

WebLink Matching Instructions

DonorPerfect Online



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DonorPerfect Online WebLink Matching Tutorial

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Introduction

This document tells how to use WebLink's Matching features to match up form submissions with donor records in your DonorPerfect Online system.

What is WebLink?

WebLink is a web-based system for creating and managing virtually any type of online entry form. These forms are personalized to collect exactly the data you want. You can even offer secure credit card processing for payments. Collected data can be easily reviewed through WebLink's administrative tools, then quickly imported into DonorPerfect Online or any database you choose.


What is a Form Submission?

Each time someone fills out and submits a WebLink form, a new record is created in the WebLink Review and Acceptance Center that contains the information entered into the form by that person. This record is called a form submission.

What is WebLink Matching?

WebLink Matching allows you to check your form submissions against the donor entries in your database before you import the submissions into your database. You can look over the potential matches that were found for each submission, and select the correct donor record to use. You can also choose to create a new donor record, or to postpone importing a submission until information can be verified.

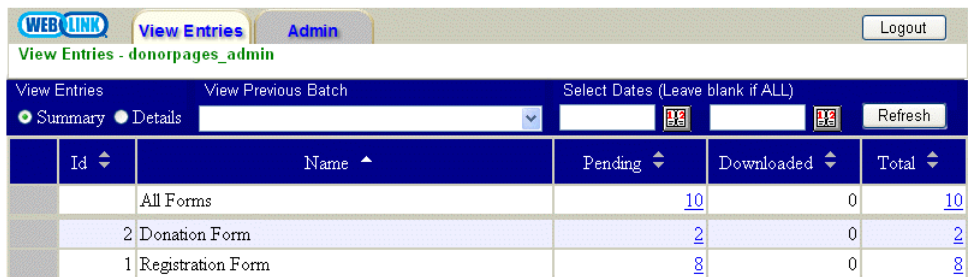
Activating WebLink Matching



Note: The following instructions assume that you have already set up WebLink and linked it into your website. For details on WebLink setup and basic use, see the WebLink Manual.

► **To activate the WebLink Matching feature**

1. Log into the WebLink Review & Acceptance Center:



Id	Name	Pending	Downloaded	Total
	All Forms	10	0	10
2	Donation Form	2	0	2
1	Registration Form	8	0	8

Figure 1 – WebLink Review & Acceptance Center

2. Click on any number entry in the **Pending** column for a form. All of the pending submission entries that correspond to that number will be displayed.



Accept	Hold	Delete	Date Time	Entry Info	Record Type	Full Name	Full Address	Email	Total Charges	Credit Card Payment
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	11/14/2007 12:20 PM	Entry:66 Form:2	Person	1 2	3, 4, 5, 6	lgardne@softera.com	\$10.00	No Credit Card
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	11/14/2007 11:37 AM	Entry:64 Form:2	Person	b b	b, b, b, b	b@b.com	\$1.00	No Credit Card

Summary:
 Count of entries: 2 Entries Total: \$11.00

Figure 2 – Pending Submission Entries for Donation Form

3. Click the **Match Options** tab at the top of the screen.

Settings :

Insert All as New


Check for Matches

Compare for :	Number of characters
<input checked="" type="checkbox"/> Last Name	8
<input type="checkbox"/> First Name	8
<input checked="" type="checkbox"/> Address	10
<input checked="" type="checkbox"/> Zip	5
<input type="checkbox"/> Email	50

Save

Figure 3 – Matching Options Screen

4. Under **Settings**, select **Check for Matches**. This activates the Matching feature.
5. Under **Compare for:** set the criteria used to determine matches:
 - a. Check the boxes beside the fields you would like to use to determine matches.
 - b. Enter the number of characters you would like to use for selected fields.




Tip: Recommended Settings:

Email (50 characters)

or

Last Name (8 characters), **Address** (10 characters), **Zip** (5 characters)

6. Click the **Save** button to save your matching options.
7. Click the **View Entries** tab at the top of the screen to return to the Pending Entries screen.



Note: You have now set up the matching options that will be used to match submissions to existing donor records for all of your organizations forms.

You do not need to repeat this process for each form, as the same match option settings apply to all forms.

Modifying WebLink Matching Options

You can change your matching options at any time. The same matching options will apply to all of your WebLink forms.

► **To change the WebLink Matching options**

1. Click on any number entry in the **Pending** column for a form.
2. In the View Entries screen, click on the **Match Options** Tab.

Compare for:	Number of characters
<input checked="" type="checkbox"/> Last Name	8
<input type="checkbox"/> First Name	8
<input checked="" type="checkbox"/> Address	10
<input checked="" type="checkbox"/> Zip	5
<input type="checkbox"/> Email	60

Figure 4 – Matching Options Screen

3. Check the fields you want to use for matching, clear the ones you don't want to use.
4. Adjust Number of Characters for each field you have selected.
5. Click the Save button to save your matching options.

Disabling WebLink Matching

If desired, you can disable WebLink Matching and simply import all submissions as new records

► **To disable WebLink Matching**

1. Click on any number entry in the **Pending** column for a form.
2. In the Pending Entries screen, click on the **Match Options** Tab.
3. Under **Settings**, select **Insert All As New**.
4. Click the **Save** button to save your changes.

Processing Matches

Form submissions are stored in the Pending Entries queue until you download them to DonorPerfect Online.

► **To process Weblink form submissions using the Matching feature**

1. Click on the number of entries in the **Pending** column for a form. The Pending Entries screen displays (Figure 5).

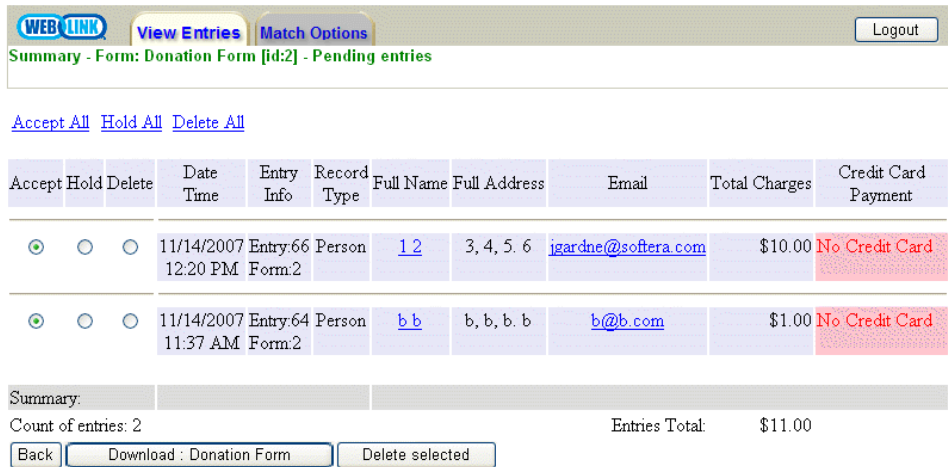



Figure 5 – Pending Entries for Donation Form

2. Check one of the following options for each submission:
 - Select **Accept** to mark the submission for download and matching.
 - Select **Hold** to keep the submission in the Pending Entries queue for now.
 - Select **Delete** to mark the submission for deletion.



Tip: You can also use the Accept All, Hold All, or Delete All links to mark all of the submissions at once.

3. Click the **Download** button for the form.
If matches are found, the match processing screen will display.

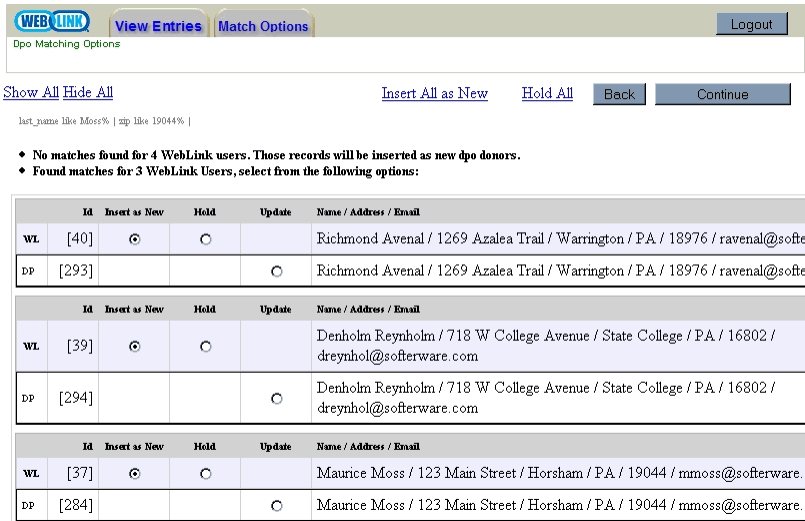


Figure 6 – Matching Screen

The Matching Screen will list the number of records where no match was found:


- **No matches found for 4 WebLink users. Those records will be inserted as new dpo donors.**

Secondly the number of records with matches will be displayed:

- **Found matches for 3 WebLink Users, select from the following options:**

The screen will then list the WebLink submission records for which potential matches were found. The WebLink submission is listed first, in blue, with a **WL** in the leftmost column. Then the possible matches found in the DonorPerfect database are listed, with a **DP** in the leftmost column.

- For each record for which a possible match was found, select one of the following:
 - Select **Insert as New** to add the WebLink record to the database as a new record, disregarding any matches that may have been found.
 - Select **Hold** to hold processing on the WebLink record, returning it to the Pending Entries queue.
 - Select **Update** next to a matching record from the DP database to update that record with the information from the form submission.



Important! If **Update** is selected, the information that the person entered in the WebLink form will overwrite the data in the corresponding fields on the **Main** and **BIO** screens. Gifts will be added to the Gifts screen as a new gift.

- Once all selections are made, click the **Continue** button in the upper right corner. From this point on, follow the instructions on the screen as described in the WebLink Manual.