

# What Works

*A complimentary Newsletter from CareWorks Software*

## HOW CAN I CUSTOMIZE CAREWORKS?

Well, for the most part, CareWorks is a closed system and cannot be altered. That being said, there are some ways to make it work better for your particular program.

It helps if you take a few moments or even days to think about how you want to be able to retrieve information from this sophisticated database. What kind of reporting does your Board of Directors ask for? What kind of statistics do you need for your grant writing and fundraising efforts? What is the population of your Receivers like? And what are their specific needs?

From the Main Menu, you will notice a button that says MAINTENANCE. Perhaps that is misleading, because it is really where you can customize CareWorks. You enter the password ('csig') and you will see you can add Service Sub Codes, Referral Sources, Donation Types, Locations, additional Denominations, additional Mobility Types and Classifications.

By adding Service Sub Codes, you can track the specific services that are requested and that you provide in your program. By adding Referral Source Sub Codes, you can evaluate trends of where the needs may be the greatest and develop a strategy to address them. Donation Types? Well, what was your most successful fundraising event? Wasn't it easy to provide a Tax Receipt to all of the Donors by using the CareWorks Mail Merge and

choosing the specific event to generate Thank You letters?

You may have noticed a field in the Volunteer and Receiver records that is called "LOCATION" (in the Advanced Tab). In Maintenance, you can identify a "Location". This may be a particular area/county/neighborhood where Volunteers and Receivers live. Perhaps you have Volunteers who only want to provide Transportation in their specific Village. You could set that up as a Location, add it to the associated Volunteers and Receivers and then you can easily match them up!

Again, in Maintenance, under the Options Tab, you will find you can add a Denomination that may not be already listed and you can also add a Mobility Type (i.e. visually impaired AND wheelchair bound). There have been previous newsletters about the Classification field. This provides so much flexibility in the program.

## FUNDRAISING IDEAS

How about a Homemade Christmas Cookie Sale? You can set up big platters, use some festive paper bags and let people choose cookies themselves and pay by the pound!



**CALL TODAY for a DEMO CD**

### Highlighted News

- How can I customize CareWorks?
- Fundraising Ideas

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