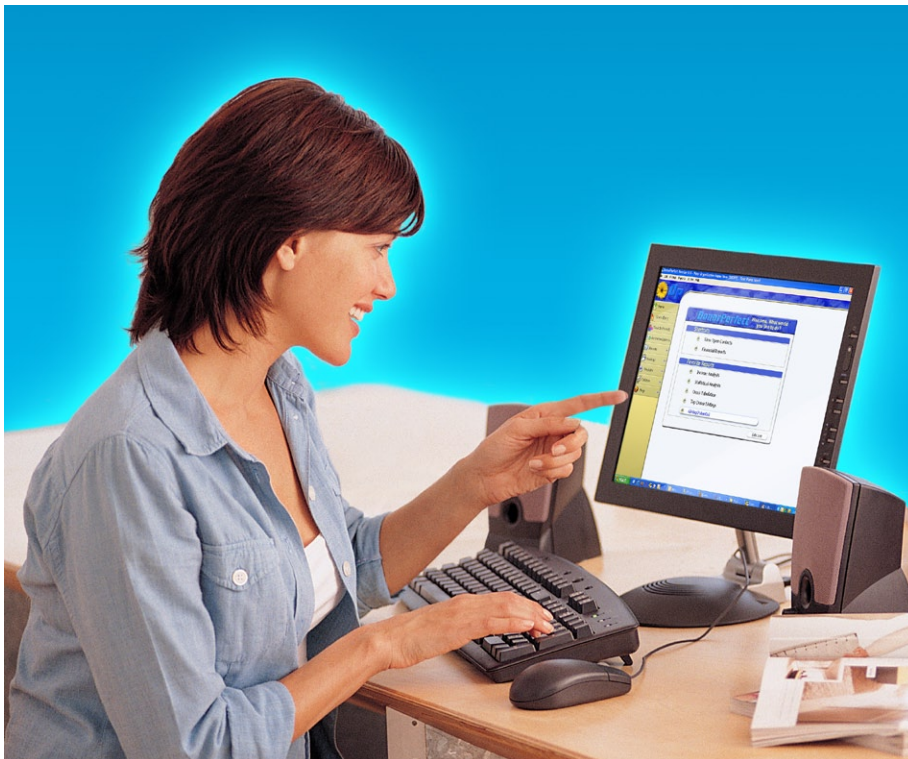


# ***Donor Perfect***™

*Fundraising Software*

## **Version 9 Highlights**



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*New Easy-to-Use Design*

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*New Quick Entry for  
Gifts & Pledges*

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*Improved Acknowledgement  
Process*

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*Enhanced Outlook®, Excel® &  
Word® Integration*

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*New Custom Report Wizard*

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*Much, Much More!*

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Updates are provided at ***no additional cost***  
as one of the benefits of your annual Support Plan.

(800) 220-8111 • [www.donorperfect.com](http://www.donorperfect.com)

*Building upon our annual surveys, client suggestions, and new partnerships, we are proud to announce the release of DonorPerfect Version 9! 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.*

## My Home Page

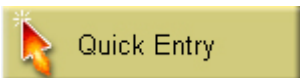
Each user can have their own home page which can be individually modified to include commonly used tasks such as searching for donors, processing acknowledgments, or running a specific report. Perfect for executive users who only want to see summary reports and analysis.

The **Welcome Screen** is a powerful, user-definable dashboard which includes:

- Shortcuts** – Create a personalized list of shortcuts to your most frequently used areas of the programs (e.g. Financial Reports, Search for Donors or the Custom Report Writer).
- Favorite Reports** – Keep up to 5 of your most frequently used reports – with your desired date ranges and selection filters just a click away.

To edit the content of the Welcome Screen simply click the 'Edit List' button on the bottom right hand corner of the window.

The **Welcome Screen** is quickly accessed by clicking **Home** on the new left-hand menu. Welcome screen settings can be managed by each user or controlled by the system administrator!



# Enter New Gifts More Efficiently

**Improved Quick Entry** provides a configurable tool to quickly search for a donor, edit address information, and create a gift (or pledge) all on one screen, speeding data entry. The easy to read grid and Quick Entry report make reviewing your work a snap.

**Recent Transactions**

Entry Type	Donor	Donor Name	Date	Gift Amount	Pledge Total	TY Letter
Pledge	45	Adams McKinley Corporation	06/18/2007	\$0.00	\$1,200.00	03
Pledge	4	Mr. Jim Barkley, Jr.	06/20/2007	\$0.00	\$1,200.00	03
Gift	4	Mr. Jim Barkley, Jr.	06/20/2007	\$120.00	\$0.00	03
Gift	45	Adams McKinley Corporation	07/01/2007	\$15.00	\$0.00	01
Gift	16	Mr. & Mrs. Roger Sandstone	07/12/2007	\$50.00	\$0.00	01

**Transaction Totals**

	Pledges	Gifts
Number of Entries	4	10
Total Amount	\$3,400.00	\$620.00

**Configuration Options**

- Gift Defaults
- Pledge Defaults
- Screen Layouts

**Add New**

Gift  Pledge

**Quick Entry Grid.** Enter, review and report on a gift and pledge transaction batch with ease

**Quick Gift Entry**

**1 Search**  Gift  Pledge Payment

Donor ID:

**Recently Viewed Constituents:**

- Mr. & Mrs. Roger Sandstone [16]
- Mr. Jim Barkley, Jr. [4]
- Mr. Justin Ackland [76]
- Mr. & Mrs. Paul Smoyer [21]
- Adams McKinley Corporation [45]

**2 Donor Information**

Donor ID: 16

Title: Mr. & Mrs.

First Name: Roger

Last Name: Sandstone

Address: 2522 N. Adams Court

City, ST Zip: Philadelphia PA 19115-3309

**3 Gift**

Date: 07/24/2007 Amount: 50.00

GL Code: LUN SQL Code: UNSO

Thank You Letter #: 01

Check #/Ref:

Fair Market Value: 0.00

**Quick Entry Data Screen.** Quickly enter gift and pledge transactions in one simple user-definable screen. Define defaults to speed data entry further.

**Credit Card payments** can be authorized and submitted for collection with our Insta-Charge button.

# Recently Viewed Constituents

**Enter Name to Look Up**

Last Name/ID#	<input type="text"/>	(or Organization)
First Name	<input type="text"/>	<input type="button" value="Lookup"/>
City	<input type="text"/>	<input type="button" value="Clear"/>
State	<input type="text"/>	

**Recently Viewed Constituents:**

- [Mr. Justin Ackland \(76\)](#)
- [Mr. & Mrs. Paul Smoyer \(21\)](#)
- [Adams McKinley Corporation \(45\)](#)
- [Mr. Jim Barkley, Jr. \(4\)](#)
- [Mr. & Mrs. Roger Sandstone \(16\)](#)

Your 10 most recently viewed records are automatically displayed. Just double-click on a name to access again.



## New Donor Screen Toolbar Buttons

New and Improved Toolbar icons make navigating to frequent features even easier.



The unlimited **Narrative** button allows you store comprehensive notes about your constituents.



The **Gift History** button provides one-click access to your donor's individual giving history.



Easily **Create a Cross Reference** record for more advanced donor searching.



Print a Label, Merge a Letter, or Run a Report using the **Printer** icon.



Quickly copy and paste a donor's name and address into your clipboard with the **Address Block** button.



Click to create an **Email** and have it tracked in your donor's contact history.

# Wealth Engine 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 databases. 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 Wealth Engine, specialist in donor and prospect research, also offers cost effective screening of your donor database that produces wealth scoring data that can be easily brought into DonorPerfect. This unique integration makes it easy to use this wealth data for segmenting and reporting so that you can target the right donor with the right message with ease.

<b>Supplied Name and Address</b> Robert Friedman 350 Central Park W Apt 5d New York NY 10025 Validated <input type="checkbox"/> No MPP <input type="checkbox"/> Yes	<b>Match Sources</b> N D&B Marketing N FEC Campaign Donations N Guidestar Foundations N Guidestar NonProfits N Inner Circle N Market Guide	<b>WealthEngine Rating Summary</b> Gift Capacity Rating: \$5,000,000+ 1 DM Rating: 1 1 Influence: 1 Top Quarter Inclination: 1 Top Quarter
---	--	--

<b>Quality of Match</b> Wealth ID Sec: 5 Pension: 5 FEC Campaign: 5 Who's Who: 5 D and B: 5 Volunteers: 5 Phil. Gifts: 527 Dir.: 5 Market Guide: 5 Trustees: 5 Aircraft: 527 Con.: 4 Guidestar: 5 GS Fdns: 5 Airmen: 5 POWR: 10 Death Index: 5 Vessels: 4 Client Donor: 5	<b>Planned Giving</b> Bequest: No Annuity: 0 Trust: 1	<b>RFM Analysis</b> Recency: <input type="checkbox"/> Frequency: <input type="checkbox"/> Money: <input type="checkbox"/> Total RFM: 0
--	--	--

<b>Aggregate Information</b> MG Total Comp: \$1,549,525 DB Company Value: \$190,736,119 Total FEC Cont: \$48,450 Property Count: 0 Charitable Cont. Flag: Y	<b>Gift Capacity Summary</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="2">% Rank</th> </tr> <tr> <td>Annual Income:</td> <td>\$1,549,525 98 =&gt; \$588,820</td> </tr> <tr> <td>Real Estate Value:</td> <td>\$0 20 =&gt; \$0</td> </tr> <tr> <td>Wealth ID Sales, Holdings:</td> <td>\$2,133,598,026 100 =&gt; \$213,359,803</td> </tr> <tr> <td>Defined Pension Plans:</td> <td>\$1,055,632 100 =&gt; \$197,931</td> </tr> </table>	% Rank		Annual Income:	\$1,549,525 98 => \$588,820	Real Estate Value:	\$0 20 => \$0	Wealth ID Sales, Holdings:	\$2,133,598,026 100 => \$213,359,803	Defined Pension Plans:	\$1,055,632 100 => \$197,931
% Rank											
Annual Income:	\$1,549,525 98 => \$588,820										
Real Estate Value:	\$0 20 => \$0										
Wealth ID Sales, Holdings:	\$2,133,598,026 100 => \$213,359,803										
Defined Pension Plans:	\$1,055,632 100 => \$197,931										

<b>Record Information</b> Record Type: Full Detail IC Member: Y IC Match:	<b>Mr. &amp; Mrs. Roger Sandstone</b> Main Gift Pledge Other Info Link Contact Bio. 2 Addr/Sal ID: <input type="text"/> WealthEngine Import Giving Rating: 1 Giving Range: \$5,000,000+ Bequest: No DM Score: 1 DM Score2: 1 Influence: 1 Inclination: 1 Annuity: 0 Trust: 1 Income Source: <input type="text"/> Income Used: <input type="text"/> Real Estate Value: 0.00 Defined Pension Plans: <input type="text"/> Market Guide Total Compensation: 1549525.00 WealthID Sales, Holdings: 21335980.30 D&B Company Value: 19073611.90 Giving FEC, Nonprofit: <input type="text"/> Total FEC Contributions: 48450.00 Property Count: 0 DOB: / / Phone: <input type="text"/>
---	---

--- QUALITY OF MATCH INFORMATION ---

Lexis Nexis: 0	WealthID Securities: 5	FEC: 5	Market Guide: 5
D&B: 5	Pension: 5	527 Dir: 0	527 Political Org: 4
Guidestar: 5	Trustees: 5	Merchant Vessels: 4	POWR: 10
GS Fdns: 5	Who's Who: 5	Vol. and Dir: 5	Phil Gifts: 0
SS Death Index: 0	Airmen: 0	Aircraft: 0	Client Donor: 0


Inner Circle Match:  Inner Circle Flag:

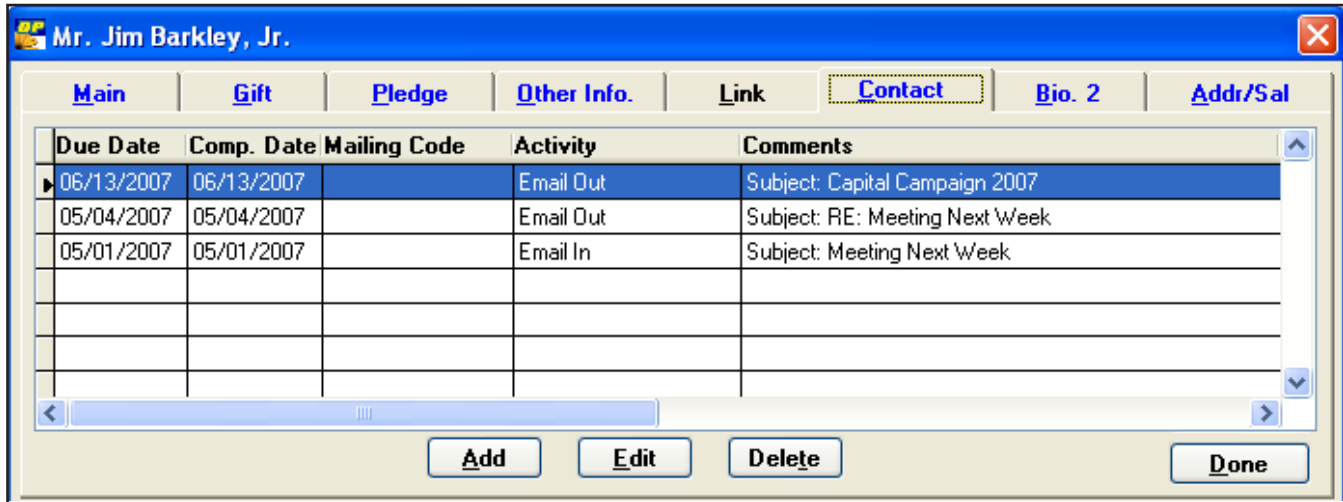
Instant access to wealth research on a donor!

Wealth Engine screening results can be imported into DonorPerfect and used for segmenting and reporting.

# Increase Productivity with Outlook® Integration

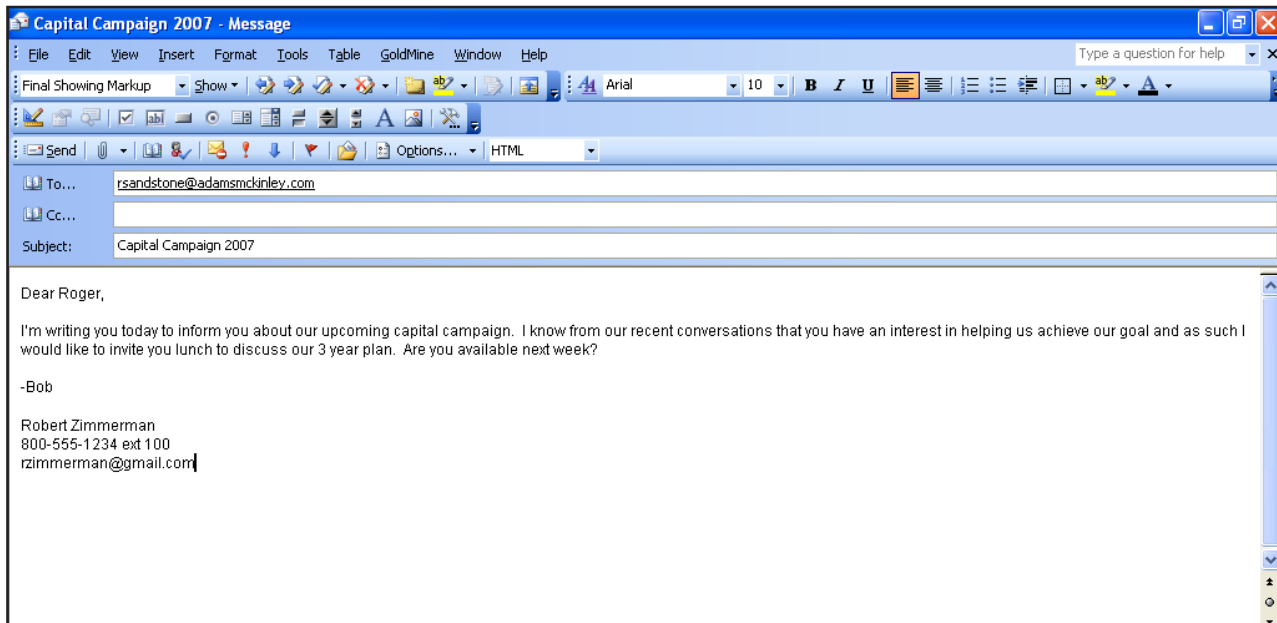
Version 9 provides enhanced email and calendar integration with Outlook to save you time.

**Email History.** Your donor contact history tab 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 toolbar. 



Each email is saved and recorded in the donor's Contact History automatically 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 on matching donor records (based on matching of email address).



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

**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 (circle the icon in the upper left corner of the screen) from the DonorPerfect Contact record screen.

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

Mr. & Mrs. Roger Sandstone

Main Gift Pledge Other Info Link Contact Bio. 2 Addr/Sal

--- CONTACT MANAGEMENT INFO ---

Activity Meeting

Contact Person Emerson L. Fittipaldi

Date Due 05/11/2007 Date Completed / /

Meeting/Grant Notes Meeting Roger for Lunch

Mr. & Mrs. Roger Sandstone: Meeting - Appointment

Appointment Scheduling

This appointment occurs in the past.

Subject: Mr. & Mrs. Roger Sandstone: Meeting

Location: Label: None

Start time: Fri 5/11/2007 8:00 AM All day event

End time: Fri 5/11/2007 9:00 AM

Reminder: 15 minutes Show time as: Free

Meeting Roger for Lunch

Contacts... Categories... Private

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

# New Automated & More Powerful Acknowledgement Processing

Reviewing and processing Thank You Letters is now even easier with our redesigned Acknowledgement Processing screens. The process involves two simple steps:

1. Review all transactions waiting for acknowledgement using one of the 4 comprehensive batch reports.
2. Create the desired thank you letters automatically in Microsoft Word® by clicking on the Process TY's button!

Select	Thank You Letter	Description	Pending Thank You's	Pending Gift Amount	Pending Pledge Amount	Already Thanked	Total Thank You's
<input type="checkbox"/>		** No Letter Assigned **	2	\$12.00	\$120.00	12	14
<input type="checkbox"/>	01	Standard Thank You	5	\$820.00	\$0.00	25	30
<input checked="" type="checkbox"/>	03	Capital Campaign Thank You	9	\$510.00	\$4,400.00	16	25
<input type="checkbox"/>	04	Major Donor Thank You	0	\$0.00	\$0.00	1	1
<input type="checkbox"/>	10	Banquet Thank You	0	\$0.00	\$0.00	3	3
<input type="checkbox"/>	11	Auction Item Purchase	1	\$555.00	\$0.00	0	1
<input type="checkbox"/>	12	Bowlathon 2002 Plg Thank You	0	\$0.00	\$0.00	1	1
<input type="checkbox"/>	22	Building Fund Thank You	0	\$0.00	\$0.00	2	2

**New Features:**

- Each User Can Process Just Their Own Acknowledgements
- Easy To Read TY Grid
- Drill Down to Specific Segments
- Automatically Process Multiple TY letters at the same Time
- Insta-Merge with Microsoft Word

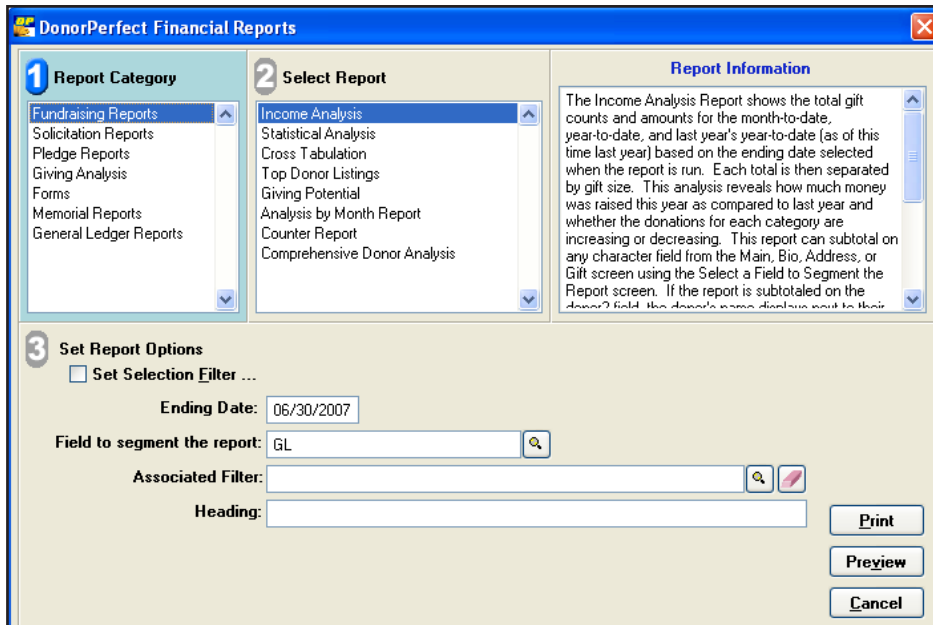
**Acknowledgement Processing Center.** Easily view gifts needing to be thanked. Powerful filtering options or simple drill down to donation detail makes it easy to ensure the most appropriate letter is going to your donor.

Select	First Name	Last Name	Gift Amount	Pledge Amount	Date	GL	SOL	Thank You Letter
<input checked="" type="checkbox"/>	Jim	Barkley	\$0.00	\$1,200.00	06/20/2007	BF	SP05	03
<input checked="" type="checkbox"/>	Jim	Barkley	\$120.00	\$0.00	06/20/2007	BF	SP05	03
<input checked="" type="checkbox"/>	Jon	Biedermann	\$0.00	\$1,200.00	06/22/2007	BF	SP05	03
<input checked="" type="checkbox"/>	Jon	Biedermann	\$120.00	\$0.00	06/22/2007	BF	SP05	03
<input checked="" type="checkbox"/>	Jon	Biedermann	\$120.00	\$0.00	06/26/2007	BF	SP05	03
<input checked="" type="checkbox"/>	Roger	Sandstone	\$0.00	\$500.00	06/26/2007	BF	SP05	03
<input checked="" type="checkbox"/>	Roger	Sandstone	\$0.00	\$1,500.00	06/18/2007	BF	SP05	03
<input checked="" type="checkbox"/>	Roger	Sandstone	\$50.00	\$0.00	06/26/2007	BF	SP05	03

Acknowledgement Listing provides detailed information on donors be thanked.

# Improved Look and Feel to Reports and Selection Filters

**Improved Report Selection Screen.** Selecting the most appropriate report and your desired report options is simple with our new three step design. The report screen now includes a detailed report description to make it easier to find the most useful report. We think you will also like the changes we've made to make reports easier to read.



**Financial Reports Screen.** Easily run any financial reports in just 3 steps.

**New Comprehensive Donor Report!** Comprehensive Donor Revenue Analysis - This new 'state of the database' report provides a valuable summary of 26 key metrics (including new donors, retained donors, and attrition rates) on your fundraising efforts for the current and prior two years.

Comprehensive Donor Analysis as of: 07/24/2006

07/24/2007

Page: 1

Calendar Year	Current Year	Last Year	2 Years Ago	Current year vs. Last Year Difference	
	01/01/2006 07/24/2006	01/01/2005 12/31/2005	01/01/2004 01/02/2005	Amount	Percentage
<b>Active Donors</b>					
Number of Active Donors	21	41	37	-20	-48.78 %
Total Revenue	\$2,660.00	\$5,190.00	\$23,859.00	\$-2,520.00	-48.65 %
Number of Gifts	24	54	66	-30	-55.56 %
Revenue per Donors (Year to Date)	\$126.67	\$126.34	\$644.04	\$0.33	0.26 %
Revenue per Gift (Average Gift)	\$110.83	\$95.93	\$361.50	\$14.90	15.53 %
Gift per Donors	1.14	1.32	1.78	-0.18	-13.64 %
Number of 2+ givers per year	3	8	19	-5	-62.50 %
<b>Retained Donors</b>					
Number of Retained Donors	15	13	13	2	15.38 %
Donor Retention rate	71.43 %	31.71 %	35.14 %	0.40 %	125.26 %
Retained Donor Revenue	\$2,065.00	\$3,990.00	\$13,631.00	\$-1,905.00	-47.74 %
Revenue Retention rate	78.00 %	77.00 %	57.00 %	0.01 %	1.30 %
Revenue per Retained Donor	\$139.00	\$306.92	\$1,048.54	\$-167.92	-54.71 %
<b>New Donors</b>					
Number of New Donors	2	27	9	-25	-92.59 %
New Donor Revenue	\$150.00	\$690.00	\$4,430.00	\$-540.00	-78.26 %
Number of New Donors	2	29	15	-27	-93.10 %
Revenue per New Donor	\$75.00	\$25.56	\$492.22	\$49.44	-6.54 %
Revenue per New Donor Gift	\$75.00	\$23.79	\$295.33	\$51.21	215.26 %
Gifts per New Donor	1.00	1.07	1.67	-0.07	0.00 %
<b>Reactivated Donors</b>					
Number of Reactivated Donors	4	1	15	3	300.00 %
Reactivated Donor Revenue	\$425.00	\$500.00	\$5,798.00	\$-75.00	-15.00 %
Number Reactivated Gifts	5	1	23	4	400.00 %
Revenue per Reactivated Donor	\$106.25	\$500.00	\$386.53	\$-393.75	-78.75 %
Revenue per Reactivated Donor Gift	\$85.00	\$500.00	\$252.09	\$-415.00	-83.00 %
<b>Attrition</b>					
Attrition Rate	38.10 %	14.63 %	27.03 %	23.47 %	160.42 %
Number of Donors Active Last 2 Years	8	6	10	2	33.33 %
Number of Donors Active Last 3+ Years	3	5	0	-2	-40.00 %

# New Custom Report Wizard

Creating a custom report can now be done much more quickly and simply using our Custom Report Wizard that guides you through simple steps to create a new custom report.

**Select Report Type:** Listing, Group and Total, or Summary Report



**Custom Report Wizard.** This wizard makes creating custom reports a snap. Select your report design template and then choose your fields, sort order and grouping options.

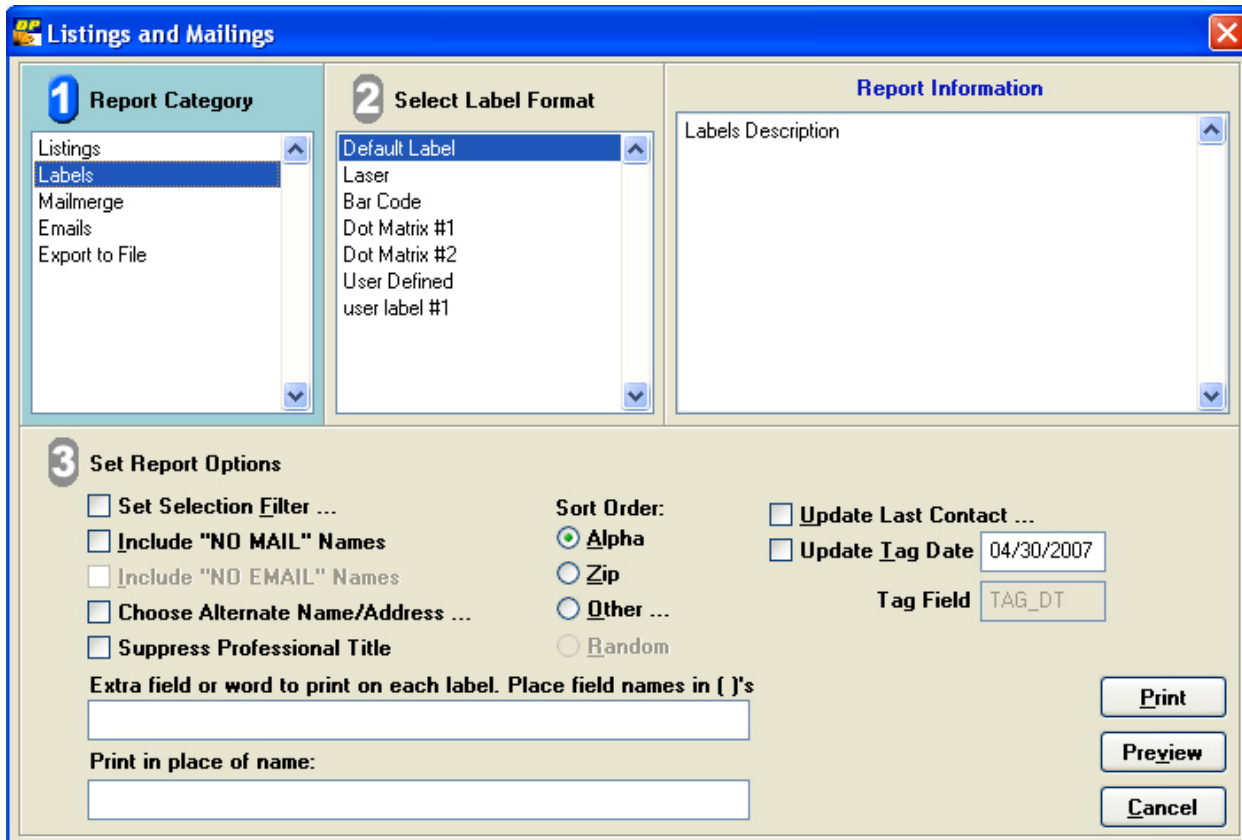


**Create custom reports in 4 easy steps.**

**Note:** The Custom Report Wizard creates reports which can be further customized with the power and flexibility of the full graphical report designer also included with DonorPerfect.

# Improved Mailing Screen

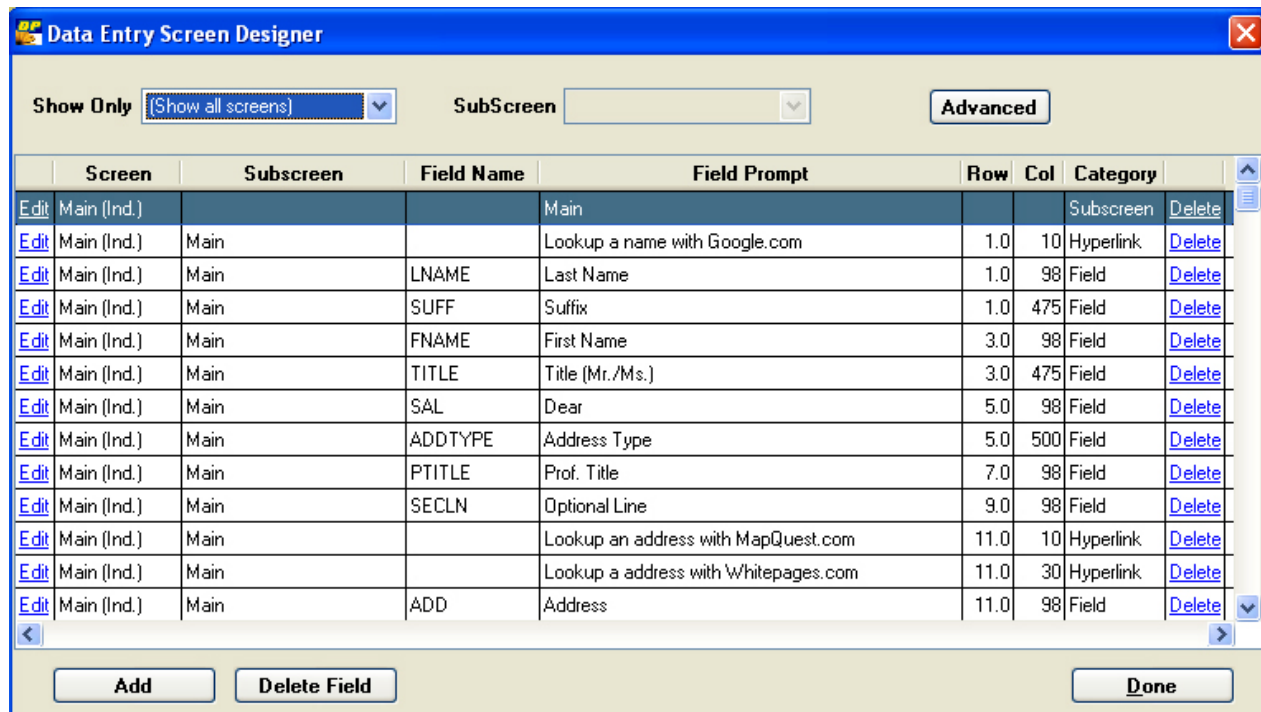
The new look of the Mailing screen makes the sequence of steps clearer.



Create listings, labels, and general mail merge documents in 3 steps, or easily export data to Microsoft Excel or any other systems.

# Enhanced Screen Generator

Now adding, modifying, or deleting fields from you system is even easier than before. Our completely redesigned Data Entry Screen Designer provides a much simpler view of your screen specifications for editing the layout of DonorPerfect to your exact needs.



Flexibility is the key! Almost every display screen in DonorPerfect can be easily modified to track just the information that is important to your organization. Add your own fields, or delete those fields that are irrelevant to your organization.

# 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. This will greatly expand your ability to communicate key data to constituents more easily and broadly. To use this feature, simply select on the financial report, set your report options, and click the appropriate icon!

STATISTICAL ANALYSIS: by GL Code, for period ending 06/30/2007

	June 2007		Year to Date		Total to Date		Pledges		Grand total
	# Gifts	Amount	# Gifts	Amount	# Gifts	Amount	# Pledges	Balance	
Code:	1	\$12.00	1	\$12.00	1	\$12.00	1	\$108.00	\$120.00
Building Fund	8	\$760.00	11	\$1,010.00	62	\$27,258.00	11	\$10,940.00	\$38,198.00
Campaign Finance Reform	0	\$0.00	0	\$0.00	1	\$250.00	1	\$20,000.00	\$20,250.00
Disaster Relief	0	\$0.00	0	\$0.00	20	\$22,475.00	0	\$0.00	\$22,475.00
Restricted-Education	0	\$0.00	0	\$0.00	22	\$6,150.00	0	\$0.00	\$6,150.00
Membership Auxiliary	0	\$0.00	0	\$0.00	2	\$275.00	0	\$0.00	\$275.00
Membership	0	\$0.00	0	\$0.00	53	\$12,156.00	0	\$0.00	\$12,156.00
Transportation	1	\$200.00	1	\$200.00	3	\$750.00	1	\$4,800.00	\$5,550.00
Unrestricted	2	\$250.00	7	\$485.00	214	\$77,413.00	2	\$135.00	\$77,548.00
	<b>12</b>	<b>\$1,222.00</b>	<b>20</b>	<b>\$1,707.00</b>	<b>378</b>	<b>\$146,739.00</b>	<b>16</b>	<b>\$35,983.00</b>	<b>\$182,722.00</b>

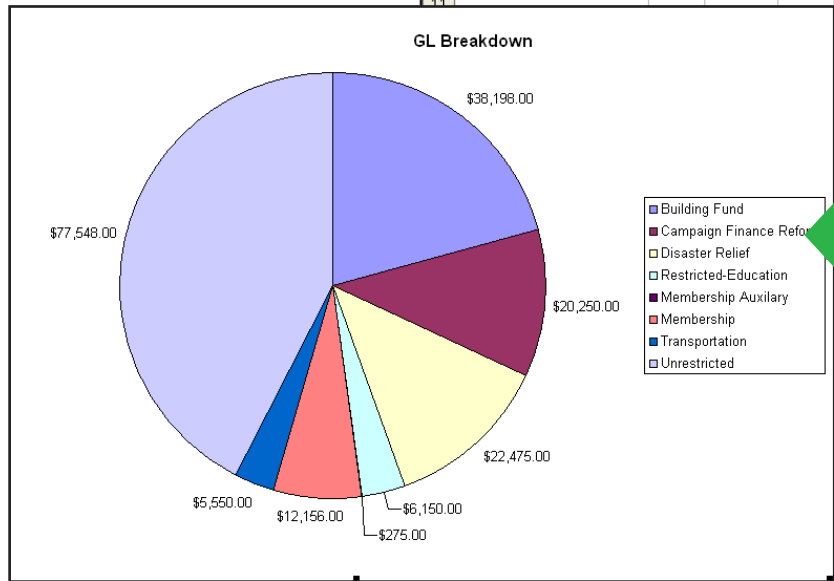
Microsoft Excel - STATANAL.xls

File Edit View Insert Format Tools Data Window Help

Arial 10

A1 GL Code

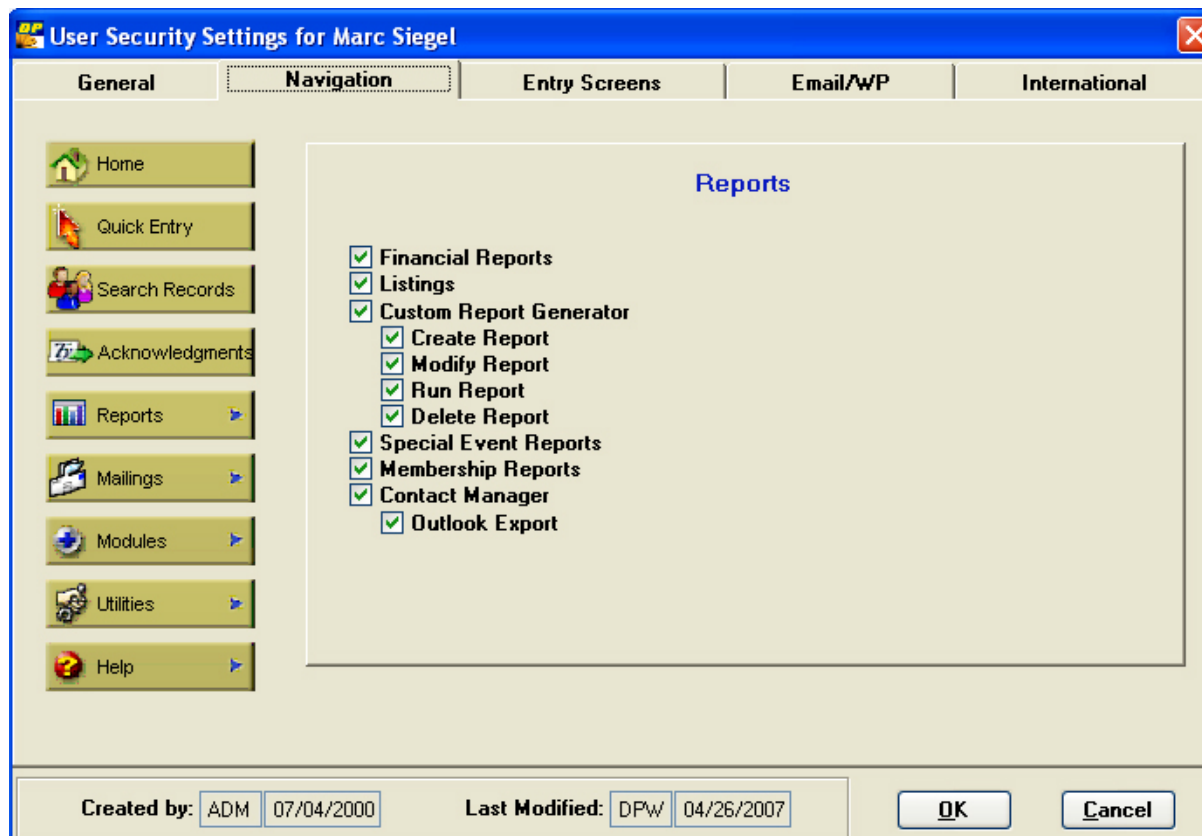
1	GL Code	# Gifts	Amount	# Gifts	Amount	# Gifts	Amount	# Pledges	Balance	Grand total
2	Code:	1	12	1	12	1	12	1	108	120
3	Building Fund	8	760	11	1010	62	27258	11	10940	38198
4	Campaign Finance Reform	0	0	0	0	1	250	1	20000	20250
5	Disaster Relief	0	0	0	0	20	22475	0	0	22475
6	Restricted-Education	0	0	0	0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



Note: There are four reports under "Forms" which are not designed for Excel export – Phonathon Report, End of Year letters, Comprehensive Report and Linked Names.

# Improved User Security Screen

The User Security screen has been redesigned and re-organized making it easier to manage your users. Easily view and edit user settings for almost every task in DonorPerfect. This advanced security system lets multi-user organizations define access to the system at the detail level they desire.



# Improved Documentation & Help

In addition to incorporating Version 9's many enhancements into the documentation we've taken this opportunity to reorganize the materials into more targeted and specific user guides - all provided in easily searchable and distributed electronic PDF format.

**DonorPerfect Getting Started Guide** - Quick guide to the basics of using DonorPerfect.

**DonorPerfect User Guide** - The comprehensive reference guide to DonorPerfect user features and capabilities.

**DonorPerfect Administrator's Guide** - Comprehensive guide to administration of DonorPerfect including system and user configuration.

**DonorPerfect Reports** - Samples of each DonorPerfect report including guidance on report options available.

We're hopeful that this new documentation structure will make it easier for everyone who works with DonorPerfect to find the information they need to maximize their success with DonorPerfect.