

Read this to find out what's new!

donorperfect online

Highlights and Features Guide



Enhanced Outlook®, Excel® & Word® Integration

New Financial Reports

WealthEngine Prospect Research Integration

Improved Split Gift Management

Increased User Login Security


Much, Much More!

This update is provided at **no additional cost** as one of the benefits of your DPO subscription.

Building upon our annual surveys, client suggestions, and new partnerships, we are proud to announce the latest release of DonorPerfect Online! We believe this update will help make your system easier to use and demonstrates our commitment to providing the best possible software and support to meet your evolving needs.






Increase Productivity with Outlook® Integration

DPO now provides enhanced email and calendar integration with Outlook to save you time.

Email History. Your donor contact history screen now provides a very convenient way to keep track of email correspondence with each donor. A record of the email is automatically created when you send an email using the Email button  on your Main screen.



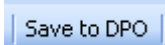
Each email is automatically recorded and saved in the donor's Contact History and includes the subject, sender, and body of the email message. Emails from Outlook® that were not created via the email button can also be imported to create contact history records for appropriate donor records (based on matching of email address).

		Home	Entry Screens	Reports	Mailings	Utilities	Modules				
		Search	Main	Gifts	Pledges	Tributes	Contacts	Bio	Other Info	Links	Addresses
		Roger Sandstone (16)					DPO August Release (augdpo1)				
		Add									
		DUE DATE	COMPLETE	ACTIVITY	MAILING	BY WHOM	COMMENT	PLAN ID			
	Edit	8/6/2007	8/6/2007	Email Out	Board Mailing 2007		RE:RE: Meeting Next Week		Delete		
	Edit	8/3/2007	8/3/2007	Email Out	Board Mailing 2007		RE: Meeting Next Week		Delete		
	Edit	8/1/2007	8/1/2007	Email In	Board Mailing 2007	Marc Siegel	Subject: Meeting Next Week		Delete		
	Edit	11/3/2006		Telephone Call		Richard Clark	Invite to Dinner Event	1	Delete		
	Edit	10/8/2006	10/8/2006	Mailing	Major Donor Newsletter 2004	Marc Siegel	Send letter to notify of purpose Initial Mailing sent to Major Donors	1	Delete		

A copy of the email message can now be just a click away.

Installing Outlook Integration Tool

Here's how to begin using this valuable feature (**NOTE: You should exit Outlook prior to this installation**):

1. Download the required plug-in by going to **Utilities, Downloads**, and download the **DPO-Outlook Integration** file to your local computer.
2. Run the **setup.exe** file to begin the installation
3. Once the installation is complete, open Outlook to see a new  button in the tool bar

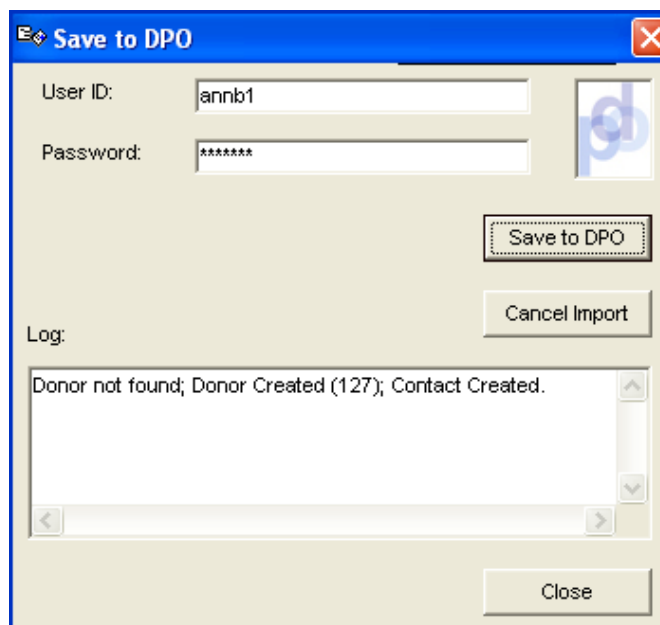
Importing Previously Created Emails

If the system finds a matching email address in your database, the corresponding record will be updated with a new contact record containing the contents of the email. If no match is found, the system will automatically create a new donor record and append a new contact record.

1. To import emails into DPO, simply highlight one or more emails and click the **Save to DPO** button
2. You will be prompted with a dialogue box



3. Check the Allow access box and select a period of time. This is a security measure designed to ensure that you don't expose your email system to any undue threats.
4. Now enter your DPO user name and password and click the **Save to DPO** button.
5. When you are finished importing your emails, simply click the **Close** button.



Managing Appointments with DPO & Outlook

Create Appointments. Next time you schedule a meeting or follow-up activity with a prospective donor you can automatically record the appointment in your Outlook calendar using the information you've already entered as a DonorPerfect contact record. Just click the Outlook icon from the DonorPerfect Contact record screen.

DonorPerfect Contact Screen. Clicking the Outlook Icon automatically creates a scheduled appointment in Outlook.

Outlook Appointment Screen. You can further define the appointment, set reminders, and edit the messages all in one easy step.

The screenshot shows the DonorPerfect interface with a contact record for Roger Sandstone. The contact details include dates, time, activity (Meeting), and assigned to (Richard Clark). A note mentions a lunch with Roger and Mary. A green arrow points to the Outlook icon in the top right corner of the contact record. Below this, the Outlook Appointment screen is shown, displaying the appointment details for 'Mr. & Mrs. Roger Sandstone, Meeting' on Wednesday, 3/1/2006, from 1:00 PM to 2:00 PM. The appointment is set to occur in the past. The Outlook screen also shows the subject, location, start and end times, reminder settings (15 minutes), and a note about the lunch.

Improved Exporting to Excel and Word

We've dramatically improved the ability to export financial reports to Microsoft Excel and Word. You can also export either summary or detailed information (information that you can drill down to). Manipulate the data any way you like for further analysis, and create helpful graphs & charts. Word or Excell formats are also convenient for sharing via email. To export, simply select a financial report, set your report options, and click the appropriate icon!

3) Select Report Options

Ending Date

- Use Donor Filter
- Use Gift Filter
- Set Selection Filter...

Report Heading



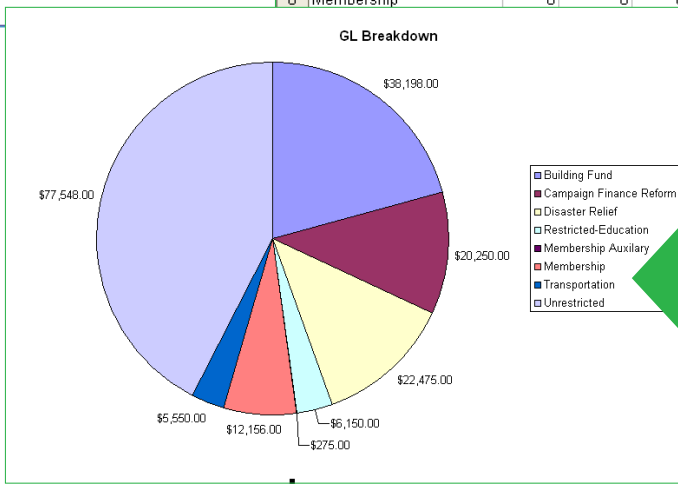
- View Report
- View Printable Version
- Export to Excel
- Export to Word

Comprehensive Donor Revenue Analysis as of 07/12/2007

	Current year 7/12/2007	Prior year 7/12/2006	Two Years Ago 7/12/2005	Amount Difference Current Year vs. Prior Year	Percent Change Current Year vs. Prior Year
Active Donors					
Number of Active Donors	11	20	25	-18	-47.60%
Total Revenue	\$17,496.78	\$33,929.90	\$30,800.00	\$-16,433.12	-48.17%
Number of Gifts	74	62	61	12	19.35%
Revenue Per Donor (Year to Date)	\$1,590.61	\$1,305.00			
Revenue Per Gift (Average Gift)	\$236.44	\$547.26			
Gifts Per Donor	6.73	2.38			
Number of 2+ givers for year	4	23			
Retained Donors					
Number of Retained Donors	11	25			
Donor Retention Rate	100.00%	95.19%			
Retained Donor Revenue	\$17,496.78	\$33,814.90			
Revenue Retention Rate	100.00%	99.88%			
Revenue per Retained Donor	\$1,590.61	\$1,352.60			
New Donors					
Number of New Donors	0	1			
New Donor Revenue	\$0.00	\$118.00			
Number of New Donor Gifts	0	2			
Revenue per New Donor	\$0.00	\$118.00			
Revenue per New Donor Gift	\$0.00	\$59.00			
Gifts per New Donor	0.00	2.00			
Reactivated Donors					
Reactivated Donors	0	0			
Reactivated Donor Revenue	\$0.00	\$0.00			
Number of Reactivated Gifts	0	0			
Revenue per Reactivated Donor	\$0.00	\$0.00			
Revenue per Reactivated Gift	\$0.00	\$0.00			
Attrition					
Attrition Rate	57.69%	0.00%			
Number of Donors Active Last 2 years	11	25			
Number of Donors Active Last 2+ years	11	20			

Microsoft Excel - STATANAL.xls

GL Code	# Gifts	Amount	# Gifts	Amount	# Gifts	Amount	# Pledges	Balance	Grand total	
Code:	1	12	1	12	1	12	1	108	120	
3 Building Fund	8	760	11	1010	62	27258	11	10940	38198	
4 Campaign Finance Reform	0	0	0	0	1	250	1	20000	20250	
5 Disaster Relief	0	0	0	0	20	22475	0	0	22475	
6 Restricted-Education	0	0	0	0	22	6150	0	0	6150	
7 Membership Auxiliary	0	0	0	0	2	275	0	0	275	
8 Membership	0	0	0	0	53	12156	0	0	12156	
					200	3	750	1	4800	5550
					485	214	77413	2	135	77548



WealthEngine Integration

The **WealthEngine Profile** (Optional Service) gives you instant access to an easy to read, easy to print wealth profile report on your donor -- compiled using the latest information from as many as 25 top data sources. Identify real estate, stock ownership and other valuable data to assist in targeting capital campaign or annual gift efforts effectively. The result is clear, comprehensive information that you can take from desktop to donor meeting, and the service typically pays for itself with the first major gift. Our partnership with *WealthEngine*, specialist in donor and prospect research, also offers cost effective screening of your donor database to produce wealth scoring data that can be easily brought into DonorPerfect. This unique integration makes it easy to use this wealth score for segmenting and reporting to easily target the right donor with the right message.

Home | **Entry Screens** | **Reports** | **Mailings** | **Utilities** | **Modules** | **Help** | **Log Out**
 Search | **Main** | **Gifts** | **Pledges** | **Tributes** | **Contacts** | **Bio** | **Other Info** | **Links** | **Addresses**

DPO August Release (augdpo1)

Constituent Contact Information

ID# 16 Org Res

Donor Type: Individual Last User: MS

Last Name: Sandstone Suffix:

First Name: Roger DO NOT SEND MAIL Reason:

Middle Name:

Dear: Roger and Mary Home Phone: (215)628-0400

Prof. Title:

Optional Line:

Bus. Phone:

Fax Phone:

Mobile Phone:

Simply click the WealthEngine logo button near the donor's name, and...

WealthEngine.com
 Advanced | Organization | Dataquick | History | Inner Circle | Preferences | Express | WS UK | Logout

Simple Search

* Report: Lexis Nexis Real Estate

* Last Name: Dukeman

First Name: Van

Or

State: IL

Or

City:

Or

Zip:

Lexis Nexis Real Estate

2.0 records found.

Name	Company	City	State
DUKEMAN VAN & PATTI		MAHOMET	IL
DUKEMAN VAN A & PATTI J		MAHOMET	IL

Other Reports

Lexis Nexis Real Estate

Match Name: DUKEMAN VAN & PATTI
 Mailing Addr: 1401 S RIVER OAKS DR MAHOMET, IL 61853-3801

Properties

Site Address: 1403 RIVER OAKS DR IL 61800	Property Type: Single Family Residential
Property Id: 151322177015	Record Date: 2005
Record Type: Undefined	Assessed Value: \$33,280
Market Val. Year: \$0	Assessed Year: 2005
Sale Amount: \$0	Loan Amount: Unknown
2nd Owner:	As of Date: Today
History Flag: N	
Site Address: 1401 S RIVER OAKS DR MAHOMET, IL 61853 *	Property Type: Single Family Residential
Property Id: 151322177016	Record Date: 2005
Record Type: Undefined	Assessed Value: \$147,740
Market Value: \$0	

...get instant access to wealth research on a donor!

To learn more about our WealthEngine integration, visit www.donorperfect.com/wealthengine. To sign up or get answers to your questions, please call your client account manager at (800) 848-3279. You can also request more information www.donorperfect.com/modulerequest

New Financial Reports

Cross Tabulation: To better understand the interrelationships of your data, this new financial report allows you to quickly compare any two coded fields side by side. For example, by comparing Solicitation Codes with GL Codes, you can compare how a particular solicitation helped contribute to a fundraising goal (i.e. how much the auction contributed to the Building Fund).

Home	Entry Screens	Reports	Mailings	Utilities	Modules	Help	Log Out					
Acknowledgements/Receipts	Listings	Financial Reports	Contact Manager	Membership Reports	Custom Report Writer							
DPO Development Environment (dpo5)												
Cross Tabulation Report												
SOLICIT CODE by GL CODE												
From 01/01/2007 to 08/31/2007												
SOLICIT CODE	Count	Sum	Count	Sum	Count	Sum	Count	Sum	Count	Sum	Count	Sum
	Building Fund		Disaster Relief		Membership		Scholarship		Total			
	7	\$310.00	4	\$195.00	1	\$100.00	2	\$1,010.00	0	\$0.00	14	\$1,615.00
Auction 2007	0	\$0.00	0	\$0.00	0	\$0.00	0	\$0.00	2	\$787.00	2	\$787.00
Golf Outing 2007	0	\$0.00	1	\$200.00	0	\$0.00	1	\$150.00	0	\$0.00	2	\$350.00
Memorial	0	\$0.00	1	\$100.00	0	\$0.00	0	\$0.00	0	\$0.00	1	\$100.00
Personal Solicitation	1	\$100.00	0	\$0.00	1	\$100.00	0	\$0.00	0	\$0.00	2	\$200.00
Phonathon 2007	0	\$0.00	8	\$700.00	1	\$625.00	2	\$200.00	0	\$0.00	11	\$1,525.00
Spring Mailing 2003	0	\$0.00	0	\$0.00	1	\$100.00	0	\$0.00	0	\$0.00	1	\$100.00
Spring Mailing 2007	0	\$0.00	1	\$150.00	0	\$0.00	1	\$1,000.00	0	\$0.00	2	\$1,150.00
Total	8	\$410.00	15	\$1,345.00	4	\$925.00	6	\$2,360.00	2	\$787.00	35	\$5,827.00

Periodic Gift Comparison: Are you on track to make your fundraising goal? Which areas need more resources to improve performance, or where should you switch resources to get a better financial return? Want to discover trends or compare different periods of time? This powerful analytical report can help you answer these questions by allowing you to compare segments of your data over different periods of time (Weekly, Monthly, Quarterly, and Annually).

Home	Entry Screens	Reports	Mailings	Utilities	Modules	Help	Log Out					
DPO Development Environment (dpo5)												
GL CODE by MONTH												
From 1/1/2007 to 5/31/2007												
GL CODE	Count	Sum	Count	Sum	Count	Sum	Count	Sum	Count	Sum	Count	Sum
	Jan/2007		Feb/2007		Mar/2007		Apr/2007		May/2007		Total	
	1	\$25.00	1	\$100.00	1	\$75.00	2	\$2,000.00	1	\$100.00	6	\$2,300.00
Disaster Relief	1	\$100.00	1	\$625.00	1	\$100.00	1	\$100.00	0	\$0.00	4	\$925.00
Membership	4	\$1,260.00	1	\$1,000.00	1	\$100.00	0	\$0.00	0	\$0.00	6	\$2,360.00
Building Fund	0	\$0.00	8	\$800.00	3	\$450.00	2	\$1,075.00	1	\$100.00	14	\$2,425.00
Scholarship	0	\$0.00	1	\$365.00	0	\$0.00	0	\$0.00	1	\$422.00	2	\$787.00
Total	6	\$1,385.00	12	\$2,890.00	6	\$725.00	5	\$3,175.00	3	\$622.00	32	\$8,797.00

Statistical Analysis: The Statistical Analysis report provides a quick and easy snapshot view of all gifts and pledges that have been received Month-to-Date, Year-to-Date, and in Total. As with all DPO Financial reports, simply click any hyperlinked amount to drill down to the detailed transactions.

Home	Entry Screens	Reports	Mailings	Utilities	Modules	Help	Log Out
Acknowledgements/Receipts	Listings	Financial Reports	Contact Manager	Membership Reports	Custom Report Writer		

DPO Development Environment (dpo5)

**Statistical Analysis Report By GL_CODE for period ending 08/31/2005
As of 8/31/2007**

Code	Description	August		Year to Date		Active Pledges		Grand Total
		Gifts	Amount	Gifts	Amount	Pledges	Balance	
BF	Building Fund (BF)	5	\$10,745.00	0	\$0.00	9	\$22,000.00	\$22,000.00
DR	Disaster Relief (DR)	0	\$0.00	0	\$0.00	4	\$2,750.00	\$2,750.00
ED	Education (ED)	3	\$176.00	0	\$0.00	3	\$0.00	\$0.00
ME	Membership (ME)	0	\$0.00	0	\$0.00	1	\$0.00	\$0.00
UN	Unrestricted (UN)	0	\$0.00	0	\$0.00	14	\$1,600.00	\$1,600.00
Grand Total		8	\$10,921.00	0	\$0.00	31	\$26,350.00	\$26,350.00

Linked Donor Contributions: A significant benefit of using one central database is being able to track relationships donors have with each other. This Link-based report allows you to analyze the relationships and giving history between donors in your database. For example, Roger gave this amount, and he works for XYZ Corporation, which has 4 other employees who gave a total of \$25,000.

Linked Donor Contribution Report From 01/01/2007 To 08/31/2007			Report Date 8/31/2007		
Constituent Name - Relationship			Linked Record Name - Relationship		
Adams McKinley(45) - Employer			Jacob Dotsaur(6) - Employee		
Gift Date	Amount	Record Type	Gift Date	Amount	Record Type
2/1/2007	\$100.00	Pledge		\$0.00	
Sub Total	\$100.00		Sub Total	\$0.00	
Joan Jett(2) - Employee			Roger Sandstone(16) - Employee		
Gift Date	Amount	Record Type	Gift Date	Amount	Record Type
	\$0.00			\$0.00	
Sub Total	\$0.00			\$0.00	
Gift Date	Amount	Record Type	Gift Date	Amount	Record Type
7/26/2007	\$20.00	Gift	4/5/2007	\$1,000.00	Pledge
5/3/2007	\$100.00	Gift			
5/3/2007	\$100.00	Gift			
4/26/2007	\$100.00	Gift			
4/6/2007	\$75.00	Gift			

Donor Recognition: If you provide different thank-yous for different giving levels, or if you just want to see a custom breakdown of donors by giving range, this simple, straightforward report is for you. It allows you to set and view custom donor giving levels.

3) Select Report Options




Date Range through

Giving Levels

	From \$	To \$	Caption
1.	\$5,000.00	\$100,000.00	Large
2.	\$2,500.00	\$5,000.00	Medium
3.	\$1,000.00	\$2,500.00	Small
4.	\$500.00	\$1,000.00	
5.	\$100.00	\$500.00	
6.	\$0.00	\$0.00	
7.	\$0.00	\$0.00	
8.	\$0.00	\$0.00	

Set Selection Filter...

Report Heading

Donor Recognition report from 01/01/2005 to 05/31/2007

Report created on 8/31/2007

Donor Id	Donor Name	Gift Total	No. of Gifts	Most Recent Gift
Presidential (\$5,000.00 to \$100,000.00)				
6	Jacob Dotsaur	\$14,475.00	8	7/6/2007
16	Roger Sandstone	\$11,985.00	50	7/26/2007
35	Roger Sandstone	\$11,000.00	3	11/21/2005
49	Mary Marlowe	\$10,300.00	3	12/21/2005
45	Adams McKinley	\$9,845.00	8	10/31/2006
Vice Presidential (\$2,500.00 to \$5,000.00)				
22	Larry Szabor	\$2,575.00	6	8/2/2006
Secretary (\$1,000.00 to \$2,500.00)				
5	George Judson	\$2,047.00	6	5/8/2007
2	Joan Jett	\$1,575.00	6	10/26/2006
25	Floyd Taggart	\$1,425.00	5	12/23/2005
8	Jacob Dotsaur	\$1,420.00	6	2/8/2007
15	Jeanella Tenievue	\$1,355.00	5	12/14/2006
29	Nels Sweeney	\$1,285.00	4	1/30/2006
62	Fred Tarkonston	\$1,076.00	2	8/27/2005
Gold (\$500.00 to \$1,000.00)				
10	Edward Grant	\$984.75	7	12/6/2006
7	Kathy Demetral	\$790.00	4	6/11/2007
19	Albert Mangen	\$675.00	5	6/17/2006
52	Floyd Taggart	\$675.00	5	8/2/2006
42	International Software	\$610.00	4	12/9/2005

AFP-Fundraising Effectiveness Report: In conjunction with our participation with the AFP Fundraising Effectiveness project, we've created a new comprehensive report containing key metrics used by Association of Fundraising Professionals such as the measures of increases and decreases in new, upgraded, recaptured, downgraded and lapsed donors.

AFP-Fundraising Effectiveness Project Report

	Period II	Period I	% Diff
	9/1/2006 to 08/31/2007	9/1/2005 to 8/31/2006	
Individuals			
Amount of Largest Gift	\$1,000.00	\$10,000.00	-90.00%
Number of Gift Transactions	69	43	60.47%
Number of New Donors	3	0	N/A
Amount of New Gifts	\$135.00	\$0.00	N/A
Number of Reactivated Donors	0	0	N/A
Number of Reactivated Gifts	\$0.00	\$0.00	N/A
Donors Who Upgraded	6	10	-40.00%
Upgrade Revenue	\$14,887.00	\$2,655.00	460.72%
Donors Who Remained the Same	0	0	N/A
Same Revenue	\$0.00	\$0.00	N/A
Donors Who Downgraded	2	13	-84.62%
Downgrade Revenue	\$450.00	\$2,466.00	-81.75%
Total Revenue	\$15,472.00	\$20,401.00	-24.16%
Organizations			
Amount of Largest Gift	\$100.00	\$2,500.00	-96.00%
Number of Gift Transactions	1	3	-66.67%
Number of New Donors	0	0	N/A
Amount of New Gifts	\$0.00	\$0.00	N/A
Number of Reactivated Donors	0	0	N/A
Number of Reactivated Gifts	\$0.00	\$0.00	N/A
Donors Who Upgraded	0	0	N/A

Restricted Login Security

In addition to state-of-the-art security measures already in place, DonorPerfect Online now provides a setting which allows you to restrict DPO access based on the IP address of the person connecting. This enhancement is useful for clients who require tightly controlled security environments (e.g. a hospital that only wants to allow access from within their building).

To activate this feature, navigate to **Utilities, Parameters, General Parameters**, and check the option for **'Enable IP Security'**. This new security feature offers two options:

- **Global IP Security:** After you have activated IP security for your system, you should see, near the bottom of the Security screen, an option for IP Security (Globally Allowed IP addresses). This option allows you to administer a global list of 'safe' IP addresses from which a user can access DPO.

To add IP addresses:

- o Type in the number of the IP address that you would like to add, then click the 'Add Rows' button.
- o Enter the appropriate IP addresses into each text box row (one IP address per box)
- o Click Save.

- **Individual IP Security:** In addition to the global IP settings, you can also specify 'safe' IP addresses each individual user can use to access DPO.

To enable user level IP address security, navigate from **Utilities, Security:**

- o Edit any user
- o Locate the IP Security section of the page and check the box for **'Enable user-level IP security'**
- o To add IP addresses, enter any number in the small text box and click **'Add Rows'**
- o Enter the appropriate IP addresses into each text box (one IP address per box)
- o Click **Save**

Note: In some cases you may want to grant a particular user access to DPO from all IP addresses despite your global IP security settings. To allow this, simply check the option for 'Override all restrictions'. This setting will trump all global and user level IP security restrictions.

IP Security

Enable user-level IP security

Allow the following IPs:

55.123.45.90

44.345.56.10

33.678.78.97

1 Add rows

Override all restrictions

Helpful Hint: How do I identify IP Addresses?

If you go to www.whatismyipaddress.com from a location you wish to add, it will display the IP address number. Simply add this number to your "safe list".

Improved Split Gift Management

New Entry Screen: To make the entry of split gifts easier than ever before, we have redesigned our split gift entry screen. To enter a new split gift, simply follow these instructions:

- 1) From a donor's Gift Listing screen, click the Add button
- 2) On the Gift screen, enter the FULL amount of the gift as well as any other relevant details such as solicitation code and sub solicitation code
- 3) At the bottom of the screen, click the **Enter Split** button
- 4) You should now be on the new **Split Gift Entry** screen. To enter your split details click the **Add Split** button
- 5) A new window should will appear providing you an opportunity to enter:
 - a. Amount
 - b. GL Code
 - c. Solicit Code
 - d. Sub Solicit Code
 - e. Gift Type

The screenshot shows a web interface for entering split gift details. At the top, it displays the donor name 'Roger Sandstone (16)' and the user 'demosysgen (nm)'. The main section is titled 'Split Gift Detail' and contains three input fields: 'Main Gift Amount' with a value of \$180.00, 'Total Split Amount' with a value of \$180.00, and 'Balance' with a value of \$0.00. Below this is the 'Split Gifts' section, which includes an 'Add Split' button and a table with columns for 'Amount' and 'General Ledger Code'. The table contains one entry: \$105.00 for 'Disaster Relief'. To the right of the table is a form for adding a new split gift with fields for 'Amount' (\$75.00), 'GI Code' (Building Fund), 'Solicit Code' (Banquet 2006), 'Sub Solicit Code' (Please Select), and 'Gift Type' (Cash). 'Save' and 'Cancel' buttons are at the bottom of this form.

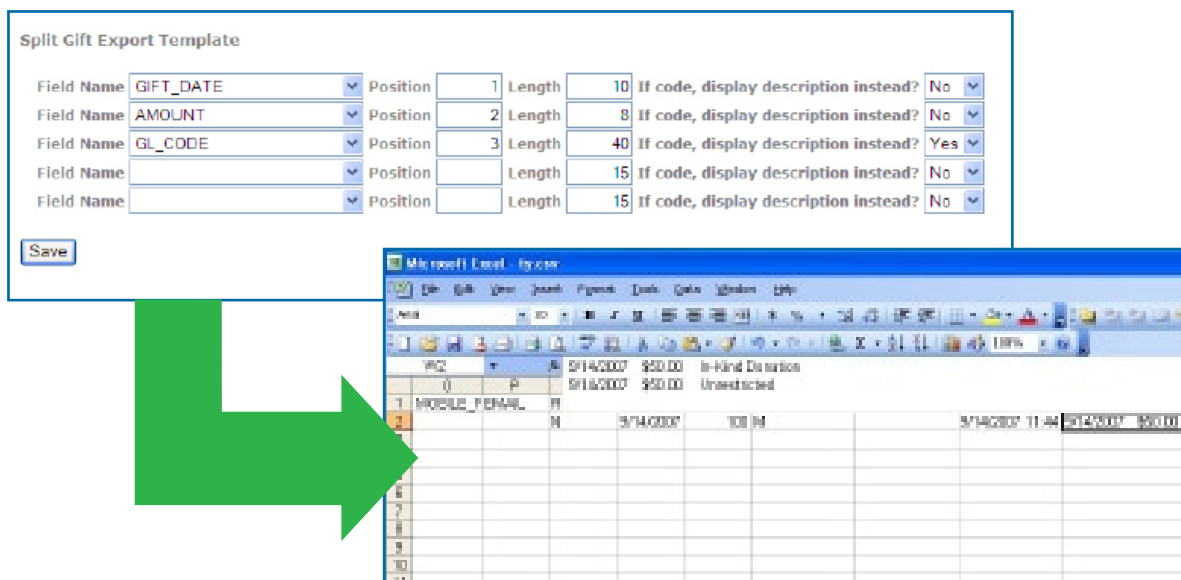
Once you have completed entering your split details, click the **Save** button.

- 6) Continue entering additional splits until you have designated the entire amount of the gift.
- 7) Now click **Save Split Detail** to return to the Gift Screen

Note: You should now see the breakouts of your split gift at the bottom of the Gift Entry screen. You can further edit each split gift by clicking the **Edit** button next to each split detail.

Acknowledging Split Gifts: To make the acknowledgment of splits gifts more detailed, DonorPerfect Online has added a special field, called Split_Gifts, to your acknowledgment export file. This field will contain a listing of your split gift details within a single field that can be used in your Microsoft Word mail merge template. The benefit of this new method is that you can now include a breakout of the donation as part of your acknowledgment/receipt.

You can even configure which gift detail fields to include in the Split_Gifts export field. To set-up, simply go to **Utilities, Parameters, and Acknowledgment/Receipts, Financial Reports**. Here you will see a grid that will allow you to select the field, order, starting position, and whether or not to show the code or the description.



Other Helpful Improvements

Merge TY Letters from the Gift Screen: Using our popular export templates you can now generate a Thank Letter Acknowledgment directly from the Gift screen. Simply select your favorite export template, click the Export to Excel button, and merge the resulting .CSV file using DPO Instant-Merge.

Notification Reminder: After you have successfully linked a gift to a tribute the system will now automatically ask you to create a notification.

Pledge Payment Identifier: Never misapply a pledge again! When entering a new gift into the system, DPO will now check to see if that donor has any existing open pledges. If an open pledge is found, you will be prompted to link that gift as a pledge payment.

Learn More

Training: We have a team of professional trainers ready to help you get the most productive and beneficial use from your investment in DPO. We offer a variety of training options designed to meet each client's individual needs and budget. For more information, please contact your client account manager at (800) 848-3279.

Clients Only Website: We maintain an extensive and growing website devoted exclusively to our clients. Features include how-to guides; past tips and newsletters; User Forum; manuals and other documentation; support, training and data services, electronic request forms, and more. Please visit: www.donorperfect.net

User Forum: We offer a unique electronic forum for client discussions. This is a great place to share your successes and challenges with fellow users - wherever they may be. Share tips, ask questions, make suggestions, or just see how others use DPO to solve their administrative problems and information management needs. Please visit: www.donorperfect.net and click either the **User Forum** link or button.