

# Converting to DonorPerfect Online

## Six Great Reasons to Switch to DonorPerfect Online

### 1. The convenience and flexibility of anytime, anywhere access.

- Not in the office? Any web-enabled device brings the office to you so projects or tasks get finished.
- The flexibility to work from home or other locations can help improve staff and volunteer retention.
- Meeting a prospect outside the office? Using a laptop or smart-phone, you can instantly access their information and make a lasting impression (and get that gift!)



### 2. DonorPerfect Mobile combines the database power of DonorPerfect Online with the convenience of a mobile app to form the perfect traveling companion for DonorPerfect users.



- View your upcoming appointments
- Find donors near your current location
- View a constituent's address on a map
- Add new contacts
- Comprehensive donor summaries & configurable top donor's reports
- Search for constituents; view & update their records
- Review pledges, pledge balances & gift history for each donor
- Call, email or text constituents with one click from their record
- Much more...

**3. WebLink Forms makes it simple to create and manage online forms that integrate with DonorPerfect.** You can easily generate forms using our "do-it-yourself" form templates. Or ask us to provide a quote to create or customize your form for you. If your form collects donations or fees, payments are deposited directly to your bank account.

Perfect for:

- Online donations
- Volunteer sign-ups
- Memberships
- Special event registrations
- and more!

**4. Constant Contact integrates with DPO to provide robust group email capabilities.** This "best of breed" approach enables you to compose, send, and track email campaigns using Constant Contact's industry leading tools, and provides seamless list management and synchronization of campaign results with your DonorPerfect system.



## 5. Ease of use and support

- Choose filters and run reports on one screen with our side-bar reporting feature.
- Knowledgebase provides articles, videos, and How-to-tips. Great for new users!
- SmartActions enables you to automate tasks, alert key staff about big gifts, or take actions whenever your “triggers” are met.



## 6. Our Clients love it!

Don't take our word for it; read what some of our clients have to say!

“With DonorPerfect Online, I liked that I could have unlimited attachments to a donor's record. And Smart Actions is like having another staff person by being able to automate processes. It was the combination of functionality and value why I selected DonorPerfect Online.”

*- Henry Taylor, Chief Development Officer  
Level Playing Field Institute*

“The service is phenomenal. The levels of access, combined with the ease of use make it so that even our most computer illiterate volunteers are able to use it effectively. The custom report writer allows me to call up information at a moment's notice and cross reference donors and gifts by every imaginable statistic. By using this feature, we are able to use very target specific approaches with each of donors, and in this economy, that's a huge plus.”

*- Susan Hanna, Assistant Director  
Community School of the Arts*

# Now is a great time to upgrade to DonorPerfect Online!

With our special upgrade offer, switching to DonorPerfect Online is easy and practical as ever before! Our special offer includes:

- 50% Lifetime discount - sign a 3 year contract and get 65% off!
- Free set-up - a \$995 value
- Affordable Unlimited User Pricing - Give controlled access to board members, volunteers, executives, and more!

**To get started with DonorPerfect Online, or to ask any questions you may have, please contact your account manager!  
(800) 848-3279 or [clientsales@donorperfect.com](mailto:clientsales@donorperfect.com)**