports."**</u>==
   *[**Become very familiar with this one!** We upload your official **Deposit Reports** at the <u>end</u> of each period. As a reminder, each month consists of 2 periods: the 1st – 15th and the 16th – end of month. These reports show the <u>exact amount sent to your Bank</u>. You should verify the deposits by logging in to your Bank account and matching the figures. These Deposit Reports also show details of "who gave what" during the corresponding period.]*

   1) Go to the section **My Deposit Reports.**
   2) Click on **"Archived Deposit Reports"** and open the report you want to review.

2. ==<u>**How do I see my donations for the current period (before Deposit Report has posted)?**</u>==

   1) Go to the section **My Donations.**
   2) Click on **"Gifts this Period"** and follow the prompts.
      [You will immediately see a current Net Total (after fees) of the donations that have posted to your portal during the current date range. If you want to see a full breakdown– click on "Report – PDF" to see a full report with each donation and the breakdown of all fees listed for you.]

3. ==<u>**How do I run a quick report for any date range?**</u>==

   1) Go to the section **My Donations**.
   2) Click on "**Gifts by Date Range**" and follow the prompts.
      *[Remember, however, that pay periods are from <u>1st to 15th</u> & <u>16th to 30th/31st</u>. If you run a report that "mixes" periods (for example, 1st to 20th) you will not see <u>**accurate deposit amounts**</u> of what was sent to your Bank. <u>**The only way to see accurate deposit amounts is to refer to your official Deposit Reports (see #1 above) that calculates your exact deposit amounts for each period of: 1st – 15th and 16th – end of month.]**</u>*

4. ==**How do I see a list of donors who have registered for an automatic monthly pledge when they used the online donation system? I want to see who has set-up automatic pledges through my Donation Page.**== *(This, of course, cannot capture monthly gifts that people may have setup though Bill Pay at their Banks or those who choose to give via one-time submissions or checks in the mail each month. This report captures the ones that were made via your online Donation Page when they chose the automatic monthly option).*

    1) Go to the section **My Pledges**.
    2) Click on **"Active Pledges"** to see a list of current pledges.
    3) Click on **"Pending Pledges"** to view a list of any pledges that will start on a future date.

5. ==**I want a list of all recent givers (names & addresses) so that I can write some personal "Thank You Notes" to key donors. How can I quickly access that info?**==

    1) Go to the section **My Donations**
    2) Click on the "**Gifts by Date Range**" option.
    3) Choose the option to: "**Run Report CSV" or "Run Report PDF"**
    4) Open the file that was created for the info you need.

6. ==**I want to see the Giving History for a specific person on my list. How do I do that?**==

    1) Go to the section **"My Contact List."**
    2) Click on **"All Contacts."**
    3) **Click on the Name** you are looking for.
    4) Once their name is selected, scroll down and click on the tab that says, "**Gift History (Read Only)"** This will allow you to see this particular donor's gift history.

7. ==**I want to upload a different Photo & Summary to my Donation Page**. I have a special project and I want my Donation Page to temporarily promote my project. How do I do that?==

    1) Go to the section **"Personal Info"**
    2) Click on **"Photo & Summary"** and follow the prompts.
    3) You may want to save your standard summary in a Word.doc before you delete it.

8. ==**I want to print labels or envelopes. How do I do that?** (Our system gives you a very quick and easy way to do it -- you can also do this via features within Microsoft Word).==

    1) Go to the section **"Special Reports."**
    2) Choose the **"Report Filters (Name Seg)"** option [*Name Seg stands for "name-segmenter" – which allows you to set parameters to define and focus your search*].
    3) This section will require some study on your part – but if you want your total list, then follow these next steps [if you only want part of your list, then you must specify what criteria you are searching for within the filters/parameters that are offered].
    4) To print labels for your **Total list**, simply leave the filters on the Name Seg page blank, scroll to the bottom of the page, and **click on the Labels Button** at the bottom.
    5) Then, go to your Reports **In Box**. Note: Any reports that are requested from the Name Seg page will be sent to your portal's "Reports Inbox" at the top of the page.
    6) You will need to use **labels that match the Avery 5160 format if you want to print them out**. You can use any brand as long they are compatible with **the Avery 5160 format**, which is an industry standard layout. You cannot revise the layout.
    7) Follow the same steps for **Envelopes** – except you will be using the **Envelope Button** at the bottom.

Note 1 – If you need custom sized labels and envelopes, you will need to create an Excel file based on the parameters that you choose, and then use the MERGE feature in Microsoft Word. You can study the sections in Microsoft Word for labels, envelopes, and merging.

Note 2 - The Name Seg section allows you to build files of sub-lists in your Mailing List, by choosing parameters. For instance, if you have created a Sublist of **HOSTS** for your missionary receptions, then you can quickly build a file of just those people. Again, take your time and study the instructions in the Name Seg section.

Additional Items

Your **Username & Password** were sent to you when you first joined WOM (after your initial contact list was entered into our system). If you ever forget your username and password, then email us and we can re-set it for you. If you still need to enter your total list, **then request our Excel Contact Template to organize your list. You must use our custom Contact Template, or it will not import.**

1. **Security** – Be assured that your data can only be viewed by you and our office -- no one else. Each missionary must log in to their own account with a specific username and password. Additionally, several daily backups of all data are made each day, onsite and offsite. We never share any of your personal information nor the information of your contacts.

2. **Making Changes to your list** - Once you log in, take time to "click around" and learn the system. Start slow and take your time – you won't learn it in one session, but it is very user friendly. You will be able to view your list, track donations, build Excel files, and more.

   Warning / Critical Item. **Before you start trying to update addresses in your list, get in the habit of first looking at the "Date Last Changed."** This will help you determine if your info is the most current or not. If you see a recent **"Date Last Changed"** then you may need to re-check with your friends to confirm their info. **You don't want to overwrite info that is more current than what you have**. Remember, our office will be making changes, too, based on notes that come in with checks, returned mail that we receive, online gifts, etc. If you are unsure, then it's best to confirm things before making changes. **The system permits you to change the ADDRESS portion – but the NAME field can only be changed by the home office. This is to protect the integrity of the record and the donation history associated with a donor name.**

3. **Using the portal and info to your advantage** – Having the ability to view current data is a powerful tool **IF** you use it correctly. **For example, if you spot a new donor, then get in the habit of using that info ASAP.** *How?* Well, even though you know that our office will be sending a Tax receipt, you may want to send a personal email or note to develop a relationship with them. You should also use the "**New Pending Pledges**" info to your advantage, and quickly thank anyone who has signed-up with a new pledge. This will help you build better relationships with your friends and supporters. You should also use the options of "**First Time Donors**" and "**Newly Added Contacts**" to help spot new donors & contacts.

4. **Pay Periods - WOM has 2 pay-periods per month. An official end-of-period Deposit Report will be uploaded after each period is finished.**

   A. **Pay Period #1 - your income from the 1st to 15th**

   B. **Pay Period #2 - your income from the 16th to 31st (or 30th)**

"Timing" for Online Donation Processing – As our Policy Manual explains – all online donations (of any amount) will post to your WOM portal 5 business days after the transaction was submitted. (This is the time that it takes for our third-party processor to fully confirm and process the transaction and release the funds to WOM). **WOM posts the entry to your portal as soon as the funds are released to us.** Thus, if a donor emails you and says, *"I just made a transaction"* – tell them thank you so much and realize that it takes a few days before the funds are processed and posted. *Don't worry, it will eventually show up. We cannot hurry the process.*

Gifts are posted to your WOM Portal once the processor has actually released the funds to WOM -- not at the time the donor clicks "Submit" when they are online.

5. **Avoid the nightly Back-up time** - The system goes through a nightly back-up and posting routine between about **1am – 4am Eastern Time**. Thus, you probably want to avoid trying to access the system during those hours. Take some time to figure out when this time period is for your country and Time Zone -- and try to avoid those hours. Yes, you can access the system then, but you will find that it may be sluggish and not as responsive.

6. **We give thanks - to our Lord and Savior that we can provide this 24/7 Login tool for all WOM mission workers, regardless of their size income.** Our heart is to create and offer powerful tools to encourage you and help your income grow over time.

Don't try to learn our system in one session. Step by step is the best plan. We provide this portal to you with the prayer that it will become a wonderful "tool" to help you succeed in God's calling.

Blessings Always! --Jason Peebles, President

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