



Political Constituency Relationship Management System





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The Main Screen



Constituent Relationship Management System Main Menu

- ▶ Constituent Management
- ▶ Reports
- ▶ E-mail Management
- ▶ Check for Duplicates

LOG OUT

- After logging in, the screen above is shown.



Constituent Management

PENTAD *Systems* LLC **CRMS** CONSTITUENT RELATIONSHIP MANAGEMENT SYSTEM

► CRMS Main Menu ► **DISPLAY** ► **EDIT** ► CMM Admin Menu

Select a Constituent to Display

CONSTITUENT NAME SEARCH

Type partial name, ENTER

Individual

SEARCH BY NAMES E-MAIL

SHOW INACTIVE CONSTITUENTS?

ADD CONSTITUENT

CONSTITUENTS

- Select **► Constituent Management** from the Main Menu to display a Constituent. You can filter results either by Name or E-Mail. You can also **ADD CONSTITUENT** by clicking **ADD CONSTITUENT** .



Constituent Management



- Adding a Constituent (Individual or Company).
Select your choice from the Drop-Down List.



Constituent Management

PENTAD **CRMS** CONSTITUENT RELATIONSHIP MANAGEMENT SYSTEM
▶ CRMS Main Menu ▶ DISPLAY ▶ EDIT ▶ CMM Admin Menu

ACTIVE? **ADD CONSTITUENT**

FIRST NAME LAST NAME

SALUTATION (Optional)

OCCUPATION AFFILIATES

NOTES

-- Add New --

SOURCE

- 6th LD
- Email 11/8/07
- 11/8/2007 Email Fundraiser
- 11/8/07 Email
- 11/8/07 Email
- 4th LD

VOLUNTEER CATEGORIES

- Doorbelling
- Endorse - Historical 05/06
- Endorse - Send 10 Cards
- Yard Sign - Finding 3 Location
- Mailings Help
- Parades

- Adding an Individual allows you to enter the Individual Constituent's details.



Constituent Management

ACTIVE? **ADD CONSTITUENT**

ORGANIZATION NAME AFFILIATED INDIVIDUALS

NOTES

-- Add New --

SOURCE

- 6th LD
- Email 11/8/07
- 11/8/2007 Email Fundraiser
- 11/8/07 Email
- 11/8/07 Email
- 4th LD

VOLUNTEER CATEGORIES

- Doorbell
- Endorse - Historical 05/06
- Endorse - Send 10 Cards
- Yard Sign - Finding 3 Location
- Mailings Help
- Parades

- Adding a Company allows you to enter the Company's details and then attach Affiliated Individuals (Constituents).



Constituent Management

- To Search for a Constituent, type their name in the box and hit Enter. The list of results displays to the right. Select one from the list to display.



Constituent Management



[EDIT THIS CONSTITUENT](#) [BACK](#)

| | |
|---|--|
| ACTIVE Andrew Allen | SOURCE GOP - Spokane County People Table Nov 04 |
| NOTES | VOLUNTEER CATEGORIES |
| ADDRESSES HOME 1328 N Lincoln St SPOKANE, WA 99201-2508 SPOKANE COUNTY | |
| CONTACT INFORMATION ACTIVE 509-448-2642 (home) <input checked="" type="checkbox"/> | |

- The Constituent Card displays the Name, Address, Contact Information, Source, Volunteer Categories, and Notes. To Edit the Constituent, click [EDIT THIS CONSTITUENT](#) .



Constituent Management



| | | | |
|---|---|---|---|
| <input checked="" type="checkbox"/> ACTIVE? | <input type="button" value="UPDATE CONSTITUENT"/> | <input type="button" value="DELETE CONSTITUENT"/> | SOURCE |
| FIRST NAME | LAST NAME | | <input type="checkbox"/> 6th LD |
| --- | Andrew | Allen | <input type="checkbox"/> Email 11/8/07 |
| SALUTATION | | (Optional) | <input type="checkbox"/> 11/8/2007 Email Fundraiser |
| | | | <input type="checkbox"/> 11/8/07 Email |
| OCCUPATION | | AFFILIATES | <input type="checkbox"/> 11/8/07 Email |
| | | | <input type="checkbox"/> 4th LD |
| NOTES | | | VOLUNTEER CATEGORIES |
| | | | <input type="checkbox"/> Doorbelling |
| -- Add New -- | | | <input type="checkbox"/> Endorse - Historical 05/06 |
| ADDRESSES | ACTIVE | | <input type="checkbox"/> Endorse - Send 10 Cards |
| <input type="button" value="EDIT"/> HOME | 1328 N Lincoln St | <input checked="" type="checkbox"/> | <input type="checkbox"/> Yard Sign - Finding 3 Location |
| | SPOKANE, WA 99201-2508 | | <input type="checkbox"/> Mailings Help |
| | SPOKANE COUNTY | | <input type="checkbox"/> Parades |
| CONTACT INFORMATION | ACTIVE | | <input type="checkbox"/> Yard Sign - Historical |
| <input type="button" value="EDIT"/> | 509-448-2642 (home) | <input checked="" type="checkbox"/> | |

- When Editing a Constituent, you can edit the Name, Address, Contact Information, Source, and Volunteer Categories.



Constituent Management



Select a Constituent to Edit

| CONSTITUENT NAME SEARCH | CONSTITUENTS |
|---|--------------|
| <input type="text"/> Individual ▾ SEARCH BY <input checked="" type="radio"/> NAMES <input type="radio"/> E-MAIL <input type="checkbox"/> SHOW INACTIVE CONSTITUENTS? <input type="button" value="ADD CONSTITUENT"/> | |

- You can also select at the top of the Display screen to filter and Edit a Constituent.



Constituent Management



Constituent Management Module Administration Menu

| CONSTITUENTS | CATEGORIES & CODES |
|-----------------------|--------------------|
| Display a constituent | Manage Categories |
| Add a new constituent | Manage Codes |
| Edit a constituent | |
| Delete a constituent | |

- Select **► CMM Admin Menu** at the top of the screen to administrate the Constituent Module. You can either Display, Add, Edit, or Delete a Constituent through this menu, or Manage the Categories and Codes for the Module.



Constituent Management



-- Choose --

Current Categories

- Click “Manage Categories” to Manage the Categories in the Constituent Menu.



Constituent Management



-- Choose --
-- Choose --
Category-Volunteer
Category-Source

Current Categories

- Select an Item from the Drop-Down List to Manage the Categories



Constituent Management



Category-Volunteer ▾

ENTER NEW CATEGORY NAME

ENTER CONFIRMATION CODE

MERGE CATEGORIES

Current Categories

- | | | | |
|---|--|---|---|
| <input type="checkbox"/> Doorbelling | <input type="checkbox"/> Host Event | <input type="checkbox"/> Signs Storage & Delivery | <input type="checkbox"/> City Chair |
| <input type="checkbox"/> Endorse - Historical 05/06 | <input type="checkbox"/> Offered General Campaign Help | <input type="checkbox"/> Voter Registration | <input type="checkbox"/> County Chair |
| <input type="checkbox"/> Endorse - Send 10 Cards | <input type="checkbox"/> Telephone Banking | <input type="checkbox"/> Volunteer 07/08 | <input type="checkbox"/> County Sign Chair |
| <input type="checkbox"/> Yard Sign - Finding 3 Location | <input type="checkbox"/> Phones | <input type="checkbox"/> GOTV | <input type="checkbox"/> Leg District Chair |
| <input type="checkbox"/> Mailings Help | <input type="checkbox"/> Steering Committee | <input type="checkbox"/> Endorse 07/08 | <input type="checkbox"/> Bumper Sticker - 07/08 |
| <input type="checkbox"/> Parades | <input type="checkbox"/> Grassroots | <input type="checkbox"/> Yard Sign 07/08 | <input type="checkbox"/> Sign Help - 07/08 |
| <input type="checkbox"/> Yard Signs - Historical | <input type="checkbox"/> Coalitions | <input type="checkbox"/> Event Volunteers | <input type="checkbox"/> Table Captain |
| <input type="checkbox"/> Letter Writing | <input type="checkbox"/> Volunteer - Historical | <input type="checkbox"/> Area Chair | <input type="checkbox"/> College R's |

- The Volunteer Category. Here you can Add, Merge, and View Current Categories.



Constituent Management



Category-Source

ENTER NEW CATEGORY NAME

ENTER CONFIRMATION CODE

Current Categories

| | | | |
|--|---|--|--|
| <input type="checkbox"/> 5th District Contacts 9/03 | <input type="checkbox"/> Physical Therapist 8/16/05 | <input type="checkbox"/> Susan B Anthony Fund | <input type="checkbox"/> 10/28/2006 Colville Rally |
| <input type="checkbox"/> GOP - Spokane County | <input type="checkbox"/> Pasco 8/25/05 | <input type="checkbox"/> June DC Wine Event | <input type="checkbox"/> 10/30/06 Halloween Bash |
| <input type="checkbox"/> GOP - State Committee 9/03 | <input type="checkbox"/> John Stone 8-5-05 | <input type="checkbox"/> 2006 June Mailer | <input type="checkbox"/> Letter to the Editor |
| <input type="checkbox"/> Friends DB 1994-2002 | <input type="checkbox"/> Cantor/Bev.Hills 9/24/05 | <input type="checkbox"/> 2006 Pink Flamingo BBQ | <input type="checkbox"/> Colville Rally |
| <input type="checkbox"/> Walla Walla/Asotin (Sizel) | <input type="checkbox"/> Goodlatte Othello 10-1-05 | <input type="checkbox"/> 8/23/06 Boehner Golf | <input type="checkbox"/> Victory Club 2007 |
| <input type="checkbox"/> Need First Cathy for Congress | <input type="checkbox"/> Goodlatte Tech 10-1-05 | <input type="checkbox"/> 8/17/06 Schneidmiller Recep | <input type="checkbox"/> 2/20/07 Olympia Luncheon |
| <input type="checkbox"/> Assn - Spokane Builders 2004 | <input type="checkbox"/> Blunt 10-8-05 | <input type="checkbox"/> 8/23/06 Boehner VC Recep | <input type="checkbox"/> 2007 Top O' Morning |
| <input type="checkbox"/> Assn - Spokane Dentists 2004 | <input type="checkbox"/> Othello 10-1 | <input type="checkbox"/> 8/24/06 Walla Walla | <input type="checkbox"/> Prospective Donors |

- The Source Category. Here you can Add, Merge, and View Current Categories.




Reports Menu



Data Export to Microsoft Excel™

| SOURCE | VOLUNTEER CATEGORIES | DATABASE FIELDS | OTHER CRITERIA |
|---|--|--|--|
| <input type="checkbox"/> ***** <input type="checkbox"/> 08 Doctor Coalition <input type="checkbox"/> 10/1 Second Autumn Open House <input type="checkbox"/> 10/12/06 AGC <input type="checkbox"/> 10/13/06 John Stone <input type="checkbox"/> 10/17/06 Potlach <input type="checkbox"/> 10/18/06 Seattle Event <input type="checkbox"/> 10/21/06 Walla Walla <input type="checkbox"/> 10/24/06 Spokane Reception <input type="checkbox"/> 10/26/2006 Walla Walla <input type="checkbox"/> 10/28/2006 Colville Rally <input type="checkbox"/> 10/30/06 Halloween Bash <input type="checkbox"/> 11/03/07 Fall Fest | <input type="checkbox"/> Area Chair <input type="checkbox"/> Bumper Sticker - 07/08 <input type="checkbox"/> City Chair <input type="checkbox"/> Coalitions <input type="checkbox"/> College R's <input type="checkbox"/> County Chair <input type="checkbox"/> County Sign Chair <input type="checkbox"/> Doorbelling <input type="checkbox"/> Endorse - Historical 05/06 <input type="checkbox"/> Endorse - Send 10 Cards <input type="checkbox"/> Endorse 07/08 <input type="checkbox"/> Event Volunteers <input type="checkbox"/> GOTV | <input checked="" type="checkbox"/> Title <input checked="" type="checkbox"/> First & Last Names <input checked="" type="checkbox"/> Company <input checked="" type="checkbox"/> Address Line 1 <input checked="" type="checkbox"/> Address Line 2 <input checked="" type="checkbox"/> City, State ZIP NO COUNTY FILTER | <input type="checkbox"/> Include Inactive Constituents Sort by Last Name <input checked="" type="radio"/> Either/Or <input type="radio"/> Does Have <input type="radio"/> Doesn't Have Address <input checked="" type="radio"/> Match Any Categories <input type="radio"/> Match All Categories <input type="checkbox"/> CONTRIBUTIONS |
| 1. Select one or more Source and/or Volunteer categories. | | <input type="button" value="NEW SELECTION"/> | <input type="button" value="GET COUNT"/> |
| 2. Select one or more database fields. | | | |

- Click  from the Main Menu to enter the Reports Menu. In this section, data can be exported to Excel according to the criteria you select.



Reports Menu

35/06
ards

City, State ZIP

NO COUNTY FILTER

Address

Match Any Categories

Match All Categories

CONTRIBUTIONS

NEW SELECTION

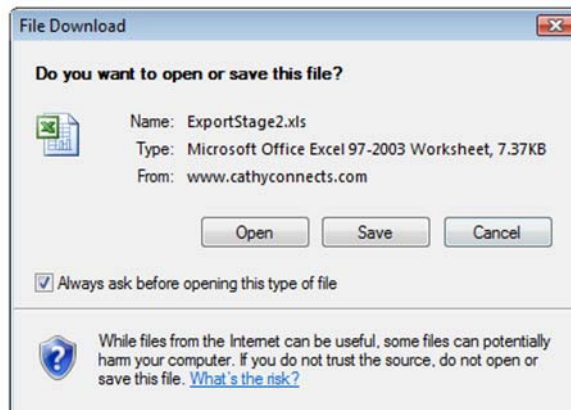
EXPORT DATA

Total records returned: 32

- Selecting **GET COUNT** with your selected criteria updates the page with “Export Data”.



Reports Menu



- Selecting **EXPORT DATA** will give you an Excel File with the records.



Reports Menu

| ConstID | Title | FullName | Organization | Address1 | Address2 | CityStateZIP | Salutation | County |
|---------|-------|-------------------------------------|--------------|-------------------------|----------|-------------------------|---------------------------|---------|
| 1567 | | Pauline Battien | | 251 N Elm St Apt 2a | | COLVILLE WA 99114 2959 | Pauline | STEVENS |
| 15612 | | Jon & Julie Castle | | 5217 W Myrtlewood Court | | SPOKANE WA 99208 9475 | Jon & Julie | SPOKANE |
| 37225 | | Aaron Chivers | | 822 E Garland | | SPOKANE WA 99207 | Aaron | SPOKANE |
| 13591 | | Rob & Chris Crick | | 427 W 24th Ave | | SPOKANE WA 99203 | Rob & Chris | SPOKANE |
| 27087 | | William Deilke | | 4318 S Tampa | | SPOKANE WA 99223 | William | SPOKANE |
| 33763 | | Grant, Michael & Kathleen Eickstadt | | 14711 N Jennifer Ct | | MEAD WA 99021 | Grant, Michael & Kathleen | SPOKANE |
| 1084 | | Laurence & Margaret Ensor | | 1312 Jefferson St | | DAVENPORT WA 99122 9412 | Laurence & Margaret | LINCOLN |
| 4464 | | Susan Fagan | | 829 SE Edgeknoll Dr | | PULLMAN WA 99163 | Susan | WHITMAN |
| 3971 | | Ryan & Beth Fix | | 4429 S Williamson Ln | | SPOKANE WA 99223 | Ryan & Beth | SPOKANE |

- Above are the contents of the Excel Spreadsheet from the Export.



Reports Menu

PENTAD **CRMS** CONSTITUENT RELATIONSHIP MANAGEMENT SYSTEM

► CRMS Main Menu ► CMM Main Menu

Send a New E-Mail Message

MAIL TO: Group List Individual
 Send to Inactive Constituents?

FROM: Cathy McMoris
SUBJECT: [subject]

SOURCE

- 5th District Contacts 9/03
- GOP - Spokane County
- GOP - State Committee 9/03
- Friends DB 1994-2002
- Walk Walk/Asotin (Size)
- Need First Cathy for Congress

VOLUNTEER CATEGORIES

- Doorbell
- Endorse - Historical 05/06
- Endorse - Send 10 Cards
- Yard Sign - Finding 3 Location
- Mailings Help
- Parades

MATCH
 Any All CATEGORIES

NO COUNTY FILTER

QUERY EMAIL ADDRESSES

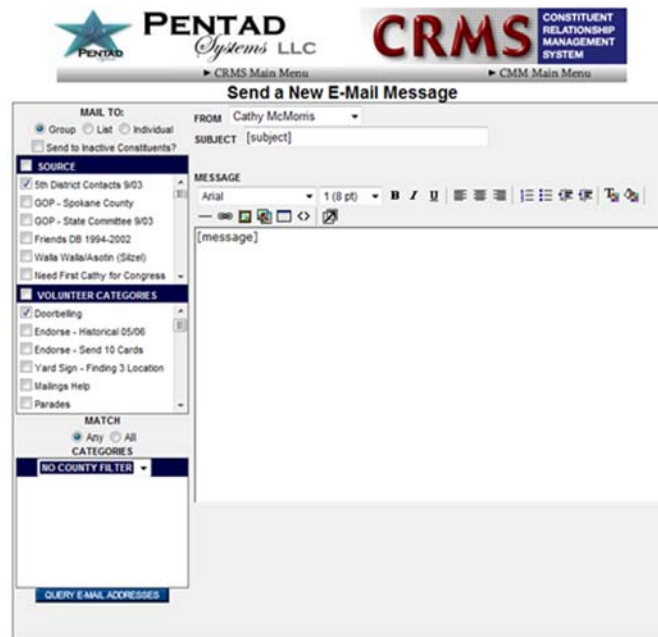
MESSAGE
Arial 1 (8 pt) [B] [I] [U] [Text] [List] [Link] [Image] [Table] [Code] [Quote] [Undo] [Redo]

[message]

- Select ► EMM Main Menu above the Reports Menu to send custom E-Mail messages according to the criteria you select.



E-Mail Management



- Selecting **E-mail Management** from the Main Menu also brings you to the custom e-mail screen.

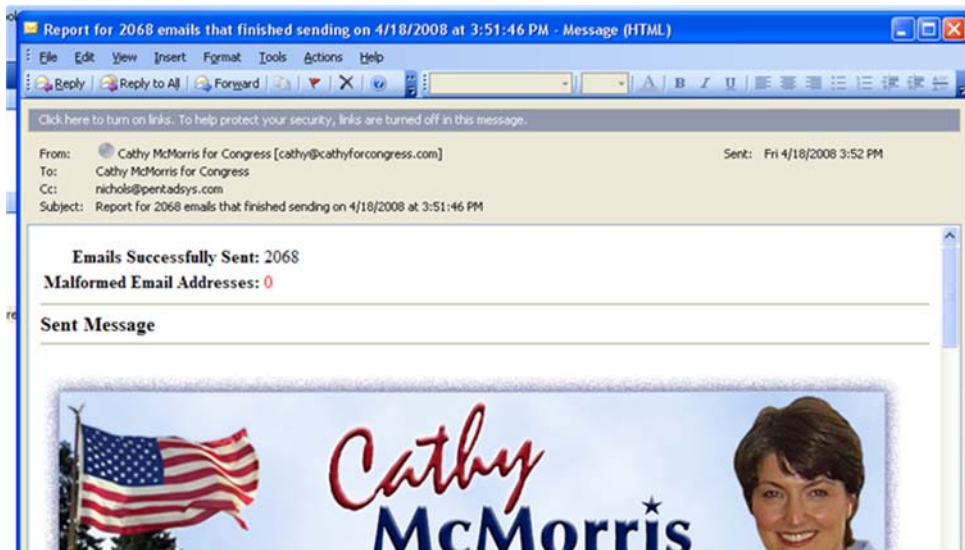


Sample Email



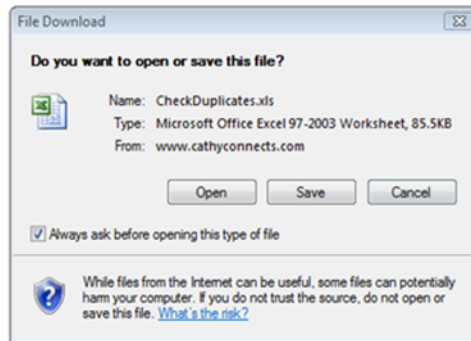



Sample Email Report





Check for Duplicates



- Select  from the Main Menu to download a spreadsheet of Constituents to check for Duplicate Constituents.



Check for Duplicates

| | A | B | C | D | E | F | G | H | I | J | K |
|----|----------|-----------|------------------|--------------------|-------|----------|-----------|--------------|------------------------|-------|---|
| 1 | ConstID1 | LastName1 | FirstName1 | Address1 | ZIP1 | ConstID2 | LastName2 | FirstName2 | Address2 | ZIP2 | |
| 2 | 38728 | Allen | Steve | 258 NW Sunrise Dr | 99163 | 38727 | Allen | James R | 258 NW Sunrise Dr | 99163 | |
| 3 | 27719 | Alwine | Dennis & Marian | 3712 N Caffell Rd | 99109 | 39412 | Alwine | Sarah | 3712 N Caffell Rd | 99109 | |
| 4 | 27719 | Alwine | Dennis & Marian | 3712 N Caffell Rd | 99109 | 39411 | Alwine | Joshua | 3712 N Caffell Rd | 99109 | |
| 5 | 38018 | Ames | Perry & Kathleen | 3462 Hwy 231 | 99181 | 38017 | Ames | Jeff | 3462 Hwy 231 | 99181 | |
| 6 | 34737 | Anderson | James R | PO Box 274 | 99032 | 39336 | Anderson | JR & Mary | PO Box 274 | 99032 | |
| 7 | 20766 | Anderson | Phillip | PO Box 110 | 99114 | 409 | Anderson | Phil & Iris | PO Box 110 | 99114 | |
| 8 | 38637 | Anderson | Carl & Jenelle | 2050 Ray Anderson | 99141 | 834 | Anderson | Ray & Wanda | 2050-B Ray Anderson Rd | 99141 | |
| 9 | 36662 | Atteberry | Melanie | 302 Sorghum Hollow | 99328 | 36660 | Atteberry | Clinton | 302 Sorghum Hollow | 99328 | |
| 10 | 36662 | Atteberry | Melanie | 302 Sorghum Hollow | 99328 | 36661 | Atteberry | James & Mary | 302 Sorghum Hollow | 99328 | |

- Opening the Excel File, we see the Constituents that are in the system. Now, we can check the file for duplicates.