DonorElf's Proven Onboarding Process

This document explains the onboarding process for DonorElf. It starts by learning about your current processes and then moves into integrating your accounting system with DonorElf. And it ends with your missionaries being able to login to DonorElf and start using it.

This onboarding process has been proven out over the years with a wide range of organizations ranging in size as small as three missionaries up to organizations with over 500 missionaries and millions of donations.

And DonorElf has been proven to work with just about any non-profit accounting system. And it can even work with multiple systems. For example, some organizations have a donation processing system that's separate from their accounting system. Raiser's Edge and Financial Edge is one such example. In this situation DonorElf retrieves the donor and donation information from Raiser's Edge and retrieves the expenses and overall balance from Financial Edge.

And don't worry if you or your office staff don't know a lot about your accounting system. The DonorElf team will do the hard work of figuring out how to integrate with the accounting system. And once they do that, they will train your staff how to upload the data to DonorElf.

DonorElf is built in the cloud, which means it can easily scale to meet the demands of any size organization, no matter how many missionaries they have. It actually uses the same cloud infrastructure Amazon uses to power its website that serves millions of people a day. This means it's as easy as clicking a button to double the size of the database or add two more web servers. So you never have to worry about becoming too big for DonorElf.

And the best part is we not only do all the setup and integration work for you, but we also don't charge for the setup. This allows your office staff and missionaries to try out DonorElf before you have to pay anything.

The onboarding process itself is split into the following five phases:
- Discovery Phase
- Implementation Phase
- Pilot Phase
- Launch
- Maintenance and Support Phase

1. Discovery Phase

In the discovery phase we spend time learning about your current processes so that we can determine the best approach to implement the integration with your accounting system.

Here are the main questions we ask about your current processes:

- What is it currently like for the missionaries in the field to try to keep up with donations, finances, and ministry partner relationships?

- Why are you currently looking at DonorElf as a possible solution for your needs?

    - What pain points are you experiencing with your current processes?

- How many missionaries (and office staff) are currently raising their support?

- What accounting system and/or donation processing systems are you using?

    - Does the accounting system also keep track of the balance for each missionary's support account, or do you have do some manual calculations (like using an Excel spreadsheet)?

- How do the missionaries currently receive their support account information?

- How much time each month does it take the office staff to send the support account information to all the missionaries?

- What are you hoping to gain out of using DonorElf?

    - What does success look like for you?

We have found that asking these questions over the phone is better than through email. That way we can easily ask any additional questions that might come up as a result of our conversation.

So we'll setup a time to talk on the phone. And you're more than welcomed to invite other staff to be part of the conversation as well.

After our conversation, we will work on an implementation document that will spell out how the integration between your accounting system and DonorElf will work. Included in this document will be what the new process will look like while using DonorElf. And we'll also give an estimate as to how long the implementation will take.

Before actual work on the implementation starts in the next phase, we will need a verbal commitment from decision maker(s) within your organization that you desire to use DonorElf as long as there are no issues with the integration. This isn't a binding contract, but we do want to know that you actually plan on using DonorElf before we invest time into the implementation phase.

2. Implementation Phase

The implementation phase covers the actual work of integrating your accounting system with DonorElf and getting them to talk to each other. If you have an accounting system and a separate donation processing system (e.g. Raiser's Edge, eTapestry, etc.) then we will integrate DonorElf with both of them during this time if you want to.

How the actual integration between the accounting system and DonorElf will be performed depends upon the accounting system and how easily we can export data from it. We can typically perform the integration in one of three ways:
- Through an API
- Upload Reports to DonorElf
- Through an Upload Application

The easiest way to export the data is if the accounting system provides an API. An API is a technical term, but it basically means that DonorElf can call your accounting system directly and retrieve the needed information. There's a couple benefits to this solution. First, the data can be retrieved without any human intervention. And second, the export can be done as often as we would like because it doesn't require any extra work on your bookkeepers' part. We typically perform the export once a day if there is an API available.

If an API is not available, then we'll research if it's possible to generate a few reports from the accounting system that can be uploaded to DonorElf's website. This typically involves exporting three or four reports as CSV files. These reports can typically be saved in the accounting system so that it's easy to generate the reports on an ongoing basis.

There's two possible ways to upload exported reports to DonorElf: through SFTP or manually through the website. If you are able to automatically generate these reports and have the ability to SFTP them to DonorElf's server, then you can setup a scheduled task that automatically performs this on a daily basis. Large organizations that have their own IT department are usually able to do this. If you're not able to SFTP the files, then you can have a bookkeeper manually generate the reports then login to DonorElf and upload them. In this situation, we recommend uploading the reports at least once a week.

And the third option is to install an upload application that will run on the same computer that the accounting system is installed on. And this application will take care of uploading the data from the accounting system to DonorElf. This is usually done for smaller organizations that use QuickBooks as their accounting system.

The implementation phase ends when we have successfully uploaded the donor and donation information from the accounting system to DonorElf.

3. Pilot Phase

The pilot phase allows a few missionaries to start using DonorElf and make sure everything is working well for them. This allows us to find any issues with the upload process and fix it before everyone else gets on the system.

The number of pilot users we recommend depends on the size of your organization. For large organizations with over 50 missionaries, we recommend having 5 to 10 missionaries be pilot users. If you have 10 to 50 missionaries, we recommend having 3 to 5 missionaries to be pilot users. And if you have less than 10 missionaries, then we typically just let all the missionaries be pilot users.

The pilot phase typically lasts between one and four weeks. The time frame depends on how many issues the pilot users find and how comfortable the organization is with moving onto the launch phase.

4. Launch

The launch phase opens up DonorElf to all the missionaries in the organization so they can start using it.

This is typically a single day event when the rest of the missionaries are granted access. However, it's also possible to have a rolling launch where a certain portion of missionaries are added at a time.

5. Maintenance and Support Phase

After all the missionaries start using DonorElf in the launch phase, then we enter into the final phase which is the maintenance and support phase. And this phase lasts as long as your organization continues to use DonorElf.

In the maintenance part of this phase, we'll make sure the integration between the accounting system and DonorElf stays working. If you ever experience any issues with the integration between the accounting system and DonorElf, then just email us to let us know, and we'll take care of it. You don't have to be responsible for maintaining the integration; we are.

During this phase we will also answer any questions users have about DonorElf. That way there shouldn't be an extra burden on your office staff to answer DonorElf questions.