

Donor Perfect™

Fundraising Software



2005 Issue 2 • Number 11

In This Issue:

Page 2

- **WebLink Customized Online Forms**

Page 3

- **Exporting Reports**

Page 4

- **Secrets to Email Success**
- **Deceased Records Notification**

Page 5

- **Fundraising Campaigns Made Easy**

Page 6

- **Web Site Links**
- **New DonorPerfect Web Site**

Page 7

- **Training Schedule**

Page 8

- **Version 8 Status Report**
- **2005 Client Survey**
- **New E-newsletter**

Working With the Web

Steadily, the World Wide Web (remember? that's what "www" stands for?) has become an indispensable part of our lives. Where would we be without "email" or "eBay?" If you needed something just a few years ago, would you have proudly declared that you could just "download" it?

At SofterWare, we've watched as the pendulum has swung from large shared computers to stand-alone personal computers and now back again to networks and interconnected resources. We continue to believe that no matter how appealing and affordable new technologies are, their success depends on the same factors we've always promoted: ease of use and flexibility.

So this newsletter is almost entirely devoted to web-based technology that either integrates with DonorPerfect or that we are using to improve our services, including:

WebLink (on page 2) is our exciting new Internet-based application which provides highly customizable forms as links from your existing web site. Like all our products,

flexibility is the hallmark of our design, and we expect that countless clients will find WebLink to be the solution they've been waiting for.

Have you seen the **new DonorPerfect web site**? Version 8 provides one-click links to the DP site and other useful sites (page 6).

Also new in Version 8, you can **export reports** in many formats, including HTML and PDFs, which can be emailed to board members, volunteers, etc. (page 3).

Speaking of **emails**, are you sure yours are getting through? On page 4, you'll find helpful suggestions and tools to make sure your constituents are receiving your message.

We're also using email to improve our ability to keep you informed and skillful in using

DonorPerfect, including our new **electronic version** of this newsletter (page 8).

That's a lot of innovation to cover in one issue! (Maybe "www" should stand for Wonderful Ways to Work better because the tools, applications and resources available seem to be increasing at such a rapid rate.) We hope this issue helps you gain a better understanding of those tools, and enables you to use them to benefit your organization and the productivity of your office.

*Tools, applications,
and resources
available via the
Internet continue
to change the way
we work.*

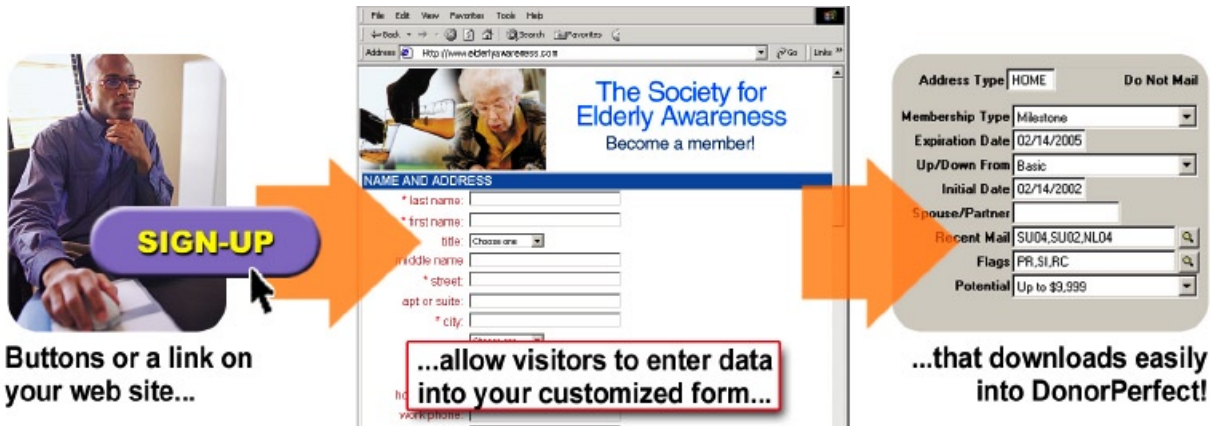
**Version 8
Update!**

See back cover for details!

WEB LINK

Customized Online Forms for:

Donations and Gifts • Memberships • Special Event Sign-Ups
Information Requests • Much, much more!



SofterWare is pleased to introduce **WebLink™**, our latest enhancement for constituent interaction. WebLink allows you to create and manage virtually any type of online entry forms and make them available through links from your web site.

How does it work?

Our unique flexible design allows for completely customizable online forms that can be personalized to collect exactly the data you want. You can even add a flexible “shopping cart” feature for selection of donation levels, fundraising item sales, etc. Using the WebLink Review & Acceptance Center, you can review the completed forms and accept and download the data for easy import into DonorPerfect.



In addition, we provide optional, fully integrated and secure payment processing, including:

- Online merchant account
- Immediate authorization and prompt deposit into your designated bank account
- Web-based reporting & administration

Benefits include:

- Eliminate data entry
- Improve convenience for constituents
- Reduce postage/mailing
- Increase sign-ups, donations and web activity

How does WebLink compare to Donate.net?

Although Weblink can be used for some similar purposes as Donate.net, they are both great solutions and each offers some unique advantages. We're happy to help you determine which solution can best meet your needs. Call your salesperson at 800-220-8111 for more information or visit www.donorperfect.com/weblink

PRICING

Annual Service Fee: \$360/year + \$120/add'l form
Transaction Costs: \$.50 to \$1, plus credit card fees if applicable
One-Time Fees:
 Form Setup: \$200 (more for complex forms)
 Import Utility: \$495
 Import mapping: Included with Import Utility
 Call your salesperson at 800-220-8111 for a quote.

SPECIAL OFFER!

Order by
December 31
 No Setup or
 Application Fee for
 Online Merchant
 Account

Exporting Reports to Other Programs

Did you know that you can now export reports to many different formats, thanks to a new Version 8 enhancement? Imagine all the uses of this great feature – you can further manipulate your data in another program, such as Excel, or email a PDF of a report to your board, or place a report, such as the **Size Split Report**, on your web site. The possibilities are endless!

Formats You Can Export To

You can export your reports to any of the following formats:

- Microsoft Word
- RTF (Rich Text Format—allows you to transfer formatted text documents between certain applications)
- Microsoft Excel
- HTML
- PDF
- BMP

Reports You Can Export

You can export any report in the system, including listings, financial reports, and custom reports.

Export Tips

Here are some tips to keep in mind:

- Everything on the report is exported—headers, footers, lines, and colors.
- Only export the data you need. If you have a large database and export a lot of data, the process could take some time.
- Create custom versions of reports that you will frequently be exporting to make sure the data you need is included (you should do some test exports first to make sure you can use them the way you want).

Steps to Export

The export process is simple. You just need to make some quick decisions about what information to export and which program to export to, and DonorPerfect does the rest!

To export a report through the preview window:

1. From the **Reports** screen for the report you want to export, click the **Preview** button.
2. Determine the format in which you want to export the report, and then click the appropriate button on the **Report Print Preview** toolbar. For an explanation of the associated format, hover your cursor over a button.

The **Export** dialog box appears for the particular format you selected.

- 1 Select pages to export.
- 2 Here you can specify **Screen** if you want to automatically open the report file in the desired application (Word, Excel, etc.). We recommend this option (rather than just choosing **File**) because it allows you to review the file and then use the **Save As** option in the program to save the file with whatever name and location you desire.
- 3 Depending on the type of file, some of these options will become available.

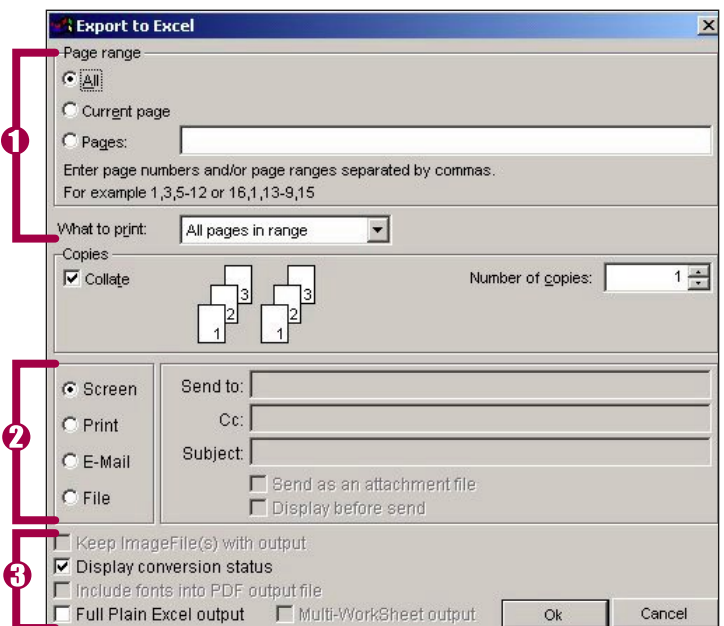
Keep ImageFile(s) with output - Only applies to HTML and is only relevant if your report includes photos or graphics (such as your logo).

Display conversion status - Show progress status during export.

Include fonts into PDF output files - Only needed if report uses unusual fonts.

Full Plain Excel output - Formats each piece of data into a separate cell in Excel. **YOU WILL ALMOST ALWAYS WANT TO CHOOSE THIS WHEN EXPORTING REPORTS TO EXCEL!**

Multi-worksheet output - Creates a separate worksheet for each page of your report.



For more details on all the report features available in DonorPerfect, see page 302 of the *DonorPerfect Manual*.



Secrets for Email Success!

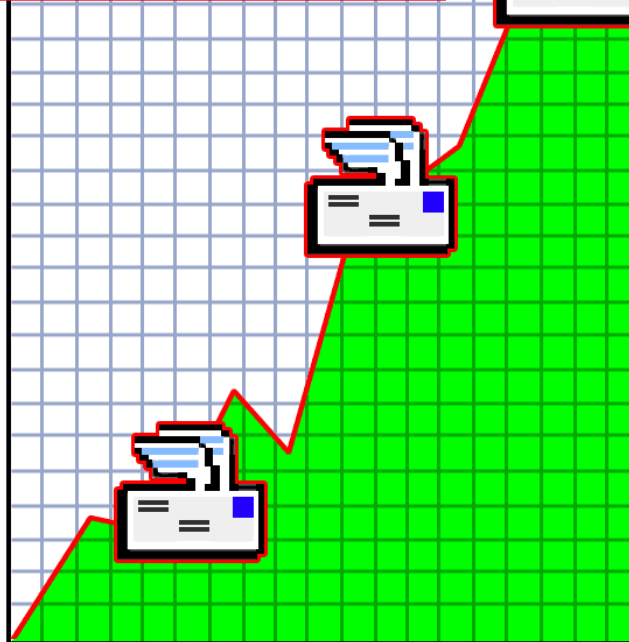
People's use of email has matured to the point where they only want to see important information from a select group. So how can your organization become one of those select few? Follow these tips:

First, define your goals. Do you want to bring your audience to your web site? Increase attendance for an event? Then, use DonorPerfect to target the right people by filtering the attributes that match your desired audience. **Quick Tip:** Ask recipients to put your email address in their address book – this helps get you past many spam filters.

Once you've identified your goal and audience, the next step is to craft your message. Knowledge of your audience's interests helps determine how, and in what order, to describe and illustrate the benefits of your message. For example, for an issue action alert, describe the issue and provide links that allow them to take the desired action (e.g., a link to your site that allows them to fill out a petition, etc.). Many nonprofits tie offline and online activities together—e.g., email a reminder notice to send back a donation form they received in the mail.

It's important that the email format you use matches your message. For instance, if you have a simple question or brief note, just a short, plain text message that gets right to the point can be highly successful. However, there is some content that recipients don't mind (and expect) in HTML, such as full color e-newsletters, holiday or seasonal

These tips will improve email success and help you achieve your goals!



promotions, event invitations and more. Our email-marketing partner, **Constant Contact**, offers templates that make creating these emails easy. Plus, they can host and manage your email database (including *unsubscribes* and *bounces*), automatically format for HTML and Text, meet spam law requirements, and provide instant reports on opens, bounce-backs and other measures.

The expression “timing is everything” also applies to emails. You need to determine when your constituents are most likely to open and read your email. Mid-day delivery is better than mornings or evenings, and Tuesday and Wednesday achieve better results than the beginning or end of the week. Your audience may be different, so test to determine your best delivery times.

Following these recommendations, you're sure to achieve the success you're looking for – in time. Just like traditional direct mailing efforts, it takes testing and careful measuring to determine what

works best. Sometimes just a few small changes to the content, delivery method, format or timing can improve your success dramatically.

Learn more about Broadcast email:
www.donorperfect.com/constantcontact

Download a free email checklist:
www.donorperfect.com/emailchecklist

New Data Enhancement: Deceased Record Notification

Eliminate uncomfortable or potentially embarrassing situations with our new **Deceased Record Notification**, which identifies people within your constituent database known to be deceased. This will provide you with sensitive information that is difficult to obtain, while improving the accuracy of your data and reducing mailing and other solicitation costs.

How does it work?

Records are updated by matching the names and addresses in your database against Social Security records and other sources. The match percentage will vary depending on the accuracy and age of your data. Typically, 1-3% is the average percentage of records that will be found to be deceased. Whenever there is a match, a “deceased” flag will be appended to the record. Our service ensures that the data is properly added to your system.

What does the service include?

- Formatting of your data for processing
- Import of deceased record data into your database
- Creation of a new “Deceased” flag to display in the Flag field
- An analysis of records updated

How much does it cost?

\$295.00 for up to 50,000 records
\$50.00 for each additional 10,000 records

SPECIAL OFFER!

Order 2 or more data enhancement services at the same time and **save 10% of the combined price**. To order or find out more information about all our [Data Enhancement Services](#), please call Russ Scupari at (800) 220-3513. Offer expires December 31, 2005.

Fundraising Campaigns Made Easy

Make annual appeals and capital campaigns easy and successful with DonorPerfect!

Here is a quick summary of some of the ways DonorPerfect can help with each aspect of making your annual appeal or capital campaign a great success. (Note: page number references are for the Version 8 manual)

Goals and Result Tracking

The **Solicitation Analysis Report** provides a great summary of your efforts and results. Note that you can enter and track your goal by entering it through *Code Maintenance* (page 104).

Cultivating Major Donors

There are many reports in DonorPerfect that can assist you in identifying donors with the capacity to make a major gift. Some like the **Major Donors Report** (page 348) allow you to see everyone who has made large gifts in the past while others, like the **Giving Potential** and **High Potential Reports** (see our [September 2005 E-Tip](#)), allow you to identify those who you have determined could be giving more. Tracking your contacts and coordinating your activities into a major donor "ask" effort is easier using the **Contact Management** features of DonorPerfect.

Board Members and Solicitors

Most campaigns use volunteers, such as board members, to solicit gifts. The appropriate coding of such information in your Flags field makes it easy to identify potential solicitors. Also, don't forget to use soft credits or the 'solicitor' field to identify gifts that are generated by these solicitors. This makes it simple to track and recognize their efforts.

Mailings

Sending solicitations by mail, email or via a mail house is one of the most common tasks clients perform with DonorPerfect, but not everyone uses all of DonorPerfect's tools for targeting and reporting. For instance, by creating a filter that reflects the recency and frequency of the donor's gifts, you can generate targeted solicitations that merge the exact information you want into mailings.

You also may wish to consider using our cost effective [Prospect Research Service](#) (see the Data Enhancement section of our web site) to enhance your list with demographic information to help you target your donors better.

Other Sources

DonorPerfect also provides tools for tracking grants, special events and other fundraising methods that may be part of your fundraising campaign. We'll save that for another article, but you can learn about these capabilities in several of our training webinars.

Thank You

Every development professional knows how critical it is to provide donors with prompt thank yous and recognition. This is a snap with DonorPerfect's thank you batching. Also, if your organization produces an annual report or other materials that group donors by giving level, the **Size Split Report** can be used. Instructions for setting up this report can be found in the [Document Library](#) on our web site, in the *Using Reports and Exports* folder (select *Setting up the Split Report*).

Consider These Giving Options:

Improve the results from your solicitation by offering donors the option of giving online (you can add a link to your website that automatically downloads into DonorPerfect for as little as \$29/mo). You can also generate larger gifts by offering donors the option of making a preauthorized monthly pledge that can be automatically collected from their credit card or bank account using [EZ-EFT](#). Contact Russ Scupari at 800-220-3513 for more information.

Solicitation Analysis Report for 01/01/2004 - 07/12/2004

Date	Code	Description	INCOME			EXPENSES		RATIO		GOAL INFORMATION			
			Mailed	Responses #	%	Total Income	Average Gift	Total	Net Income	Net per \$ spent	Goal	Amt Needed To Reach Goal	% of Goal Met
05/01/2004	AU01	Auction 2004	100	14	14.00	900.00	64.28	150.00	750.00	6.00	1 000.00	100.00	90
02/28/2004	BQ01	Banquet 2004	500	1	0.20	2 500.00	2 500.00	5 000.00	-2 500.00	0.50	25 000.00	22 500.00	10
03/12/2004	BQ03	Banquet 2003	150	7	4.66	2 500.00	357.14	450.00	2 050.00	5.55	10 000.00	7 500.00	25
07/04/2004	FOUN	Foundation Proposal	10	4	40.00	8 000.00	2 000.00	0.00	8 000.00	0.00	30 000.00	22 000.00	27
02/01/2004	GRNT	Grant Request	25	4	16.00	20 000.00	5 000.00						
TOTAL:			785	30	3.82	33 900.00	1 130.00	5					

Learn about these and other useful reports in Chapter 10 of your Version 8 manual.

Five Year Giving Report

Name	Year to Date	Last Year Year to Date	2 Years Ago Year to Date	3 Years Ago Year to Date	4 Years Ago Year to Date
Mr. & Mrs. Calvin Johnson	1000.00	750.00	1 100.00	2000.00	2,000.00
Mrs. Mary Marlowe	875.00	500.00	440.00	550.00	300.00
Mr. & Mrs. Alvin Ralston	725.00	750.00	1000.00	350.00	500.00
Mr. & Mrs. Roger Sandstone	1400.00	750.00	1780.00	6200.00	3,600.00
Mr. & Mrs. Steve Stern	600.00	650.00	450.00	550.00	450.00
Mr. & Mrs. Paul Sykes	575.00	850.00	650.00	2000.00	450.00
# donors	6	6	6	6	6
Total	5175.00	4250.00	5420.00	11650.00	7,300.00

Useful Web Sites in Just One Click

Version 8 includes several new web-access features.

Link to DonorPerfect Clients Only Area



Click this toolbar button to go to the *Clients Only* area of our web site (see *Check Out the New DonorPerfect Web Site*, at right).

User-Defined Web Site Icon



Define this button to go to any web site you use frequently by going to **Utilities\Change Parameters\Other Parameters\General Parameters**. In the **User Defined Icon** field, enter the site URL, including **http://** at the beginning.

General Parameters		
Reinstatement Days	547	Fiscal Yr Begins 01
Beginning IDNUMB #		0
Required Flag Length	2	
Personal Index (Dp)	dp_ytd	
Pers. Index (Dpgift)	dpgift.date	
Pers Index (Dpothor)	dpothor.date	
Pers Index (Dpothor2)	dpothor2.date	
User Defined Icon	http://www.google.com	

Link to Sites on Entry Screens

You can now incorporate additional web site links onto your entry screens. Although you can place links to any sites you find helpful, we've created a utility program that automatically adds links to the following sites:

- **Google**—run a Google search on the donor's name or organization.
- **MapQuest**—map your donor's address.
- **White Pages**—run a white pages search on either your donor's name or his/her zip code.
- **Web site**—go directly to a URL entered in a field called **Website** (if you have one) in the Main (DP.DBF) table.

You can download this utility program (called ADDICON.FXP) as part of the latest Version 8 update from the **Download/Updates** page of our **Clients Only** web site. Save the update file to your desktop, and then double-click it to run the update. Then, take the following steps:

1. Open DonorPerfect. From the **Utilities** menu, click **Run a Custom Program**.

2. Click **ADDICON.FXP**, and then click **OK**. This closes DonorPerfect and runs the program.

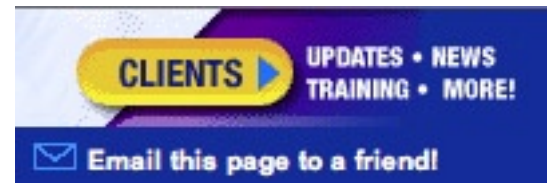
3. Now run DonorPerfect again and go to any donor's record. The buttons that link to Google, MapQuest, the White Pages, and a constituent web site should now appear on the Main tab.

4. In some cases, the buttons may overlap with text on your screen, so you may need to make some adjustments to their location through **Utilities/Change Screen Layouts**. You can find the row that corresponds to the button by searching (press **CTRL+F**) for the text *Google*, *MapQuest*, *Whitepages*, or *web site*. Then, adjust the positioning of the field by changing **Line** and **Column** placement. You can find more details on how to customize your screens on pages 54-59 of your *Version 8 Manual*.

Mr. & Mrs. Roger Sandstone	
Main	Gift
	Last Name Sandstone
	First Name Roger
	Dear Roger and Mary
	Prof. Title
	Optional Line
	Address 2522 N. Adams Co
	City, ST Zip Philadelphia

Check Out the New DonorPerfect Web Site!

Have you visited www.donorperfect.com lately? Its been entirely redesigned, and reorganized into three main areas: **Product Information** (marketing stuff), **Training & Services** and the **Client Area**. Although we encourage you to look through the entire site, our objective was to make it quicker and easier to use the areas of the site that are designed specifically for clients. Just click the **Clients** button at the top right on any page.



New Site Highlights

- **Email a friend** – Every page has a link making it easy to email the page to a friend or colleague.
- **Navigation** – We've added a quick pull-down list to help you find commonly used pages, and a side navigation menu (which changes depending on which of the main areas you are in).
- **Expanded product content**

Client Area

- **Side Menu** – The most common client tasks, including Request Support, Register Software, Download Updates, Document Library, Make Suggestions and more, are just a click away.
- **Client Request Information Form** – We've created a new form to make it easier to request information about additional products or services.
- **Scrolling News** – Watch recent DonorPerfect news scroll by or click the **All News Items** link to see everything.

Client Information Management – Less visible are changes we've made to make it easier for us to keep your data current. For instance, if email we send to you is blocked or returned, the site will notify you when you login using that email address and ask you to correct (or confirm) the email address.



DonorPerfect Training

Training Schedule

Class Location	The Basics	The Next Step	Cost
New York City	Dec 7, 2005	Dec 8, 2005	\$300 per day, per person <i>The Next Step</i> classes are appropriate regardless of the version you use. The Basics is for Visual Edition users only.
Los Angeles	Jan 18, 2006	Jan 19, 2006*	
Tampa	Feb 21, 2006	Feb 22, 2006*	
Philadelphia	Mar 14, 2006	March 15, 2006*	
Atlanta	Mar 22, 2006	March 23, 2006*	
Chicago	Apr 5, 2006	Apr 6, 2006*	

Class dates for 2006 are tentative. Refer to our web site for latest schedules.

Webinars	Date/Time (Eastern)	Cost
The Basics* (Visual Edition)	Dec 13-16, 2005, 1:30-3:00 PM	<div style="border: 1px solid black; padding: 5px; text-align: center;"> Instructor led training from the convenience of your own computer! </div>
	Dec 26-29, 2005, 2:00-3:30 PM	
— MINI-WEBINARS —		
The Director's Cut	Dec 5, 2005, 3:30-5:00 PM	The Basics Each Connection.....\$240 Additional People.....\$50 (on same computer)
	Jan 5, 2006, 3:30-5:00 PM	
	Feb 1, 2006, 11:30-1:00 PM	
Director's Cut 2: The Sequel	Dec 12, 2005, 3:30-5:00 PM	Mini-Webinars Connection.....\$75 Additional People.....\$25 (on same computer)
	Jan 19, 2006, 2:00-3:30 PM	
	Feb 6, 2006, 11:30-1:00 PM	
The Logic of Filters	Dec 6, 2005, 3:30-5:00 PM	PARTIAL SUPPORT CLIENTS ADD 10% SURCHARGE
	Jan 17, 2006, 2:00-3:30 PM	
	Feb 14, 2006, 12:00-1:30 PM	
More Filters & Functions	Dec 20, 2005, 12:00-1:30 PM	<div style="border: 1px solid black; padding: 5px; text-align: center;"> Register Online It's quick and easy! </div>
	Jan 23, 2006, 12:00-1:30 PM	
	Feb 20, 2006, 12:00-1:30 PM	
Mailmerge	Dec 22, 2005, 4:00-5:30 PM	www.donorperfect.com/training has all the training options available, including classes, webinars, telephone training and on-site training.
	Jan 12, 2006, 11:30-1:00 PM	
	Feb 16, 2006, 12:00-1:30 PM	
Customizing Reports*	Dec 23, 2005, 12:00-1:30 PM	Register by phone: 888-220-8111
	Jan 18, 2006, 2:00-3:30 PM	
	Feb 13, 2006, 12:00-1:30 PM	
Special Events	Dec 8, 2005, 3:30-5:00 PM	Questions: Sandra Blackwell Registrar (x135) Tom Heitzenrater Training Manager (x142)
	Jan 9, 2006, 11:30-1:00 PM	
	Feb 2, 2006, 3:30-5:00 PM	
Pledge Campaigns	Dec 7, 2005, 11:30-1:00 PM	* Visual Edition Only – Not appropriate for Version 4.6 users.
	Jan 20, 2006, 2:00-3:30 PM	
	Feb 15, 2006, 12:00-1:30 PM	
Managing Grants	Jan 3, 2006, 3:30-5:00 PM	
Managing Memberships	Dec 22, 2005, 12:00-1:30 PM	
	Feb 6, 2006, 3:30-5:00 PM	
The Database Doctor	Dec 21, 2005, 12:00-1:30 PM	
	Jan 30, 2006, 11:30-1:00 PM	
	Feb 27, 2006, 3:30-5:00 PM	
Version 8 Highlights*	Dec 12, 2005, 11:30-1:00 PM	
	Jan 19, 2006, 10:00-11:30 PM	
	Feb 7, 2006, 3:30-5:00 PM	
Year End Procedures	Dec 19, 2005, 4:00-5:30 PM	
	Dec 30, 2005, 2:00-3:30 PM	
	Jan 3, 2006, 11:30-1:00 PM	
	Jan 9, 2006, 3:30-5:00 PM	

Keep Your DonorPerfect Resolutions!

2006 is fast approaching. We often are asked what is needed to close out DonorPerfect for the current year and to begin the new year fresh. Fortunately, the system does most of the work for you automatically. The first time someone logs into DonorPerfect in 2006, it will ask you to allow it to recalculate the gift totals. Once that is done, the system is reset for the new year.

In our *Year End Procedures* webinar, we explain what goes on behind the scenes during recalculation and give you some guidelines for moving forward in 2006. We show you specific reports to run to evaluate your year. We give a number of 'good housekeeping' hints—things you may be aware of but may tend to forget or neglect.

This is also the season to recognize donors by giving level and we will explain the Size Split report for this purpose. In addition, we'll review the options for providing your donors with individual statements of their donations during the last tax year.

So let us help you keep your DonorPerfect resolutions. Sign up for *Year End Procedures* today!

Save Training Costs! Unlimited Mini-Webinar Subscription!

Move through our entire catalog, which includes over a dozen topics!

- Unlimited Mini-Webinars \$195.00
- Unlimited Mini-Webinars PLUS (includes *The Basics*) \$395.00

Visit www.donorperfect.com/subscription

Version 8 Status Report!

Currently, Version 8 has been shipped to about half of all Visual Edition clients. We expect the remainder to be shipped over the next couple of months. They are sent automatically to every client on support, but if you are eager to receive your update, you can download it directly from our web site. Just click the [Downloads/Updates](#) option in the Client area and choose the **Full Visual Edition Version 8 Update**. You can also download the *Version 8 Manual* and the *Version 8 Highlights Brochure*.

Incremental Update

Periodically, we produce smaller updates that include corrections to any minor issues clients encounter with Version 8. Our support department may ask you to download such an update if you encounter any of these issues, but you can also download the most recent version from the web site if you wish. Each update is distinguished with a release date. To check the version on your system, go to **Help/About DonorPerfect** and check the **Version & Release Date**.

2005 Client Survey

Watch your email for our Annual Client Survey. This survey is an opportunity for you to let us know your opinion of our software, our service and how you feel we can improve both. This feedback drives our product development and service offerings, and is critical to helping us help you. Your participation will be greatly appreciated. If you do not receive this email, contact Julie Blum, our Client Satisfaction Liaison. You can reach Julie at (800)220-3537 or via email at jblum@donorperfect.com.

Special E-Delivery

For several years, we've made past newsletter issues available on our web site. This issue, we are experimenting with a PDF version delivered by email. It is virtually identical to the printed version except that it will have more full color and provide hyperlinks to our web site. Plus, you can easily forward it to anyone in your organization. Or, give us their email addresses and we will be happy to add them to our distribution list.

We recognize that there are still advantages to a printed newsletter, and we'll continue sending a printed version until we're confident that clients prefer to receive an electronic version.

Let us know what you think about both newsletter formats by taking a quick survey at www.donorperfect.com/enews.

Do you have ideas for DonorPerfect newsletter articles? Suggestions for improvement? A great tip you'd like to share?

We'd love to hear your feedback!

Send us an email at newsletter@softerware.com to let us know what you think.