

## DonorPerfect™

CLIENT PROFILE

### **WEBLINK™** saves the *Institute for Public Relations* hundreds of hours per year!

#### AT A GLANCE:

##### **Organization:**

*Institute for Public Relations*  
College of Journalism and  
Communications at the University  
of Florida

##### **Business Challenge:**

Too much time spent manually  
registering event participants, pro-  
cessing donations & credit cards.

##### **Solution:**

**WebLink™** custom online forms  
and payment processing, and  
**DonorPerfect™** fundraising  
software from SofterWare.

##### **Key Results:**

- Saved hundreds of hours a year using WebLink to auto-mate registrations and process payments at the same time.
- Increased online donations by over 100%.
- Eliminated data entry, allowing Development Director to focus on fundraising.
- Comprehensive reporting capabilities improved communication with board.
- Transferred manual files and payment data to secure electronic records for easier reporting and improved audits.



*Michelle Hinson,*  
*Director of Development*

*“Instead of being a data entry clerk, I can now concentrate on real fundraising and development issues.”*

Michelle Hinson is Director of Development for the Institute for Public Relations. In addition to her responsibilities for donor cultivation and special events, she's responsible for developing new revenue streams, and serves as chief point of contact for the Institute's board of trustees.

##### **Business Challenge:**

Michelle needed a better way to eliminate manual effort for special event registration and credit card processing. As Michelle stated, “We were in the dark ages. We desperately needed online event registration and payment processing. I did everything manually - literally having to enter by hand hundreds of registration forms and credit card payments. I was a slave to data entry.” Michelle noted her most precious resource is time, but with these manual processes, she had none left for strategic planning, fundraising and development issues.

##### **Solution:**

Michelle chose to implement DonorPerfect Online. This web-based version of DonorPerfect enabled her to minimize the upfront investment with low volume-based monthly fees, while letting SofterWare manage the IT infrastructure. “Using DonorPerfect, we're able to streamline the event planning side like making name tags and rosters. Plus, the instant receipting function is a dream comes true! DonorPerfect has made my fundraising efforts easier and better, from entering records and donation processing, to the powerful reporting and analysis.”

Next, she added WebLink, which provides customizable web forms as links from a nonprofit's web site. The forms collect registration data and allows payment processing for both event registrations and online donations. Credit card information is validated, processed with funds

Contact your SofterWare regional account manager at 1-800-220-8111 to answer your questions about DonorPerfect.  
For more information visit: [www.donorperfect.com](http://www.donorperfect.com)

# ***DonorPerfect***<sup>™</sup>

## **WebLink saves the *Institute for Public Relations* hundreds of hours per year!**

deposited right into the Institute's designated bank account. The data collected can then be reviewed for accuracy and also edited. The approved transaction can then be quickly and easily imported into DonorPerfect.

There is always some concern when rolling out new technology. As Michelle mentioned, "Putting new systems in place is daunting even with tons of time, money and staff (none of which I have). I took baby steps. I instituted DonorPerfect first. About six months later, I set up WebLink. The process was easy and didn't take long to set up. The beautiful thing was there were no glitches. It worked perfectly from the get go."

### **Benefits:**

According to Michelle, "Now anyone interested in registering for our programs or donating to us can do it through our web site, and I can download the information directly into DonorPerfect. There is no more duplication of data entry. I save hundreds of hours a year with this process. And instead of being a data entry clerk, I can now concentrate on real fundraising and development issues." Michelle has also been able to make the most out of the data she collects. "My Board loves the financial reports I can pull. Since the Board is international in scope, I turn the reports into PDF files and email them – all done within DonorPerfect. And the custom report function is great since it will let you create almost any report imaginable.

For example, our auditor was never very impressed with my Excel spreadsheet reports (not to mention my manila folders crammed with registration and payment information). Our data is now securely stored and can be turned into professional looking reports. All of this makes it very easy to reconcile financial information in DonorPerfect with our accounting program."

The two main focuses of WebLink for Michelle have been event registrations and online donations, and both have been successful. Said Michelle, "We're seeing an increase of over 100% in online donations, and I smile now when I think of event registration and payment processing. I no longer have tons of paper registrations and payments strewn everywhere. I feel like I am now in control." She went on to joke, "I didn't start to cry when I was told we would hold two more events this year. That's a major step forward!"

As the Institute continues to diversify its revenue base by creating more programming, WebLink will capture registration information and credit card payments. As Michelle stated, "Using WebLink allows me to use my time more strategically, which is already paying big dividends for the Institute."

***For more information about WebLink, call (800) 220-8111.***

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*Michelle Hinson, Director of Development  
Institute for Public Relations*