

7 Steps to CharityTracker Success

We want to make sure that all of your resources are spent meeting real needs in your community. Here are 7 suggestions to help get you on your way.

1. PLAN

Cast your vision for assistance and appoint an administrator and assistance team. Determine how you want to go about meeting the needs of those in your area. Unless you're part of an already established assistance program, make sure you have policies and procedures in place.

2. CONTACT

Determine if there are others in your community with the same vision and then contact them. Find out if they would like to work together to reduce assistance fraud while helping those in need. You might be surprised by how many people say yes!

3. CONNECT

Some people are only interested in tracking assistance giving in their organization and CharityTracker makes a great standalone tool. However, the full potential of CharityTracker is realized when a community works together! Sharing information is the most effective way to determine if your resources are being distributed to the people who need it the most. If no one is using CharityTracker in your community you can be the first. If someone in your area is already using CharityTracker—great!—joining their existing network is easy!

4. LEARN

Most people hate training manuals—so do we! That's why we've made learning CharityTracker as easy as watching a video. Our tutorial videos cover features that may be new to you and if you get stuck at any point our support forums are available 24/7.

5. INVITE

Getting organizations to accept an invitation to your CharityTracker Network should be easy. Here is where you turn the folks you connected with earlier into members of your CharityTracker Network. Invitations are quickly sent with our easy to use invitation utility.

6. PREPARE

Pre-launch checklist.

Are you ready to get started? Look through this quick checklist and be sure that all your bases are covered.

- Is your browser updated with the latest Adobe Flash Player?
- Have you watched the tutorial videos?
- Are you aware of your responsibility regarding confidentiality, and other legal obligations?

7. LAUNCH!

From this point forward, assistance given by any agency within your network will be tracked. CharityTracker gives you a powerful foundation from which to help you make informed decisions. We at Simon Solutions are both honored and excited to serve you and those whom you serve.