

What Works

A complimentary Newsletter from CareWorks Software

DATA ENTRY in CareWorks

As you know, I often do training to help new users of CareWorks. However, since our software company doesn't actually USE the program, I'm sure I miss some of the subtleties that everyday users encounter.

Recently, a new customer asked us to convert their data into CareWorks. So, I ended up doing a large amount of data entry and this is what I learned:

1. We always recommend that you enter your Congregations first. As it turns out, in practice, this really is a very good idea. It saves so much time when you begin to enter your Volunteers and Receivers.

2. If you enter most of your zip codes in MAINTENANCE before you begin the rest of your data entry, it will make your task much easier by eliminating the entry of the city and state.

3. We recommend that you think ahead of time about how you want to be able to pull information OUT of CareWorks. How might you want to group your Receivers, how about your Volunteers? How can you gather information from CareWorks that will help you apply for a grant or other funding? What information is your Board of Directors looking for each month? Which congregation has the most requests for services and are they donating to your program?

If you have MS Access installed on your computer, I can help you write queries. Also, the CLASSIFICATION

field can be a valuable tool for this. It needs to be set up in MAINTENANCE and then can be used for Volunteers, Receivers, and Congregations as well as Community Members.

CAREWORKS Demos

With the advent of Windows 7, we had to do away with sending out CDs for CareWorks demos. Consequently, now we send out the demo version on a 2 gig FLASH DRIVE!!! For those who request a demo, we tell them to keep the flash drive even if they don't buy the software. If they do decide to purchase CareWorks, we STRONGLY encourage them to use the flash drive for their backups! And we all know how important backups are, right?

FUNDRAISING IDEAS

SUMMER IS HERE!

Maybe you could ask some of the youth members of a nearby church or high school to volunteer for Yard Cleanups. Then, you could have an ice cream social and raffle off opportunities for the yard cleanups. Perhaps a fortune could be made that could help your program. WIN, WIN!

[Call for a free demo today](#)



Highlighted News

- DATA ENTRY
- National Conference
- Fundraising Ideas